

Workplace Leadership Giving

An effective guide to help your Leadership campaign

Give. Volunteer. Act.



United Way
Kingston, Frontenac
Lennox and Addington

Change starts here.

417 Bagot St. Kingston, ON K7K 3C1
Tel: 613-542-2674 Fax: 613-542-1379
Email: uway@unitedwaykfla.ca
Website: www.unitedwaykfla.ca

LEADERSHIP GIVING OVERVIEW

Benefits of a Leadership Campaign

Leadership giving is now an important part of United Way employee campaigns in all business and public sector organizations. United Way relies on the volunteer Leadership Campaign Chairs to spearhead the Leadership giving program for their organization, 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 \$1,000 or more to United Way.

This program is one of United Way's true success stories. It began in 1999 with 113 individuals giving \$151,000 and has played an increasingly important role in subsequent campaigns. In 2010 \$898,615 was contributed by 500 individuals.

The Friends of the Way program, made up of individuals who donate \$500 - \$999 has seen a similar growth pattern. In 1999 there were 188 Friends donating \$110,000. In 2010 this grew to 690 Friends donating \$401,857.

Leadership gifts accounted for 27% of United Way's annual achievement last year. Friends and Leaders make up 39% of the campaign; 1187 donors contributed \$1,279,472.

The continued success of this program relies on your efforts to run a strong Leadership campaign in your workplace in 2011.

This guide will give you the information you need to run a Leadership campaign. It provides an outline of your role as Leadership Campaign Chairs 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 seen as positive role models for their company peers and other employees.
- Public recognition as a Leader - Leadership donors are listed in the Honor Roll, which is widely distributed to individuals throughout the 2010 campaign.

2011 Leadership Giving program

Staff contacts

Bhavana Varma, President & CEO, 613-542-2674 ext. 2

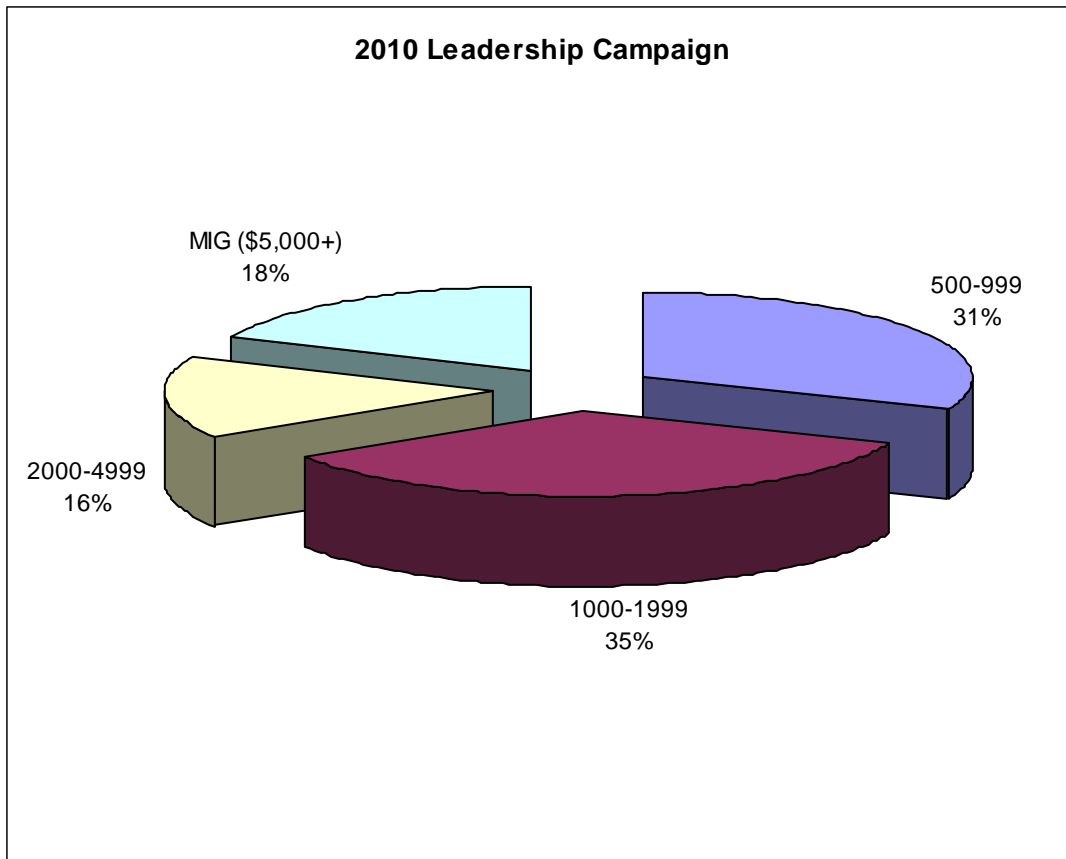
Marie Mackenzie, Campaign Director, 613-542-2674 ext. 7

