

# The Loaned Executive's Handbook



**LIVE UNITED**

**United  
Way**



**United Way of Lee County, Inc.**

[www.UnitedWayofLeeCounty.com](http://www.UnitedWayofLeeCounty.com)



# HOW TO

**LIVE UNITED:**

**JOIN HANDS.**

**OPEN YOUR HEART.**

**LEND YOUR MUSCLE.**

**FIND YOUR VOICE.**

**GIVE 10%. GIVE 100%.**

**GIVE 110%.**

**GIVE AN HOUR.**

**GIVE A SATURDAY.**

**REACH OUT A HAND TO ONE AND**

**INFLUENCE**

**THE CONDITION OF ALL.**



Welcome!

We are so excited to have you as a part of our team! This booklet is designed to familiarize you with United Way of Lee County, Inc., our system of donation requests and the allocation of the funds raised. We will also address some of the most common questions or reservations raised by potential givers. Our hope is that this booklet will prepare and inspire you to join us and LIVE UNITED as an advocate for our community.

Sincerely,

The Team at United Way of Lee County, Inc.

## UNITED WAY

**Mission Statement:**

To increase the organized capacity of people to care for one another. One of the ways we do this in our community is by generating and applying the necessary resources to meet the needs of the community, recognizing that meeting basic human needs should be the overriding consideration of all decisions.

**Our Commitment to You:****WE CARE.**

We care about this community. Our staff and volunteers live and work in this community. We put our hearts and hands into making this community a better place in which to live. This year United Way agencies will provide over 100,000 services for children, teenagers and adults in our area.

**WE ARE EFFECTIVE.**

Before receiving a penny of your gift, agencies and programs must prove they provide a vital service that will help solve local problems. We ensure that your money gets results.

**WE ARE ACCOUNTABLE.**

Volunteers representing all walks of life review budgets and interview agencies to make sure your contributions are spent on what really matters — improving lives. They monitor annually how well those programs are maximizing your gift to solve local problems and serve human needs.

**WE ARE EFFICIENT.**

Your local United Way invests more than 85% of your gift back into the community — a higher percentage than most nonprofits nationwide. That means we put your money where you intended for it to go — where it will help people and do the most good.

**WE ARE LOCAL.**

Your contributions stay local. We focus our resources and services to address needs important to people who live and work where you live, and help the people who need it most.

## Impact Areas:



United Way meets the needs of the community in these four impact areas by providing direct service in our office as well as allocating funds to the following agencies:

- ◆ 2-1-1 Community Connections
- ◆ Achievement Center - Easter Seals
- ◆ American Red Cross, Lee County Chapter
- ◆ Andrew Willis Fund
- ◆ Auburn City Schools Dental Clinic
- ◆ Auburn Day Care Centers
- ◆ Auburn Dixie League Baseball \*
- ◆ Boys/Girls Clubs of Greater Lee County
- ◆ Child Advocacy Center of East Alabama
- ◆ Child Care Resource Center
- ◆ Community Market of Food Bank of East Alabama
- ◆ Dixie Youth Baseball of Opelika \*
- ◆ Domestic Violence Intervention Center
- ◆ EAMH-MR, Family & Children Services: Special Deliveries
- ◆ East Alabama Services for the Elderly
- ◆ Food Bank of East Alabama
- ◆ Greater Peace Child Development Center
- ◆ Joyland Child Development Center
- ◆ Lee County CASA (Court Appointed Special Advocate)
- ◆ Lee County Literacy Coalition
- ◆ Lee County Youth Development Center
- ◆ Project Uplift
- ◆ Rape Counselors of East Alabama
- ◆ Salvation Army
- ◆ Unity Wellness
- ◆ William Mason Emergency Fund

## SEEING THE RESULTS

### THE STORY

Lillian and her 3 children left their home in the middle of the night to escape a violent husband and father. Now, Lillian and the children are without a source of income, home, or food.

### THE RESULTS

In Lillian's time of critical need, United Way and its agencies were available to help. The Domestic Violence Intervention Center was able to assist Lillian in her job search, provide day care for the children, and help provide temporary shelter while looking for a permanent home. The Community Market of the Food Bank of East Alabama provided Lillian and her children with healthy meals.

### THE STORY

Jim is a senior citizen on a fixed income of only \$640 a month. He can't afford to pay his utility bills and still afford groceries and some of his other basic needs.

