

United Way  
Metro Chicago



UNITED WAY OF METROPOLITAN CHICAGO

# Leadership Giving Chair Handbook

CAMPAIGN 2007

**UNITED WAY LEADERSHIP GIVING CAMPAIGN HANDBOOK**

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**National City**<sup>®</sup>



**BlueCross BlueShield  
of Illinois**



Dear Leadership Giving Chair,

You have been asked to serve as your organization's Leadership Giving Chair because you are a recognized leader yourself. You have the talent needed to organize and execute a stellar campaign. By lending your abilities to your organization's 2007 United Way campaign, you are directly helping to improve lives and strengthen our community. Thank you!

As the Leadership Giving Chair, you will play an integral part in the success of your organization's campaign by requesting individual gifts of \$1,000 or more. This will require you to inform your colleagues about the ways in which United Way helps people overcome life's challenges and become independent.

You'll want to work with your organization's Campaign Leader to decide on a timeline for your Leadership Giving activities. **Ideally, Leadership gifts are requested in advance of your general employee campaign (about two to four weeks before) to set a strong example of giving.**

United Way of Metropolitan Chicago has created this handbook as a resource to help you plan your Leadership Giving campaign. In it you'll find tips and talking points, as well as practical advice from other successful Leadership Giving chairs. Also remember to visit the Campaign Toolkit on our website, [www.uw-mc.org](http://www.uw-mc.org). You'll find a variety of materials that will help you make the case for giving.

Again, thank you for being a part of United Way.

Sincerely,

A handwritten signature in black ink that reads "Barbara Kaplinsky". The signature is written in a cursive style with a large, looping flourish at the end of the name.

Barbara Kaplinsky,  
DIRECTOR OF LEADERSHIP GIVING

### BEST PRACTICES FOR A SUCCESSFUL CAMPAIGN

- Make a Leadership or Tocqueville contribution to the annual campaign. This sets a clear standard for others to follow
- Familiarize yourself with the talking points outlined in this handbook
- Attend a Campaign Leader and Leadership Giving Chair (LGC) Forum
- Recruit and manage a Leadership Giving Committee
- Work with a committee to develop a campaign plan and establish Leadership Giving goal
- Identify prospects for Leadership Giving solicitation
- Educate committee members on United Way and train them to make Leadership Giving solicitations
- Coordinate Leadership Giving events and educational opportunities
- Incorporate United Way of Metropolitan Chicago Initiative strategies into campaign, as appropriate (see page 9)
- Invite a United Way Community Building staff person or volunteer to speak with your affinity groups regarding United Way work in their community
- Monitor and communicate campaign progress
- Develop and implement thank-you and recognition strategies for Leadership Giving donors

### WHAT DOES UNITED WAY DO?

United Way provides the **leadership and resources** it takes to help people across Chicagoland become independent.

Through a comprehensive community assessment process (assisted most recently by Boston Consulting Group), United Way works to **understand the challenges** facing people in each community. Then United Way works with hundreds of volunteers to fund the **network of programs** that can best address those issues—or launches **new initiatives** that will.

And United Way holds itself and all of its partner programs **accountable for delivering measurable results:**

United Way has moved to an outcomes-based funding model, requiring all of its funded programs to clearly outline what they are trying to achieve and how they will measure their success. Then they must demonstrate measurable progress toward those goals.

For example, when United Way volunteers review an application or go out on a site visit to an after-school program, they aren't as interested in how many high school students attend that program. More importantly, they want to know how many of those kids are improving their grades, planning career goals and on track to graduation. They want to know that the program provided students the range of support they needed—things like mentoring, tutoring, esteem-building, counseling—to succeed in the long-term.

### TALKING POINTS

Why support United Way?