Melissa Forrest, Campaign Associate, 613-542-2674 ext. 0

LEADERSHIP GIVING OVERVIEW

2010 Annual Campaign Results - Leadership Giving

Year	# of Leaders	Total Leadership	Increase	Campaign Achievement	Increase	Leadership \$ as % of Total
2010	500	895,615	13%	\$3,145,000	7%	27%
2009	466	\$798,256	15%	\$2,930,000	2%	26%
2008	420	\$695,518	19%	\$2,963,515	4%	24%
2007	332	\$578,000	14%	\$2,878,000	9.3%	20%
2006	294	\$507,095	9.6%	\$2,633,000	3%	19.2%
2005	278	462,842	18.4%	\$2,557,000	9%	18.1%



LEADERSHIP GIVING PROGRAM

Role of the Leadership Chair

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

Qualifications

- Belief in the United Way serving KFL&A's 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 Chair will:

- Coordinate efforts with the employee campaign by working with the Employee Campaign Chair (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 their colleagues
- Coordinate the canvassing of current and potential Leadership donors
- Where applicable, coordinate canvassing for employees on maternity leave or sick leave through home mailings
- Consider a retiree campaign, if appropriate
- Monitor/track Leadership gifts
- Report ongoing and final Leadership results to United Way and submit all pledge cards using the appropriate Campaign envelope
- Ensure that Leadership donors and volunteers receive appropriate thanks and recognition
- Evaluate the Leadership campaign and make recommendations

Things you should ask about continued:

√ **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?
- How does your company's results compare to sector results?
- Was canvassing done face to face?
- Did centralized reconvassing take place? Was it done by your company or United Way?
- Where did donors go if they had questions?

√ **Recognition**

- How many donors were 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:

3.1. 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.

3.2 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 organization 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 form 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.

# of renewing Leaders		How many Leaders do you hope to renew?	
Leader retention goal (%)		What is this as a percent of 2007 Leadership donors?	
\$ from renewing Leaders		How much money do you hope to raise from renewing Leaders?	
# of new Leaders		How many new Leaders do you hope to identify?	
\$ from new Leaders		How much money do you hope to raise from new Leaders?	
Total # of Leaders		What is your total goal for renewing and new Leaders combined?	
Total Leadership \$ goal		What is your total Leadership goal?	

Step 5. Engage your colleagues

A simple way to educate your colleagues about United Way and its agencies is to provide them with an opportunity to see the campaign video and hear an agency speaker.

There are two **Seeing is Believing tours** that are scheduled throughout the campaign that you can also take your colleagues on. These tours will educate them about the United Way 's member agencies and see where the money is being invested. Your employees will be motivated after the tour or agency speaker so it would be a good time to canvass them

5.2 Book a Leadership Speaker

You can also invite a the community leader to speak to your colleagues at a Leadership event. As your staff partner for this year's list of speakers. These individuals are willing to come to your organization and talk about United Way and why they support us. Organizations that participated in this program last year saw greater increases in their campaign results than organizations that did not provide this opportunity to their employees

8 Leadership Presentations—Leadership Analysis

new Leaders	New \$	Total # leaders	\$ leadership
20	\$ 28,216	60	88,468

Step 6. Canvass

6.1 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.

Always try to present the impact that donations to United Way have on the quality of life in our city. With their help, there is a better way to solve hunger and homelessness, create more space for children to learn and have fun, and make it easier for families and individuals to live with **hope, dignity and a sense of belonging**.