### THE RESULTS

United Way and its agencies help senior citizens stay independent longer. Jim received two hot meals a week from The Salvation Army's Meals on Wheels program and additional food from the Community Market's Brown Bag program. Food assistance helped Jim afford his other expenses.

**THE STORY**

Betty is 13 years old and has never visited a dentist office because her family cannot afford it. During the past months, Betty has developed a painful toothache. Betty's grades are beginning to drop because it is hard for her to pay attention in class.

**THE RESULTS**

Auburn City Schools Dental Clinic provides dental care for their students who cannot afford it. Betty was able to see a dentist and receive treatment. Now Betty is able to have regular cleanings to prevent further problems.

**THE STORY**

Mike is a 35 year old who recently lost his job and is without medical insurance. Mike has recently been diagnosed with a severe heart condition and cannot afford his new prescription drugs.

**THE RESULTS**

United Way and its agencies are committed to promoting good health. The William Mason Emergency Fund provided Mike with financial help for his prescription drugs. The Achievement Center was able to help Mike with gas to travel out-of-town for his visits to the heart specialist.

## **ASKING FOR A DONATION/GIFT**

**Be Effective.**

### **PROJECT A POSITIVE IMAGE**

You are United Way. See yourself as a marketer of United Way and its agencies. For many, you will be their only contact with the United Way.

### **INTRODUCTION**

Introduce yourself and explain that you are a volunteer for the United Way Campaign. Ask for a few minutes of the manager/owner's time to explain what United Way is and what services the United Way agencies provide. It's always best to call ahead and try to set up a specific time for the contact.

### **IDENTIFY THE NEED**

At the start of your contact, determine what the manager/owner knows about United Way. Ask the contact to look over the list of agencies on the brochure. It is possible that the owner or a number of his employees have already been touched by United Way services (i.e. Boys & Girls Club, Salvation Army, Red Cross, Baseball, etc.) in one way or another. Identify the needs of the agencies to continue providing services in our community. With budget cuts at the state and federal levels, many agencies will have to cut services unless they receive additional community support for their programs.

### **SATISFY THE NEED**

Provide whatever information is required about United Way and the agency services. Explain how United Way agencies provide valuable services within the community and contribute to our local economy as well. Use the examples from the "Value Added Statements" handout.

### **ANSWER THE QUESTIONS & OBJECTIONS**

Ask for the manager/owner's input, including questions. If they have concerns or objections, try to answer. If there is anything that you can't answer or are uncomfortable with, please call United Way. Don't ever argue--it only causes hard feelings. Some frequently asked questions will be addressed in this handbook.

## **It's All About Presentation.**

### **PREPARE — DON'T AD LIB**

Be prepared. Know your material.

### **DEVELOP YOUR PLAN, THEN WORK YOUR PLAN**

Before contacting the individual, organize your thoughts and develop an outline of what you would like to cover, step by step. You'll feel more comfortable and will save time if you have an idea of what you'd like to accomplish during your visit. Use your plan. Stay on topic--it will save your time and the manager's as well.

### **BE COMFORTABLE WITH YOURSELF**

You are volunteering your time to help others in our community. You are representing agencies who provide services to thousands. You are special...**BE POSITIVE!!**

### **ANXIETY**

When you are anxious, your brain shuts off and you begin to forget. Lucky for you, you have a plan! Think back to your plan or reference your outline.

### **IMAGERY**

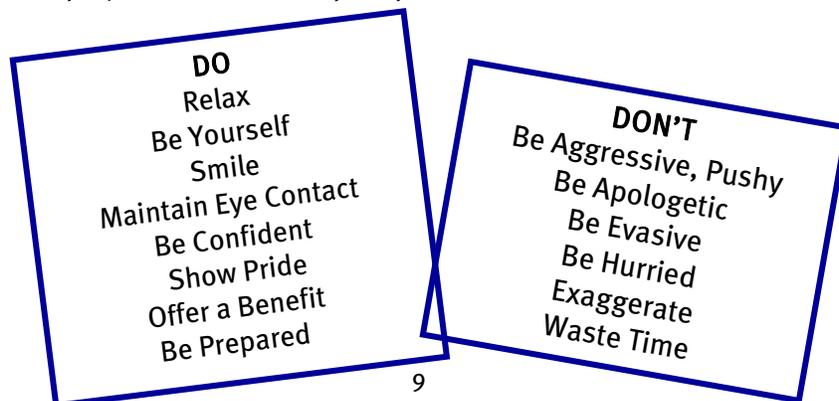
Imagery is very powerful. Picture yourself achieving success. You'll project that positive image every time!

