



United Way

Brant

Change starts here.

2016 LEADERSHIP GIVING GUIDE

BENEFITS OF A LEADERSHIP CAMPAIGN

Leadership giving is an important part of United Way employee campaigns in all business and public sector organizations. United Way relies on volunteer Leadership Champions to spearhead the Leadership giving program in their individual workplaces, and provides training, ongoing support and fundraising materials to help ensure the success of the Leadership giving program.

The Leadership campaign promotes and recognizes personal contributions from Leaders of the Way, who donate \$1,200 or more to United Way. This program is one of United Way's true success stories. Leadership Giving at Brant United Way has grown leaps and bounds. From just over \$138,000 in 1999 to just under \$280,000 in 2015, leadership donors have played an increasingly important role in the investments in our community.

This guide will give you the information you need to run a Leadership campaign. It provides an outline of the role of the Leadership Champion and tools to help you be successful. Your United Way staff partner will also be a valuable resource in helping you plan and execute your campaign.

DONOR BENEFITS

- Enhanced sense of community - Leadership giving provides donors with the personal satisfaction of making a significant contribution to the quality of life for everyone in the community.
- Gain positive image as an employee - Leadership donors are positive role models for their company peers and other employees.
- Public recognition as a Leader - Leadership donors are listed in the Honour Roll, which is widely distributed to individuals throughout each annual campaign.

HOW YOUR DONATION HELPS

\$ 5,000 will provide a nutritious snack to 30 children 5 days a week for the duration of one school year, ensuring all children are well nourished and ready to learn.

\$4,000 will help twenty-five youth build self-confidence and life skills through membership and participation in programs for one year.

\$ 3,000 trains and equips a volunteer Roots of Empathy instructor for schoolchildren. Through this program, teachers have seen an increase in kindness such as sharing, helping and understanding, and a decrease in aggression, bullying and other negative behaviour.

\$ 2,000 provides lodging, food and clothing for 2 families who have experienced personal disaster such as a house fire.

\$1,200 provides a family of four facing the challenge of vision loss the authentic summer camp experience at a lake front lodge. Kids and their families can develop new skills, make friends, learn new activities, and be themselves in a safe, friendly environment.

HOW YOU CAN BECOME A LEADER

- Payroll deduction through your workplace
- Monthly donation by credit card or your bank account
- One-time donation by cash, cheque or credit card
- Donations of publically traded securities

Leadership giving results in a charitable tax credit that reduces the amount of Federal and Provincial income tax payable.

Leadership Level	Tax Credit	Actual cost of the donation after tax
Bronze \$1200	\$442	\$759
Silver \$2,500	\$964	\$1,536
Gold \$5,000	\$1,968	\$3,032
Platinum \$10,000	\$3,976	\$6,024

**The tax credit figure assumes that the donor is a resident in Ontario. Donors should consult with a qualified financial advisor for the most accurate information with respect to their particular taxation situation.*

WORKPLACE LEADERSHIP GIVING PROGRAM

ROLE OF THE LEADERSHIP CHAMPION

In many organizations, an individual is appointed by the senior decision-maker to serve as the Leadership Champion. In addition to making a personal Leadership gift to United Way, the Leadership Champion is responsible for canvassing current and potential Leadership donors within the workplace.

QUALIFICATIONS

- Belief in the United Way mission and willingness to actively solicit on behalf of United Way
- A recognized leader with the opportunity for growth and visibility within your company
- Ability to commit time to planning and execution of Leadership giving campaign

RESPONSIBILITIES

In partnership with the President, the Leadership Champion will:

- Coordinate efforts with the employee campaign by working with the Employee Campaign Coordinator (ECC)
- Develop a Leadership campaign plan, including goals, strategies and a timetable
- Arrange a Leadership presentation or other event to build awareness of United Way amongst campaign volunteers and other potential Leadership donors
- Champion and encourage Leadership giving among current and potential Leadership donors
- Ensure that Leadership donors and volunteers receive appropriate thanks and recognition

LEADERSHIP GIVING PROGRAM STRATEGIES

STEP 1 - DEVELOP A TIMELINE

It is important that you coordinate your plans within the Employee campaign timeline for your organization. Keep your WCC informed for your Leadership campaign plan and align your canvass to coincide with the overall campaign.