6.2 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.

6.3 Don't hesitate to suggest to your colleagues how much to give. Use benchmarking to show how much others are giving. The average Leadership (\$1,000 +) gift in 2009 was \$1,711. 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.

6.4 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. Over 450 people made Leadership gifts last year - every donation can help make Kingston, Frontenac, Lennox & Addington better for all of us.

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

6.6 Leadership Canvasser Tips

- **Be Fearless** - you are not asking for yourself - you are asking for the community!
- **Share your passion** - explain why you personally give to United Way. A personal story always has more impact
- **Be yourself** - your enthusiasm and commitment will motivate others to give
- **Use your resources** - refer to our Honour Roll (in the Annual Report) when canvassing. Your colleagues will be interested to see who else is already supporting United Way as a Leader and may decide to join them at the same giving level!
- **Don't take things personally** - if someone says "no", try to determine why and address their objection

6.7 Suggested giving guidelines

The following guidelines are provided to help you talk about gift amounts with your canvassers and potential donors

Your Annual Income	Weekly 4% Gift	Weekly 3.5% Gift	Weekly 3% Gift
\$40,000	\$30.77	\$26.92	\$23.08
\$50,000	\$38.46	\$33.65	\$28.85
\$60,000	\$46.15	\$40.38	\$34.62
\$70,000	\$53.85	\$47.12	\$40.38
\$80,000	\$61.54	\$53.85	\$46.15
\$90,000	\$69.23	\$60.58	\$51.92
\$100,000	\$76.92	\$67.31	\$57.69
\$250,000	\$192.31	\$168.27	\$144.23

Step 7. Follow Up

It is often easier to renew a past gift with a donor who has some knowledge of United Way than it is to build awareness from scratch with a completely new donor. Ask your United Way staff partner about identifying your past Leaders early and work a centralized recanvass and home mailing strategy into your campaign plan. 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 recanvassing 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.

- **Recanvass** - After your initial canvass, the majority of your potential Leadership donors will respond by returning their pledge card. However, there may be people who forget or have not completed their pledge card for various reasons. It is very important that you systematically recanvass these employees
- **Centralized recanvass** - Once your canvassing efforts are completed and your returns have been remitted to United Way, we will organize a centralized recanvass through United Way's office. Our volunteers will contact only last year's Leaders who have not made their donation in order to ask for their renewed support or obtain feedback on our campaign. That's why it is imperative to return donations to United Way as soon as possible in order for us to follow up with a recanvass in a timely manner

Step 8. Thanking donors

8.1 Leadership Recognition

Recognition is a necessary component of every successful campaign. Everyone appreciates a “thank you” for a job well done. There are both formal and informal ways in which to recognize and reward organizations, volunteers and donors.

The United Way has a committee of volunteers who thank Leaders and Friends by phone, preferably within 48 hours of receiving the pledge card.

A receipt (for cash, credit card and cheques) is issued, along with a thank you letter from the President, within 48 hours of processing the gift.

However, as Leadership Chair, you may wish to develop a bank of volunteers of your own to thank your donors. If you choose to do so, please advise the United Way.

8.2 Workplace recognition

It is essential to incorporate your organizations’ recognition plan into your overall campaign plans, as you set your strategies. We encourage you to personally thank your donors as well. This can be done by sending a personal thank you note from you or the CEO, or by sending an e-mail or making a thank you phone call. You can also consider organizing an event at the end of your campaign as a thank you gesture. Your United Way staff partner can help you identify how best to recognize your donors and your volunteers.

8.3 United Way Leadership recognition

All individuals contributing gifts of \$1,000 or more to United Way serving KFL&A will be publicly recognized in United Way’s Honour Roll according to the levels below. Leadership donors are asked to indicate on their pledge card whether or not they wish to be recognized in the Honour Roll. The names of donors who prefer to remain anonymous will not appear in this publication. All donors will receive a personal thank you call at which time their preference will be confirmed.

