

How to Identify and Engage Potential Leadership Donors

Leadership givers are an important group and can have a positive impact on the success of an employee giving campaign. When organizing meetings with leadership, be sure to plan effective and efficient events, clearly communicating appreciation for their support, as well as specific examples of how they can invest in United Way.

1. **Recruit a Leadership Giving Chair from your senior management team to coordinate your Leadership Giving effort.**

Choosing a well-respected, personable individual who currently is a Leadership Donor can visibly increase the success of your effort. You want to select someone who is also very organized and able to participate in training and/or roundtables.
2. **Ask your CEO to offer a corporate match of all leadership contributions.**

Or, ask your organization to match all new and increased contributions at the Leadership level.
3. **Set and publicize a specific goal for your Leadership Giving program.**

Determine suggested giving levels and set increased dollar goals. You may want to also set a goal for the number of new leadership donors.
4. **Identify all potential Leadership Giving prospects and assign a peer solicitor to each.**

Most prospects prefer to be approached by a peer. We also recommend you choose solicitors who currently contribute at a leadership level. Your United Way representative can help train the solicitors on how to ask for a leadership gift and to answer questions about United Way. We also recommend solicitors request specific dollar amounts from their prospects.
5. **Plan a special Leadership Giving event hosted by your CEO or Leadership Giving Chair.**

It's best to hold this event separate from and prior to the general campaign. You will also want to check with senior management to ensure you have selected a time most can attend. A high level of management support and participation will improve overall results. Your United Way representative can assist you with event ideas, themes, and/or schedule a speaker.

 - **Small Group Meeting**
 - Organize a group breakfast or lunch (15-30 people) hosted by CEO or Leadership Giving Chair
 - Let management communicate the value of community support, involvement and the corporate campaign goals.
 - Have United Way speakers illustrate the impact of an investment.
 - Clearly communicate how people can take action and engage with the work of United Way.

- **Large Group Meeting**
 - Organize a large breakfast or lunch with CEO (as host).
 - Have CEO personally invite (via e-mail or letter) management and Leadership Donors.
 - CEO welcomes audience and speaks of supporting United Way by providing a personal story, if possible.
 - Have United Way speaker illustrate the impact of an investment in United Way.
 - Provide company Leadership Chair or CEO time to inform donors about the impact of their contribution.

- 6. **Promote the combined giving option and other methods of giving.**

Remind employees that they can combine their gift with their spouse or partner's gift to reach leadership levels. Also, promote gifts of stock, appreciated securities and other planned gift ideas.

- 7. **Consider innovative ways to involve current and potential leadership donors.**

Your United Way representative can help you arrange a group volunteer project or focus area tour specifically for your leadership prospects. We also suggest you provide information throughout the campaign about how United Way is investing donor's contributions in the community. Periodic e-mails provide a quick, effective way to keep United Way in mind.

- 8. **Provide updates to other employee groups on the progress and success of your Leadership program.**

Recognition of leadership's role in a visible place shows that leadership giving is "setting the pace" for your employee campaign and leading by example.

- 9. **Thank your leadership donors.**

Host a thank-you reception, perhaps at your CEO's home or at a local venue. Have your CEO or Leadership Giving chair send a personal thank-you note and publicize the results in publications with a list of participants (if they agree to have their names published).

- 10. **Communicate year-round.**

Make sure to provide a list of leadership donors to United Way so they can be thanked, kept up to date on how their donation is making a difference, and invited to special leadership events and opportunities.