### **PROJECT ENTHUSIASM**

Excitement is contagious!

### **BODY LANGUAGE**

Use body language to your advantage. Make eye contact. Use a moderate tone of voice and speech to project a positive image. Also, project confidence in your posture.



## **Sell It.**

### THE SIX STEP CALL

#### 1. Introduction

- Make an appointment
- Develop Rapport
- Test Awareness of United Way
- Explain the United Way Agencies and their Allocations
- Ask for the Manager/Owner's Personal Support
- Ask CEO to communicate his support to his employees

#### 2. Explain the “Fair Share Guide” $\frac{1 \text{ hour's pay}}{\text{month}} \times 12$

#### 3. Payroll Deduction/Pledge Cards

##### **Packet.**

Explain the contents of the packet (pledge cards and brochures for each employee, a total card for compilation of corporate and employee pledges).

##### **Encourage payroll deduction.**

If they will not agree to payroll deduction, pledges can be billed or checks can be made out to United Way of Lee County, Inc.

##### **Offer to assist with the employee campaign.**

Films and speakers from United Way and its agencies are available to demonstrate their services. A film and/or short speech by an agency is an excellent way to start off an employee campaign. (Call United Way to set up).

##### **Schedule.**

Set a date to return to pick up the packet. Call ahead of pick up to make sure the packet is ready. It is optimum for there to be no more than two weeks between delivery and pick up.

#### 4. Answer Questions.

#### 5. Ask for a Pledge.

#### 6. Say “Thanks.”

### **Objections Happen.**

You can expect at least some of the people you request donations from to object, particularly when you ask them to increase their pledges. Objections are a natural part of the asking process, so they should be regarded as welcome signs that you are doing your job the way it should be done. Objections, however, can present problems if not handled properly, so keep the following points in mind.

### **IT'S NOT PERSONAL.**

An objection is never directed against you; it is directed at the idea you are presenting.

### **IT'S PROBABLY NOT REAL.**

Most objections are “stalls” rather than sincere objections. You usually have to probe pretty deep to uncover the real source.

### **BE EMPATHETIC.**

Listen carefully to what your prospect says and empathize. However, don't *agree*. Reflect the objection by asking a question about it.

### **YOU HANDLE OBJECTIONS.**

The operative word here is *handle*, not answer. You can't *answer* an objection because it's almost always more imagined than real. Deflect it by simply restating the objection in a positive sense.

### **DON'T ARGUE.**

If you argue with an objection you will force your prospect into defense mode. Remember the old wise saying about winning the battle but losing the war? You may win the argument, but you will lose the donation.

### **ENCOURAGE THE PROSPECT TO TALK.**

When the prospect voices an objection, let him/her expand on it at length. If the objection is insincere, illogical, or both, it will tend to fall of its own weight as the person articulates it.

### **ABOVE ALL, RELAX & BE YOURSELF**

You have an important idea to present, and you should be straight-forward in your presentation.

## FAQs

*The following questions have been raised by volunteers and prospective donors alike. Reading over these questions will give you a comfortable knowledge base to address concerns, questions, and objections from a prospect.*

### **Why should I give to United Way?**

When you give to United Way, you can help provide solutions to the most critical human care issues in our community. You become part of a coordinated, community-wide effort that brings about the changes that matter most where you live and work. United Way of Lee County maximizes your gift by combining your contributions with others and strategically investing in results-driven programs and initiatives. By giving hope to kids, families, seniors and people with disabilities, you can help our entire community. Plus, with the ease of payroll deduction, you can help others and improve the quality of life in our community without the financial challenge of a one-time donation.

### **Is United Way a national or local organization?**

United Way of Lee County is a local autonomous non-profit organization. Like more than 1,400 United Ways across the country, we are governed by a local volunteer Board of Directors. United Way of Lee County pays nominal dues to United Way of America in exchange for important cost-saving services such as staff training, community research information, campaign products and ongoing consultation.

### **Why does United Way of Lee County have administrative costs?**

In the business of community impact, United Way of Lee County incurs costs for fundraising, marketing, year-round support of our fundraising and agency partners, community investment and common business operations such as accounting, human resources and overall organizational management. As careful stewards of our donors' investments in our community, we operate our organization with the utmost efficiency and effectiveness. Around ninety-one cents of every dollar is invested in local programs and initiatives that improve lives and deliver results, making us one of the most efficient non-profits in the nation.

