Dear Campaign Cabinet Volunteers,

First, I want to say thank you! Thank you for giving of your time and energy to help people in need in our communities. You, a dynamic group of 63 volunteers, each play a critical role in reaching our goal of raising $5.8 million for United Way of Cass-Clay. These dollars support our BOLD Community Goals, and in turn help thousands of individuals and families across Cass and Clay Counties.

On behalf of United Way of Cass-Clay, thank you for being a part of the 2020 Campaign Cabinet!

Sincerely,
Chris Barta
Marvin
Volunteer Campaign Chair

United Way of Cass-Clay works to understand and solve our biggest challenges.

By uniting partners, volunteers and donors we create a better tomorrow for everyone.
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# UNITED WAY BOLD GOALS

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<td>Prepare Children To Succeed</td>
<td>Help People Be Independent</td>
<td>Lift People Out Of Poverty</td>
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What is the Campaign Cabinet?
The Campaign Cabinet is made up of dedicated, enthusiastic volunteers who believe in United Way of Cass-Clay’s work to unite partners, volunteers and donors to create a better tomorrow for all of us.

What do Campaign Cabinet Volunteers do?
- Connect with the leaders from businesses and organizations from across our community, and utilize their talents and connections to encourage, inspire, motivate, and equip individuals and groups to give, volunteer and advocate for United Way
- Reach out to leaders, investors, Employee Campaign Coordinators (ECC’s) and campaign volunteers to foster meaningful relationships that fuel United Way’s mission
- Have the opportunity to expand their network through connecting with volunteers and leaders from many different industries
- Develop new relationships with business leaders, companies and organizations in the community
- Directly impact the success of United Way, and its ability to help individuals and families across our Cass-Clay community
- Make a difference in our community by ensuring United Way can work to understand and solve our community’s biggest challenges

What is Involved?
Campaign Cabinet Volunteers:
- Coordinate and attend CEO Connects and act as campaign liaison to ECC volunteers with your assigned companies
- Increase the number of companies that engage with United Way and participate in United Way campaigns through your influence and network
- Drop off and pick up campaign packets for your companies
- Educate, engage, and share your enthusiasm for United Way with your companies as well as other individuals and leaders
- Provide monthly updates to your Campaign Cabinet Coach
- Stay in contact with assigned companies until their campaigns are complete
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<td><strong>Amanda Even</strong></td>
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<td><strong>Shannon David Misialek</strong></td>
<td><strong>Betsy Christianson</strong></td>
<td><strong>Jen Ranz</strong></td>
<td><strong>Alerus</strong></td>
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2020 CAMPAIGN CABINET VOLUNTEER DIRECTORY
2020 UNITED WAY CAMPAIGN CABINET VOLUNTEER TIMELINE

**VOLUNTEER COMMITMENT INDICATED WITH BLUE BOXES**

- **MAY 19** - Campaign Cabinet Launch
- **JUNE** - Campaign Cabinet Meeting
- **JULY** - Campaign Cabinet Meeting
- **AUG** - Campaign Cabinet Meeting
- **SEPT** - Campaign Kick Off Event

- **MAY 19 - AUG 1**: CEO Connects
- **JULY 16-AUG 3**: Initial ECC Check Ins
- **AUG** - Pick Up Packets
- **AUG 11-AUG 14**: Deliver Packets to Your Businesses
- **SEPT - NOV**: ECC Check Ins

**ECC Training August 4**
CEO Connect Framework

SECURING THE MEETING

BEFORE THE CALL

- Review the company’s Campaign Profile History Report to determine level of engagement with United Way and take note of the company contact information.
- Review the company’s website to gain basic background information about who they are and what they do.
- Review campaign information provided by United Way. Contact the United Way team if you would like more information or details on the company’s level of engagement.

BEGIN WITH A PHONE CALL, AND FOLLOW UP WITH EMAIL IF NO RESPONSE

- Introduce yourself and explain your role as a United Way Volunteer.
- Thank them for their past support of United Way.
- Request an in-person or virtual meeting:
  - Purpose: To discuss United Way investment strategy and past and upcoming company involvement.
  - Attendees: CEO, yourself, a United Way team member. They can invite the Employee Campaign Coordinator (ECC) if they would like.
  - Length of meeting: 15-20 minutes.
  - Format: Encourage an in-person connect. Offer a virtual meeting if they are not comfortable meeting in-person.
  - Confirm before ending call: Date, time and location details of meeting.

