

# WORKPLACE CAMPAIGN LEADERSHIP AND TOCQUEVILLE GIVING BEST PRACTICES

## Appeal to the CEO for Top-Down Support

- Show where the company ranks compared to other companies.
- Show the percentage of the total employee campaign that comes from leadership donors.
- Ask the CEO to set goals for Leadership Gifts and Tocqueville Gifts.
- Ask the CEO to seriously consider soliciting \$5,000+ gifts personally.
- Ask the CEO to encourage managers to demonstrate leadership in the campaign, the same way they are expected to lead in other company initiatives – by making a leadership gift AND by encouraging their employees to consider giving.

## Make the Case for Leadership Giving

- The CEO and anyone involved in the company campaign should understand the importance of Leadership Giving (See Case for Leadership Giving)
- Leadership Gifts of \$1,000 or more account for 49% of all gifts from individuals; Tocqueville Gifts of \$10,000 or more account for 26% of all gifts from individuals.
- Leadership donors on average designate less of their donation.

## Appoint a Leadership Giving Chairperson

- Organizations that have the most successful leadership giving campaigns have a Leadership Campaign Chair. This should be someone who reports to the CEO.

## Identify Prospects

- Employees making \$75,000 or more are good Leadership Prospects (\$1,000 or more.)
- Employees making \$200,000 or more are good candidates for a Tocqueville gift (\$10,000 or more.)
- Employees who have given \$850 - \$999 in recent years.

## Plan Special Leadership Programs

- Have CEO convene a breakfast / lunch / cocktail party or dinner to discuss leadership giving; make sure the invitations are personal to each prospect and from the CEO!
- Invite all prospects as well as current Leadership and Tocqueville donors.
- Invite an outside speaker from to make the Case for Leadership Giving: a CEO of another company with a large number of Leadership Givers, an agency speaker with a client to demonstrate the results of giving or a panel (discussion or “town hall” meeting that address community and industry trends.)
- Distribute United Way materials targeted to leadership prospects.
- Educate prospects about the advantages of donating stock.

## Emphasize Cawthorn and Haas Match Step Up Programs

- The Cawthorn Match helps donors reach the \$5,000 giving level:  
In the 1st year the donor gives \$1,500 and the Mr. Cawthorn gives \$3,500; in the 2nd year the donor gives \$3,500 and the Mr. Cawthorn gives \$1,500; in the 3rd year the donor gives the full \$5,000. In each year, the donor is recognized as a \$5,000 donor, and receives all benefits of that level of giving.
- The Haas Match helps donors reach the \$10,000 giving level and join the Tocqueville Society:  
In the 1st year the donor gives \$5,000 and Mr. Haas gives \$5,000; in the 2nd year the donor gives \$7,500 and Mr. Haas gives \$2,500; in the 3rd year the donor gives the full \$10,000. In each year, the donor is recognized as a \$10,000 donor, and receives all benefits of a Tocqueville member.

## Emphasize Community Impact Giving:

- Show some metrics regarding where the money goes and what results were obtained.
- Emphasize the importance of Community Impact dollars in supporting United Way’s mission.