

Workplace Leadership Giving

www.unitedwaykfla.ca



United Way
Kingston, Frontenac,
Lennox and Addington

Leadership Giving Overview

Leadership giving is the fastest area of growth in the United Way campaign.

Leadership gifts account for the growth of the campaign year over year and a small number of donors raise approximately half of the campaign annually.

The success of your workplace campaign will benefit from your efforts to run a strong Leadership campaign in your workplace. This guide will give you the information you need to run a Leadership campaign.

It provides an outline of your role as Employee Campaign Chair with tools to help you succeed. If you can, recruit an Executive Sponsor or a Leadership Chair to help you with this important strategy. Your United Way relationship manager is a valuable resource in helping you plan and execute your campaign.

For more information about Leadership Giving, please contact leadership@unitedwaykfla.ca

Leadership Giving Levels

Transformational: \$100,000+

Philanthropic Circle: \$25,000 - \$99,999

Platinum: \$10,000 - \$24,999

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

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

Bronze: \$1,200 - \$2,499

Your Impact – With Your Support

- **Children and youth start the school year with the food and supplies they needed to succeed**
- **Individuals have access to mental health supports and community supports to help them feel connected**
- **Meal and food programs, including takeout, food boxes and in-person meals are able to support community members in need**

Workplace Leadership Giving Program

Role of a Leadership Chair

In many organizations, an individual is appointed by the senior decision-maker or recruited by the Employee Campaign Chair to serve 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 United Way KFL&A's mission and willingness to actively solicit for 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

Working closely with United Way staff, the Leadership Chair will:

- Share and promote the details of the Leadership Challenge Grant, if available
- Coordinate efforts with the employee campaign, working with the Employee Campaign Chair (ECC)
- Develop a Leadership campaign plan, including goals, strategies, and a timetable
- 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
- Monitor/track Leadership gifts
- Ensure that Leadership donors and volunteers receive appropriate thanks and recognition
- Evaluate the Leadership campaign and make recommendations
- Where possible, arrange a Leadership presentation, reception, or other event to build awareness of United Way amongst campaign volunteers and other potential Leadership donors

Leadership Giving: Strategies for Success

Step 1. Develop a Timeline

There are many different strategies you can implement to run a successful United Way Leadership campaign. Planning the campaign is the first important step. Your Leadership campaign is a key element of the overall campaign. It is important that you coordinate your plans within the employee campaign timeline for your organization. Keep your ECC informed of your Leadership campaign plan and align your canvass to coincide with the overall campaign.

Step 2. Gather Information About Previous Campaigns and Leadership Giving

Before you begin to plan your upcoming campaign, analyze past campaign results 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.

Begin your analysis by gathering all available information on previous campaigns, including statistical data. You can do this by reviewing documentation passed on by last year's committee and meeting with last year's Campaign Chair.

Meet with your United Way relationship manager and review last year's results prior to making any further plans. The United Way has detailed information on Leadership and giving levels in your workplace. This will help you set realistic and achievable goals. Remember to always canvass last campaigns' Leaders of the Way to ensure they are not missed.

Step 3. Identify Potential Prospects For New Leadership Gifts

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

Option 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.

Option 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 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 relationship manager to assist you in this goal setting process.

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 Seeing is Believing tours that are scheduled through the campaign that you can also take your colleagues on. These tours will educate them about the United Way funded agencies and you can see the impact of your donation. Your colleagues will be motivated after the tour or agency speaker so it would be a good time to canvass them

Book a Leadership Speaker

The United Way can help you bring community leader to speak to your colleagues at a Leadership event. 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.

Step 6. Canvass

Lead by example - Remember to make your Leadership donation before you canvass your colleagues. It is far easier to help others on the value of their investment 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 community. 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.

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 giving. Ask your United Way relationship manager to help you customize statements for your workplace.

Do not hesitate to suggest to your colleagues how much to give. Use benchmarking to show how much others are giving. Your United Way relationship manager can provide benchmarking information relevant to your industry sector. Use the strategy that is most suitable for your organizational culture.

Every donation matters. Remind your colleagues that their donation to United Way's funds are pooled with others who invest in United Way for maximum impact. The Community Fund has real power to bring about the changes that matter where they live. Every donation can help make Kingston, Frontenac, Lennox & Addington better for all of us.

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

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 (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!

- Do not take things personally - if someone says “no,” try to address their objection(s). Feel free to contact your United Way relationship manager if you cannot address these questions or objections.

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 relationship manager about identifying your past Leaders early and work a centralized follow up strategy into your campaign plan.

