

CEO Visit Agenda



Schedule:

1. Call to schedule a CEO visit. (If CEO can not meet suggest meeting with another manager or their assistant)
2. Call United Way (UWEC) and let them know the date of the CEO visit. (They will schedule a staff member to go with you)

Prepare:

1. Review employee and company giving history and notes.
2. Meet with United Way’s Executive Director or Resource Development Director to discuss strategy.
3. Review corporate gift history and prepare the ask.
4. Determine the top 3 goals for the campaign.
5. Check to see if Campaign Coordinator has been established. Is he/she signed up for training?
6. Ask UWEC to prepare your CEO packet. This will include a page for your notes.

Time Allotment	Subject	Who
3 minutes	Introductions, brief thank you, set agenda, confirm length of meeting Agenda Items to share with CEO: <ul style="list-style-type: none"> • Quick review of United Way’s impact on the community in the past year (volunteer will share their experience here) • Review previous year’s campaign results • Goals for the upcoming campaign (please see attached sheet) 	Volunteer/ Board
5 minutes	Ask CEO about developments that have happened in the last year or impending issues that might affect the campaign.	Volunteer/ Board
5 minutes	Thank CEO for the organization’s partnership with UWEC. Ask CEO for Loaned Executive and hand LE Brochure to CEO. Explain what is being accomplished with donor gifts. Point out UWEC’s Annual Report. Highlight key results. Hand CEO Annual Report with tabbed sheets that mentions that company.	Volunteer/ Board
5 minutes	Share impact work from the volunteer perspective. Discuss Employee and Company issues.	Volunteer/ Board
10 minutes	Campaign Review: <ul style="list-style-type: none"> • Now I would like to discuss last year’s campaign. Before we get into specifics, I’d like to know, overall, how you think the campaign went. From your perspective, what worked and what would you like to improve? • Let me share your <u>3 year giving history</u>. (Reference the Campaign Report in the packet. Review the data. Point out the potential. Hand them the potential/goal sheet) 	Staff

10 minutes	<p>Campaign Discussion:</p> <ul style="list-style-type: none"> • What would you like to accomplish this year? • We have a road map for a successful campaign. (Show the 8 keys to success and comparison chart) • In <u>reviewing your campaign</u>, I have some ideas to share with you on how to take it to the next level. (Present top 3 suggestions) What do you think? • Can you tell me who your <u>Campaign Coordinator</u> will be? We have scheduled training for campaign coordinators. (Point out the schedule in their packet) (Hand out campaign coordinator sheet) Would your coordinator be able to attend one of the trainings? I'll follow up with your campaign coordinator to confirm the date. • And finally, I'd like to ask you to renew your <u>corporate gift</u>. There is a corporate gift pledge form in your packet (hand them corporate pledge card). Have you determined your gift for the year? • Here is what you can expect from us. <ul style="list-style-type: none"> ❖ We will meet with your coordinator to build a plan based on what we've decided today. ❖ UWEC will assign a Loaned Executive or staff member to work the plan. We'll be on site for all your major events. ❖ Once the results are in, We'll be back in touch to let you know how things went and get your input. 	Staff/ Volunteer/ Board
38 total minutes	Thank the CEO for his/her time.	

Follow up:

1. Send thank you note to CEO, summarize agreed-upon strategies.
2. Schedule meeting with the company coordinator and training attendance date.
3. Fax/email CEO visit notes to Jessica Brown, 256-546-4360 or jessmbrown@bellsouth.net

THANK YOU!