#### **1. Only United Way can provide the leadership to address our region's greatest human care needs.**

With the deepest network of relationships with the business community, government, the health and human service sector and millions of individuals, **United Way is uniquely positioned to coordinate region-wide efforts for change.** Today's challenges are complex. Issues like affordable housing, healthcare access or educational achievement cannot be solved by any one organization alone. So, in addition to funding a network of effective agency programs, United Way plays a leadership role in convening government and community leaders, human service providers and others to work together on the toughest issues. For example:

- **Hurricane Katrina Response:** In the wake of Hurricane Katrina, more than 7,000 evacuees were relocated to Chicagoland. After the first responders handled emergency needs, United Way created and led a coordinating council to provide recovery services, streaming essential funds to agencies. These funds allowed agencies to continue to provide critical services, even though FEMA funds would not be available for another year and a half. United Way was also able to recruit and deploy more than 1,300 volunteers to do intakes and link evacuees to immediate emergency services such as food and shelter.
- **African American Initiative:** Recently, United Way of Metropolitan Chicago convened African American community leaders and asked this question: *What is the greatest challenge facing the African American community?* The answer was unanimous: *We are failing to help young African American males transition to adulthood.* For example, 59% of low-income African American teens don't graduate high school. One in three African American males is unemployed. And one in three African American males between 20 and 29 is incarcerated or on parole. United Way launched the *African American Initiative* to help young African American males, ages 10 to 16, overcome barriers to achievement and grow into healthy, successful men. *The African American Initiative*, now operating in five Chicago communities, is spurring innovative collaborations and community agendas to help African American youth stay on track to graduation, understand employment options and assume healthy family and social roles.
- **Latino Initiative:** Latinos are the largest ethnic minority in metropolitan Chicago, representing 20% of the population, and Chicago has the third largest Latino population of all U.S. cities. Latinos have become a strong economic force in Chicagoland (nearly one third of Latino households have incomes of \$60,000 or more and 40,000 Latino-owned businesses generate over \$7.5 billion in revenue for the region). Latino youth, however, still face challenges. Half of Latinas become pregnant before the age of 20 and one third of Latino youth in the region are limited English speakers. Only 14% of Latinos have completed college. The United Way *Latino Initiative* will help youth develop an understanding of the value of education as well as a self-identity that bridges their two cultures, helping them grow successfully into adults.
- **Immunization Initiative:** Doctors recommend that children receive the MMR immunization (against Measles, Mumps and Rubella) by the age of 12 months. In 2006, United Way learned that in Chicago's Austin neighborhood, however, only 20% of three-year-olds had received these vaccines. Hundreds of children were at risk of acquiring devastating yet preventable diseases. In response, United Way launched the *Immunization Initiative* to keep kids healthy. The initiative provides non-licensed, home-based daycare providers, ministers and schools with training and tools to access and track vaccinations, educate parents, and achieve higher community immunization rates. Two years ago, the *Immunization Initiative* was highlighted at the National Immunization Conference, and recently, child development organizations and community leaders in Chicago's Humboldt Park neighborhood have asked United Way to replicate the *Immunization Initiative* in their community.

### 2. Independent research by the Civic Committee of the Commercial Club of Chicago has shown that United Way is the only organization that can ensure the underpinning of our region's health and human service system.

- State and federal funding for health and human services has been decreasing every year for several years. Many agencies have had to cut budgets and eliminate critical programs, skip payrolls or even close their doors altogether. In a joint study with the Chicago Community Trust on Health and Human Services in our region last year, United Way found that, despite funding declines, demand for services is increasing.
- United Way is our region's largest non-governmental funder of health and human services and the single largest source of *unrestricted funds* (enabling agencies to pay the rent, keep the lights on—things that fewer and fewer public and private funders will cover).

In addition, because United Way does such a thorough job of reviewing its funded agencies for fiscal accountability and program effectiveness, **United Way partner agencies are able to leverage *additional funding***—up to seven times more—from many public and private funders who view United Way investment as a seal of approval.

- Yet, United Way has only one dollar for every three dollars of requests in Chicago alone.

### 3. Only United Way supports the entire network of services needed to help people become independent.

For example, one woman who is a survivor of domestic abuse may need a safe place to live as well as daycare for her children while she's at work. Another woman may have a relative she can stay with—but she may need legal assistance and job training so that she can support herself. One agency alone cannot provide the network of services it takes to help people overcome challenges and become independent.

