

How to Conduct a Successful Summit Society Campaign



Summit Society Members contribute \$500 or more annually to the United Way of Northern Arizona Campaign. Conducting a Summit Society Campaign is one of the best ways to increase the success of your organization's overall United Way Campaign. As an integral part of your workplace giving program, The United Way of Northern Arizona Summit Society allows your employees to make a greater impact on the lives of the people throughout Northern Arizona and sets your organization a part as a leader in our community.

TO IMPLEMENT YOUR LEADERSHIP GIVING CAMPAIGN

- Hold separate Summit Society meetings in addition to general employee meetings, and/ or integrate Summit Society Giving into all your employee meetings. We encourage you to work with your United Way representative to determine the best strategy for your organization.

SUMMIT SOCIETY CAMPAIGN BEST PRACTICES

- Gain CEO and Senior Management support
- Meet with your CEO/ Management Staff to make sure they understand and support United Way and Summit Society Giving.
- Work with your United Way representative to identify the best person to ask your CEO for a Summit Society or Tocqueville gift.

RECRUIT A CHAIR TO ORGANIZE YOUR SUMMIT SOCIETY CAMPAIGN

- Ask your CEO to appoint a well-respected member of your organization already giving at a Summit Society level to spearhead the Summit Society Campaign.

RECRUIT A TEAM TO ASSIST THE LEADERSHIP GIVING CHAIR

- Recruit a team of current Summit Society Givers to assist the Summit Society Chair.
- Make solicitations in person. Peer to peer solicitations are the most effective "Ask".
- Your Summit Society Team can solicit incentives from senior leadership and/ or businesses to support Summit Society participation.

DEVELOP A PLAN AND TIMELINE FOR YOUR LEADERSHIP GIVING CAMPAIGN

- If you're holding separate Summit Society meetings, schedule your organization's Summit Society Giving campaign one to two weeks prior to the kick-off of your general campaign.
- By announcing the results of an early Summit Society Campaign, Summit Society Givers can set the tone for the rest of the campaign, encouraging and inspiring others to give.
- Set goals for Tocqueville and Summit Society Giving.
- Include current and potential Leadership Givers in "Ask" meetings.

**United Way
of Northern Arizona**



SETTING UP A UNITED WAY SUMMIT SOCIETY MEETING

- Consider holding your meeting during an already scheduled managers/directors meeting prior to the campaign.
- Work with your United Way representative to schedule a speaker for your meeting.
 - A Leadership Speaker from a local company.
 - An employee from your organization who is a Summit Society Member.
- Ask CEO to make his/her donation prior to the meeting & endorse the Summit Society campaign at the meeting.
- Promote interest and confirm attendance of invitees.
- Use incentives to encourage attendance.

SAMPLE LEADERSHIP GIVING MEETING AGENDA

- CEO endorses Summit Society Giving.
- Present the benefits of Summit Society Giving and supporting United Way.
- United Way Representative speaks.
- Show United Way video.
- Distribute personalized pledge cards and pens and support materials (brochure, etc).
- Explain incentives (if available).
- Make “The Ask”.
- Thank everyone for attending and for their support.

AFTER THE MEETING

- Collect all Pledge Forms. Personally contact anyone who did not attend the meeting and make “The Ask”.

THANK ALL LEADERSHIP GIVERS

- Send a personal thank you from the Summit Society Chair to all Summit Society Members.
- Hold a thank you event hosted by the senior leadership and distribute incentives.
- Recognize all Summit Society Members in a visible way that will encourage other employees to give (e.g. Summit Society shirts, plaques).
- Advise Summit Society Members to expect a thank you letter from United Way of Northern Arizona.
- Invite Summit Society Members to United Way of Northern Arizona’s annual community event.
- Communicate to Summit Society Members year round.
- Promote United Way of Northern Arizona’s e-Newsletter to employees.

ADDITIONAL LEADERSHIP STRATEGIES

- Encourage Summit Society Members to increase their giving to the next level by creating internal incentives.
- Communicate impact of their donation all year.
- Host a gathering for Summit Society Members midyear to thank them for their gift.
- Encourage Summit Society Members to visit our website at www.nazunitedway.org or follow us on FaceBook.

