



IT TAKES YOUR LEADERSHIP CAMPAIGN TO LIVE UNITED

Leadership donors contribute \$500 or more to United Way of Harrisonburg and Rockingham County and are member of the Skyline Society. Leadership Giving allows your employees to make a greater impact and sets your organization apart as a leader in our community. Putting together a successful leadership campaign can be like assembling the puzzle, so to make it a little easier we have provided you with the essential pieces necessary to build a dream leadership campaign.

1. Obtain support from your CEO and senior management team

- Meet with your CEO to request their support and personal involvement in the Leadership Giving campaign.
- Has your CEO already made a personal Leadership Giving (\$500+) donation? If not, work with your United Way staff contact to identify the best person to ask your CEO for a Leadership or Tocqueville gift.
- Encourage the establishment of a Leadership Giving “club” within your company to enhance company participation and recognition.

2. Recruit a Leadership Giving Coordinator to organize your 2 Leadership Campaign

- Work with your CEO to select the best possible person for this role. This individual needs the following characteristics:
 - Well respected by his/her peers.
 - Personable, highly organized, a team player, and a leader.
 - The Leadership Giving Coordinator must be a leadership giver.
- Arrange for the Leadership Giving Coordinator to participate in United Way training.
- The Leadership Giving Coordinator should work closely with the Company Campaign Coordinator to ensure optimum results.

3. Develop a detailed Leadership giving program and timeline

- Leadership Giving has a separate kick-off event at all locations before the kick-off of the general campaign.

- By announcing the results of an early Leadership Campaign, Leadership Givers can set the tone for the rest of the campaign, encouraging other to give.
- Both your company and your United Way should sponsor year-round events that reward Leadership Giving donors. These events can be in-company Leadership Giving “club” activities (like breakfasts, coordinated agency tours, or special Day of Caring activities specifically for these donors).
- Set Leadership Giving Program donation goals.
- Market Leadership Giving and maintain communication with donors and potential donors
 - Include current and potential Leadership Givers in “Ask” meetings
 - Send each potential donor a personalized membership/pledge card.

4. Identify potential donors and potential giving levels for 4 each of them

- Work with your local United Way representative to set criteria for potential Leadership Giving donors.
- Include company retirees as part of the potential Leadership Giving pool.
- The Leadership Giving Coordinator and the Company Campaign Coordinator can decide on the appropriate amount of each donation request. Local United Way staff can provide you with guidelines for donation amounts based on compensation.

5. Recruit additional peer volunteers if needed

- If your organization has more than 10 leadership contributors or prospects, one person may not be sufficient to visit with each individual.
- Train peer volunteers (with help from your local United Way).
 - The ability to explain how Leadership Giving supports the company’s charitable giving goals is one of the tools that can be used for effective peer-to-peer solicitation. Include this information as part of the training that peer volunteers receive.
 - Explain the company Leadership Giving Program to all volunteers.
- Your group of potential contributors can include individuals other than management. Recruit appropriate peer-level volunteers to work with them

6. Kick-Off the Leadership Giving program

- Design your kick-off event to match your corporate culture. For example, a casual breakfast may work in one company, while a formal cocktail party may work in another.
- Plan the kick off event to ensure that the maximum number of potential donors, along with key upper management staff, can attend. You may consider holding the meeting during an already scheduled managers/directors meeting.
- Invite a United Way staff person or a key United Way volunteer who knows about Leadership Giving to participate in the program.
- The program provides donors and potential donors information on the following:
 - Benefits of United Way participation, including volunteer opportunities.
 - A video on United Way that your local United Way staff provides.
 - How Leadership Giving works and who is participating now.
 - Invite active Leadership Giving donors to talk about their positive experiences as donors.
- Thank participants for attending the kick-off and for their past and future participation.

7. Begin peer visits, making the ask

- Select the best person within the company to extend the invitation to become a leadership donor.

- Peer volunteers approach individuals on their potential donor list in person to thank them for their past gift, invite them to make a new or increased gift, answer any questions and reinforce the value of their contribution.
- If the individual is prepared to make a donation or pledge at the initial meeting, the peer volunteer should accept the donation.
- If the potential donor wants to think about making a donation, the peer volunteer leaves the gift card with the person.
- The volunteer notes that the person has not yet made a donation so that proper follow-up can be done.

8. Follow-up on results

- The Leadership Giving Coordinator should follow-up with the peer volunteers to ensure that potential donors are contacted as planned.
- Follow up with all assigned colleagues until each pledge card is returned.
 - Set a time frame for follow-up contacts. Be sure to ensure that contacts are spaced so those potential donors do not feel that they are being “harassed” for donations.
- Be positive that each prospect receives a clear and direct ask and that the peer volunteer receives an answer – yes or no.
- Make sure you share these results with the Company Campaign Coordinator.

9. Say “Thank You”

- Send a personalized letter from your company’s CEO and Leadership Giving Coordinator thanking each leadership donor.
- Send a thank you letter to any peer volunteers who may have helped solicit leadership donors.
- Plan for a special event (such as a reception, lunch, dinner, or party) hosted by your company CEO to thank Leadership Giving donors and peer volunteers for their support and commitment.
- Recognize all leadership givers in a visible way that will encourage other employees to give.
- Acknowledge donors throughout the year, not just once.
- Show respect for your donors’ degree of commitment by informing them of volunteer opportunities in the community that will extend their gifts, raise their recognition on the community, and foster the company’s image as a good citizen in the community.

10. Report your success

- Tell the company leaders and employees.
- Tell your local United Way
 - Provide United Way with the names, home addresses, and donation amounts of your Leadership Giving donors, so that United Way can acknowledge their donations, thank them for their generosity and commitment, and provide them with appropriate tax records.