### 4. United Way is the most efficient way to get resources into the community.

United Way consolidated 54 United Way entities into one system in 2004, lowering expenses by more than \$4 million annually. That means \$4 million additional dollars every year go directly to funding the most effective programs. For the 2007 campaign, the United Way overhead rate is 13.2%.

### WHERE WILL MY UNITED WAY CONTRIBUTION GO?

United Way funds a network of programs to address the greatest challenges in our region. We work with hundreds of community leaders and volunteers to evaluate each program, ensuring that every dollar we invest delivers meaningful and lasting results. Here is a look at the issues we are working to address and the results we are getting.

- **Financial Stability** Your support provides job training, placement assistance and employment retention training; transportation assistance and affordable daycare so families can work; and GED programs and English-as-a-Second-Language (ESL) classes to help adults secure jobs that pay a living wage.  
**RESULTS: Although one in four families go without food, medical care or other necessities in order to pay for housing, 88% of people who complete the Bethel New Life employment training program secure jobs that enable them to provide for themselves and their families.**
- **Affordable Housing** Your support provides legal and financial aid for people who are at risk of losing their home; assistance finding affordable housing and subsidized apartments for working families; and home ownership programs that help people build long-term equity and stability.  
**RESULTS: Although housing costs in our region have jumped 22% since 2000 while average income has declined, 97% of formerly homeless families that participate in Bridge Communities transitional housing program now maintain permanent, stable housing—and nearly one quarter own their own homes.**
- **Educational Achievement** Your support provides daycare and early childhood programs to prepare kids for lifelong learning; early intervention programs for children with special needs; and tutoring, mentoring and programs to keep youth on track to graduation.  
**RESULTS: Although one in three Illinois first graders is not ready to learn when he or she begins school, 88% of preschoolers who enroll at the James Early Childhood Center master the skills they need to succeed in first grade.**
- **Crisis Support** Your support provides safe houses, counseling, legal support and job training for survivors of domestic violence; food and shelter for homeless individuals and victims of home fires and other disasters; and emergency food pantry support and rent assistance for struggling families and individuals.  
**RESULTS: Although one in four women will be a victim of domestic abuse in her lifetime, 86% of women who enrolled in Family Rescue's transitional housing program for victims of domestic violence were employed within six months, and 92% met their educational goals.**
- **Access to Healthcare** Your support provides specialized healthcare services for seniors and people with disabilities; counseling and support for people with mental illness or substance abuse issues; assistance in accessing and navigating the complex Medicare and Medicaid systems; and subsidized healthcare clinics for the uninsured.  
**RESULTS: Although less than half of adults in Illinois with a serious mental illness receive treatment or counseling, 89% of individuals with chronic mental illness who participate in Metropolitan Family Services' adult mental health program strengthen their independent living skills.**

## HOW TO RUN A LEADERSHIP GIVING CAMPAIGN

### 1. **Appoint a Leadership Giving Chair** (If not already appointed)

**TIMEFRAME:** 6 weeks before kick-off

**TARGET COMPLETION DATE:**

- The CEO will appoint a well-respected individual to serve as Leadership Giving Chair.
- Leadership Giving Chair should attend Campaign Leader and Leadership Giving Chair training to ensure a successful campaign.

### 2. **Develop a Strong Leadership Giving Campaign Committee**

**TIMEFRAME:** 4–6 weeks before kick-off

**TARGET COMPLETION DATE:**

- Select a team large enough to allow for a personal visit to every employee within your target group (potential Leadership donors).
- Committee Members should be respected by their colleagues and be an asset to the solicitation process.
- Members of the Committee should be Leadership Givers themselves.

