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# How to Conduct a Successful Leaders in Giving Campaign



United Way of  
Greater Cleveland



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One of the best ways to increase overall giving in your company is to conduct a campaign aimed at those members of your leadership team who are capable of giving most generously. Here at United Way of Greater Cleveland donors from \$1,000 to \$9,999 are recognized as members of our Humanitarian Society and collectively contribute about one-quarter of the total dollars raised each year by the annual campaign.

#### THE HUMANITARIAN SOCIETY

Humanitarian Society donors are divided into four sub categories:



##### **INVESTOR (\$1,000 - \$2,499):**

Helping to invest in a life that's not your own

##### **ADVOCATE (\$2,500 - \$4,999):**

Helping to meet the needs of many others

##### **CHAMPION (\$5,000 - \$7,499):**

Helping to support another's life because you care

##### **PARTNER (\$7,500 - \$9,999):**

Helping to join together for change

We also recognize those donors giving \$10,000 and above as members of our Philanthropist Society. Both donor societies combined represent 40 percent of the overall campaign. But this booklet concentrates on Humanitarian Society giving where you can have the most impact.

# Thank You

## for Your Commitment to Making Greater Cleveland Greater!

As an Employee Campaign Manager you play a pivotal role in making an impact on the lives of those in need throughout the Greater Cleveland area — over 450,000 people were helped last year.

What sets your organization apart as a community leader is a commitment to running an effective employee campaign and utilizing the best resources available to ensure success.

Please be sure to visit [unitedwaycleveland.org/ecmtools](http://unitedwaycleveland.org/ecmtools) for myriad resources that will help you run an even better workplace campaign.

The following are the key steps in conducting a **Leadership driven** campaign designed to encourage and recognize those individuals who make gifts of \$1,000 or more to United Way of Greater Cleveland.

1. **Get Your Corporate/Organizations Leaders Involved**
2. **Recruit a Leadership Coordinator**
3. **Identify Leadership Giving Prospects**
4. **Calculate Leadership Campaign Goal**
5. **Host a Leadership Meeting**
6. **Follow-Up Personally & Ask for a Gift**
7. **Make the Campaign Fun and Exciting**
8. **Always Say Thank You**



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# Have questions?

## Here are some answers.

### How do I get my corporate leaders involved?

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- Ask the CEO or chief decision maker to host a meeting of his or her leadership team.
- Send an email or letter to the leadership team asking them for their support

### How do I recruit a Leadership Coordinator?

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- Identify someone who is a well-respected, personable individual and who's a current donor of \$1,000 or more to the campaign.

### How can I identify my Leadership Giving prospects?

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- Your United Way representative can provide you with a list of current and past donors giving \$1,000 or more. Some donors may be close to the \$1,000 giving level and should be asked to join the Humanitarian Society by increasing their pledge amount. Take a careful look to determine who can be approached and encouraged to increase their gift.
- Don't forget about employees that have recently been hired or promoted.
- **Retirees** can also be good Leadership Giving prospects.
- Be sure to review your company's practice regarding asking employees for a specific dollar amount.



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### How do I calculate my Leadership Giving goal?

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- Determine if your company has a Leadership Giving standard. Some organizations define these donors by a percentage of compensation.
- Working with your Leadership Coordinator, set a realistic goal based on the retention of current donors and new donor prospects giving at the Humanitarian Society (\$1,000-\$9,999) level. Take into account employees who have left the company and those who did not give last year but remain with the company and may consider a gift this year.

### What is the best type of meeting?

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- **Host a breakfast or a lunch meeting**, or you can include a presentation as part of a regular staff meeting.
- Consider holding a **meeting at a United Way partner agency** so employees can see firsthand United Way dollars at work within the Greater Cleveland area.
- See **sample 15-minute model agenda** at [unitedwaycleveland.org/ecmtools](http://unitedwaycleveland.org/ecmtools)
- Encourage donors to move up through the levels of giving within the Humanitarian Society (\$1,000-\$9,999), especially if you notice that someone is close to the next level.
- Ask your Leadership Coordinator to follow-up with those employees unable to attend the meeting.

### How do I handle employee solicitation?

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- Ask your United Way representative to prepare **personalized Humanitarian Society pledge cards and letters** to encourage donors to increase their support.
  - Ask employees to complete their pledge cards.
  - Ask your Leadership Coordinator to follow-up with outstanding donors.
  - Don't forget retirees that have supported United Way at a Leadership level and ask for their continued Leadership level support.
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## Is there anything I can do to make this fun and interesting?

- Many successful organizations utilize **fun incentives** such as a raffle for a day off or dress-down days. Take a look at the list of fun and meaningful ideas we have included in this brochure, or check our website under [unitedwaycleveland.org/ecmtools](http://unitedwaycleveland.org/ecmtools).

## What is the process for thanking our most generous donors?

- Have your CEO host a **thank you reception** and invite Leadership level donors.
- Have the CEO or Leadership Coordinator send a **personal thank you note**. Where you have permission, utilize company communications to recognize donors without divulging gift amount.
- Our Humanitarian Society volunteer co-chairs will personally sign letters of thanks to all donors giving \$1,000 to \$9,999.
- All Humanitarian Society donors will be invited to an annual **Appreciation Reception** hosted by the Humanitarian Society co-chairs. Encourage your donors to attend.
- **Your United Way representative is a phone call or email away. Don't hesitate to call if you need help.**

## Ideas to make the campaign fun and meaningful

- **Invite past and potential Humanitarian Society donors to an exclusive kickoff meeting with your CEO.** Show the campaign video and your United Way representative can arrange a speaker from United Way's Speakers Bureau who will share a story of how United Way funds are at work in our community.
- **Make sure your Humanitarian Society donors are on the United Way e-newsletter mailing list** so they receive news exclusively for them.
- **Distribute the "Why Our Community Needs United Way" article** and/or select success stories from [unitedwaycleveland.org/success](http://unitedwaycleveland.org/success) to email to potential and current donors to communicate the impact of their gifts.
- Witnessing the work that donations enable is very impactful. **Invite Humanitarian Society members to participate in a Day of Caring at one of United Way's funded programs.** Days of Caring projects range from reading to children to delivering and serving meals. United Way will find a project to fit your organization's interests.
- **Consider holding one of your regularly scheduled leadership meetings at a United Way partner agency** and combine with an agency tour or briefing. Your United Way representative can help in coordinating.
- **Build in fun incentives for donors.** For example, a day-off raffle for first time Humanitarian Society donors and those who pledge by a certain date, or increase by a certain percentage amount.
- **Distribute a special token of appreciation** to Humanitarian Society donors for their outstanding contribution to the community, such as a Live United to be a Greater Clevelander t-shirt.
- **Check [unitedwaycleveland.org/ecmtools](http://unitedwaycleveland.org/ecmtools) for more fun ideas.**

# Thank You

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**United Way of  
Greater Cleveland**



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