

United  
Way



United Way of  
Indian River County

LOANED EXECUTIVE HANDBOOK

**EMPOWERING GROWTH.  
DELIVERING HOPE.  
IMPACTING CHANGE.**

## CONTACT US

Phone: (772) 567-8900

Website: [UnitedWayIRC.org](https://UnitedWayIRC.org)

Social: [@UnitedWayIRC](https://www.instagram.com/UnitedWayIRC)

**Sydney Mihailoff**, *Relationship Development Manager* | ext. 117 | [Sydney.Mihailoff@UnitedWayIRC.org](mailto:Sydney.Mihailoff@UnitedWayIRC.org)

**Jessica Schmitt**, *Director of Philathropy* | ext. 121 | [Jessica.Schmitt@UnitedWayIRC.org](mailto:Jessica.Schmitt@UnitedWayIRC.org)

**Meredith Egan**, *Chief Executive Officer* | ext. 125 | [Meredith.Egan@UnitedWayIRC.org](mailto:Meredith.Egan@UnitedWayIRC.org)

## 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 accept this role, we can create opportunities for a better future for everyone in Indian River County. You are empowering growth, delivering hope, and impacting change in your community.

This guide is full of ideas and information to help you during your Loaned Executive journey. We are just a phone call or email away with support and direction, any time you need it.

It is you who makes a difference in our community by going above and beyond to make this campaign successful. Thank you for being that exceptional individual.

LOCAL IMPACT.

LOCAL DECISIONS.

LOCAL INVESTMENTS.

**United Way of Indian River County makes it easy for donors to make a big impact.**

We have a history of innovation in responding to pressing needs and identifying gaps in services. Our local partner programs meet people where they are and give them a hand up, not a handout.

Focused on preventative services, we realize no one can do their best at work or school if they are hungry, sick or in pain. Today, the most vulnerable are struggling more than ever. That's why United Way steps in to coordinate solutions.

## OUR MISSION

To improve lives by mobilizing the caring power of our community.

## OUR VISION

United Way envisions a world where all individuals and families achieve their human potential through education, financial stability, and healthy lives.



## OUR IMPACT AREAS

### Health

- Behavioral Health, Mental Health and Substance Abuse for Children and Adults
- Oral Health
- Physical Health
- Senior Care and the Ability to Live Independently
- Prenatal Care
- Domestic Violence

### Education

- Early Childhood Education
- Mentoring for Students in Grade School and Post-Graduation
- On-Time Graduation
- Grade Level Performance in Reading, Math, and Science

### Financial Stability

- Access to Healthy Food
- Safe Sustainable Housing
- Financial Coaching and Planning
- Employment Training



## ELEVATOR SPEECH

*United Way advances the common good by creating opportunities for a better life for all. Our focus is on health, education, and financial stability – the building blocks for a good quality of life. We engage with people and organizations throughout Indian River County that bring the passion, expertise, and resources to get things done. We invite you to be a part of the change by giving and volunteering... because great things happen when we LIVE UNITED.*

- **Supports local, innovative solutions** to tackle our toughest challenges
- **Create lasting change** that benefits everyone in measurable ways
- **Educate our community** about social issues and needs
- **Invests time listening** and invite everyone to be part of the change
- **Aligns volunteer efforts** to create impact
- **Advocates for our community** and provide a voice to those not heard
- **Convenes people** to understand, collaborate and innovate
- **Invests in building capacity** to strengthen nonprofits
- **Utilizes skilled volunteers** to make program funding recommendations

## LOANED EXECUTIVE PROGRAM OVERVIEW

Loaned from a wide range of local organizations, Loaned Executives play an important role in United Way's annual fundraising campaign. Partner organizations and their trusted leaders lend their time, talent and expertise in helping spread United Way's mission and message across our community – all the while building upon their individual skills, social networks and professional experience.

### **Loaned Executive Term: 4 to 5 hours per month from August through December**

Ideal candidates may include employees on the rise or in transition, sales managers, or management trainees with attributes such as comfort with public speaking, leadership potential, self-motivated, results-oriented, organized, or sales-oriented.

### **Loaned Executive Benefits**

- Network + cultivate valuable business contacts
- Increase leadership + management skills
- Enhance soft skills like public speaking, creative problem solving + empathy
- Develop insight into community needs + resources
- Become an advocate + make a difference
- Build self-esteem, well-being + confidence

### **Business Partner Benefits**

- Fulfill social responsibility goals
- Enhance business image
- Boost community visibility + relationships
- Increase employees professional development, leadership + advanced skills
- Impact community quality of life, maximize volunteer efforts + create civic leaders

ENGAGE.  
EMPOWER.  
LEAD.  
IMPACT.