STEP 2 - GATHER INFORMATION ABOUT PAST CAMPAIGNS

Before you begin to plan your upcoming campaign, you should analyze past campaign results in order to build on strengths and identify areas of opportunity. If you are running a first-time campaign, you will focus on identifying opportunities and then building your campaign plan.

Meet with your United Way staff partner and review last year's results prior to making any further plans. This individual can provide you with further information to help you set realistic and achievable goals

Things you should ask about include:

Results

- What was last year's Leadership goal? Was it achieved?
- How many people gave gifts of \$0 last year but gave \$1,200 the year before (lapsed donor). What was their total dollar value?
- Are lapsed donors still with your organization? Are they retired? On sick leave? On maternity leave?

Canvassing

- Were employees canvassed for Leadership gifts?
- How did your colleagues receive pledge cards (e.g. personal delivery, inter-office mail, at the Leadership breakfast, etc.)?
- Was there a group presentation?

- Was the canvassing effective? If not, why?
- How long did the campaign run?

Assessment

- What were the major strengths and weaknesses of last year's campaign?
- Are there any major recommendations for the upcoming campaign?
- Was canvassing done face to face?
- Where did donors go if they had questions?

Recognition

- How were donors thanked? (e.g. personal thank you note, thank you phone call or email, etc.)? Was this sufficient?
- How were volunteers recognized? (e.g. personal thank you note, thank you event etc.)? Was this sufficient?

STEP 3 - IDENTIFY POTENTIAL PROSPECTS FOR NEW LEADERSHIP GIFTS

The next important step is to identify potential new Leadership donors. You can use one of the following two approaches:

Targeted Approach

By using this approach you can identify new Leader targets based on salary ranges, titles, organizational levels, etc. If appropriate, target whole departments. It is crucial that you provide Leadership prospect target information to your ECC (Employee Campaign Chair) early in the planning phase to produce personalized pledge card and Leadership packages for prospects along with renewing Leaders.

Inclusive Approach

An inclusive approach means that you will extend a request for, or consideration of, a Leadership gift to all employees in the company. Where appropriate, this approach ensures everyone is aware of the opportunity to become a Leadership donor.

If privacy is a concern in your workplace, this inclusive strategy is an excellent way to address this issue by inviting everyone to a Leadership presentation.

In the past, many organizations have used a combination of the targeted and inclusive approaches. They would target employees, for example, based on title/salary range and would get information from United Way about donors who are already giving at the Leadership level, but they would also send an open invitation to the remaining employees explaining the value of a Leadership gift.

STEP 4 - SET GOALS

Having a goal will help to measure success and give you something to celebrate at the end of your campaign. What gets measured gets done!

Set your goals after identifying your list of current and potential donors. Ask your United Way staff partner to assist you in this goal setting process.

STEP 5 - ENGAGE YOUR COLLEAGUES

Show the campaign video, book an Agency speaker, or take employees on a **Seeing is Believing tour**. These tours will educate them about the United Way's member agencies and allow them to see where the money is being invested. Your employees will be motivated after the tour or agency speaker making it a good time to canvass them.

You can also invite a community leader to speak to your colleagues at a Leadership event. Ask your staff partner for this year's list of speakers. These individuals are willing to come to your organization and talk about United Way, why they support at the leadership level, and the impact it has had in their lives.

STEP 6 - CANVASS

Lead by example - Remember to make your Leadership donation before you canvass your colleagues.

It is far easier to convince others if you have already made your personal commitment. Your enthusiasm and commitment will motivate others to give. Explain why you personally give to United Way. A personal story always has more impact.

Use Impact Statements. An example of how a donation at a certain level is making a difference in someone's life is a very effective way to communicate the impact of Community Fund dollars. Ask your United Way staff partner to help you identify the most suitable statements for your workplace.

Don't hesitate to suggest to your colleagues how much to give. Use benchmarking to show how much others are giving. Your United Way staff partner can provide benchmarking information relevant to your industry sector. Use the strategy that is most suitable for your organizational culture.

Each donation matters. Each donation matters. Remind your colleagues that their donation to

United Way's Community Fund is pooled with others who invest in United Way to maximize impact.

