2026-27 LOANED EXECUTIVE PROGRAM

UNITED WAY
Waco-McLennan
County

PROGRAM OVERVIEW

For almost 70 years, United Way Worldwide has utilized loaned executives as a way to further the mission of taking care of local communities. United Way of Waco-McLennan County has reintroduced the Loaned Executive (LE) program to our community. This program has been a large part of United Way's success nationally as it trains participants in all things United Way. It develops professional skills to help participants' organizations, the community-at-large and their careers. This program also offers excellent hands-on experience to understand local needs and how we can **each use our voice** to create a community where **everyone belongs.**

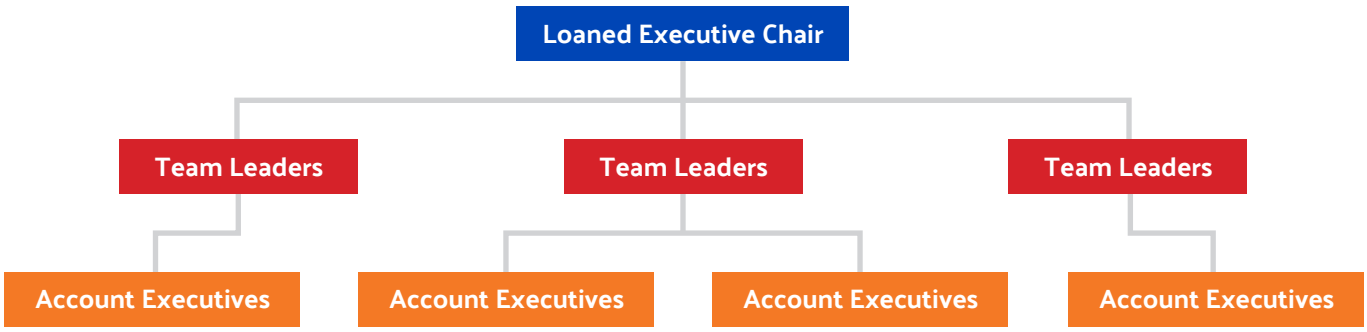
Each year corporations and small businesses alike "loan" employees to United Way on a part-time basis (on average no more than five hours per month) to act as an army of ambassadors to share what it means to be united and to provide support for our workplace campaigns! Our workplace campaigns raise funds to help our partners meet community needs in a variety of ways such as providing essential services to homeless teens, improving the health of families, enhancing workforce development and meeting basic needs for those in the Waco-McLennan County area.

Loaned Executives will participate in team building and training to expand their skills as the next generation of diverse leaders in our community. They will also visit with our Community Partners to see firsthand how United Way of Waco-McLennan County and our funded partners help improve the quality of life for many of our most vulnerable residents. Participants will also assist with presentations at workplaces and special deliveries to help grow the network.

Loaned Executives can return each year to participate in new roles within the organizational structure of the LE Program. Programming and training will be updated annually to offer new skills and development for participants. As a recurring program, we hope to contribute to developing highly qualified leaders over the years as they earn a greater understanding of the impact they can have when serving their community.

United Way encourages participants to consider serving a two-year term as a Loaned Executive which allows for building deeper relationships, seeing initiatives through from launch to measurable impact and making a more meaningful investment in the long-term success of United Way's work in our community.

LOANED EXECUTIVE ORGANIZATIONAL CHART



POSITION OVERVIEW

The Loaned Executive functions as a member of a team, working directly with campaign staff, company leadership and workplace volunteers to manage employee campaign group results. The Loaned Executive works closely with five to eight assigned accounts and has the opportunity to provide campaign presentations and engage in corporate solicitation. In essence, the Loaned Executive drives the campaign's sales force once the campaign commences.

Participants will report to the Loaned Executive Chairs and United Way Professional Staff. LEs' time commitment will vary during the commitment period from July through February, based on when assigned accounts run their campaign and how engaged those campaigns are. Loaned Executives are high performers, detail-oriented and self-starters with passionate personalities.

LOANED EXECUTIVE CHAIR

The **Loaned Executive Chair** acts as the main liaison between the LE teams and United Way Staff*. Throughout the program, the LE Chair will meet monthly with the Team Leaders to monitor communication to businesses and help with any issues that the teams may encounter. The Chair will also meet with Team Leaders and United Way Staff at the beginning and end of the program to go over desired trainings, agendas, and changes to the program. We want to be sure to engage the LEs more throughout the program and ensure we have a constant stream of feedback. The Chair will help with facilitating this.

*Individual LEs are still welcome to reach out to United Way Staff with any questions, but the Chair will provide a regular progress report of all teams

TEAM LEADERS

Team Leaders will lead groups of 3-5 LEs for the duration of the program year. They will gather monthly progress reports from their teams to share with the Chair during short monthly meetings. They are tasked with helping to facilitate meetings with companies and assist with communication between LEs and United Way Staff. Depending on the number of companies and number of LEs, Team Leaders may be assigned fewer companies so that they have more time to assist the LEs. Team Leaders facilitate things like group chats, meetings with a buddy, etc., and assist with time management during the 30-minute block at the beginning of each monthly LE meeting. Throughout the duration of the program, Team Leaders will submit monthly reports directly to United Way Staff. The report framework will be provided by UW staff.

ACCOUNT EXECUTIVES

Account Executives include all LEs, new and returning, who are not pursuing a leadership role. New LEs begin the program as an Account Executive with the ability to move up as they stay in the program. Account Executives will become knowledgeable on all things UW and workplace campaigns. They will also heavily focus on the maintenance of current campaigns and new recruitment within the community to help boost fundraising ability.