### 3. **Plan Your Leadership Giving Campaign**

**TIMEFRAME:** 4–6 weeks before kick-off

**TARGET COMPLETION DATE:**

- Educate your committee about the impact United Way makes in the community. Explain the steps needed to run an effective Leadership Giving Campaign and discuss the resources available such as brochures, videos, agency speakers, etc., to maximize their efforts.
- Establish the timing of the Leadership Giving Campaign within the timeline of the overall workplace campaign (2-4 weeks before the general campaign).
- Set Leadership Giving Campaign goals based on past Leadership Giving and Leadership Giving potential within your company.
- Determine who to solicit based on employee compensation and/or position within your organization. **Include company retirees as well as employees who contributed close to \$1,000 during last year's campaign.**
- Determine how much each person should be asked to contribute. Your CEO and vice president might be asked to consider joining the *Tocqueville Society* with a gift of \$10,000, while your senior managers might be asked to consider donations of \$2,500 or more.
- Determine whom each member of your Leadership Giving Campaign Committee will contact. Divide names to ensure peer-to-peer solicitation and an appropriate match between “solicitor” and “prospect.”
- Set a target date for completing initial contacts.

### 4. Host a Leadership Giving kick-off

**TIMEFRAME:** Start of Campaign

**TARGET COMPLETION DATE:**

- Educate and thank your Leadership donors and/or prospects.
- Ask CEO or senior management to endorse your company Leadership Giving Campaign through a letter, email, or voicemail to potential Leadership Givers.
- Invite an agency representative and/or United Way staff member to speak.
- Show your company's United Way video or the local or national United Way video.
- Distribute Leadership brochures and pledge cards.
- Organize a visit to a United Way agency or *Day of Caring* event to see contributions at work.

### 5. Ask for Leadership Gifts

**TIMEFRAME:** During Campaign

**TARGET COMPLETION DATE:**

- Approach each potential donor individually following the kick-off. Make a specific request for a Leadership gift of \$1,000 or more.
- Follow up with colleagues until each pledge form is received.

### 6. Say Thanks

**TIMEFRAME:** 1 – 3 weeks after campaign

**TARGET COMPLETION DATE:**

- Send a thank you note to Leadership donors and members of the Leadership Giving Campaign Committee.
- Host a reception to acknowledge and thank Leadership donors.
- Publicize results of Leadership Giving Campaign and thank donors during general campaign kick-off.
- Include a thank you letter to all Leadership Givers, listing names if appropriate, in your company newsletter.
- **Provide United Way with the names, email addresses, recognition preferences and donation amounts of your leadership donors by the specified due date (form will be provided with the Campaign Final Report Form). United Way will send a personalized thank you to each leadership donor, offer volunteer and special event opportunities and include those who wish to be recognized in the United Way of Metropolitan Chicago Leadership Giving Directory.**

### WHY LEADERSHIP GIVING?

Leadership is about setting an example, inspiring others to do more and making things happen. Every year in metropolitan Chicago, more than 7,000 Leadership Givers demonstrate that they know what it means to lead by contributing to United Way. These generous donors help create a better future for people in our community.

Metropolitan Chicago lags significantly behind other United Ways nationally in regard to their Leadership Giving dollars—on average, 32% lower. That is why we need your help in this year's campaign—to increase our Leadership Giving donors and make a greater impact in our community.

### DONOR BENEFITS OF LEADERSHIP GIVING

While giving is often its own reward, a gift of \$1,000 or more qualifies individuals for special opportunities:

- **Recognition:** Receive special recognition in our annual United Way online Membership Directory.
- **Access to other community leaders:** Get to know other Leadership Givers through opportunities like Strength Through Diversity\*.
- **Special engagement opportunities:** Become actively involved with your United Way investment. Volunteer to assist with agency site reviews and allocations, train to serve on a nonprofit board through our Project Blueprint\* program and more.
- **Year round communication:** Stay informed about the impact your contributions are making through Leading the Way, our quarterly Leadership Giving newsletter.
- **Charitable giving tax savings:** (more information provided on the following page)

Contributions to United Way in the form of payroll deduction, check, credit card or securities qualify for deductions on donors' federal tax forms. (By donating appreciated stock, donors can eliminate paying a federal capital gains tax; these gifts may be subject to additional reporting requirements.)

\* See page 17 for information about these opportunities.