If you receive feedback from donors who decide not to donate, please share this information with your United Way relationship manager. This will enable United Way to better understand donors’ preferences. Every successful campaign hinges on the perseverance and efforts of a strong canvassing and recanvassing strategy. Incorporate 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 form or giving online. However, there may be people who forget or have not made their gift 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 work with you on whether you wish to organize a follow up or whether you would prefer this be done through United Way’s office.
- Our volunteers will contact only last year’s Leaders who have not made their donation to ask for their renewed support or obtain feedback on our campaign. If using physical pledge forms, it is imperative to return donations to United Way as soon as possible for us to follow up in a timely manner.

Step 8. Thanking Donors

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, usually with- in a week of receiving the pledge card.

A receipt (for cash, credit card and cheques) is issued, along with a thank you letter from the United Way President & CEO, 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.

Workplace recognition

Incorporate a recognition plan into your overall campaign plans, as you set your strategies. We encourage you to find ways to personally thank your larger donors, within your organization’s privacy rules. This can be done by sending a personal thank you note from you or the CEO, by sending an e-mail or making a thank you phone call.

You can also consider organizing a thank you event at the end of your campaign. Your United Way relationship manager can help you identify how best to recognize your donors and your volunteers.

Finance & Administration

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 can check 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; they will receive email updates from the CEO. They will also be invited to attend a leadership reception in the spring, held traditionally by local Philanthropist.

1.3 Privacy Statement

United Way KFLA 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.

To see our complete privacy policy, www.unitedwaykfla.ca/privacy-policy/ or call our VP Operations John DiPaolo at 613-542-2674 ext. 1102

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 impact 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. Except for 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 charities to which they are designating. This also ensures that the designation goes to the correct branch and charity. 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.

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%.

You can visit link to access a [tax calculator](#).

You can also find more information at Canada Revenue Agency website www.cra-arc.gc.ca

Planned Giving

Ask us how you can continue the tradition of giving!

The Eternity Fund is the permanent endowment fund of the United Way. When you donate to the Eternity Fund, the money is invested, and the principal is preserved. Only the income earned is used to support essential services and programs, ensuring your gift will benefit future generations.

Gift Of Securities

Gifts of securities are the most tax-effective way to donate, while helping friends and neighbours in need.

Through the donation of shares to those in need, you can limit the tax paid on capital gains and receive a charitable tax receipt for the market value of your publicly traded shares.

Giving a gift of securities is easy:

1. You or your broker will complete the Share Transfer Form located on our website at www.unitedwaykfla.ca/securities/
2. Send the form to United Way's brokerage firm, which is listed on the Share Transfer Form.
3. Authorize your broker to transfer the securities to United Way's broker account. Your shares will be sold immediately.
4. A tax receipt and acknowledgement letter will be issued for the market value on the date of transfer. A United Way representative may also call you to verify information.
5. Please speak with your financial advisors about the tax benefits.

If you have any questions, please feel free to contact us at: leadership@unitedwaykfla.ca

Making A Gift Of Life Insurance

Make a difference in the lives of others for years to come.

By harnessing the power of time, you can make small, regular payments on a Life Insurance policy that will grow over the years to produce a truly major gift for United Way of KFL&A.

Benefits of giving a gift of Life Insurance:

- Leave a legacy that aligns with your values and helps the community of KFL&A
- Receive a tax credit for the Cash Value built up in your policy
- Your Gift will be invested in an area that helps local people live with hope, dignity and a sense of belonging

“A gift of life insurance is an extremely easy way to leave funds to the United Way. Whether it is a portion, or all the death benefits of an existing policy or a brand new one, you have all the control and flexibility for the selection of proceeds. Make sure you work in harmony with your Family and your Financial Advisor so that everyone understands your philanthropy. The United Way can help get you started!” - Patrick Murphy

Making the most of each donation, for today and for tomorrow.

How to Give a Gift of Life Insurance: Option 1:

Name United Way of KFL&A as Benefactor

Start a new life insurance policy for United Way

Meet with your financial advisor and name United Way of KFL&A as the beneficiary of the policy. At the time of your passing, United Way of KFL&A will receive the proceeds directly from the insurance company. Although this will not yield tax credits during your lifetime, the proceeds received upon your death are treated for tax purposes in the same manner as a gift made in your Will. United Way of KFL&A will issue a donation receipt to your estate which can be claimed in your final tax return.

Option 2: Transferring Ownership to United Way of KFL&A

Donate or give an existing plan or partial benefits to the United Way

By transferring ownership of a life insurance policy to the United Way KFL&A you will receive a donation receipt for any cash value of the policy at the date of transfer. This will enable you to claim a donation tax credit at that time. If premiums are still due on your policy, you will also receive donation receipts for each additional premium you pay. In this case, there will be no donation receipt issued at the time of death.

Remember: A gift of Life Insurance, with United Way of KFL&A as owner or beneficiary, is made out- side your estate. It will not diminish the legacy to your family and friends. You can show generosity to your community without compromising your family’s financial security.

To make a gift of Life Insurance please contact your financial advisor today.

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Charitable Registration Number: 125978270RR0001



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