

# LOANED EXECUTIVE CHECKLIST

This Loaned Executive (LE) Checklist is a guide to help ensure a successful United Way 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.

## KEY DATES AND DEADLINES

- August 11- 26: Establish initial contact with all of your accounts.
- September 12: Campaign starts and all campaign bags should be delivered.
- October 31: Campaign ends and all envelopes should be returned to United Way.
- TBD: Division team meetings, as needed.

## PRE-UW CAMPAIGN PREPARATION

1. Develop a personal statement about why you serve.
2. Be familiar with United Way principles and themes before you make “the call.”
3. Review company profile and giving history and note any trends.
4. Review any notes provided by past LE’s and staff liaisons regarding your accounts.

## ESTABLISH INITIAL CONTACT WITH YOUR ACCOUNTS (August 11-26)

1. Call your account and introduce yourself as their local United Way representative for this year’s campaign.
2. Speak with the manager or the United Way campaign coordinator.
3. Set a date and time to meet with the company contact person and confirm.
4. Mock telephone script:

*Hello!*

*My name is \_\_\_\_\_ and I am a volunteer with United Way of Midland County. Can I speak with the 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/because*

*\_\_\_\_\_ (brief personal statement). I’m inspired by their goal to ensure all families and individuals reach their full potential. I would be happy to show you how they are making that happen and how you can be a part of the change.*

## SERVING YOUR ASSIGNED ACCOUNTS

1. Briefly review your role as a LE and the United Way message strategy.
2. Review the organization’s giving history with United Way.
3. Offer to help bring the message to life through a speaker or person impacted by their support.
4. Distribute the campaign bags.
5. Explain the on-line tools available at [www.unitedwaymidland.org](http://www.unitedwaymidland.org).
6. Review last year’s campaign and strategize for current year.
  - Using the “Tools for your Success,” discuss ways to bring the messages to company employees.
  - Explain the Jean Day for United Way, Change 4 Change and Paper T-shirt opportunities.



- Consider the use of internal communication tools (i.e. newsletter, e-mail to share the impact eBlast message and stories of impact)
  - Promote payroll deduction as the preferred method of donating (if available).
  - Agree on fundraising goals and make sure goal is approved by management:
    - Determine if the company offers an incentive for employee giving or if they have incentives for increased giving over last year
    - Communicate the financial and participation goal
    - Incentives for first-time donor
  - Establish target dates for campaign:
    - Set the date for the campaign kick-off (2-week campaign is best).
    - Set follow-up meeting with company representative.
    - Set date for picking up the pledge envelopes (due to United Way by 10/31).
7. Ask whether the organization will be giving a corporate gift and confirm with organization management.
    - Consider a company match of employee giving to provide an incentive.
    - Explain Leadership Circle and Young Leaders United giving levels and the matching grants.
  8. Plan the Campaign Kick-off Meeting(s).
    - Establish who will be the spokesperson for the kick-off.
    - Offer an agency or United Way speaker(s) to present utilizing the Speakers Bureau.
    - Utilize the generic PowerPoint to develop a presentation for the organization's kick-off.
    - Send out an invitation one week prior to the meeting.
    - Reinforce that giving is always confidential and optional.

## DURING THE UW CAMPAIGN

1. Kick-off meeting
  - a. Make it fun—use creativity or create fun competition within the work place.
  - b. Utilize the tools provided in the campaign back
    - i. Show the campaign video and the short video stories of impact
    - ii. Utilize the eBlast impact messaging and links
    - iii. Hand the posters to inspire and educate
    - iv. Ask for employee testimonial to be shared at a meeting.
    - v. Review key UW messages.
    - vi. Explain how to fill out the UW pledge card.
    - vii. Have management provide supporting comments at the meeting.
    - viii. Collect pledge cards at the end of the kick-off meeting or direct them to online giving.
  - c. Reinforce that giving is always confidential and optional.
2. Display the goal poster at the workplace to track progress towards their goal.
3. Consider a second meeting for those who missed the first kick-off event!
4. Encourage management to communicate progress with employees and the importance of participating
5. Remind employees that they can create impact throughout the year by volunteering.

## POST UW CAMPAIGN WRAP-UP

1. BY OCTOBER 31st—Pick up and turn in the company results to UW using the envelope provided.
2. Evaluate your company's campaign strengths and weaknesses and make recommendations for next year.
3. Communicate all updated company information, including contacts.
4. Send a thank you letter to staff that participated in the campaign.  
(United Way has notes you can use.)