

## Tocqueville Donor Visit Proposed Call Script: Prospective Member

### 1. Set up a time to visit in person!

*Via phone or email:*

- Introduce yourself! Share your name and company affiliation
- Identify your role as a volunteer with United Way Tocqueville Society – one of 60+ volunteers
- Ask if you can find a time to meet in person
- Let them know that you would like the opportunity to thank them personally for their generous commitment to United Way, learn more about them, share updates on United Way's work that you have recently learned, and share the opportunity to join a group of philanthropic leaders making a lasting impact in our community.

### 2. If they would prefer to not meet in person or don't foresee having the time to meet, ask if you can set a time for a phone conversation.

OR

### 2. If you are unable to set a time to meet in person or via telephone

*Abbreviate the points of the in-person visit*

- Thank them for their gift and ongoing commitment to United Way
- 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 it's United Way's "Year of Discovery" where 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 (dollar buy statements)
  - o Briefly share a particular program or story that resonates with you and thank them for supporting that type of work through their contribution
- Confirm received packet or let them know that they will receive it in the next few weeks.
- Encourage donor to attend this year's events: Spring Social at Graduate Hotel on May 19, Day of Caring Volunteer Project August 16, Tocqueville Reception at Wisconsin Institute for Discovery on September 8.
  - o *They are welcome and encouraged to attend both of these events, regardless of their ultimate decision to join Tocqueville Society*
  - o *Invitations to both events will be mailed to prospective members after calls are complete*

### 3. If you meet in person or set up a time for a longer phone call, refer to the Donor Conversation Guide and Call Report Form on the reverse of the United Way Gift Discussion.

- Once you have had the opportunity to discover more about the donor's interests and share your own experiences, invite them to an upcoming event
- Invite them to thoughtfully consider joining
  - o Walk through Tocqueville materials folder with them (in person)
  - o Describe giving levels to become a Tocqueville member or Step-up program, as appropriate
  - o Ask if you can send them more materials for their consideration (phone)

### 4. Complete the Call Report Form to capture your conversation

### 5. Return the form to your United Way staff liaison

- o Scan and email: [mark.greene@uwdc.org](mailto:mark.greene@uwdc.org) or [kristi.shepard@uwdc.org](mailto:kristi.shepard@uwdc.org)
- o Fax: (608) 246-4368
- o Mail: 2059 Atwood Avenue, Madison, WI 53704
- o Complete online: [www.unitedwaydanecounty.org/tocquevillecallreport](http://www.unitedwaydanecounty.org/tocquevillecallreport) Password: volunteer
- o Download MS Word file from URL above, complete and return via email, fax, or mail.