**Why should I give to United Way instead of giving directly to an agency?**

There are several reasons why supporting United Way is the best way to help the most people in our community. These reasons include:

- By investing in United Way of Lee County, you help provide solutions to the most critical human care needs of our community. You don't have to choose which need is most important, United Way addresses them all.

- Community volunteers carefully review each United Way funded program on an annual basis. Their oversight ensures agencies adhere to sound fiscal policies and that your contribution is invested in programs that do the most good.

- Giving through United Way reduces costly and time-consuming fund-raising efforts for the agencies providing programs. This enables them to better spend their time helping people who really need help.

- When you give through your workplace campaign, your gift can be spread out over the course of a year through payroll deduction, making it easier for you to support the human care needs of our community.

- When you give to United Way of Lee County, your gift is invested with the contributions of others to help provide a continuum of care for those most in need. This enables you to partner with us in creating sustained changes in community conditions that improve the lives of individuals throughout our area.

**Does United Way fund abortion counseling or abortions?**

No agencies funded by the United Way of Lee County are in any way involved with offering abortion counseling or abortions.

**Are my contributions used locally to benefit this community?**

Yes. Eighty-five cents of every dollar contributed to the United Way of Lee County stays here in the county.

**Is my United Way contribution tax deductible?**

Yes, your contribution is tax deductible.

**Who really benefits from United Way money?**

We all do. Take a look around your office or workplace...it's almost certain that several people there use United Way agencies services. (Has anyone you know ever needed blood? Remember the Red Cross and Salvation Army aid to the Alabama flood and tornado victims?) Last year in Lee County, over 100,000 services were provided by United Way supported agencies.

**Who does United Way of Lee County serve?**

All services of United Way-supported agencies are open to every citizen of this area without regard to race, gender, age, etc.

**What are the advantages to a "united" campaign?**

One campaign for many agencies helps eliminate the confusion and irritation for the donor that would result from many separate solicitations; it also conserves time and energy of the volunteer campaign workers who put their efforts into one campaign rather than several. Campaign costs are also an important factor. A "united" campaign can be conducted for about four cents on every dollar raised whereas even well-run separate campaigns cost 15-20 cents for each dollar raised. A "united" campaign puts more of the contributor's money to work in the agencies for which it was given.

**Can I choose which agency gets my contribution?**

A donor may designate all or part of their gift to a United Way-supported agency. This money will be sent along with other designations to that agency as "first dollars" of its approved allocation. If the total dollars designated to an agency exceed the amount of its allocation, the agency will still receive all designated dollars.

**How is the campaign goal set?**

The goal is based on the proven needs of the agencies that provide the services in our community. Highly qualified and concerned local volunteers represent you, they evaluate the budgets of our United Way agencies and our support costs, and they study priority needs and other available funding sources to recommend how funds will be allocated. These actions, plus allowances for uncollectible pledges and the economy form the basis for a campaign goal.

### **What does your United Way do in addition to raising funds?**

The United Way of Lee County, Inc. is involved in a variety of other functions. United Way researches and plans for future community-wide needs, recruits and trains volunteers, reviews United Way agencies and community needs to direct funds where they are needed most, provides information and referral services to help link people with the services they need, responds and adapts to changing social conditions and human needs, helps solve community health and human care problems and serves as a resource for the Lee County area. Our United Way frequently serves as a catalyst in bringing local resources together to meet emerging needs. One example of this type of activity is the establishment of a Community Market in Lee County.

### **How do agencies become a part of United Way?**

First, an agency must request to become a member. Its operation and services are then studied in detail by the volunteers of the Fund Distribution Committee. Among other factors, the agency must meet each of the following standards:

- In operation for at least two years;
- Performs a needed, not already provided, service of preventive, remedial, or educational value in the field of health, social services or recreation;
- Be certified by the Internal Revenue Service as a non-profit agency;
- Be under the guidance of a local Board of Directors;
- Does not perform a service for which public (tax supported) agencies have accepted the responsibility and have made adequate provision;
- Keep complete and regular accounts and have its books audited annually;
- The agency agrees to participate in community planning efforts in order to coordinate its work with the work of other agencies.

**PROUD**  
TO BE A PART OF THE  
**CHANGE.**  
**PROUD TO**  
**LIVE**  
**UNITED**<sup>TM</sup>



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**GIVE. ADVOCATE. VOLUNTEER.**