## WHY LEADERSHIP GIVING?

### HERE'S HOW THE DEDUCTION LOWERS A DONOR'S TAXES:

IF A DONOR'S GIFT TO UNITED WAY IS	\$1,000	\$2,500	\$5,000
THE FEDERAL TAX SAVINGS WILL BE	-280*	-700*	-1,400*
THE DONOR'S UNITED WAY GIFT COSTS	\$720**	\$1,800**	\$3,600**

\* Assumes a 28% tax bracket. Donations could be subject to a minimal phase out depending on the donor's adjusted gross income.

\*\* Savings may increase for donors in a higher tax bracket.

For specific information regarding personal situations and tax benefits, donors should consult their tax counsel.

**LEADERSHIP GIVING PROGRAM INFORMATION**

**LEADERSHIP GIVING LEVELS**

<b>EDWARD L. RYERSON CIRCLE</b>	
DANIEL H. BURNHAM LEVEL	\$1,000 – \$1,499
JANE ADDAMS LEVEL	\$1,500 – \$2,499
JEAN BAPTISTE POINTE DU SABLE LEVEL	\$2,500 – \$4,999
PÈRE JACQUES MARQUETTE LEVEL	\$5,000 – \$7,499
ABRAHAM LINCOLN LEVEL	\$7,500 – \$9,999

<b>TOCQUEVILLE SOCIETY</b>	
TOCQUEVILLE SOCIETY	\$10,000 – \$14,999
ORDER OF INDEPENDENCE	\$15,000 – \$24,999
ORDER OF LIBERTY	\$25,000 – \$49,999
ORDER OF EQUALITY	\$50,000 – \$74,999
ORDER OF FRATERNITY	\$75,000 – \$99,999
THE NATIONAL SOCIETY	\$100,000 – \$999,999
MILLION DOLLAR ROUNDTABLE	\$1,000,000 AND ABOVE

**TOCQUEVILLE SOCIETY**

The *Tocqueville Society* recognizes individuals or families contributing \$10,000 or more annually to United Way.

**STEP-UP TO TOCQUEVILLE**

The Step-Up program offers Tocqueville membership to donors who commit to reach the \$10,000 level within four years. These donors have the opportunity to become fully acknowledged members of the *Tocqueville Society* by committing to the following contribution plan: \$5,000 year one; \$6,500 year two; \$8,000 year three; \$10,000 year four.

**TOCQUEVILLE NEXT-STEP PROGRAM**

The Tocqueville Next-Step Program offers immediate membership at the next giving level to current *Tocqueville Society* members who commit to reaching the next level within 2 to 3 years, as specified below.

	<b>ORDER OF INDEPENDENCE</b> (\$15,000–24,999)	<b>ORDER OF EQUALITY</b> (\$50,000–74,999)
	Entry Year: \$12,500	Entry Year: \$30,000
	Year Two: \$15,000	Year Two: \$40,000
	<b>ORDER OF LIBERTY</b> (\$25,000–49,999)	Year Three: \$50,000
	Entry Year: \$18,000	
	Year Two: \$20,000 Year Three: \$25,000	

For more information on the *Legacy Society*, The United Way *Endowment*, or the *Diamond Donor Club*, contact our Major Gifts Office at 312.906.2475 or [majorgifts@uw-mc.org](mailto:majorgifts@uw-mc.org).

THE UNITED WAY ENDOWMENT

With government support declining annually and the number of people at risk growing, United Way is working to ensure that people get the support they need in the future. To commemorate our 75th Anniversary, United Way of Metropolitan Chicago is launching the *Endowment*. The *Endowment* will:

- **Provide resources for a quick and effective response to unexpected crisis.** In the event of a large-scale disaster in our community, the immediate response of emergency personnel and agencies would last for a brief 48-72 hours. For the long-term stability of the region, United Way would lead the coordination of health and human service providers to help people to independence after facing a crisis. The United Way *Endowment* will ensure that funding is available immediately to address recovery issues effectively.
- **Stabilize human care services at times when resources are less available.** During an economic downturn, the need for health and human services dramatically increases while the resources to provide services sharply decline. The United Way *Endowment* can help bridge that critical funding gap so health and human service providers can continue to serve individuals and families in need.
- **Serve as a source of revenue to fund emerging needs.** For example, the number of Latinos nearly doubled since 1990 to 20% of the region's total population, with 54% living in the suburbs where services traditionally have not existed. In addition, the population of people 65 and older is projected to double by 2030 and this growth is expected to overlap with the growth of people with disabilities. These trends represent just some of the issues facing health and human service providers that must be addressed with innovative approaches and collaboration not currently being used.

