

WARREN COUNTY UNITED WAY
Major Firms Account Manager
Job Description



The United Way raises 80% of its total in-county campaign contributions from the corporate and employee gifts of 190 plus Major Firms. The Major Firm accounts raise from \$500 to \$120,000 each, and all of them have a history of support for the United Way. The volunteer assigned to monitor a specified number of these accounts is called an **ACCOUNT MANAGER**.

JOB DESCRIPTION:

Work directly with the ECC (*Employee Campaign Coordinator*) to assist and direct them with the employee fundraising activities. As an Account Manager, you are the liaison between the Area Chair and the ECC. Account Managers deal with the CEO or his or her representative in order to obtain a corporate gift. You will also monitor the status of the employee workplace campaign and report the results and completion date, as well as any issues to the Area Chair.

RESPONSIBILITIES INCLUDE:

1. Attend United Way Account Manager training. (*choose 1*)
June 8, 2011 – 9:00 am to 10:15 am (United Way office)
June 14, 2011 – 9:00 am to 10:15 am (United Way office)
June 16, 2011 – 9:00 am to 10:15 am (United Way office)
2. Meet/or make contact with CEOs or the employee assigned to handle the workplace campaign, to ensure their participation in the annual fundraising campaign.
 - Present the United Way Case Statement and review past corporate/employee campaign performance.
 - Ask the CEO for a Corporate Gift.
 - Encourage the CEO to appoint an Employee Campaign Coordinator (ECC).
3. Monitor the employee campaign of assigned accounts by working closely with and maintaining communication with Employee Campaign Coordinator (ECC) and assisting in areas that need special attention.
 - Assist the ECC in organizing their employee campaign – setting goals, planning special events, offer suggestions and ideas, etc.
 - Call ECC for weekly reports on campaign progress and report account status to Area Chair.
4. If possible, attend campaign related events such as Campaign Kick-off and Campaign Finale/Annual Meeting, special fundraisers etc.
5. Do the necessary follow-up and administrative work for assigned accounts.
 - Complete campaign notes for assigned accounts and maintain the United Way Account File Folder (you will receive at training) with any emails, letters, suggestions for future campaigns, contact information etc.
 - Thank and recognize your Employee Coordinator. Let the volunteers know that they are appreciated. Thank them for their work on the employee campaign at their workplace.
 - Return the United Way Account File folder(s) to the United Way office when your assigned account has completed their campaign.

TIME COMMITMENT: Time may vary based on your knowledge of United Way, your assigned accounts, and other issues that may surface. The following are estimated time commitments of a Major Firms Account Manager:

- June- August: 5-10 hours
- September- November: 6-10 hours

OUR COMMITMENT TO YOU: To provide you with the training, tools and resources needed to accomplish your tasks. This includes materials and information related to the Warren County United Way, your volunteer position, and your assigned accounts. The time and experience of the United Way staff will always be available to help you be the best volunteer that you can be.

DATES TO KNOW FOR 2011 CAMPAIGN

June	
Account Manager Training (attend 1 Session)	June 8, 14, or 16
Account Managers Begin Early Calls	June 20
July	
Account Manager Early Calls Completed	July 13
Complete and turn in the Early Call Form(s)	July 15
Employee Campaign Coordinator Training Dates	August 3, 9, or 11
August	
Account Managers - Deliver materials to your accounts who have not attend ECC training	August 15-19
Campaign Kickoff Luncheon (noon) at Heatherwoode Golf Club in Springboro	August 31
September	
Assist ECC as need - report status to your Area Chair or United Way Campaign Team	Throughout September
Make Contact with your ECC's and report their Campaign Status to your Area Chair or United Way office	September 20
October	
Midpoint of Campaign	October 3
Make Contact with your ECC's and report their Campaign Status to your Area Chair or United Way office-advise United Way or Chair of any concerns or issues	October 5
One week left until campaign ends	October 20
Make Contact with Your ECC's-Report a final campaign number or their best projection	October 28
November	
Follow up with your open accounts to make sure that a Campaign Report Envelope is completed and all supporting documentation is turned into the Warren County United Way office.	by November 4
Return your Account Files (received at training) to the United Way office	by November 15, 2011
December	
Attend or participate in the Best Practices Survey/Meeting	December 2011
2012	
Campaign Finale & Annual Meeting	February or March 2012