



United Way of  
Waco-McLennan County



**2022 LOANED EXECUTIVE PROGRAM**

## PROGRAM OVERVIEW

For almost 70 years, United Way Worldwide has utilized loaned executives as a way to further the mission of taking care of local communities. United Way of Waco-McLennan County is reintroducing the Loaned Executive (LE) program to our community. This program has been a large part of United Way's success nationally as it trains participants in all things United Way. It develops professional skills to help participants' organizations, the community-at-large and their careers. This program also offers excellent hands-on experience to understand local needs and how we can **each use our voice** to create a community where **everyone belongs**.

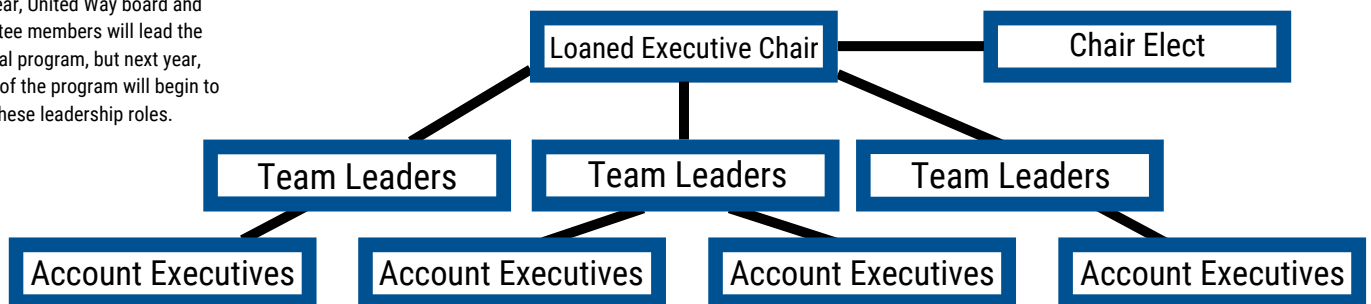
Each year corporations and small businesses alike "loan" employees to United Way on a part-time basis (on average no more than five hours per month) to act as an army of ambassadors to share what it means to Live United and provide support for our workplace campaigns! Our workplace campaigns raise funds to help our partners meet community needs in a variety of ways such as providing essential services to homeless teens, improving the health of families, enhancing workforce development and meeting basic needs for those in the Waco-McLennan County area.

This is the inaugural year for our new Loaned Executive Program! Loaned Executives will participate in team building and training to expand their skills as the next generation of diverse leaders in our community. They will also visit with our Community Partners to see firsthand how United Way of Waco-McLennan County and our funded partners help improve the quality of life for many of our most vulnerable residents. Participants will also assist with presentations at workplaces and deliveries of our Break Room Thank You's.

Loaned Executives can return each year to participate in new roles within the organizational structure of the LE Program. Programming and training will be updated annually to offer new skills and development for participants. As a recurring program, we hope to contribute to developing highly qualified leaders over the years as they earn a greater understanding of the impact they can have when serving their community.

### LOANED EXECUTIVE ORGANIZATIONAL CHART\*

\*This year, United Way board and committee members will lead the inaugural program, but next year, members of the program will begin to fill these leadership roles.



### POSITION OVERVIEW

The Loaned Executive functions as a member of a team, working directly with campaign staff, company leadership and workplace volunteers to manage employee campaign group results. The Loaned Executive works closely with five to eight assigned accounts and has the opportunity to provide campaign presentations and engage in corporate solicitation. In essence, the Loaned Executive drives the campaign's sales force once the campaign commences.

Participants will report to the Loaned Executive Chairs and United Way Professional Staff. LE's time commitment will vary during the UW campaign season from August through January, based on when assigned accounts run their campaign and how engaged those campaigns are. Loaned Executives are highly organized, detail oriented and self-starters with passionate personalities.



## ESSENTIAL RESPONSIBILITIES

- Attend campaign meetings and events as scheduled for essential skills training and professional development
- Attend training program designed to provide:
  - Knowledge of the United Way, its services and its role in the community
  - Skills to organize and conduct campaigns
  - Confidence to successfully accomplish the assignment
- Develop professional relationships with Campaign Coordinators, prepare and motivate coordinators regarding campaign techniques that will enhance overall employee contributions while promoting available campaign tools and proven campaign techniques
- Analyze the results of previous campaigns, with campaign professional staff, for development of a campaign work plan and assist and speak at group meetings, training events and kickoff functions
- Provide detailed and timely documentation of account activities and campaign results (i.e. personnel changes, campaign coordinator name, contact information, etc.)
- Monitor and review campaign progress on a regular basis with appropriate professional staff to track progress, identify problem areas and concerns
- Oversee scheduling and conducting of employee group meetings for assigned accounts; ensure availability of necessary resources (campaign materials, videos, speakers, etc.)
- Submit an evaluation at the conclusion of the campaign