In addition to a contribution to the annual campaign, a gift to the *Endowment* creates a legacy for improving lives for generations.

THE 2007 NATIONAL CITY HALF-MILLION DOLLAR CHALLENGE GRANT  
FOR TOCQUEVILLE & LEADERSHIP GIVERS



Through a generous half million dollar grant, National City will match, dollar for dollar, every new or increased contribution of \$1,000 or more to the 2007 campaign, making your Leadership gift to our community even more powerful.

Here's how the grant works:

IF YOU ARE...	National City Half-Million Dollar Challenge Grant Matches:	CHICAGOLAND RECEIVES...
A new Leadership Giver (\$1,000 to \$9,999) EXAMPLE: \$1,000	Dollar-for-dollar \$1,000	\$1,000 gift + \$1,000 match = \$2,000
A current Leadership Giver and increase your gift to the next giving level EXAMPLE: \$1,000 ► \$1,500	Dollar-for-dollar \$1,500	\$1,500 gift + \$1,500 match = \$3,000
A Tocqueville Step-Up Donor EXAMPLE: \$5,000 (recognized at \$10,000 level)	Dollar-for-dollar \$10,000	\$5,000 gift + \$10,000 match = \$15,000
A new Tocqueville Donor (\$10,000 or more) EXAMPLE: \$10,000	Dollar-for-dollar \$10,000	\$10,000 gift + \$10,000 match = \$20,000
A current Tocqueville Donor giving \$10,000 who joins the Next-Step Program with a gift of \$12,500 (recognized at \$15,000 level) EXAMPLE: \$10,000 to \$12,500	Dollar-for-dollar \$15,000	\$12,500 gift + \$15,000 match = \$27,500

*At the request of National City, match dollars are invested back into the community through United Way of Metropolitan Chicago and are not designated to a specific organization.*

## AFRICAN AMERICAN INITIATIVE AND LATINO INITIATIVE CHALLENGE GRANTS



BlueCross BlueShield  
of Illinois



United Way  
Metro Chicago



BlueCross BlueShield of Illinois and ComEd, two extraordinary corporate citizens, have stepped forward to encourage support of United Way initiatives by providing 2-to-1 matching grants for new and increased gifts to the *African American Initiative* and the *Latino Initiative*.

- **BlueCross BlueShield of Illinois** will match, 2-to-1, all new and increased contributions to the United Way *African American Initiative*
- **ComEd** will match, 2-to-1, all new and increased contributions to the United Way *Latino Initiative*

(Read about these initiatives on page 6.)

If you are a new Leadership donor (\$1,000–9,999) or *Tocqueville Society* member (\$10,000 and up) and you are designating at least \$1,000 of your total gift to the *African American Initiative* or the *Latino Initiative*, your gift will be matched 2-to-1 by the initiative’s respective sponsor.

For example, if you designate a gift of \$1,000 to the *African American Initiative* or the *Latino Initiative*, the sponsor will donate an additional \$2,000, creating a total gift of \$3,000.

If you join the *Tocqueville Society* at \$10,000 and designate your total gift to *African American Initiative* or the *Latino Initiative*, the sponsor will match your gift with an additional \$20,000, for a total gift of \$30,000.