## ROLES & RESPONSIBILITIES

- Attend Loaned Executive (LE) training and report progress of assigned accounts
- Personally meet or phone conference with the Employee Campaign Coordinator (ECC) of each assigned account to plan campaign, set presentation date and times, and implement best practices where possible
- Personally contact the ECC regularly to check progress of their workplace campaigns
- Assemble and deliver appropriate campaign materials (pledge cards, brochures, envelopes)
- Ask the ECC to follow up with all employees not attending the presentation to ensure everyone has an opportunity to participate
- Assist the ECC in collecting pledge cards or encouraging online giving
- Deliver fully completed Campaign Envelope to the Relationship Development Manager
- Support your own United Way workplace campaign with a personal gift
- **HAVE FUN! Your efforts will help thousands of people in Indian River County!**



## GIVE THANKS

*Everyone wants to feel appreciated, so be sure to thank your donors for their generous gifts. Thank you messages and gifts don't have to be big and extravagant. Remember sincere appreciation is key. Examples, templates, branding materials, and other resources can be found in our Workplace Campaign Tool Kit at [unitedwayirc.org/campaign-resources](https://www.unitedwayirc.org/campaign-resources). For personalized materials or additional guidance, please contact us at (772) 567-8900.*

- Write a personal thank you note to the business or Employee Campaign Coordinator (ECC)
- Make a thank you banner or poster for the ECC to hang in the employee break room
- SWAG for everyone! Hand out United Way promotional items
- Say thank you with a piece of candy and a message:
  - Crunch Bar - *'Our community would be in a CRUNCH without your support!'*
  - Life Savers - *'You are a LIFE SAVER!'*
  - Starburst - *'We're BURSTing with thanks!'*
  - Tootsie Rolls - *'Thanks for the ROLL you play in our community!'*



## SPECIAL EVENTS + ENGAGEMENT IDEAS

*It's okay to have fun! Special events are also a great way to encourage participation and boost results. Additional event ideas can be found in the Workplace Campaign Tool Kit at [unitedwayirc.org/campaign-resources](http://unitedwayirc.org/campaign-resources). Here are a few ideas:*

### Bake Sale

Arrange for employees to donate baked goods. Advertise well in advance with posters, memos, and bulletins. Have volunteer employees available to help set up, serve and clean up afterwards.

### Paper Plane Competition

Have a paper airplane contest from an upper floor of your building. Charge \$1 or \$2 per paper airplane (sheets of paper with folding design already printed on it with space for name). Prizes awarded for longest and straightest flight, or as an alternative, place prizes on the floor and the plane that lands closest to it, wins.

### Balloon Pop

Employees donate prizes for this event, which is a variation of a traditional raffle. Before filling a balloon with helium, put a note inside with the name of the prize. Employees pay \$2 to buy a balloon and pop it to find out what prize they won.

### Casual Day

Sell Casual Day stickers or "I'm dressed this way for United Way!" stickers (available from UWIRC) allowing employees purchasing them to dress casually on certain days (usually Fridays). Employees purchase stickers for \$2 or \$5 each.

## VOLUNTEER OPPORTUNITIES

*Volunteering individually or with a team is a great way to connect with your community and boost your self-esteem. Volunteers govern, provide directions and oversight, make funding decisions, serve on committees, and drive our annual events. With opportunities throughout the year, there is something for everyone.*

### Community Impact

- Grant Review Panel
- Volunteer Income Tax Assistance
- Disaster Relief Volunteer
- Office/Clerical/Mailings
- Committee Member

### Special Events

- Day of Caring
- Jackie Robinson Celebration Game
- Citrus Golf Tournament
- Citrus Sale

# LIVE UNITED.



## FREQUENTLY ASKED QUESTIONS

### **What is the Loaned Executive Program?**

Loaned Executive's (LE's) are working professionals who assist United Way staff during peak campaign season in the development and implementation of workplace campaigns. Specifically, LE's lend their expertise and energy to help United Way expand solicitation efforts, reach new markets, and broaden the base of community giving.

### **Why is the Loaned Executive Program important?**

Loaned Executives keep fundraising costs low by maximizing staff and volunteer efforts. In return, United Way provides a unique management program that develops sales and executive leadership skills in addition to an understanding of community organizations. Becoming a Loaned Executive is an investment in yourself and your community.

### **Isn't United Way a national organization?**

Yes, United Way Worldwide is a national organization that we fall under the umbrella of (are affiliated with.) But we are a local organization where the Board of Directors consists of IRC representatives, make local decisions, and your money stays local.

### **How much does United Way spend on overhead?**

We are transparent with our finances and work hard to keep our overhead around 15% annually. Learn more at [unitedwayirc.org/finances](https://unitedwayirc.org/finances).

### **Why should I give to United Way of Indian River County (UWIRC)?**

United Way is a community of connected individuals, united and working together to benefit all. Your dollars go further when you give to UWIRC - we offer wrap around services for everyone in IRC. One individual or family can benefit in multiple ways from the programs that we fund in the health, education, and financial stability sectors.

United Way recruits volunteers from all across the community and are involved in the funding decisions to funded partners and programs. These are based on outcomes, the needs in the community, standards, and impact. The funds raise locally are spent locally to advance the common good here in Indian River County. We all win when a child succeeds in school, when families have good health, and our neighbors have good paying jobs.

### **What is United Way's designation policy?**

We honor donor's requests for directing their dollars to a specific funded partner. These designations are treated as first dollars 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.



**United Way of  
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1836 14th Avenue  
Vero Beach, FL 32960

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[www.unitedwayirc.org](http://www.unitedwayirc.org)