United Way of the Greater Triangle
Serving Durham, Johnston, Orange and Wake Counties

Leadership Giving Strategies Planning Tool

For best results in **Leadership Giving**, choose at least 2 best practices in each category below. Each strategy is ranked High (H), Medium (M) or Low (L) based on return on investment (ROI). Your United Way representative can help with the implementation of these ideas. A how-to document on "Conducting a Leadership Campaign" is available on the UWGT website.

EDUCATE Your Employees!

- ❑ Take Leadership Prospects on a Live United bus tour (H)
- ❑ Invite your CEO/Executive to speak about his/her leadership giving philosophy (M)
- ❑ Explain the different Leadership Affinity Groups and their membership benefits (M)
- ❑ Attach Leadership Giving information to pledge forms of potential Leadership Givers (M)
- ❑ Provide examples of what a Leadership gift will provide in community services (available on the UWGT website) (L)

ASK For the Gift!

- ❑ Host a specific Leadership event (breakfast, lunch, cocktails at CEOs house, etc) (H)
- ❑ Ask current Leadership Givers to recruit one new Leadership Giver (H)
- ❑ Hold Leadership Campaign early and announce amount raised at the campaign kickoff event (H)
- ❑ Ask Leadership Givers to give at a certain amount (give $25/week or $5/day) or to consider increasing their gift by 10% for 2010 (M)
- ❑ Hold Leadership event at a regular senior management meeting (M)
- ❑ Invite employees to Leadership events based on job title, salary, last year's gift, etc. (M)

THANK Your Donors!

- ❑ Offer company match for first-time Leadership Givers (H)
- ❑ Host thank you event with CEO for Leadership Givers (H)
- ❑ Personalized thank you (phone call or letter) to new/continuing Leadership Givers from CEO, company Advocate, and/or committee members (H)
- ❑ Recognize Leadership Givers through intranet, emails, poster, etc. (M)
- ❑ Offer incentives for Leadership Givers (first-time Leadership gift, step up to new Leader level, etc.) (L)

Leadership Giving Levels and Affinity Groups

African American Leadership Initiative (AALI): African American donors of $1200+
Young Leaders Society (YLS): $500+ under age 30, $800+ ages 31 – 40
Women's Leadership Council (WLC): Women donors of $1200+
Leadership Circle: Donors of $1,200+, who are not a member of any other affinity group
Tocqueville Society: Donors of $10,000+, with $5,000 to Give United
Loyal Contributors: Donors who have given to any United Way 10+ years
Legacy Society: Donors who have made a bequest or other deferred gift