

**United Way of Central Illinois  
Loaned Executive Account Checklist**



United Way of Central Illinois

**ACCOUNT:** \_\_\_\_\_

**LOANED EXECUTIVE:** \_\_\_\_\_

Check List	Date Completed	TASKS	NOTES
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**ANALYZE ACCOUNT - United Way Meeting**

		Review Account Profile	
		Calculate at least two "What if" scenarios	

**INITIAL CONTACT**

		Call account contact	
		Identify yourself as a volunteer for the United Way	
		Thank for past support	
		If person you contacted is not Employee Campaign Coordinator (ECC), ask for the name of the ECC	
		Discuss the importance of having a face-face meeting with the ECC. Schedule meeting.	
		Invite to Campaign Kick Off September 14th	
		Confirm ECC (and/or committee member) attendance at one of the ECC trainings. If possible, offer to attend with them.	
		Document all contact with account (date, time, mode of communication, and person with whom you spoke, any pertinent information).	

**EMPLOYEE CAMPAIGN COORDINATOR (ECC) COMMUNICATIONS**

		Prepare agenda (Sample in binder)	
		Thank for past support	
		Share a story about how United way is helping in our community. A copy of the Community Impact Report is helpful.	
		Use the account profile worksheet as a guide to identify ways you can help.	
		Present the Account Folder.	
		<b>Review the Account History first.</b> Highlight the Total Employee Gift, Average Gift, Percent Participation, Leader's Guild and Community Builders (if they have them). Based on how you analyzed their account, show the ECC how they can increase their campaign through increased participation or through increased dollars. Use your "what if" statements.	
		Present the Employee Campaign Coordinator Guide.	
		Depending on when the meeting occurs, talk up their attendance at the ECC Training, and/or thank them for their attendance and ask what, if any, feedback they have.	
		Present the supply order form. Ask them to email it back to you or to United Way, or mention that you would be willing to pick up.	
		Find out ECC's (sometimes it can be 2 people) t-shirt size	
		Let them know that they can pick up supplies or that you/UW will deliver their supplies by their need by date.	

**United Way of Central Illinois  
Loaned Executive Account Checklist (cont.)**



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Check List	Date Completed	TASKS	NOTES
<b>EMPLOYEE CAMPAIGN COORDINATOR (ECC) COMMUNICATIONS (continued)</b>			
		Highlight each of the items the company can request. Remember, each of the supplies is a great marketing/promotional tool.	
		Ask what fun things they have planned, and/or how you/United Way can help them have a successful campaign.	
		Document all communications. Information helps all of us.	
<b>MANAGING A SUCCESSFUL CAMPAIGN</b>			
		Campaign supplies ordered	
		Campaign Supplies delivered to company	
		Endorsement of the CEO/Senior Management made known to all employees	
		Set internal campaign goal with ECC	
		Payroll deduction is offered and encouraged.	
		Attend or find another UW representative to attend campaign meetings/events (kickoff, solicitation meetings, etc.)	
		Schedule presentation through Mitch Baker	
		Each employee received United Way pledge card and brochure with a personal contact	
		Use United Way video and/or speaker during the company campaign	
		Post-campaign follow up with lapsed donors?	
		Document all communications. Information helps all of us.	
<b>FOLLOW UP AND REPORTING BACK</b>			
		Check in on each account one week prior to company campaign kickoff to make sure they have everything they need.	
		Check in midway through campaign	
		Contact following campaign to check on processing and report envelope status	
		Document all communications. Information helps all of us.	
		Thank you letter to CEO and ECC	
		Thank you made to all contributors	
		Pick up United Way yard sign(s), banners and videos and return them to United Way	
		Campaign report submitted to United Way by November 15th (not always possible)	