**TIP:** If CEO defers meeting to the Employee Campaign Coordinator (ECC), encourage the CEO to attend the meeting, and highlight the importance of CEO engagement. If the CEO would like to invite the Employee Campaign Coordinator (ECC) to this meeting, great!

AFTER THE CALL

- Email Valerie Fechner (vfechner@unitedwaycassclay.org) with the following information:
  - Confirmation that the meeting has been scheduled.
  - Date, time, and location details of the meeting.
  - Format of meeting: in person or virtual.
  - Any contact information updates not currently listed on Campaign Profile History Report.
We want you to feel confident while talking to CEO’s. Please use the guidelines above and the script below to help you be successful.

**Script for a Phone Call:**
Hello Mr/Ms <CEO Name>, my name is <first and last name> and I am a volunteer on the United Way of Cass-Clay’s Campaign Cabinet.

My role as a volunteer is to help raise support in the community for United Way and support your campaign this year. On behalf of United Way and the families they serve, thank you. Thank you for your continued support!

I’d like to set up a meeting with you and a United Way representative to discuss how we can best support you this year. Is there a time in the next two weeks we could meet in person for 15-30 minutes? Or, we can meet virtually if you’re more comfortable with that.

Great, thank you! We’ll plan to meet on <confirm details (format, date, time, location, address, etc.)>

Thank you for your time and support!

**Content for an Email:**
Dear Mr/Ms. <CEO name>,

My name is <name> from <company name> and I serve as a volunteer with United Way. I left you a voicemail message <today, yesterday, etc.> and wanted to follow up via email as well.

Thank you for your company’s support of United Way through hosting a United Way campaign last year.

As part of my volunteer role, I get to support your campaign. <Insert a couple sentences about how your work relates to their company, or any connection you have to their company>

I’d like to set up a meeting with you and a United Way representative to discuss how we can best support you this year. Is there a time in the next two weeks we could meet in person for 15-30 minutes? Or, we can meet virtually if you’re more comfortable with that.

I look forward to hearing from you,
<Your Signature>
CEO Connect Framework

PHONE CALL

BEFORE THE CALL

☐ Review the company’s Campaign Profile History Report to determine level of engagement with United Way and take note of the company contact information

☐ Review the company’s website to gain basic background information about who they are and what they do

☐ Review campaign information provided by United Way. Contact the United Way team if you would like more information or details on the company’s level of engagement

MAKING THE CALL

☐ Begin with a phone call, and follow up with email if no response
  • Introduce yourself and explain your role as a United Way Volunteer
  • Thank them for their past support of United Way
  • Ask them why they care about United Way and our community
  • Confirm who will serve as the Employee Campaign Coordinator (ECC)
  • Answer any questions and thank them for their time

TIPS:

If CEO tells you they don’t have time to visit, ask if you can set-up a time to call them back. The phone connect should take 10 minutes.

If CEO tells you they don’t have time to visit and are not interested in scheduling a time for a call, please confirm who will serve as the Employee Campaign Coordinator (ECC) for this year and inform them you’ll be reaching out to them.

If they defer the call to the Employee Campaign Coordinator (ECC), highlight the importance of CEO engagement in campaigns and that you’d really appreciate 10 minutes of their team.

IMMEDIATELY AFTER THE CALL

☐ Email Valerie Fechner (vfechner@unitedwaycassclay.org) with the following information:
  • An update on the phone call: Did you visit with the CEO, schedule a time to call back or did they decline a visit
  • Any contact information updates not currently listed on Campaign Profile History Report
We want you to feel confident while talking to CEO’s. Please use the guidelines above and the script below to help you be successful.

**Script for a Phone Call:**
Hello Mr/Ms <CEO Name>, my name is <first and last name> and I am a volunteer on the United Way of Cass-Clay’s Campaign Cabinet.

My role as a volunteer is to help raise support in the community for United Way and support your campaign this year. On behalf of United Way and the families they serve, thank you. Thank you for your continued support!

<CEO Name>, I’d love to hear about why you’re passionate about supporting United Way each year.

<Comment on their response and share how you personally connect to United Way.>

Thank you for taking the time to visit with me today, <CEO Name>. I will be working with your Employee Campaign Coordinator this summer to ensure your team feels connected and engaged in United Way. Can you confirm that your Employee Campaign Coordinator for this year will be <ECC Name>?