### Here’s how the grants work:

If you are...	The Grant Matches...	The Initiative Receives...
A new Leadership Giver (\$1,000-\$9,999) example: <b>\$1,000</b>	<b>2 for 1 on \$1,000 new dollars</b> \$2,000	\$1,000 gift + \$2,000 match <hr/> \$3,000
A current Leadership Giver and increase your gift to the next giving level example: <b>\$1,000 → \$1,500</b>	<b>2 for 1 on \$500 increased dollars</b> \$1,000	\$1,500 gift + \$1,000 match <hr/> \$2,500
A new <i>Tocqueville Society</i> Member (\$10,000 and above) example: <b>\$10,000</b>	<b>2 for 1 on \$10,000 new dollars</b> \$20,000	\$10,000 gift + \$20,000 match <hr/> \$30,000
A current <i>Tocqueville Society</i> Member and increase your gift to the next giving level example: <b>\$10,000 → \$15,000</b>	<b>2 for 1 on \$5,000 increased dollars</b> \$10,000	\$15,000 gift + \$10,000 match <hr/> \$25,000

\* Each sponsor will contribute up to \$200,000 in matching funds to their respective Initiative.

### TIPS FOR SUCCESS!

Here's how several organizations used Leadership Giving Best Practices to make the most of their Leadership Giving Campaigns.

#### AT&T

AT&T's successful Leadership Giving Campaign focused on employees at the Director level and above throughout the Midwest. Their President of Business Communications invited Directors and other potential Leadership Givers to a social event, consisting of a brief presentation on the benefits of Leadership Giving followed by an opportunity for networking. This was followed by a *Day of Caring* that allowed potential donors to see firsthand how United Way gets results in the community. One month prior to the general employee campaign, potential Leadership Givers were approached for their support.

The campaign was completed with a celebration event that highlighted photos from the *Day of Caring*, Thank You notes from partner agencies, and the grand total raised for United Way. Employees were asked to complete a survey regarding the campaign, the findings of which will be incorporated into next year's campaign.

#### Deloitte & Touche

The Deloitte & Touche Leadership Giving Committee initiated a Leadership Campaign challenge to the Chicago office partners, principals and directors. Members of the Leadership Giving Committee attended the United Way Leadership Giving Roundtable for tips and best practices to make their campaign a success.

The Deloitte & Touche Community Involvement & Marketing team created targeted communications for potential Leadership Givers (remember to talk with your United Way Representative for ideas on how you can create targeted communications). Those who contributed at the Leadership level received visible national recognition from the CEO. Throughout their campaign, the Leadership Giving Committee maintained close contact with their United Way representative to refine their strategies.

#### ITW

ITW's Leadership Giving Campaign focused in part on executive retirees who had previously supported United Way. In keeping with this strategy, the campaign was chaired by a former CEO. In addition, ITW decided to integrate their Leadership Giving Campaign into the general United Way campaign. Leadership giving was highlighted on a recurring basis, providing ongoing reinforcement of the Leadership Giving message.

The current CEO hosted a breakfast to ask for Leadership Giving support from management-level employees, who were encouraged to lead by example. ITW's Campaign Chair said that one of the secrets of their success is to "maintain a balance between education and fun."

### **Northern Trust**

Northern Trust's chairman and CEO met with all senior vice presidents to emphasize the importance of leadership in the community, and personally asked his direct reports to support United Way. He also sent a personal letter to all Chicago vice-presidents thanking them for their contributions and encouraged them to continue giving at the Leadership level.

This top-down approach reinforced the Northern Trust belief that senior management should reflect the goals and culture of their organization through contributions and volunteerism.

### **PriceWaterhouseCoopers**

The Leadership Giving chair at PriceWaterhouseCoopers has a philosophy on philanthropy. "Serving as a United Way Campaign Leader is like serving on a non-profit board. Leaders must bring their own financial resources to the table before they can ask other donors." And when PriceWaterhouseCoopers' campaign committee decided to focus on increasing Leadership Gifts, senior partners reinforced the message by sending their team their personal story of involvement with United Way at the Leadership level.

Campaign captains promoted recognition events and private thank-you receptions to show donors that PriceWaterhouseCoopers leadership appreciates and recognizes Leadership donors.

### **William Blair**

William Blair strengthened their Leadership Giving campaign by incorporating a variety of best practices, including education, senior-level endorsements and highlighting the opportunity to strengthen donations through challenge grants. This last technique proved highly successful—many donors reported that their Leadership gift was motivated in part by the chance to leverage their gift with challenge grants.

## RESOURCES

### United Way of Metropolitan Chicago Staff

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