The Community Fund has real power to bring about the changes that matter where they live. With the Leadership Challenge fund, each new or increased gift will have an even greater impact!

Leave no stone unturned. Make sure that each prospect receives a clear and direct ask and that you receive an answer - yes or no.

STEP 7 - FOLLOW UP & RECANVASS

If you receive feedback from donors who decide not to donate, please share this information with your United Way staff partner. This will enable United Way to better understand donors' preferences and use this information as we plan for future campaigns. Every successful campaign hinges on the perseverance and efforts of a strong canvassing and reconvassing strategy. Make sure that you have incorporated time into your campaign plan to enable you to approach each prospective donor more than once if necessary.

STEP 8 - THANKING DONORS

Recognition is a necessary component of every successful campaign. Everyone appreciates a “thank you” for a job well done. The United Way has a committee of volunteers who thank Leaders by phone, preferably within 48 hours of receiving the pledge form. A receipt (for cash, credit card and cheques) is issued, along with a thank you letter from the Executive Director, within one week of processing the gift.

All individuals contributing gifts of \$1,200 or more to Brant United Way will be publicly recognized on United Way’s Honour Roll according to the levels below. Leadership donors are asked to indicate on their pledge form if they wish to be recognized on the Honour Roll. Names of donors who prefer to remain anonymous will not be published. As the Leadership Champion, you may wish to recognize donors in your workplace as well.

Bronze: \$1200 to \$2,499

Silver: \$2,500 to \$4,999

Gold: \$5,000 to \$9,999

Platinum: \$10,000 plus

LEADERSHIP CHALLENGE FUND

This year your generosity can do more.... Once again, Brant United Way will offer a way for donors of \$1,200 or more to increase the impact of their donation through the Leadership Challenge Fund.*

Launched in 2010, the inaugural Leadership Challenge Fund was created as a tribute to Paul Williamson, FCPA, FCA, CLU for his efforts to inspire many other individuals and organizations to get behind United Way. And inspire it did! In our first year, our community and donors rose to the challenge and raised an **additional \$51,443** in leadership donations.

Leadership gifts are donations of \$1,200 or more. Here’s how it works:



NEW LEADERSHIP DONORS

Each first-time donation of \$1,200 or more to the United Way* will be matched dollar-for-dollar.

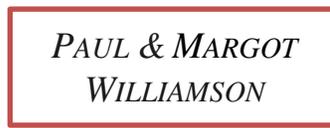
No matter how much under \$1,200 you gave last year, if you raise your gift to \$1,200 this year, you become a new Leader. The Leadership Challenge Fund then matches your \$1,200 donation, and the

United Way receives a total of \$2,400. By becoming a new Leadership donor, you double the impact of your gift.

RENEWING LEADERSHIP DONORS

If you are already a Leader and, this year, you add at least 10% to your gift, the Leadership Challenge Fund will double your increase. For example, increase your donation by \$120 from \$1,200 last year to \$1,320 this year, and the United Way will receive \$1,440.

Brant United Way extends our deepest gratitude to our 2016 Leadership Challenge Fund partners:



** Annually, the Leadership Challenge Fund will match each gift; not exceeding the value of the Fund for that campaign year.*



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Together, we are **possibility.**

Brant United Way 2016 Leadership Levels & Benefits				
Levels	Bronze \$1,200 - \$2,499	Silver \$2,500 - \$4,999	Gold \$5,000 - \$9,999	Platinum \$10,000 +
Benefits				
Personal thank you call	from a United Way Board Volunteer	from the Executive Director	from the Campaign Chair	from the Campaign Chair
Subscription to our e-newsletter ¹	●	●	●	●
Valuable tax receipt ²	●	●	●	●
Personal invitation to our Campaign Kick-off	●	●	●	●
Leadership Impact Report	●	●	●	●
Recognition in our online Leadership Honour Roll	●	●	●	●
Achievement Celebration	Invitation	Invitation	Reserved seating	Reserved seating
Invitation to participate in Day of Caring		●	●	●
Seeing Is Believing Tour			Invitation	Personal tour with the Executive Director

¹for those who provide an email address

² Donors who give through payroll deduction will not receive a tax receipt directly from Brant United Way. Donations will be included on the T-4 slip from their employer.