Wonderful, thank you. Do you have any questions for me or for United Way? I’d be happy to connect you directly to them if you have any specific questions about their work.

Thank you for your time and support!
THE MEETING

PRE-MEETING
- Come prepared. Review Campaign Profile History Report prior to meeting so that you are familiar with past campaign history and can provide thoughtful information and feedback to the CEO

THANK
- Thank CEO for taking the time to meet
- Introduce yourself by sharing your name and company
- Share about your role as a Campaign Cabinet Volunteer and why you chose to volunteer
- Introduce United Way team member

EDUCATE & INSPIRE
- Share a short story or comment that demonstrates how United Way's work and impact is relevant to you as a volunteer
- Provide the transition for United Way team member to discuss the work of United Way*
- Highlight aspects of United Way that resonate personally with you

ENGAGE
- Encourage CEO to share why United Way is important to them personally, and why United Way is important to their company*
- Review Campaign Profile History Report with CEO*
- Explore opportunities within their campaign while also pointing out positive aspects (United Way team member can help lead this)
- Confirm your commitment to serving as point person for next six months*
- Inform the CEO that you will follow up and contact the ECC in Aug.
- Encourage CEO to work with a United Way team member to establish campaign goals

THANK
- Thank the CEO for their engagement and support of United Way
- Request their attendance at future United Way events and company campaign events
- Encourage CEO to ask any questions and address all questions
- Determine any follow up items and future communication
- Close meeting with a final thank you

Items marked with an * indicate that these are crucial components of a CEO Connect – thank you for your help in focusing on these items. While all CEO Connects will be different, our Campaign Cabinet Volunteers are our champions when it comes to making sure important topics are covered during these CEO Connects.
July 15-August 3 — Initial ECC Check-In
☐ Introduce yourself and your role as a United Way Volunteer
  • As a volunteer, you act as a liaison and connector to United Way and support ECC’s with resources and information
  • Ensure that the ECC has what they need to make their company’s campaign a success
  • Assure them that you will act as a guide and mentor and that you will work together to make their company’s campaign the best it can be

☐ Explain Campaign Timeline
  • Invite ECC to attend ECC training on August 4 and the Kick Off Event in September
  • View United Way Event Calendar on our website
  • If an ECC cannot attend training, let them know you will drop off their packet
  • Explain you will check-in with them at least three times prior to November 25 to ensure they have everything they need to be successful

☐ Confirm Campaign Dates and Goals
  • Discuss plans and ideas and help brainstorm if necessary
  • Set participation and/or dollar amount goals
  • View Campaign Ideas on our website
  • Encourage ECC to invite a United Way team member and an Impact Speaker to speak at their kick off meeting – impact speakers can be scheduled by contacting Valerie Fechner at United Way

☐ Thank them for serving as an ECC and reiterate their crucial role as a volunteer and advocate for United Way!

September 1-October 31 — Midpoint ECC Check-In
☐ Before their campaign starts:
  • Confirm kick off meeting date(s) and campaign closing date and ensure they have all resources and materials needed
  • View ECC Handbook on our website

☐ During their campaign:
  • Confirm they are still on track to end their campaign at the planned date (or by November 25) and reach out to United Way if additional support is needed

November 1-25 — Final ECC Check-In
☐ Confirm that they plan to finalize their campaign by November 25
☐ Schedule a date to pick up their packet, or encourage them to drop it off at the United Way office located at 219 7th Street South in Fargo

December 1-31 — Wrap Up and Thank You
☐ If your companies have not yet finished their campaigns by November 25, follow up and encourage the ECC to wrap up the campaign as soon as possible
☐ Thank them for their time coordinating their campaign and celebrate their accomplishments
YOUR RESOURCE DEVELOPMENT TEAM

Christie Lewandoski  
Resource Development Director  
clewandoski@unitedwaycassclay.org

Valerie Fechner  
Resource Development Manager  
vfechner@unitedwaycassclay.org

Marisa Pacella  
Resource Development Manager  
mpacella@unitedwaycassclay.org

LET'S GET SOCIAL

Stay tuned for an announcement about a new and fun platform to communicate, share ideas and connect with other Campaign Cabinet Volunteers and ECC's – coming soon!