

United Way *Tocqueville Society*

Tocqueville Donor Visit Call Guide

1. Set up a time to chat!

Via phone or email:

- Introduce yourself! Share your name and company affiliation
- Identify your role as a volunteer with United Way Tocqueville Society
- Ask if you can find a time to talk (phone, virtual, in-person)
- Share that you would like the opportunity to thank them personally for their commitment, discuss their plans for 2023, learn more about them, and share updates on United Way's work that you have recently learned.
- Calls will be made between May 15 – June 15, 2023

2. What to cover in the conversation

- Thank them for their gift and ongoing commitment to United Way. (If they are a Tocqueville Legacy Circle member, thank them for this as well - it will be noted on your call sheet).
- Confirm that they received their packet – if they have not received it let them know one will be mailed.
- Inform donor that we seek to understand donors interest areas, philanthropic goals, vision for Dane County, and how United Way can help connect to their passion and support their philanthropic goals.
- Share why you are grateful for their continuing support and ask one of the probing questions below:
 - o *As our membership grows and diversifies, we are looking for ways to better engage and connect with each other. I welcome your thoughts.*
 - o *Tocqueville membership is considered a "household" membership – do you have suggestions on how we can improve our outreach to both household members? (This will apply most to work based gifts)*
 - o *Tell me more about your United Way why*
- Ask if you can count on them to renew their gift this year
- Invite them to thoughtfully consider an increase in their gift

3. Complete the Electronic Call Report to capture your conversation

Impact Talking Points

Link to United Way of Dane County "Plan for Community Well-Being":

<https://www.unitedwaydanecounty.org/communitywellbeing/>

Quick Stats:

- 88% of the toddlers in our home visitation programs reached developmental milestones/kindergarten readiness, and 96% of caregivers say they have increased confidence in their parenting/parent-child interaction and parenting knowledge.
- United Way of Dane County HIRE Initiative trained 1,051 and hired 334 individuals at family sustaining wages in 2022.

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- Through United Way's Housing First program more than 586 families have moved out of homelessness – that includes 1,302 local children.
- In 2022, United Way of Dane County 211 made 41,176 referrals and logged over 170,500 minutes providing local assistance to people in our community in times of crisis.
- 87% (3,645) individuals saw improved health outcomes in programs that address the needs of BIPOC communities

Plan for Community Well-Being:

- United Way of Dane County is The Intersection where the community meets - through work with hundreds of nonprofit and community partners, we aim to be a catalyst for systemic change, helping more families and individuals get what they need in the areas of early childhood, education, income and health so they may lead healthy, thriving and secure lives that meet their own defined goals – making our entire community stronger and better positioned to thrive.
- Since 2003, we have focused our work under a community vision known as The Agenda for Change.
 - Now, two decades later, we have not only measurably moved the needle in kindergarten readiness, literacy rates, homelessness reduction, job training, health access and more, we've encouraged and enabled more organizations to work together to achieve common goals – all while centering equity in our work and chipping away at the root causes of issues.
 - So, United Way is launching The **Plan for Community Well-Being to take us into the next century of impact and innovation.**
- We know that the well-being of our children and families directly impacts the overall health of our community, so we've focused our Plan for Community Well-Being on helping more families get what they need in the areas of early childhood, education, income and health.
- **Why United Way?**
 - Dollars donated to United Way are well-spent and yield visible results in the community. In fact, for every dollar donated through United Way, the return is more than six times in community impact – thanks to our network of caring connection. And through that network of caring connection, we're enabled to solve big-picture issues that no one person or organization can solve alone.
 - They've been working for more than 30 years to improve diversity, equity, and inclusion in Dane County. Centering equity in everything we do, we strive for outcomes that reflect a more inclusive community.

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- United Way focuses on bettering the health of the entire community. Because we know that when more people have what they need to succeed, our entire community is better positioned to thrive.