Leader	\$1000 - \$1,999
Builder	\$2,000 - \$4,999
Pacesetter	\$5,000 - \$9,999
Patrons	\$10,000 - \$24,999
Philanthropists	\$25,000 +

LEADERSHIP CHALLENGE GRANT

This year your generosity can do more...

- The Leadership Challenge Grant will help Leadership donors increase the impact of their gifts. Leadership gifts are donations of \$1,000 or more.

Here's how it works:

New Leadership Donors

- Each first-time donation of \$1,000 or more to the United Way* will be matched dollar-for-dollar.
- No matter how much under \$1,000 you gave last year, if you raise your gift to \$1,000 this year, you become a new Leader. The Leadership Challenge Grant then matches your \$1,000 donation, and the United Way receives a total of \$2,000.
- By becoming a new Leadership donor, you double the impact of your gift.
- Your \$2,000 has a large impact. For example, \$2,000 helps 50 children build social skills and self-confidence through recreational and after-school programs in high-risk neighbourhoods

Renewing Leadership Donors

- If you are already a Leader and, this year, you add at least 10% to your gift, The Leadership Challenge Grant 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.
- This \$1,440 can provide 14 blind or visually impaired individuals with supports and programs to increase their independence and ability to participate in daily life activities.

**The Challenge Grant matches gifts to United Way. The matching dollars will support the United Way's general Community Fund. Designations to specific charities, through United Way, do not qualify for the matching grant. A maximum match of \$2,000 per donor has been established to enable more people to participate in the Challenge Grant.*

This year's Leadership matching generously provided by Empire Life.

In 2010, 210 donors qualified for the Challenge Grant for a total of \$325,390

FINANCE & ADMINISTRATION

A very important part of running a United Way campaign is handling all the financial and administrative details. This section will help you with this task.

1. The Pledge Card

For the 3 part pledge form:

- White (top) copy - United Way copy that is submitted to United Way in a campaign envelope
- Yellow (Middle) copy - Payroll copy (forward to your payroll department) for donors selecting payroll deduction
- Pink (bottom) copy - Donor copy, retained as an acknowledgement

For the one page form:

- The bottom tear off is the donor receipt
- The second tear off is the payroll copy for those selecting payroll deduction
- The top portion is the United way copy

Payroll Deduction - The donor should indicate the amount per pay, the number of pay periods and the total amount they wish to contribute through payroll deduction. The multiplication of the amount per pay with the number of pay periods should equal the total payroll amount.

Gifts of Securities/Share Options—Donors who wish to make their donation through a gift of securities or share options, should contact United Way directly at 613-542-2674. The donor should tick the box and enter the approximate donation amount in the total donation area. Forms for gifts of securities are also available on our website www.unitedwaykfla.ca.

Cheque, Postdated Cheque, or Cash—Cheques must be made payable to **United Way or United Way serving Kingston, Frontenac, Lennox & Addington**. The cheques must be signed and the total amount of cash/cheques should equal the donation amount on the pledge card at the top of this section. As well, the cash/cheques should be stapled or affixed to the white United Way (top) copy of the pledge card.

Visa/MasterCard—The donor must include the credit card number and expiry date and sign the pledge card. Donors may choose to make single or installment payments. If the donor does not specify a start date, United Way will debit in January, April, July, and October for quarterly payments and in January and July for semi-annual payments. Donors may also choose to give through monthly installments, which will be processed on the 15th of every month.

Signature/Date—For all payment types, the donor must sign and date the pledge card to verify that they have agreed to make this donation.

1.1 Leadership Information

Leadership donors should indicate whether they wish to be publicly recognized by United Way and if so, how they would like their name to appear. If the donor does not wish their donation to be publicly recognized, they should tick the anonymous box.

Donors can also choose to be recognized jointly with their partner or spouse by indicating their spouse/partner's name and their workplace on the pledge card.

1.2 Communication

Leadership donors receive an update and a copy of the annual report in the spring. They will also be invited to attend a leadership reception in the spring, traditionally hosted by our Honorary Patron, Mr. A. Britton Smith.

The donor has the option of requesting additional information on charitable bequests. The donor must make sure that the address is complete in the name and home address area of the pledge card.

I am retiring—optional, United Way will contact the donor at home in the future.

