

LOANED EXECUTIVE TRAINING GUIDE



Together, we're greater than any challenge.

THANK YOU FOR LEADING THE FIGHT

We all have the potential to make the world a better place and make a difference in our community.

By becoming a Loaned Executive for United Way of Indian River County’s annual campaign, you’ve committed to joining the fight to take on our community’s toughest challenges.

Thanks to people like you who take on this role, we are working to break the cycle of generational poverty by helping children graduate and helping families become financially stable. We also hope that it makes a difference in your life, as it has for so many others who have taken on this unique leadership role.

This guidebook is full of ideas and information to help you during your Loaned Executive journey. Remember, your Workplace Campaign Manager is just a phone call or email away with additional support and direction.

Thank you for being that special person that we need to make a difference in our community.

United Way of Indian River County Board of Directors and Staff

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LOANED EXECUTIVE DESCRIPTION

Support Staff: Sydney Mihailoff, Relationship Development Manager
Tracey Segal, Campaign Director

Objective: To increase financial and volunteer resources critical to the success of the Annual Campaign and help United Way and its partner agencies create lasting change.

ROLES & RESPONSIBILITIES

- Attend LE training and report on progress of assigned accounts
- Personally meeting or phone conferencing with the Employee Campaign Coordinator (ECC) of each assigned account to review the Account Call Form, plan campaign, set presentation dates, and implement best practices (tours, incentives, and special events) where possible
- Personally contact the ECC regularly to check progress of their internal campaign
- Assemble and deliver appropriate campaign materials (pledge cards, brochures, report envelopes, UW give-a-ways)
- Conduct presentations for assigned accounts
- Ask the ECC to follow up with all employees not attending presentation sessions to ensure everyone has an opportunity to participate
- Assist the ECC in completing the Campaign Report Envelope; collect employee pledge cards, donor detail spreadsheet (to include name, amount deducted per pay period, total amount given, and any designations or leadership gifts)
- Deliver fully completed Campaign Report Envelope to Sydney Mihailoff at the United Way with the completed donor detail spreadsheet
- Support your own United Way workplace campaign with a personal gift
- Most of all....HAVE FUN! Your efforts will help thousands of people here in Indian River County!

THE PRESENTATION AND “THE ASK”

Each individual has their own speaking style when presenting to a group. Some people may talk about numbers and statistics, others tug on heartstrings. No one approach is better than the other; it's all about personal style.

If you've been involved with United Way for any length of time, share your experiences. If you're new to United Way, tell them what you've learned since beginning as a volunteer with United Way. If someone within the company has a personal experience with United Way, see if they'd like to share it during the presentation.

The most important thing is to remember to be yourself, use your strengths and help provide a positive, consistent and informative experience to each person at every meeting you conduct. The goal is to present every employee with a quality, non-coercive opportunity to give. United Way has a strict policy against coercion.

Sample “Ask” messages:

- I've made my gift. Please join me in making yours today.
- By combining our gifts, we can make a greater impact here in our local community...please consider giving.
- Your gift will touch the lives of so many...please give generously.
- Please support United Way by donating. Thank you.
- Giving through payroll deduction makes it easy to give and easy to care.

PRESENTATION DELIVERY TIPS

- Have passion and energy. An audience is most likely to engage when the speaker is enthusiastic. By being enthusiastic, your message becomes even more compelling. Remember to **Plan, Prepare, and Practice** before you **Present**. (The four P's)
- Make sure your appearance is well presented and appropriate. Depending on what type of work environment you are going to be visiting, it might be more appropriate to wear logo wear instead of a suit or vice versa.
- Give away items (clips, cups, pens, etc.) if you have any...make it fun! Either bring enough for the crowd, or make it a contest at the end of the presentation...Gives them something to look forward to and keeps their attention. Everyone likes FREE things!
- Speak clearly and adjust your voice so everyone can hear you. Speak slowly. It is common to speak rapidly when nervous. Take a deep breath before you begin and remember to breathe during the presentation.
- Effectively used, a pause in your presentation can emphasize a point or allow the audience to react to a fact, anecdote or joke. This is better than saying the word “um....” when you might need a moment to gather your thoughts. (This would be another good time to take a deep breath!)



