LOANED EXECUTIVE CHECKLIST

United Way
United Way of Midland County

GIVE. ADVOCATE. VOLUNTEER.

This United Way Loaned Executive Checklist is a guide to help ensure a successful campaign for your assigned accounts. While not every item will be applicable to every account, we encourage you to use this as an overall guide.

Pre-UW Campaign Preparation

- ❑ Develop a personal statement about why you serve.
- ❑ Be familiar with the United Way principles and themes before you make "the call."
- ❑ Review company profile and 5-year giving history and note any trends.
- ❑ Review any notes provided by past LE's regarding your accounts.
- ❑ Develop a fundraising target with your division chair and share this with your company representative.

Establish First Contact with Your Account

- ❑ Call your account and introduce yourself as their local United Way representative for this year's campaign.
- ❑ Speak with the General Manager. If they are unavailable after a couple of attempts, ask to speak with their United Way representative.
- ❑ Set a date and time to meet with the company contact person and confirm.
- ❑ Mock telephone script:

Hello!
My name is ________________ and I am a volunteer with United Way of Midland County. Can I speak with the General Manager or could you tell me who in your office is responsible for the United Way campaign?

Midland County is truly unique. I became involved with United Way through ____________________________________ (brief personal statement). I'm sure you've heard the term Live United. It has become the rallying cry to create positive changes in our community. Each and every one of us plays a role in building a stronger future, and it begins with a promise. We'd like to invite your organization to join us in making a pledge to build a stronger tomorrow for everyone in Midland County.

Continue with your talking points...

The UW Campaign Planning Meeting

- ❑ Briefly review your role as a loaned executive and why you serve as a LE.
- ❑ Review their UW giving history.
- ❑ Present the theme for this year's campaign.
- ❑ Distribute the campaign bags that include, posters, DVD, employee pledge cards (if needed). Also explain the host of on-line tools available on the UW website.
- ❑ Review last year's campaign and strategize for current year.
    - Discuss ways to communicate UW messages to company employees.
    - Encourage the use internal communication tools (i.e. newsletter, e-mail, etc.)
    - Promote payroll deduction as the preferred method of donating (if available).
    - Agree on fundraising goals and make sure goal is approved by management:
    - – Financial goal
    - – Participation goal
    - – Incentives for increased giving over last year
    - – Incentives for first-time donors
    - – Determine if the company is willing offer an incentive for employee giving.

LIVE UNITED.

LOANED EXECUTIVE CHECKLIST (CONTINUED)

- Establish target dates for campaign:
  - Set the date for the campaign kick-off (best is a 2 week campaign).
  - Set follow-up meeting with company representative.
  - Set date for envelopes to be returned to you. Offer to pick the envelope up.

❏ Ask whether the organization will be giving a corporate gift and confirm with organization management.
- Consider a company match of employee giving to provide incentive for employees to maximize their contribution.
- Explain Leadership Circle giving levels and the matching grant program.

❏ Plan the Campaign Kick-off Meeting(s).
- Establish which management member will be the spokesperson for the kick-off.
- Offer to arrange an agency or United Way speaker(s) to present.
- Refer to the Coordinator's Guide for a successful kick-off checklist
- Utilize the generic PowerPoint to develop a tailored presentation for your organization's 20-minute kick-off.
- Send out an invitation one week prior to the meeting.
- Collect the pledge cards at the end of the meeting.
- Reinforce that giving is always confidential and optional.

During the UW Campaign

❏ Kick-off meeting
- Make it fun—use creativity or create fun competition within the work place.
- Show the UW video.
- Consider using an agency speaker at the kick-off meeting.
- Review key UW messages.
- Explain how to fill out the UW pledge card.
- Have management provide supporting comments at the meeting.
- Collect pledge cards at the end of the kick-off meeting (or set timeline).

❏ Display the thermometer at the workplace to track progress towards their UW goal.
❏ Consider a second meeting for those who missed the first kick-off event!
❏ Encouragement management to communicate progress with employees and the importance of turning in pledge cards.

Post UW Campaign Wrap-up

❏ End Campaign—Turn in the results to UW using the envelope provided.
❏ Evaluate your company's campaign strengths and weaknesses and make recommendations for next year's team.
❏ Send a thank you letter, or certificate to staff that participated in the campaign.