

United Way Fox Cities

LIVE UNITED



HOW TO

LIVE UNITED:

**JOIN HANDS.**

OPEN YOUR HEART.

LEND YOUR MUSCLE.

FIND YOUR VOICE.

GIVE 10% GIVE 100%

**GIVE 110%**

GIVE AN HOUR.

GIVE A SATURDAY.

THINK OF WE BEFORE ME.

REACH OUT A HAND TO ONE AND

**INFLUENCE**

THE CONDITION OF ALL.

GIVE. ADVOCATE. VOLUNTEER.

**LIVE UNITED**



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

# What is a Company Leadership Giving Program?

In your company, you have many leaders – defined by title and by example. United Way Fox Cities recognizes as leadership givers, individuals who make an annual gift of \$1,000 or more. 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 the Fox Cities there are more than 600 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 Fox Cities 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 make a greater impact on the lives of people throughout the Fox Cities and sets your organization apart as a leader in our community.

## Leadership Giving Levels

Tocqueville Society	\$10,000 and above
Founders	\$7,500 - \$9,999
Keystone	\$5,000 - \$7,499
Cornerstone	\$2,500 - \$4,999
Pillar	\$1,500 - \$2,499
Horizon	\$1,000 - \$1,499

### All leadership levels offer the following:

- Option to combine the gifts of both spouses for recognition purposes
- Several pledge payment options: Payroll deduction, cash, check, billing, stock payment
- Anonymity – option to decline having names published in United Way Fox Cities’ materials

## Benefits of a Leadership Giving 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 Fox Cities to respond efficiently to emerging community needs.
- **Increased Community Spirit** – Leadership donors have increased pride in the Fox Cities 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-nine worthy agencies and serves the Fox Cities in a holistic manner.
- **Community Awareness** – A formal leadership giving program increases understanding and awareness of the Fox Cities’ 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 Fox Cities, United Way programs and initiatives help people become better employees and broaden the pool of potential employees.

# How To Conduct A Successful Leadership Giving Campaign

## Step #1

Gain CEO and Senior Management Support

- Meet with your CEO/management staff to make sure they understand and support United Way's Leadership Giving Program.

## Step #2

Recruit Leadership Giving Coordinator & Team

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

## Step #3

Develop a Plan and Set Goals for your Leadership Giving Campaign

- Establish the timing of the leadership giving campaign.
- Review last year's efforts and results.
- Set goals for new leadership gifts and total leadership giving.

## Step #4

Create a Prospect List

- Work with your United Way Fox Cities representative to set criteria for soliciting potential leadership donors. Consider:
  - Employees who gave at Leadership levels last year.
  - Current donors who give \$500 – \$999 or whose salary is \$50,000 and more.
  - Employees receiving stock or stock options as part of their compensation package.
  - Include retirees as part of the potential leadership pool; invite them to participate in your company's leadership giving campaign.

## Step #5

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. See "Leadership Giving Presentation: Sample Agenda."
- If you hold separate leadership meetings, schedule your organization's leadership giving campaign one to two weeks prior to your campaign kick-off. 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.
- Consider holding your meeting at an already scheduled managers/directors meeting prior to the campaign.
- Distribute United Way materials, pledge forms and other appropriate information. When possible, personalize the materials with the individual's name.
- Invite employees with a letter of endorsement from the CEO.
- Ask your CEO to make his/her donation prior to the meeting and endorse the leadership giving campaign at the meeting.
- Discuss leadership giving and its benefits in all employee meetings and invite employees to join. Do not assume that employees cannot give at the leadership levels.

## Step #6

Thank Your Contributors

- Send a personal thank you from the CEO and Leadership Coordinator to all contributors and members of your team.
- Offer a thank-you reception hosted by the CEO.
- Advise leadership givers to expect a thank-you letter from United Way Fox Cities.

## Step #7

Report Names and Final Results

- Complete the **Pledge Summary Form**, noting the correct spelling of names and gift information for each leadership contributor to ensure United Way Fox Cities properly recognizes and thanks individuals for their generosity.

**Important Note:** *United Way maintains a strict policy of confidentiality and only after receiving personal approval are leadership contributors listed in printed materials. All internal company lists and United Way information should be treated with the highest sensitivity throughout the campaign process.*

# Leadership Giving Presentation: Sample Agenda

The most successful leadership campaigns take place one to two weeks prior to the 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 a breakfast, luncheon, or reception for current and potential leadership givers. Hosted by the CEO or Leadership Giving Coordinator, the purpose of the leadership presentation is to provide information about the work of United Way in the Fox Cities and to ask employees to consider giving at leadership levels. Current leadership level donors are asked to consider increasing their current leadership gifts.