PRESENTATION DELIVERY TIPS - CONTINUED

- Make eye contact with your audience. This helps to build a relationship. If you are in a large group and it is too hard to look directly at people, look at the back of the room and fix on something else. You will still be holding your head high and looking confident.
- Don't fidget with your hands, and keep them out of your pockets.
- Don't plant your feet and cling to the podium or microphone. Walk a little bit around the stage or room. A few steps here and there make you look more natural and comfortable with what you are doing.
- If you make a mistake during your presentation, do not call attention to it. Most likely the audience will have no idea that it has happened. Just forget about the mistake, put a smile on your face, and keep moving forward.
- Depending on the group, you may be met with mixed responses. Remember, you may have a captive audience who doesn't really care what you have to say, but YOU still must care about them and your topic or it will have a negative impact on your presentation.
- Lastly, be yourself. Allow your own personality to come across in your presentation!

IMPORTANT DATES AND TIMES

Workplace Campaigns begins- September

LE Training (Mandatory)

Tuesday, September 7

9:00 AM - 4:00 PM

LE Recognition Luncheon

TBD

12:00 PM - 1:00 PM

Workplace Campaigns wrap-up December 31st!

SAMPLE UNITED WAY SPEECH

For 60 years, United Way's dedicated donors, advocates, volunteers, and partners have fought for the Health, Education, and Financial Stability of every person in Indian River County. We support 45 programs at 35 partner agencies whose focus ranges from children to senior services. More than 24,000 of our friends and neighbors were helped by a funded United Way partner agency in the last year. We can do all of this because of your help, 20% of our campaign comes from the workplaces like yours.

Year round we work with local agencies, community leaders, and philanthropic partners to assess the community's most pressing issues to then develop real innovative solutions. We have re-evaluated our funding process and are proud to say that any nonprofit who feels they can help address one of our community goals is open to a seat at the table. The result of this, is that programs and agencies are collaborating in new ways and aligning themselves to a common mission – supporting the people of Indian River County.

In the past 18 months our local United Way led the charge in crisis fundraising when we established our COVID-19 Community Response Fund. In a matter of weeks, we raised over \$1.4 million which was distributed to those in need by way of housing assistance, utility assistance, food assistance, and so much more.

More than just fundraising though, our local United Way hosts a robust Volunteer Income Tax Assistance program. This past tax season, our 30 volunteers completed over 1,300 returns for low-income families with a total of \$1.6 million in refunds put back into the pockets of Indian River County residents.

We have a vision to continue to remain steadfast in our commitment to you – to ensure your contribution goes to the programs and services that help people achieve healthy, fulfilling lives. No matter the crisis, you can count on us to be there for you, your family and your neighbors.

Thank you for being with us, staying with us, and working with us to make our community a place where everyone has the opportunity to thrive. I hope we can count on you for your continued support.



PLEDGE CARD MANAGEMENT

Getting the pledge card back is the key to any successful campaign. Now that you have completed the presentation and “the ask,” people are at their highest level of awareness and emotional response. This means they are much more likely to give/make a decision right now. Let everyone present know they have a moment to fill out the pledge card and United Way representative and/or ECC will come around to collect them.

It is suggested that you ask employees to return their pledge card regardless of their giving decision. This is by no means to be coercive. In fact, it is proven to ensure no one feels pressured to give to United Way during the Employee Campaign Coordinator’s follow up during the final days of the campaign. Whatever decision they make is fine, but by collecting all cards, or as many as possible, at the end of the meeting, you reduce the amount of follow up with employees. You also ensure that someone who has attended a meeting, been presented with the opportunity to give, but has chosen not to, does not get asked again to donate to the campaign. This has the potential to imply a sense of obligation that will surely be resented.

BEST PRACTICES

CEO Involvement

The ECC works closely with the CEO or key executive to ensure he/she is visible, involved and informed. Beyond leading employee presentations, the CEO can opt to:

- Write a letter and/or email to all employees at the start of the company's campaign endorsing United Way, announcing internal campaign goals and asking employees to consider contributing. (Samples in manual.)
- Send an email after the employee presentation, following up with employees that did not attend, to inform them of the process and deadline for turning in pledge cards to the ECC.
- Send a thank you note, letter or email to all employees upon campaign completion.
- Write an editorial for the company's newsletter if you have one.

Agency Tours

Nothing tells the United Way story better than agency tours. Employees can see for themselves how their gift to the campaign makes an impact in someone's life. If the CEO has authorized agency tours:

- Coordinate a date/time for employees to tour one or several United Way partner agencies.
- Identify areas of philanthropic interest (ex: children's services, senior care, literacy) and finalize all tour arrangements by working with your United Way representative

Refer to the Agency List in your binders for program descriptions of United Way funded service(s) at each partner agency



Incentives

Many companies use incentives to encourage participation, promote a sense of teamwork, raise additional dollars toward the campaign goal and generally make the campaign more fun. Here are a few examples:

- Drawings for gift certificates, gas cards, movie tickets, a day off with pay, lunch with the boss or other creative ideas can be done at the end of each employee meeting for people who turn in their pledge cards, whether they choose to give or not.
- Giving company or United Way products (mugs, shirts, pens, ball caps) to everyone who attends the employee meetings or contributes.

