**2023 United Way Campaign**

**Workplace CEO Meetings**

**Annotated Agenda**

**Greeting/Introductions Volunteer Caller**

* Volunteer Caller to offer initial greeting and set purpose of meeting
* Open to general introductions for all those on the call

**Thank for past support & ask about current status Volunteer Caller (5 minutes)**

* Offer personal thanks for the company’s previous involvement with the campaign
* Recognize employees serving as United Way volunteers *(information to be provided by assigned UWCI staff member)*
* Share personal story/reasoning for supporting/being involved with UWCI
* Offer opportunity for open discussion on CEO’s preferred topics (”return to work” on operations, workforce, economic outlook, campaign expectations)

**Inside of Folder:**

**Review/Discuss United Way’s Value Proposition Volunteer Caller (5 minutes)**

* Venn Diagram: UWCI uniquely positioned at the center of our community, bringing together individuals, businesses, nonprofits, and government agencies.
	+ - Mobilize community members and business leaders to advance community issues
		- Invest in more than 190 programs in the 5 Elements of a Thriving Community
		- Build public-private partnerships to drive policy change
* When you partner with United Way, you get:
	+ - Impact – Donated dollars directly improve the lives of our central Iowa friends and neighbors who are struggling.
		- Meaningful Engagement – United Way as a partner in meeting employee engagement, social responsibility, and philanthropic goals.
		- Transparency – clear, data-driven results.
		- Services for Employees – You help spread awareness of valuable services available to your employees and their families, like our 2-1-1 helpline, Volunteer Income Tax Assistance (VITA), and other initiatives.

\*\*\*Good opportunity to share the benefits you’ve seen from your company running a campaign\*\*\*

**Back of Folder:**

* Before we share data on the impact of your investments, we want to share some data that shows how a partnership with United Way benefits your company/organization and your employees:
	+ - 88% of company leaders believe effective engagement programs help attract and retain employees.
		- Employees are more loyal, motivated, and productive when they work for companies with a strong purpose.
		- Companies increasingly say they see workplace volunteerism and giving programs as a valuable way to strengthen their relationships with their employees and local communities.
			* 68% of employees say it is imperative or very important their employers provide them with paid time off to volunteer.

**Review 2023 Community Impact Report UWCI Staff (5 minutes)**

* *UWCI Staff member will tailor comments based on any known alignment or interest areas of the company.*

**Review Campaign Profile & Goals/Strategies Volunteer Caller (10 minutes)**

* Refer to and discuss company’s history with United Way.
* Thank company again for past support.
* Highlight any or all best practices most suited for the company:
	+ - Host an active, multifaceted United Way Campaign that promotes community impact, volunteer events, affinity group membership, and fun, engaging activities that include all employees.
		- Senior Leader and Executive Leadership Team strongly support employee engagement and are present at events.
		- Host a Leadership Giving event for current and prospective donors.
		- Provide a corporate gift/match to demonstrate company's commitment to United Way.
		- Engage Employee Campaign Chair(s), cross functional Campaign planning committee, and internal Champions.
* Go over growth strategies and proposed goals for 2023 campaign.
* Ask for reaction to campaign trends, best practices, and suggested growth strategies.

**Questions or follow-up All (5 minutes)**

* Opportunity for questions or further discussion on a specific topic.
* Confirm any follow-up action items that were discussed.

**Thank You/Adjourn All**