



United Way
of Greater St. Louis



United Way Executive Director

You are responsible for the collection, billing, and recognition of charitable giving to United Way. Be certain that you are familiar with your responsibilities and are courteous to businesses and citizens.

DURING BUSINESS START-UP, COMPLETE THE FOLLOWING

1. Remain in your business until the Opening Town Meeting to help with business start-up. Your business needs everyone's help before it opens.
2. Complete your **Opening Town Meeting Speech**. Read the speech to the volunteer in your business to make sure you know how to pronounce all words. You will give this speech at the opening town meeting.
3. Complete a **Certificate of Recognition** for each business.
 - a. Write the name of the business on the first line of the certificate.
 - b. Sign the certificate. (Cursive is preferred.)
 - c. Place a checkmark for each completed certificate on the **United Way Executive Director Checklist**.
4. Prepare a **United Way Invoice** for each business. Write the name of the business on the line at the top. Place a checkmark under Invoice Prepared on your checklist.
5. Show the **Professional Offices Pledge Card** to all employees in your office and ask for their support of United Way. Employees should check the amount they would like to pledge and write their initial to confirm the donation. Enter your pledge first on the tablet using the instructions on the "Recording Pledging" laminated sheet found in the front of your binder.

(Go to the next page.)



United Way
of Greater St. Louis



DURING THE FIRST SET OF BREAKS (AFTER THE NATIONAL ANTHEM), COMPLETE THE FOLLOWING

1. After the Opening Town Meeting, you will begin to visit businesses. Go to each business and do the following. **Be sure to take your invoices and tablet with you.**
 - a. Ask for the CEO or another employee if the CEO is not available.
 - b. Read the laminated **Introduction to United Way** sheet found in the front of your binder to explain why you are collecting pledges.
 - c. Ask for the **Pledge Card**, show the CEO (or other employee) how to enter the pledges online on your tablet, and have the CEO enter them. If no one in the business has time to enter the pledges, you make take the card back to the Professional Offices and enter them later.
 - d. Collect the **Philanthropy Pledge** sheet for the business. Remind the CEO that the business employees signed it, and it is located in the BizPrep envelope.
 - e. Give the appropriate **United Way Invoice** to the CEO or CFO.
2. File the **Philanthropy Pledge** sheets in the folder on your desk when you return.

DURING THE SECOND SET OF BREAKS, COMPLETE THE FOLLOWING

1. Follow the instructions on the **Recording Pledges** sheet to determine total giving.
2. Return to businesses and deliver the **Certificates of Recognition**.
3. Check with your CFO to see if all payments have arrived in the mail. There are three checks that should arrive from each business: one for accounting/legal fees, one for rent/insurance, and one for charitable giving.
4. Go to businesses to collect any payments that have not arrived in the mail.
5. Prepare your **Closing Town Meeting Speech** to report how much money was collected from business and personal donations.
6. Return your tablet to a JA staff member.
7. Assist with clean-up at the end of the day. Put all used paper in the blue recycle bin.

Congratulations on a job well done!