Agency Speaker Instructions

TAUW partner agencies take part in the Agency Speaker program. The program is a great way for partner agencies to share information about their organizations with companies, individuals and other nonprofits. The purpose of the Agency Speaker program is to inform, inspire and thank donors.

1. ***Speaking Engagements*** -- Trained Agency Speakers attend company or community events to talk directly with employees about their experiences, programs and results.
2. ***Agency Tours*** -- Groups of employees visit TAUW partner agencies and see firsthand the agency's services and programs in action.
3. ***Agency Fairs*** -- Several TAUW partner agencies set up tables at companies or community events so area citizens can learn about multiple programs.

Sharing agency stories through Agency Speaker motivates individuals to give, advocate and volunteer. Through an Agency Speaker, participants help audiences understand how their investments in TAUW impact the community.

Important Terms

1. Agency Speaker Coordinator - serves as the facilitator and organizer of all Agency Speakers and accepts or declines events on behalf of the agency.

2. Agency Speaker - the agency representative who participates in speaking events and can convey your agency's mission and story. If the coordinator also serves as a speaker, he or she will need to register as a speaker as well.

3. ECC (Employee Campaign Coordinator) - company representative that serves as the coordinator for the TAUW campaign.

4. Campaign Kick-off - the official start of a company's United Way fundraising campaign; the employees are given information about TAUW and its partner agencies through TAUW and/or Agency Speakers.

   Format of a typical Campaign Kick-off

   - Distribute pledge cards and other information → ECC, 4 minutes
   - Welcome employees and give UW endorsement → Company's CEO, 3 minutes
   - Show UW video → ECC, 5 minutes
   - Guest speaker → TAUW Representative / Agency Speaker, 5 minutes
   - Ask employees to fill out pledge cards → ECC, 2 minutes

Tulsa Area United Way Message

1. Tell the agency's story
    - Key programs
    - Community impact
2. Explain how TAUW funding impacts the organization
3. Talk about collaborations with other agencies
    - Any existing wrap around services
    - How the agency leverages dollars received
    - Mention how the agency is one of many partnering agencies providing services from before birth to after death
    - Bring it back to importance of TAUW—services that would be eliminated without TAUW
4. Thank the audience

Agency Speaker System

1. Invitations – The agency coordinator will receive an email with the subject "**An Invitation to an Agency Speaker Event"** and a link to the website www.tauwagencyspeaker.org.

    a. The Agency Coordinator is responsible for checking the availability of speakers from the agency and matching them to the event. Please respond to the request as soon as possible. Preferably within **1-2 business days after receiving the request**.

    b. To submit a match or decline a speaker request select the "**Click Here**." link which will deliver you to www.tauwagencyspeaker.org. Review the information on the **Match Speaker** form.

    c. To accept and match, scroll down to **"Please match a speaker to this request." Select the speaker's name from the dropdown menu** and click the **Submit** button at the bottom left.

Please note: If the speaker is not listed, the speaker has not registered as a new speaker, or the coordinator has not approved the new speaker's status. **Refer to New Speaker and Agency Coordinator Approval content below.**

d. To decline, select **No Match/decline invitation from the dropdown menu** and **Match** at the bottom left.

e. If accepted, a confirmation email with details of the event will be sent to the coordinator, selected Agency Speaker, TAUW staff member, and the Company Campaign Coordinator.

f. If declined, TAUW will invite another agency.

2. New Speaker – **All new speakers (including the coordinator) must register** at www.tauwagencyspeaker.org. After registering, the coordinator must review and approve the form. Please contact Jordan Som de Cerff to register as a Coordinator and a Speaker.

a. Click "**Register**" option from the Login Icon 

b. Fill out and submit the initial short-form.

d. Fill out the **Speaker Bio form** and **select the correct agency** from the drop-down menu. Click "**Create Bio .**

Availability information is used for matching purposes. Contact and bio information is sent to everyone involved with the event, including the company campaign coordinator, TAUW staff, agency coordinator and Agency Speaker. Many companies use the bio information for promotional and introductory purposes. Feel free to include basic agency information as well as individual bio information in the Speaker Bio section.

3. Coordinator Approval for New Speakers - **Before new speakers can be matched, the Coordinator must approve the speaker's bio** at www.tauwagencyspeaker.org**.**

a. log in to www.tauwagencyspeaker.org.

b. Should you need to renew your Agency Coordinator password, click the Forgot Password link, complete the process and a change-password email will be emailed to you. (Please be sure to check your Junk mail folder.) If you do not receive an email from the system with your password, contact Jordan Som de Serff (See contact info below..

c. Select **"User Admin"** the from the Agency Coordinator options to approve and manage speakers.

d. Find the new speaker (their status will be blank), and click on the **"Details"** button. Review the Agency Speaker Bio. Please note that much of this information will be emailed by the system to everyone associated with the event once the match is confirmed, so please review it carefully and edit as needed. Once the Bio content has been reviewed, make sure to check **"I Approve This Bio"** checkbox at the bottom of the page, then click the **"Update Bio"** button.
Agency Coordinators may access and edit speaker bio content at anytime by clicking on the **"Details"** button.

e. Please note that new speakers must be approved to be available for matching to speaker requests.

4. Coordinator Vacation – If the coordinator will be out for more than a couple of days, please email Jordan Som de Serf the contact name, phone number, and email for the substitute who will receive Agency Speaker requests until the coordinator's return. This is especially important during the months of August through October.

TAUW Agency Speaker System Administrator Contact Info:
Jordan Som de Serff
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AgencySpeakerAdmin@tauw.org.