ESSENTIAL RESPONSIBILITIES

- Attend campaign meetings
- Attend training programs designed to provide:
  - Knowledge of United Way, its services and its role in the community
  - Skills to organize and conduct campaigns
  - Confidence to successfully accomplish the assignment
- Develop professional relationships with Campaign Coordinators, prepare and motivate coordinators regarding campaign techniques that will enhance overall employee contributions while promoting available campaign tools and proven campaign techniques
- Analyze the results of previous campaigns with campaign professional staff for development of a campaign work plan and assist and speak at group meetings, training events and kickoff functions
- Provide detailed and timely documentation of account activities and campaign results (i.e. personnel changes, campaign coordinator name, contact information, etc.)
- Monitor and review campaign progress on a regular basis with appropriate professional staff to track progress, identify problem areas and concerns
- Oversee scheduling and conducting of employee group meetings for assigned accounts; ensure availability of necessary resources (campaign materials, videos, speakers, etc.)
- Submit an evaluation at the conclusion of the campaign

LEADERSHIP SKILLS AND TRAINING FOR EMPLOYEE DEVELOPMENT

United Way will help train the future leaders of your organization in:

- **Project Management**
- **Team Leadership**
- **Networking**
- **Customer Service**
- **Strategic Planning**
- **Interpersonal Communication**
- **Building Community Awareness**
- **Working with Diverse Populations**
- **Problem Solving**
- **Team Building**
- **Group Facilitation**
- **Public Speaking**
- **Supervising Others**

As a Loaned Executive you will have a say in the types of programming that take place in your cohort.

MAKING IT HAPPEN

Sponsoring companies "loan" their executives to us for an average of five hours each month for professional development trainings and assistance with our local campaign management. These executives have the opportunity to learn more about the social needs in our community and the organizations who work to elevate the quality of life for families and individuals facing challenges to their health, education and financial stability. In addition to learning valuable skills to assist with their careers, they help lift our community voice to create a place where everyone belongs and has the opportunity to live their best life! For new members, there is a program cost of **$250** to cover meals, apparel, and trainings. Returning members pay **$150** to cover meals and training expenses. 100% of the program cost is used for the Loaned Executive Program.

BENEFITS TO YOUR COMPANY

- **Leadership Training**
- **Employee Development**
- **Networking Opportunities**
- **Business Advertising**
- **Good Corporate Neighbor Recognition**

JOIN THE MOVEMENT

29% of children under the age of five in the Waco-McLennan County area are living in poverty. We have sought the community's voice on the issue of Child Well-being and our community has spoken. Our children and families need an even better Waco-McLennan County and you can join United Way of Waco-McLennan County as it helps everyone live their best life.

We would love for you to be part of the team working to ensure a bright future for McLennan County. At United Way, dollars raised locally stay local to help the needs of our community. Join us for another year of this great program and be a part of our network of leaders. You can choose to participate with us year after year to grow your skillset and earn leadership positions within the program. We want and expect our Loaned Executive Program to mirror the diversity that exists in our community.

FAQS

1. What is the difference between Loaned Executives and Campaign Coordinators?

The main difference is that Loaned Executives will work with United Way to monitor and assist with multiple workplace campaigns whereas Campaign Coordinators work at individual businesses to run a single campaign. There may be some instances where a Campaign Coordinator participates in the Loaned Executive program, and, in that case, they would run their workplace campaign and also work with United Way to monitor and assist other campaigns as needed. LEs participate in customized professional development trainings and can continue with the program for several years because new skills are added annually, and they can grow into leadership positions.

2. What does the program cost cover?

The program cost covers meals, trainings, and apparel for the Loaned Executives. The entirety of the program cost goes to covering those items.

3. Can more than one person participate per company?

Absolutely! Space may be limited, but we encourage companies to nominate more than one employee if they have significant interest among their staff and want to expose multiple employees to the "hands-on" learning and networking opportunities that this program will provide.

2026 LOANED EXECUTIVE CALENDAR*

Meetings will occur monthly from July - January, approximately 3-6 hours per month on average. Graduation lunch to be held in February.

- 11:30 am - 12:00 pm Company contact time spent with your team
- 12:00 pm - 12:30 pm United Way Training and team building
- 12:30 pm - 1:00 pm Lunch
- 1:00 pm - 2:00 pm Professional Development/Site Visits

Meetings will include presentations from local organizations providing social services in our community, discussions of local demographics, challenges facing our communities, and time to plan and execute ways to strengthen the United Way network.

The 2025 class of Loaned Executives included:

- Carson Bell, American Bank
- Marilyn Brooks, Baylor Scott & White Medical Center – Hillcrest
- Cole Cornish, Caterpillar
- Steve Fischer, Community Bank & Trust
- John Gorrell, Extraco Banks
- Mayra Gutierrez, Alliance Bank Central Texas
- Courtney Kilburn, The First National Bank of Central Texas
- Raymond Lucien, Fidelity Bank of Texas
- Brandi Meador, Alliance Bank Central Texas
- Sandy Muzyka, Baylor University
- Armando Olivarez, SouthState Bank
- Griffin Peevey, Reid Peevey Commercial Real Estate
- Sandra Ragan, Brazos River Authority
- Ferlisa Raglin, Waco Housing Authority
- Whitney Richter, Texas Farm Bureau
- Camille Wilder, Baylor University

***Times are subject to change**
Time requirements will vary based on assignments.
August through January, approximately 3-6 hours per month on average
February through May, approximately 2-4 hours per month on average

CONTACT INFORMATION

Please reach out to Allen Holt, Director of Resource Development at **allenholt@unitedwaywaco.org** or at **(254) 752-2753, extension 204** for any questions.