

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 via phone (or virtual if available)
- Share that you would like the opportunity to thank them personally for their commitment, discuss their plans for 2021, learn more about them, and share updates on United Way's work that you have recently learned.
- Calls will be made between May 24 – June 15

2. What to cover in the conversation

- Thank them for their gift and ongoing commitment to United Way
- Confirm that they received their packet or let them know that they will receive it in the next few weeks.
- Ask if you can count on them to renew their gift this year
- As we pivot from an historically difficult year, know we will continue to focus on the systemic and racial barriers families are facing right here in Dane County.
- United Way is committed to centering families in a 2Gen (wholistic) approach, facilitating a "no wrong door" care coordination system, building more workforce housing, increasing literacy and graduation rates, training and supporting workers and addressing the root causes of poverty you make this possible.
- Examples of the services your gift is providing include...
 - • **Ensure that 25** additional students of color will graduate on time, be college ready and attend college.
 - • **Provide a full year** of weekly one-on-one math or literacy tutoring sessions for 13 students.
 - • **Equip case workers** with books and toys for 58 children in our ParentChild+ home visiting program.
 - • **Provide housing assistance** for 26 low-income families, preventing eviction and entry/return to homelessness.
 - • **Provide 100 hours** of foundational job readiness training for a class of up to 15 unemployed job seekers looking to develop basic computer and work readiness skills.
 - • **Provide medical care** to 10 uninsured patients for a year.
- Share why you are grateful for their continuing support
 - o Personal anecdote: share why is it important to you that this group of donors continues to support United Way's work so generously
- 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.
- Invite them to thoughtfully consider an increase in their gift – Suggested ask on call sheet

United Way *Tocqueville Society*

- Acknowledge they received a call from centennial volunteer (**details on call sheet**) or point to the Tocqueville Legacy Circle centennial insert in their packet.

For members not contacted by centennial volunteer (see Centennial FAQ sheet):

As we prepare to celebrate our Centennial, we know that Tocqueville Society members like you will continue to be leaders, innovators and change-makers, positioning our community for lasting impact over the next 100 years. *We ask you take a look at the Tocqueville Legacy Circle insert in your materials and consider this as an opportunity to celebrate the centennial year! Please direct any questions to Kristi Shepard at Kristi.shepard.uwdc.org.*

3. Complete the Electronic Call Report to capture your conversation