1.3 Privacy Statement

United Way serving Kingston, Frontenac, Lennox & Addington is committed to protecting the privacy of the personal information of its donors, members, employees, and other stakeholders. We value the trust of those with whom we deal with, and of the public, and recognize that maintaining this trust requires that we be transparent and accountable in how we treat the information that you share with us. During the course of our various projects and activities, we frequently gather and use personal information. People from whom we collect such information expect that it will be carefully protected and that any use of this information is subject to consent.

Our privacy practices are designed to achieve this.

To see our complete privacy policy, visit www.unitedwaykfla.ca or call our Privacy Officer John DiPaolo at 613-542-2674 ext 8.

1.4 Additional Giving Options

While most donors entrust their gift to United Way's Community fund, allowing professional staff and experienced volunteers to determine where their gift will have the greatest impact, some donors may select one of United Way's other giving options.

Donors who wish to designate a portion of their gift to a United Way service area, a United Way funded agency, or another United Way must complete this section of the pledge card. As a service to our United Way donors who wish to designate an additional portion of their gift to another registered charity, we offer them the opportunity to do so as well. United Way can accept designations to registered Canadian charities only. With the exception of designations to other United Ways and our impact areas, a 10% processing fee applies to each designation. A Minimum donation of \$20 is required for a designation.

It helps United Way keep its costs low if the donor provides the charitable business number for any non-United Way charities to which they are designating. Charitable business numbers can be obtained by visiting www.cra.org or by calling 1-800-267-2384. If the donor is unable to obtain the charitable business number, they should complete as much information as possible about the charity in the name, address, city, and province fields.

United Way does not provide the donation amount to the charity, as per our privacy guidelines. Donors may choose to advise the charities directly. It is important for donors to note that the United Way pays all cash designations in the spring following the fall campaign. All designations through pledges are paid only after the money is collected from all workplaces, i.e. a year after the pledge is received. This allows time to collect and process all pledge payments before issuing the cheques.

Designations to member agencies are paid over and above their annual allocation through the Community Investment Fund.

FINANCE & ADMINISTRATION

TAX BENEFITS

Tax benefits make giving to United Way even more attractive.

An individual who makes a gift to United Way receives a federal tax credit against income taxes. The annual federal tax credit is equal to 15% of the first \$200 donated by an individual and 29% of the amount exceeding \$200. When combined with the reduction of provincial taxes, the total tax savings can be up to 46%.

Your Gift of	Income Range			
	\$37,106- \$74,214		Above \$74,214	
	Total tax savings	Actual cost	Total tax savings	Actual cost
\$1,000	\$363	\$637	\$420	\$580
\$2,000	\$765	\$1,235	\$884	\$1,116
\$2,500	\$966	\$1,534	\$1,116	\$1,384
\$5,000	\$1,970	\$3,030	\$2,277	\$2,723
\$7,500	\$2,974	\$4,526	\$3,437	\$4,063

Note: The calculations on this chart assume that the first \$200 receives the 15% Federal tax credit. If \$200 or more has already been given to charity, then the savings generated by further giving through United Way increases substantially. The figures on this chart are approximate.

GIFT OF SECURITIES

Donating publicly traded securities

In 2006, the Capital Gains Tax was removed from publicly traded shares that have been donated. This means that the donor receives a tax receipt for the full value of the shares but is not taxed on any gain. A minimum of \$1,000 of the total gift must remain with United Way serving KFL&A Community Fund, United Way serving KFL&A Priority Area or any other United Way in Canada.

To make a gift of securities, donors must:

- Call United Way 613-542-2674 ext. 0 **prior** to the actual transfer of shares. They will be provided with all appropriate information, including the appropriate brokerage account number. A share transfer form can be downloaded from our website.
- Fax the share transfer form back to United Way.
Donors will be asked to provide the following information:
 - Name, telephone number, address
 - Recognition preference and name, Workplace
 - Broker information (name, company name, phone number)
 - Name of security, Number of shares transferred, date of transfer
- Instruct broker to initiate trade and transfer shares to United Way's accounts

MAKING A GIFT OF SECURITIES IS AS EASY AS CALLING 613-542-2674 ext. 0