## LEADERSHIP SKILLS AND TRAINING FOR EMPLOYEE DEVELOPMENT

United Way will help train the future leaders of your organization in:

- |                                   |                                   |                     |
|-----------------------------------|-----------------------------------|---------------------|
| ·Project Management               | ·Strategic Planning               | ·Problem Solving    |
| ·Team Leadership                  | ·Interpersonal Communication      | ·Team Building      |
| ·Networking                       | ·Building Community Awareness     | ·Group Facilitation |
| ·Customer Service                 | ·Working with Diverse Populations | ·Public Speaking    |
| ·Diversity, Equity, and Inclusion |                                   | ·Supervising Others |

## BENEFITS TO YOUR COMPANY

- |                            |                                       |
|----------------------------|---------------------------------------|
| • Employee Development     | • Business Advertising                |
| • Networking Opportunities | • Good Corporate Neighbor Recognition |

## MAKING IT HAPPEN

Sponsoring companies “loan” their executives to us for an average of five hours each month for professional development trainings and assistance with our local campaign management. These executives have the opportunity to learn more about the social needs in our community and the organizations who work to elevate the quality of life for families and individuals facing challenges to their health, education and financial stability. In addition to learning valuable skills to assist with their careers, they help lift our community voice to create a place where everyone belongs and has the opportunity to live their best life! There is a program cost of **\$250** to cover meals, apparel, and trainings. 100% of the program cost is used for the Loaned Executive Program.

## JOIN THE MOVEMENT

29% of children under the age of five in the Waco-McLennan County area are living in poverty. We have sought the community voice on the issue of Child Well-being and our community has spoken. Our children and families need an even better Waco-McLennan County and you can join United Way of Waco-McLennan County as it helps everyone live their best life.

We would love for you to be part of the team working to ensure a bright future for McLennan County. At United Way, dollars raised locally stay local to help the needs of our community. Join us for the inaugural year of this great program and be a part of our network of leaders. You can choose to participate with us year after year to grow your skillset and earn leadership positions within the program. We want and expect our Loaned Executive Program to mirror the diversity that exists in our community.

## FAQs

### 1. What is the difference between Loaned Executives and Campaign Coordinators?

The main difference is that Loaned Executives will work with United Way to monitor and assist with multiple workplace campaigns whereas Campaign Coordinators work at individual businesses to run a single campaign. There may be some instances where a Campaign Coordinator participates in the Loaned Executive program, and, in that case, they would run their workplace campaign and also work with United Way to monitor and assist other campaigns as needed. LE's participate in customized professional development trainings and can continue with the program for several years because new skills are added annually, and they can grow into leadership positions.

### 2. What does the program cost cover?

The program cost covers meals, trainings, and apparel for the Loaned Executives. The entirety of the program cost goes to covering those items.

### 3. Can more than one person participate per company?

Absolutely! Space may be limited, but we encourage companies to nominate more than one employee if they have significant interest among their staff and want to expose multiple employees to the "hands-on" learning and networking opportunities that this program will provide.



## 2022 LOANED EXECUTIVE CALENDAR\*

### **AWE-INSPIRING AUGUST 17, 8:30 AM – 1:00 PM**

#### **Loaned Executive Kickoff & Training**

Orientation and Team Building Projects and Activities. United Way Campaign Training and Kickoff.

### **SCHOOL SPIRIT SEPTEMBER 3, 6:00 PM**

#### **Baylor United Way Game**

Recognition of LE inaugural group on the field.

### **SPEAK UP SEPTEMBER 15, 11:30 AM – 2:00 PM**

#### **Check-in and Professional Development**

11:30-12:30 - Organize LE Teams, assign accounts & schedule 1st steps  
12:30-2:00 - Dr. Barbara Baggerly-Hinojosa with Leadership Empowerment Group provides insight on unleashing your potential as a powerful public speaker.

### **OPPORTUNITY OCTOBER 14, 11:30 AM – 2:00 PM**

#### **Site Visits, Check-in, and Development**

11:30-12:30 - Learn how local non-profits are providing opportunities to help residents improve their lives.  
12:30-2:00 - A Waco Native and Baylor Alum, renowned business consultant, Jay Mathis, will share his secrets to building a healthy organization.

### **NO LIMIT NOVEMBER 15, 11:30 AM – 2:00 PM**

#### **Giving Tuesday**

11:30-12:30 - Campaign Reports, UW discussion, team building  
12:30-2:00 - We've discussed speaking to large groups, and now, Dr. Michael Godfrey offers a deep dive into interpersonal communication.

