

How to Conduct a Successful Leadership Campaign

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 Valley and sets your organization apart as a leader in our community.

To Implement Your Leadership Giving Campaign

- Hold separate Leadership Giving meetings in addition to general employee meetings, *and/or*
- Integrate Leadership Giving into all United Way employee meetings

We encourage you to work with your United Way Development Officer to determine the best strategy for your organization.

Leadership Giving Campaign Best Practices

Gain CEO and Senior Management Support

- ✓ Meet with your CEO/management staff to make sure they understand and support United Way and Leadership Giving.
- ✓ Work with your United Way representative to identify the best person to ask your CEO for a Leadership or Tocqueville gift.

Recruit a Leadership Giving Chair to Organize your Leadership Campaign

- ✓ Ask the CEO to appoint a well-respected member of your organization already giving at the Leadership level to spearhead the Leadership Giving campaign.

Recruit a Team to Assist the Leadership Giving Chair

- ✓ Recruit a team of current Leadership Givers to assist the Leadership Giving Chair.
- ✓ Make solicitations in person. Peer-to-peer solicitations are the most effective "Asks."
- ✓ Your Leadership Giving team can solicit incentives from the CEO/management team and/or local businesses.

Develop a Plan and Timeline for your Leadership Giving Campaign

- ✓ If you're holding separate Leadership meetings, schedule your organization's Leadership Giving campaign one to two weeks prior to the kick-off of your general campaign.
- ✓ By announcing the results of an early Leadership Campaign, Leadership Givers can set the tone for the rest of the campaign, encouraging and inspiring others to give.
- ✓ Set goals for Tocqueville and Leadership Giving.
- ✓ Include current and potential Leadership Givers in "Ask" meetings.
 - Potential Leadership Givers are current donors who give \$500-999 or those whose salary is over \$50,000.
 - Include retirees and/or Board Members as part of the potential Leadership pool.
- ✓ Invite employees with a letter of endorsement from the CEO or Leadership Giving Chair.

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Setting Up a United Way Leadership Giving Meeting

- ✓ Consider holding your meeting during an already scheduled managers/directors meeting prior to the campaign.
- ✓ Work with your United Way representative to schedule a speaker for your meeting.
 - A Leadership Speaker from a local company
 - A United Way Partner Agency speaker
 - An employee from your organization who is a Leadership Giver or United Way recipient
- ✓ Ask your CEO to make his/her donation prior to the meeting and endorse the Leadership Giving campaign at the meeting.
- ✓ Have handouts available including the Leadership Giving Brochure and pledge cards.
- ✓ Prepare PowerPoint presentation (customizable template available at www.vsuw.org/campaign)
- ✓ Promote interest and confirm attendance of invitees.
- ✓ Use incentives to encourage attendance.

Sample Leadership Giving Meeting Agenda

- PowerPoint presentation
- CEO endorses Leadership Giving
- Present the benefits of Leadership Giving
- Employee/agency speaker shares story
- United Way Representative speaks
- Show United Way video
- Distribute personalized pledge cards and pens and support materials (brochure, etc)
- Encourage gifts of stock
- Highlight United Way's Financial Stability/Helping the Working Poor Tax Credit
- Explain incentives (if available)
- Make "The Ask"
- Thank everyone for attending and for their support

After the Meeting

- Collect all Leadership Pledge Cards
- Personally contact anyone who did not attend the meeting and make "The Ask."

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Include Leadership Giving in all United Way Employee Meetings

- ✓ 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. It is a personal choice and many organizations report that “front line” employees often account for a significant amount of Leadership Givers.
- ✓ Work with your United Way representative to schedule a speaker for your meeting.
 - A Leadership Speaker from a local company
 - A United Way Partner Agency speaker
 - An employee from your organization who is a Leadership Giver or United Way recipient

Thank all Leadership Givers

- ✓ Send a personal thank you from the CEO and Leadership Chair to all Leadership Giving donors.
- ✓ Hold a thank you event hosted by the CEO and distribute incentives.
- ✓ Recognize all Leadership Givers in a visible way that will encourage other employees to give (e.g. Leadership Giving shirts, plaques).
- ✓ Advise Leadership Givers to expect a thank you letter from Valley of the Sun United Way.
- ✓ Invite Leadership Givers to Valley of the Sun United Way’s annual community event.
- ✓ Communicate to Leadership Givers year round.
- ✓ Utilize United Way’s Resource Center at www.vsuw.org to access success stories, program results, current news and events.
- ✓ Promote and encourage donors to attend VSUW Leadership events.
- ✓ Promote Valley of the Sun United Way’s eNewsletter to employees.

Additional Leadership Strategies

- ✓ Utilize VSUW Francis Family Step-up Program and Tocqueville Step-Up Program to encourage prospects to step-up to Leadership and Tocqueville.
- ✓ Create internal step-up program to recognize individuals giving at the \$500 or \$750 level.
- ✓ Encourage Leadership givers to increase their giving to the next level by creating internal incentives and promoting VSUW benefits.
- ✓ Hold a “Be One, Bring One” event encouraging current members to bring a prospect.

Utilize VSUW Support Materials

Many Leadership Campaign support materials can be downloaded from the Resource Center on Valley of the Sun United Way’s website, www.vsuw.org, including:

- ✓ Leadership Giving Brochure
- ✓ What Your Dollars Can Do – Leadership Version
- ✓ Leadership PowerPoint Presentation with key messaging and benefits (customizable)
- ✓ Sample Leadership Script
- ✓ Sample CEO Leadership chairperson “Ask,” “Follow-Up,” and “Thank You!” letters
- ✓ Securities Contribution Forms (stocks and bonds)
- ✓ Financial Stability/Helping the Working Poor flyer

Available at www.vsuw.org/campaign