



# A Guide to Building a Successful Leadership Giving Program In Your Workplace

[www.UnitedWayWaukesha.org](http://www.UnitedWayWaukesha.org)



# WHAT IS A COMPANY LEADERSHIP GIVING PROGRAM?

In your company, you have many leaders - defined by title and by example. United Way in Waukesha County recognizes individuals who make an annual gift of \$1,000 or more as leadership givers. It takes a special type of person to give at the leadership level - someone who shows true commitment to creating a healthier and stronger community for the benefit of all. Here in Waukesha County there are nearly 500 such contributors who are individually and collectively working to make our community a better place.

Through gifts of \$1,000 and above, leadership giving members are a vibrant and active force in helping United Way in Waukesha County create positive, sustained changes in our community.

Conducting a leadership giving campaign is one of the best ways to increase the success of your organization's overall United Way campaign. As an integral part of your workplace giving program, leadership giving allows your employees to have a greater impact on the lives of people throughout the Waukesha County community and sets your organization apart as a leader in the community.

## Leadership Giving Levels:

\$1,000 - \$1,999:	Bronze Circle / Leadership Society
\$2,000 - \$3,499:	Silver Circle / Leadership Society
\$3,500 - \$4,999:	Gold Circle / Leadership Society
\$5,000 - \$7,499:	Platinum Circle / Leadership Society
\$7,500 - \$9,999:	Diamond Circle / Leadership Society
\$10,000 & above:	Tocqueville Society

# BENEFITS OF A LEADERSHIP PROGRAM

## Community Benefits:

- **Proven Success in Addressing Issues** - United Way funded programs are making people's lives better, today and into the future.
- **Access to New Resources** - New dollars from leadership donors enhance the ability of United Way in Waukesha County to respond efficiently to emerging community needs.
- **Increased Community Spirit** - Leadership donors have increased pride in the Waukesha County community and desire to participate in community activities.
- **Recognition of New Community Leaders** - Leadership donors and volunteers gain recognition for their charitable activities and as community leaders.

## Donor Benefits:

- **Personal Satisfaction** - Leadership donors give back to the community and make a difference in the lives of many people each and every day.
- **Smart Way to Invest** - United Way supports thirty-three agencies...One gift that maximizes your impact.
- **Community Awareness** - A formal leadership giving program increases understanding and awareness of the Waukesha County needs.
- **Positive Image** - Leadership donors are perceived as positive role models by their peers, which may increase the level of participation and total dollars raised throughout the company.

## Company Benefits:

- **Positive Image** - A leadership campaign demonstrates a company-wide commitment to improving lives.
- **Employee Performance** - Leadership giving activities encourage teamwork and enhance relationships by connecting employees with a shared vision and passion.
- **Internal Leadership** - Potential leaders can develop and hone their communication and leadership skills.
- **Stronger Employee Pool** - By addressing key issues in the Waukesha County community, United Way funded programs and initiatives help people become better employees and broaden the pool of potential employees.

# STEPS TO A SUCCESSFUL LEADERSHIP CAMPAIGN

## 1 Recruit Coordinator/Team

- Recruit a respected senior level staff member and current leadership giver to serve as coordinator. (This coordinator will oversee and conduct a leadership giving campaign within your workplace giving campaign.)
- The leadership giving coordinator should work closely with the overall Employee Campaign Coordinator to ensure optimum results.
- Depending on the size of your organization, consider recruiting additional individuals to help. Involving others will lead to increased participation and awareness.

## 2 Set Goals

- Establish the timing of the leadership giving campaign.
- Review last year's efforts and results - Analyze past campaigns utilizing five year giving history provided by United Way.
- Set goals for new leadership gifts and total leadership giving.

## 3 Create a Prospect List

- Work with your United Way in Waukesha County representative to set criteria for soliciting potential leadership donors. Consider:
  - \*Employees who gave at the leadership level last year.
  - \*Current donors who give \$500-\$999 or whose salary is \$50,000 or more.
  - \*Employees receiving stock or stock options as part of their compensation package.