### **DREAM BIG DECEMBER 8, 11:30 AM – 2:00 PM**

#### **LE Team Meeting**

11:30-12:30 - Spirit of Giving Celebration, team check-ins.  
12:30-2:00 - Elaine Botello, founder of Victory Employer Services, guides us through setting expectations and establishing consistency in new management roles.

### **JUMP ON IT JANUARY 13, 11:30 AM – 2:00 PM**

#### **LE Team Meeting & Final Push**

11:30-12:30 - Campaign Reports, UW discussion, team building  
12:30-2:00 - Professional Development TBD.

### **FINISH LINE FEBRUARY 16, 11:30 AM – 2:00 PM**

#### **Celebration and Recognitions**

Bring your supervisor to our end of campaign celebration to showcase the good work that you have done.

### **MARCH, APRIL, MAY**

#### **Community Investment Council (CIC) Participation (Optional but encouraged)**

CICs allow you to learn more about how the dollars you raised impact the community. They make recommendations on which programs should receive grants funded through our workplace campaigns. (If interested in participation please indicate at the start of the program)

### **JUNE**

#### **2023 Campaign Planning**

### **JULY**

#### **Break**

**\*Dates, times, and topics are subject to change**

**Time requirements will vary based on assignments.**

August through January, approximately 3-6 hours per month on average  
February through May, approximately 2-4 hours per month on average

## CONTACT INFORMATION

Please reach out to Wendy Ellis, CEO at [wendyellis@unitedwaywaco.org](mailto:wendyellis@unitedwaywaco.org) or to Kent Mattern, Resource Development Intern at [intern@unitedwaywaco.org](mailto:intern@unitedwaywaco.org) with any questions. Our office can also be reached at (254) 752-2753.



**LIVE UNITED**



United Way of  
Waco-McLennan County

# 2022 Loaned Executive Program

## APPLICANT INFORMATION

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Job Title: \_\_\_\_\_

Business E-mail: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Business Address: \_\_\_\_\_

Home Address: \_\_\_\_\_ Mobile Number: \_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

**Shirt size:**    ☐Small    ☐Medium    ☐Large    ☐XL    ☐2XL    ☐3XL    ☐4 XL    ☐5XL

**Dietary/Food Restrictions:** \_\_\_\_\_

## LOANED EXECUTIVE COMMITMENT

As a volunteer and representative of my company, I agree to fulfill my duties and responsibilities to the best of my ability with the support of my company, other United Way of Waco-McLennan County volunteers and staff. I have reviewed the information and time commitment outlined in the 2022 Loaned Executive Booklet with my supervisor (if applicable). I understand the expectations of those who participate in the Loaned Executive program and acknowledge that absences from more than two (2) of the mandatory meetings will result in my withdrawal from the program. \_\_\_\_\_ (*initial*)

**Please provide one professional reference with submission of your application.**

**Loaned Executive Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

What skills or knowledge do you hope to gain from being a Loaned Executive?

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Why do you want to be selected as a Loaned Executive?

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United Way of  
Waco-McLennan County

# 2022 Loaned Executive Program

Please review the information and time commitment outlined in the Loaned Executive Booklet with your supervisor and have them sign below to ensure all parties involved understand the expectations of those who participate in the Loaned Executive program.

## COMPANY COMMITMENT

As a sponsoring company, you agree to support your employee as he or she fulfills their duties as a Loaned Executive. United Way of Waco-McLennan County understands the importance of your employee's time and the impact they have in the success of your business. For that reason, time away from your company for meetings and/or events is carefully considered throughout the program.

Company Name: \_\_\_\_\_

Supervisor Printed Name *(if applicable)* \_\_\_\_\_

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

☐ I have reviewed the 2022 Loaned Executive Calendar printed in the Loaned Executive Booklet and agree to support my company's candidate in the program.

**Send applications to** [intern@UnitedWayWaco.org](mailto:intern@UnitedWayWaco.org); **or by mail:** UWWMC, P.O. Box 7634, Waco, TX 76714

**Application Deadline - August 10, 2022**

## PAYMENT INFORMATION\*

(full payment of \$250 due no later than August 17, 2022)

**CHECK ENCLOSED** (payable to United Way of Waco-McLennan County)

**CREDIT CARD**

**SEND INVOICE**

**CREDIT CARD NUMBER:** \_\_\_\_\_ **EXP DATE:** \_\_\_\_/\_\_\_\_

**CIRCLE ONE:**      VISA      MASTERCARD      AMERICAN EXPRESS      DISCOVER

**NAME ON CARD:** \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_

\*Limited scholarships may be provided. Please contact [intern@unitedwaywaco.org](mailto:intern@unitedwaywaco.org) with any questions