

Tocqueville Donor Visit Call Guide: Renewing Member

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 as a Tocqueville member, learn more about them, and share updates on United Way's work that you have recently learned.

2. What to cover in the conversation

- Thank them for their gift and ongoing commitment to United Way
- United Way has been extremely busy since the Coronavirus outbreak since it started in early March. (If they made a gift it will be noted)
- Examples of the services United Way is providing include...
 - o **Mobilizing volunteers**...for example, we matched Epic employees with volunteer shifts for Meals on Wheels
 - o **Raising money** in collaboration with Boys and Girls Club and Selfless Ambition (\$2 million, issued \$1.5 million in grants to more than 90 organizations in April)
 - o **Providing information via 211 – averaging 300 calls per day...most common inquiries are around basic needs (utility/rent assistance and food access)**
- Throughout this unprecedented time United Way has been leading the way – doing what it is designed to do. Mobilizing the caring power of the community to help our neighbors in need and it is the work they will continue to do.
- 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.
- Let donor know what their dollars accomplished in the community
 - 88% of 4-year old participants in ParentChild+ are 4_K ready
 - A 50% reduction in acute family homelessness
 - Over 5,000 students received behavioral health treatment, helping them focus academically
 - HIRE Initiative continues to train individuals and place them in jobs – many at a family sustaining wage
- 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
- Invite them to thoughtfully consider an increase in their gift

3. Complete the electronic Call Report to capture your conversation