## 4 Promote the Campaign - Communicate!

- Develop and publicize the company goal for leadership giving - in addition to the overall campaign goal.
- Invite prospects to a special breakfast, luncheon, or meeting to present benefits of leadership giving and why. See "Leadership Giving Presentation: Sample Agenda."

- Consider conducting your leadership giving campaign one to two weeks prior to your overall campaign kickoff. By announcing the results of an early leadership campaign, leadership givers can set the tone for the rest of the employees, encouraging and inspiring others to give.

- Distribute United Way materials, pledge forms and other appropriate information. When possible, personalize the materials with the individual's name.

- Make the Ask! Make personal contact. People give to people. Set up a one-on-one meeting or group solicitation to ask for a pledge. Don't leave the pledge forms on desks.

- Invite employees to give at the leadership level or attend a special event with a letter of endorsement from Leadership Chair or CEO.

- Emphasize payroll deduction. This is the easiest way to contribute.

- Ask previous contributors to consider increasing their gifts to respond to the growing needs of our community. Remember that giving is a personal decision.

- Always respect decisions and thank all employees regardless of whether or not they give.

- Discuss leadership giving and its benefits in all meetings and invite employees to join. Do not assume that employees cannot give at the leadership level.

## 5 Thank Your Contributors

- Send a personal thank you note/letter.
- Offer a thank you reception hosted by CEO
- Advise leadership givers to expect a thank you letter/call from United Way in Waukesha County

## 6 Report Final Results to United Way

# LEADERSHIP GIVING PRESENTATION: SAMPLE AGENDA

The most successful leadership campaigns take place one to two weeks prior to kick-off of your general campaign and help set the pace for your entire United Way campaign.

A formal leadership giving presentation is most effective when part of an invite-only event, such as breakfast, luncheon, or reception for current and potential leadership givers. Hosted by the CEO and/or Leadership Giving Coordinator, the purpose of the leadership presentation is to provide information about the work of United Way in the Waukesha County community and to ask employees to consider giving at the leadership level. Current leadership donors are asked to consider increasing their current leadership gifts. The staff at United Way in Waukesha County is available to help you plan all parts of your leadership giving campaign. A sample agenda of an effective leadership presentation follows:

## **PART I**

### **CEO/Senior Staff/Leadership Campaign Coordinator (3-5 minutes)**

- Welcome
- Opening Remarks
- Declaration of corporate and personal support
- Statement on importance of management's leadership in your United Way campaign
- Agenda Review

## **PART II**

### **Employee Testimonial or United Way Funded Agency Client Story (5 minutes)**

- How United Way touched his/her life
- Why United Way is important to our community
- Why he/she supports United Way

## **PART III**

### **United Way Staff/Volunteer (5-10 minutes)**

- Update on United Way in Waukesha County activities/impact
- Viewing of 2011 campaign video
- Explanation of what is leadership giving/levels and why leadership giving
- Request of meeting attendees to consider a leadership level pledge
- Highlight of promotions (Challenge grant match, entertainment package, and essentials package)

## **PART IV**

### **Company Representative (5 minutes)**

- Review campaign specifics: goals, activities, etc.
- Offer to address questions, comments, etc.
- Thank colleagues for their attention and consideration of a leadership level gift.

## **Available Resources**

- United Way Website - [www.unitedwaywaukesha.org](http://www.unitedwaywaukesha.org) - check out the campaign center**
  - \*PowerPoint Presentation for a Leadership Giving Meeting
  - \*Talking Points
  - \*List of United Way funded programs/agencies
  - \*Video
  - \*United Way staff - contact Michelle DuBord at 262-547-8459

## **Leading the Way**

Across the country, leadership giving is the fastest-growing segment of most company workplace campaigns. Surveys suggest companies that have a leadership giving program in place experience, on average, 20% higher employee per capita giving than companies not using this technique.

