LOANED EXECUTIVE LEADERSHIP PROGRAM

Tomorrow’s Executives Building a Path for a Self-Sufficient Community Today
What is a Loaned Executive?

- A “rising star” in their company looking to immerse themselves in the community and build their management and leadership skills
- A community spokesperson and fundraiser, supporting corporate partners running workplace giving campaigns
- An employee looking for a rewarding experience leading, planning, presenting and implementing successful projects
Loaned Executive Leadership Program

• This program is a win-win for your company, the participant, and the community. In just 15 weeks, a participant can fundraise more than 10 times the amount of your corporate sponsorship of this position. The result is that your investment generates more dollars to fund valuable programs helping low-income New Yorkers.

• Ideal Loaned Executive candidates include recent college graduates, retirees, those transitioning careers, and others with a strong commitment to United Way of NYC’s mission.
<table>
<thead>
<tr>
<th>VALUE TO PARTNER COMPANY</th>
<th>BENEFIT TO PARTICIPANT</th>
<th>ADVANTAGE TO UNITED WAY OF NYC</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Aids in further development of employees with executive leadership potential and advances professional skills</td>
<td>• Develop extensive sales, leadership, marketing, and relationship management skills</td>
<td>• Allows for an extension of resources that help sustain our community impact work</td>
</tr>
<tr>
<td>• Elevates company’s social responsibility reputation</td>
<td>• Strengthen negotiation and communications skills</td>
<td>• Access to highly-skilled, specialized individuals representing a cross section of the NYC workforce</td>
</tr>
<tr>
<td>• Demonstrates a public commitment and strong partnership with UWNYC</td>
<td>• Network with key community leaders and corporations</td>
<td>• Amplify campaign resources while reducing expenses.</td>
</tr>
<tr>
<td>• Optimizes company’s visibility on UWNYC’s marketing avenues (i.e. - website, social media and promotional materials)</td>
<td>• Promote goodness and improve human quality of life by being involved with volunteer engagements</td>
<td>• Creates new corporate and community connections</td>
</tr>
<tr>
<td></td>
<td>• Deepens philanthropic understanding of community needs and resources</td>
<td>• Training program’s best practices extended to future new hires</td>
</tr>
</tbody>
</table>
United Way Worldwide Best Practice

in more than 6 major markets

CIBC has always worked to improve the lives of people in the communities we serve. Part of that commitment has been our long term partnership with United Way both in Canada and the United States. So when asked to participate in the Loaned Executive Leadership Program, we were delighted to help United Way of NYC increase outreach in support of their crucial work breaking down barriers and building opportunities that improve the lives of low-income New Yorkers for the benefit of all.”

Jennifer Warren, CIBC Managing Director and Head of US Region

“The United Way Loaned Executive Program was a ‘win-win-win’ for National Grid, United Way, and the local communities that we proudly serve.

We achieved a record setting employee campaign, supported United Way’s broader mission with hands-on leadership, and significantly increased the impact we had on vulnerable customers in our local communities. Our Loaned Executive, Keith Rooney, was a role model during this assignment and has since been promoted into a new role as our community leader in Downstate New York.”

Ken Daly, President National Grid New York; Rudy Wynter, President National Grid FERC
Loaned Executives In Action

Matt preparing for CIBC’s Campaign kick-off

Dave speaking alongside UWNYC’s CEO at a corporate partner’s community engagement meeting

Irish and Dave volunteering with a corporate partner at Food Bank for New York City

Terry and Ernie leading a Trivia activity as part of a National Campaign
Past Participating Companies

“The training I received was very beneficial for my development and helped me prepare for a promotional opportunity to Director of Community & Customer Management. The loaned executive program will help foster future relationships and give different employees an opportunity to be developed, network, and really understand what it’s like to serve people in our communities who really need help.” - Keith Rooney, National Grid

“Not only was the experience both rewarding and humbling, it also taught me how to be resilient and helped me build my confidence in networking and public speaking. Though the idea of working outside my comfort zone was a little scary, I wanted to embrace the challenge and really push myself while making a positive impact.” - Irish Tan, Brown Brothers Harriman

“I have been seeking the opportunity to work with the UWNYC and thanks to CIBC sponsoring a Loaned Executive I was able to participate in the 2016 campaign. I was provided a deep and solid understanding of the full scope of UWNYC's impact on the neediest families of NYC and participate in the campaign that funds these efforts. In addition I was able to meet the highly committed management and staff at CIBC who manage the annual campaign.” - Matt DeSimone, sponsored from CIBC

“Words cannot express the gratitude and appreciation that I have for you all and the work that you do. I woke up every morning eager to head into this office to help in anyway I could towards the mission statement.” - Ernest Chan, Brown Brothers Harriman
2016 Participants
- Irish Tan, Brown Brothers Harriman
- Dave Hearrington, Brown Brothers Harriman
- Matt DeSimone, CIBC Sponsored
- Keith Rooney, National Grid

2017 Participants
- Frank Lombardo, National Grid
- Maya Rosenberg, Brown Brothers Harriman
- Chavonne Hudson, Zurich Insurance
- Kimberly Foster, EY (not pictured)
2018 Participants
• Terry Yarde, National Grid
• Ernest Chan, Brown Brothers Harriman

2019 Participants
• Sam Abassi, Brown Brothers Harriman
• Cheryl Nicholas, Brown Brothers Harriman
• Danisha Dumornay, EY
• Eboni Brown, National Grid

Not Pictured: 2020 LE- Juan Santiago, National Grid
Company Involvement

Option 1: Loaned Executive (35 hours per week for 16 weeks)

- Companies loan their employees, releasing them from day-to-day activities for the program’s duration.
- Loaned employees manage multiple corporate accounts, including their employer’s campaign.
- Loaned employees work out of UWNYC’s office, traveling throughout NYC.

Option 2: Sponsor a Loaned Executive (28 hours per week for 16 weeks)

- Companies financially sponsor a temporary employee who is hired by UWNYC.
  - Company will be recognized as a sponsor of the program.
  - Covers salary, expenses, and payroll taxes/FICA for the maximum period.
  - Sponsorship is considered part of the company’s workplace fundraising campaign.
Next Steps

I. **Choose Your Option**
   - Option 1
     - Loan an Executive
   - Option 2
     - Sponsor an Executive

II. **Choose Your Executive**
   - Option 1
     - Identify Internal Executive Participating in Program
   - Option 2
     - UWNYC will Hire Executive to Participate in Program

III. **Cohort Timeline**

<table>
<thead>
<tr>
<th></th>
<th>Confirm Company Participation</th>
<th>Orientation</th>
<th>Program Begins</th>
<th>Graduation and Program Concludes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mid June</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Late July</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Late Aug- Early Sept</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mid Dec</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Based on your company’s campaign dates
Thank You

Contact
Shana Van Valkenburg at
svanvalkenburg@uwnyc.org or 212-251-2423