The staff of United Way Fox Cities 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 (Approximately 5-7 minutes)**

- ◆ Welcome
- ◆ Opening remarks
- ◆ Declaration of corporate and personal support
- ◆ Statement on importance of management's leadership in your United Way campaign
- ◆ Direct ask for leadership gifts
- ◆ Agenda review

## Part II

**Employee Testimonial** (*Employee who is a current leadership giver or a beneficiary of services is ideal; if no employee is available to speak, the campaign video provides a powerful testimonial.*)

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

## Part III

### **United Way Fox Cities Staff/Volunteer (Approximately 6-8 minutes)**

- ◆ Update on United Way Fox Cities
- ◆ Viewing of campaign video
- ◆ Explanation of leadership giving levels and payment options
- ◆ Request of meeting attendees to consider a leadership level pledge

## Part IV

### **Company Representative and/or United Way Fox Cities Staff (Approximately 2-3 minutes)**

- ◆ Announce that the corporate gift and the CEO's gift have been made.
- ◆ Review campaign timeline and other information.
- ◆ Offer to address questions, comments, etc.
- ◆ Thank colleagues for their attention and consideration of a leadership level gift.

## United Way Fox Cities Talking Points

### *Why you should give to United Way Fox Cities.....*

- ◆ ***At United Way Fox Cities we LIVE UNITED.*** Partnering with individuals, businesses, government, and other non-profit organizations, United Way Fox Cities addresses the Fox Cities' most critical human care issues and works to bring about changes that matter most where you live and work.
- ◆ ***United Way Fox Cities maximizes your investment.*** United Way brings the community together to improve lives – combining your contribution with others and strategically investing in results-driven programs and initiatives.
- ◆ ***United Way Fox Cities helps people who really need help.*** United Way helps make more than 100 programs available for you, your friends, family, coworkers, and neighbors in need throughout the Fox Cities.
- ◆ ***United Way Fox Cities is different.*** United Way Fox Cities is different from any other non-profit in our community. United Way serves as a collaborator, educator, and leader in bringing about positive changes that impact our entire community.

## Available Resources:

- ◆ United Way Fox Cities Staff
- ◆ United Way Pledge Forms
- ◆ United Way Fox Cities Annual Report
- ◆ Campaign Video
- ◆ [www.unitedwayfoxcities.org](http://www.unitedwayfoxcities.org)

***To request Leadership Giving materials, contact United Way Fox Cities.  
Call (920) 954-7210 today!***

### ***Leading the Way***

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

**Involving your CEO or company leadership is an important way to ensure your campaign's success. We invite you to use these sample letters to get started and encourage you to customize your communication to reflect the culture and interests of your organization.**

**Leadership Giving Prospect Letter**

Dear (Name):

I am writing to thank you for your past investment in the community through United Way Fox Cities and to invite you to consider making a leadership gift of \$1,000 or more to the **(current year) Campaign**.

Economic uncertainties, both national and local, make these challenging times. United Way Fox Cities is meeting the challenges related to local health and human services head-on by conducting research, targeting needs, collaborating with local agencies to mobilize resources, and measuring impact to affect positive and significant change.

A contribution to the 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 toward helping those in need become strong, healthy, and self-sufficient.

Leadership giving to United Way Fox Cities 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 as we help United Way Fox Cities create lasting change in our community by focusing on living united.

Sincerely,

NAME  
TITLE

**Request to Continue Leadership Giving Support**

Dear (Name):

Today, we think very carefully about investing in our future, whether it's through a 401(K) program or other ways to save for retirement. 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 into our community? After all, when our community is strong and safe, we all benefit.

That's where our United Way comes in. United Way Fox Cities brings our whole community together to Live United – tackling tough issues and helping people. United Way Fox Cities makes it possible to do things no one person or company can do alone – from helping kids start school ready to learn to helping people meet basic human needs and more.

Our annual United Way campaign at <Company> will soon be underway. We thank you for your generous investment of <\$> last year and hope that you would consider renewing your support as a leadership donor this year. Leadership Giving recognizes those donors who contribute \$1,000 or greater, either individually or in combination with other members of the household.

A leadership gift to United Way Fox Cities helps 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. United Way leadership givers are a vibrant and active force in helping United Way Fox Cities build a stronger community...together.

On behalf of the many people who will benefit from your generosity, thank you for your caring role in making the Fox Cities a better place to live, work and play.

Sincerely,

NAME  
TITLE

**CEO Invitation to Leadership Breakfast**

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 Fox Cities 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 our (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 Fox Cities 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). Thank you.

Sincerely,

NAME  
TITLE

**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 <Company>'s <Current Year> 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, Week of Caring participants, volunteer hours, etc.

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

On behalf of <Company>, United Way Fox Cities and our community, thank you for your generous leadership contribution. I encourage you to continue your support throughout the year by volunteering, voting, donating food, giving blood, or through additional financial support. Please also visit the United Way Fox Cities website at [www.unitedwayfoxcities.org](http://www.unitedwayfoxcities.org) to find out more about your dollars at work in our community.

Your leadership matters!

Sincerely,

NAME  
TITLE