# SAMPLE LETTERS TO UTILIZE AND CUSTOMIZE

Download letters from United Way's website at [www.unitedwaywaukesha.org](http://www.unitedwaywaukesha.org)  
(campaign center tools and resources page)

## Leadership Giving Prospect Letter

Dear (Name):

I am writing to thank you for your past investment in the community through United Way in Waukesha County and to invite you to consider making a leadership gift of \$1,000 or more to the 2011 campaign.

United Way in Waukesha County is meeting the challenges related to local health and human services needs by providing essential services and programs while focusing on long-term solution for community wide issues.

A contribution to United Way is more than a charitable gift - it is an investment in the future of our community. By being a leadership giver, you serve as an example to others and help lead the way towards helping those in need to become strong, healthy, and self-sufficient.

*For the 2011 campaign, any new leadership gift of \$1,000 or more will be matched 50% by a challenge grant sponsored by ProHealth Care and Wisconsin Energy Foundation. This is a great way to maximize your gift!*

Leadership Giving to United Way in Waukesha County benefits more than one person or program. An investment at this level puts your dollars to work along with thousands of others in our community, to help people live better lives. Please join me at a leadership level as we help United Way create lasting change in our community by focusing on Living United.

Sincerely,

## Request to Continue Leadership Gift Letter

Dear (Name):

Security for the future are often the focuses of our forward planning. We want to be able to live comfortably now and in retirement, and often make investments to ensure this. We take proactive measures to create security for ourselves and for our loved ones. Often, we consult experts who advise us as to where best to invest our resources to have the highest possible return. Should we not put similar consideration into investing in our community? After all, when our community is strong and safe, we all benefit.

That's where our local United Way comes in United Way in Waukesha County brings our whole community together to Live United - meeting the challenges related to local health and human services by providing essential services and focusing on long-term solutions.

Our annual United Way campaign at < organization> will soon be underway. We thank you for your generous leadership level investment of <individual's 2010 pledge> last year and hope that you will consider renewing your support as a leadership donor this year. Leadership Giving recognizes those donors who contribute \$1,000 or more.

Leadership Giving to United Way in Waukesha County benefits more than one person or program. An investment at this level puts your dollars to work along with thousands of others in our community, to help people live better lives. Please join me by continuing to give at a leadership level as we help United Way create lasting change in our community by focusing on Living United.

Sincerely,

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## Invitation to Leadership Breakfast/Luncheon

Dear (Name):

Being a community leader takes a commitment to finding solutions to the challenges we face in our community. I am writing to encourage you to join me in demonstrating your concern for people in need by becoming a United Way in Waukesha County Leadership giver - with a contribution of \$1,000 or more.

As we prepare to launch this year's United Way campaign at <company/organization>, I invite you to attend our upcoming Leadership <breakfast/luncheon> meeting on <date/time/location>. The purpose of this special meeting is to share information about <company's/organization's> Leadership Campaign.

I'm proud of <company's/organization's> tradition of community support. The decision to be involved with United Way as a Leadership giver is one that I value and hope you will strongly support. A Leadership pledge to United Way in Waukesha County helps shape the future of our community and sets an example for others to follow.

I look forward to seeing you at our Leadership event on <date>. Please RSVP on or before (Date to Name) to \_\_\_\_\_. Thank you.

Sincerely,

## Leadership Giving Thank You Letter

Dear (Name):

Thank you for your extraordinary leadership and generous investment in the community. As a leadership contributor you have played a special role in making <organization>'s 2011 United Way campaign a tremendous success. It takes all of us, Living United, to achieve incredible results like these:

< Include your campaign successes like: total dollars raised for the community, leadership gifts, employee participation, day of caring participation, volunteer hours, etc. >

But what matters most are the lives you've touched. Your personal commitment and generosity will provide help and hope to those when they need it most - and inspire even more people to get involved.

On behalf of <organization>, United Way in Waukesha County and our community, thank you for your generous leadership contribution. Your Leadership matters!

Sincerely,

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in Waukesha County