



SETTING UP SCHOOLS



USA TEAM MEMBER NOTES SECTION



MEETING THE SUPERINTENDENT

USA REP: Hello Mr. /Mrs. (Superintendent), I'm with United School Associates, it's a pleasure to meet you. We are known as the "*The Educator's Benefits Company*"

SUPERINTENDENT: Fine. (Sit down)e

USA REP: Thank you. As I mentioned, I'm UNITED SCHOOL Associates. Since I'm your new Faculty Service Representative this year, I wanted to take this opportunity to come by and meet you personally.

We've just finished our enrollment at _____, _____, _____, as well as many, many others. (Show letter while naming the districts) And we just completed the enrollment at Mr. /Mrs. _____'s district.'

As I mentioned, I wanted to stop by and let you know I'm your new Faculty Service Representative. I'd like to once again get your permission to contact the principals concerning our annual enrollment to set up our voluntary meeting */brief announcement, and like all the other schools we'll just see those that are interested. In addition, I'm sure I'll need to pick up a letter like one of these (hand them 2 or 3 of your best Superintendent letters) or USA REPORT CARD.

SUPERINTENDENT: All right. I'll have my secretary type it up.

USA REP: Well fine, I'll be sure and stop by at the conclusion of the enrollment. By the way (as you leave the office), bow many do you require for payroll deduction?

*Note: Meeting can have a very negative connotation to some superintendents. Therefore in some cases you may want to refer to voluntary meetings as a "Brief Announcement" during non-instructional time.



WHEN THE SUPERINTENDENT SAYS:

SUPERINTENDENT: What's this all about? We don't allow people to solicit our teachers.

USA REP: We are the endorsed provider for the Chicago Teachers Union, our organization that for the past several years has supplied teacher and all personnel with very special programs for Paycheck Protection, Critical Illness Pro and we donate classroom materials to the school we serve

SUPERINTENDENT: REALLY!

USA REP: Yes Sir and it's done on a voluntary basis in a meeting after school. Those that want to come, come. Those that don't, don't. And we only see those that want to see us like these. (Show request slips from other meetings pointing out time and place for room #.)

OR

USA REP: Yes Sir and it's done on a voluntary basis. We make a brief announcement during non-instructional time set by the school's principal. Those that want to come, come. Those that don't, don't. And we only see those that want to see us like these. (Show request slips from other meetings pointing out time and place for room #.)

SUPERINTENDENT: That's fine.

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Meeting School Secretary (Gatekeeper):



Good morning/afternoon, I am here to see Principal..... Secretary: Is he or she expecting you?
(Only see principal for presentation): He/she should be, we are back here for our annual service call
we are the endorsed provider for the Chicago Teachers Union and donating school supplies to your
school

USA TEAM MEMBER NOTES SECTION



Meeting with Principal



Good morning/afternoon Dr. (If they say they are not a doctor- make light humor and say: You look like a doctor☺)

I am with United Schools Associates, we are the endorsed provider for the Chicago Teachers Union (show folder) better known as the: *“the Educators’ Benefit Company”* for the district. Our company establishes School Partnership Exchange Program with School here in the district to provide you free valuable services in exchange for the promotion and aware of our Educators’ Benefit Programs to your staff. We are partners with Donors Choose to provide free school donations to your classroom teachers, which is supported by the Teacher’s Union. Are you familiar with DonorsChoose? In Chicago not long-ago Google/Staples donated also \$400k – funded all projects.

Mr. /Mrs. /Dr. Principal, in reviewing our records we see hear in your school you have___ (take out Donors Choose info on their school) a Donors Choose projects taking place here at your school. Teacher Smith has this project, Teacher Jones has this project etc., First and foremost, our company would like to present to you a \$100 gift card toward the funding of those projects.

If the school has no existing Donors Choose/Think It-Up projects, mention to them how all their neighboring schools have benefited through Donors Choose projects (Show names and list). Let the principal know if they want to assemble their staff for a brief meeting to share with the staff how to use this valuable service works – we would be more than willing to come out and share with your staff how they can start their own classroom project through Donor Choose and we will kick things off by donating to the school today a \$100 Donors Choose Gift Card.

Scheduling Faculty Meeting:

In addition, to the Donors Choose gift card we are providing you with today (Dr.) Mr. /Mrs. Principal to promote awareness of our valuable Educator Benefits Program for your staff, we are going to sponsor a Free Red-Carpet luncheon - “Staff Appreciation Day” - for your staff including doors prizes of movie tickets, Cash and additional Donor Choose gift cards. (Show flyer we will email to the principal and place in the teachers’ mailboxes) When is your next faculty meeting?



Great, we would like to arrive 45 minutes early to set up the best faculty meeting you will have all year! We just request 5 minutes at the top of your meeting to make a brief announcement about our programs.

For High Schools, we also provide “Next Generation” lesson plans provide by Life Happens and Scholastic. The program is designed to help teach high school students learn about financial responsibility and prepare them to make wise decisions in their future. In addition to helping students learn the principles of risk management, insurance, and financial planning the program is also designed to help students develop and apply critical-thinking, decision-making and problem-solving skills.

Next, for your wonderful staff each person will receive \$50,000 life insurance policy for free child education expenses. The parent must be between the ages of 19-42, the child under the age 18 and with an income of less than \$40,000. If someone does not meet these requirements, it is transferrable to anyone who does meet the requirements.

Moreover, any staff member that sits down with us to do a benefit review, your school will get \$5.00 credit per visit with each of your staff members. So, the more benefit reviews we conduct the more your school earns. After our enrollment, we will present the credit to your school in the form of a gift card from Donors Choose.

(Dr.) Mr. /Mrs. Principal, here is our school pledge on how we will conduct ourselves while visiting your school. (Separate document to place in the USA School Partnership Packet given to the Principal.).

After our service call we would like you to give us a report card on how we conducted ourselves in your school. Here is what some of your colleagues have said about us: (Read Principal Evaluation letters) Opening USA Setting Up School book

Scheduling Luncheon:

(Dr.) Mr. /Mrs. Principal, I can schedule your red-carpet event for Tuesday or Wednesday. What time is your first lunch period? How many staff members do you have this year? Of which, how many are teachers? In what room can we set up the luncheon in? So, do you prefer Tuesday or Wednesday for the Red-Carpet Luncheon? May I have your email address to send you the electronic flyer for distribution to your staff? I will return the day before the luncheon to place flyers in all the staff mail boxes.

To make all these services available to your school I need your approval on this document (take out School Case Set Up form) which gives us permission to speak with your staff about our benefit programs.



(Leave behind a USA School Partnership Packet)

Lastly, may I see the room where we will be hosting the luncheon to make certain we have enough space for the event?

Tips:

- Try to always see the principal.
- Referrals works best.
- Get to the point quickly – Principal don't have much time.
- Best time to see principal: early morning before school, Mid-morning, Mid- afternoon or 20 - 30 minutes after dismissal- when the building is almost vacant with students.
- Never try to see Principal when near the time students are arriving or dismissal.
- Always seek to set up a faculty meeting or a professional development day.
- Before entering the school to see the principal, check the parking lot to see if their car is at their designated parking spot. If no car is there, chances are – the principal is not in the building.
- You can also check the school's calendar to see if the principals have out of the building for a principals meeting.

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