Some companies may choose to use a standard for incentives, for example:

- Individuals who contribute at a certain level, or increase their gift by 10% over last year, are eligible for a drawing or get a day off with pay.
- A 10% increase in giving, company-wide, and everyone gets a half-day off with pay.
- 100% participation and the company will host a picnic, barbecue or ice cream social.

BEST PRACTICES

Special Events

Special events are also a great way to enhance internal workplace campaigns and raise additional dollars towards the goal. Here are a few ideas:

- Sell tickets to a barbecue or pizza party at lunch time where the boss serves or cooks for everyone.
- Offer a casual or jeans day for a minimal contribution.
- Organize a manager car wash.
- Plan a sporting event and offer tickets to employees to cheer on their colleagues.



Say THANK YOU!

Be sure to say thank you, whether someone gave or not. Work with your United Way representative to plan a thank you presentation and as the ECC, you can:

- Personally thank your co-workers, giving contributors a United Way lapel pin.
- Write a personal thank you note to your co-workers.
- Hang a thank you banner or poster in the employee break room. (United Way can create a customized poster for you.)
- Feature a thank you letter from an agency client in the company newsletter.
- Hand out company or United Way promotional items.

FREQUENTLY ASKED QUESTIONS

WHY SHOULD I GIVE TO UNITED WAY OF INDIAN RIVER COUNTY (UWIRC)?

United Way is a community of connected individuals, united and working together for the benefit of all. We are all part of something greater, and a tear anywhere weakens the entire social fabric. We all win when a child succeeds in school, when a neighborhood turns around, when families have good health and workers have solid jobs.

UWIRC recruits the people and organizations from all across the community to get things done. More than 100 local business and community leaders are involved in the decision to fund partner programs based on; needs in our community, United Way standards, and the impact our programs have in making a meaningful difference in peoples' lives.

Funds raised LOCALLY are spent LOCALLY to advance the common good here in Indian River County.

WHY SHOULD I GIVE TO UNITED WAY OF INDIAN RIVER COUNTY RATHER THAN DIRECTLY TO A FUNDED PARTNER?

UWIRC volunteers work on behalf of the common good to make steady advances in this community by addressing common problems. We have a wide variety of needs in this county, not for just one type of assistance or program, but for an entire interconnected network that will benefit the whole. For instance, we are working hard to improve education knowing that poor education is a strong predictor of crime. However, we also know that poverty is a strong predictor of both student success and health problems which, in turn, have a negative effect on learning. UW has chosen to focus on Education, Financial Stability and Health in order to change these community conditions.

DOES UNITED WAY FUND THE BOY SCOUTS?

No. United Way's funding decisions are based on a program's ability to address the most pressing needs in our community. The diversity of programs United Way supports allows people to choose the best fit for their particular needs, values, and beliefs. Funding decisions are made by members of this community during our annual Citizens Review Process. We encourage all who are interested in deciding on funding priorities to join the process.

DOES UNITED WAY FUND PLANNED PARENTHOOD?

No. We are funding 12 programs addressing health in this community.

HOW MUCH DOES UNITED WAY SPEND ON OVERHEAD?

We are proud of our financial accountability. The percent of charity expenses that go to administrative and fundraising costs—commonly referred to as “overhead”—is a poor measure of a charity's performance. We ask you to pay attention to other factors of nonprofit performance: transparency, governance, leadership, and results. All, including overhead, can be found on the website at unitedwayirc.org.

FREQUENTLY ASKED QUESTIONS

WHAT IS UNITED WAY'S DESIGNATION POLICY?

We honor donors' requests for directing their dollars to a specific funded partner. These designations are treated as first dollars in toward an agency's total allocation. The Community Investment Volunteers then make recommendations on any additional funding each program should receive from resources generated as part of the Annual Campaign.

SOMEONE I KNOW GAVE TO UNITED WAY FOR YEARS BUT DID NOT GET HELP WHEN HE OR SHE NEEDED IT, SO WHY SHOULD I GIVE NOW?

2-1-1 works diligently to connect every caller with services that can help, and we and our funded partners try very hard to serve everyone who contacts them. Unfortunately, there may be obstacles such as waiting lists for appointments and limited or strained resources. UWIRC is interested in hearing about needed resources in this community so that we can, as a community, meet the human service needs of our families, friends, and neighbors.

