

United Way *Tocqueville Society*

Prospect Referral Form

Prospective Tocqueville Society members include people from the community who have the ability, interest and linkage to United Way to join the Society now or in the future. We are identifying potential donors and creating a list of prospects from the following sources:

- Submissions by Volunteers, Loaned Executives, Staff
- Gold and Platinum Key Club Donors
- Top 250 CEO's and Executive Teams in Dane County
- News Articles
- Published Donor Lists

A few things to consider in recommending prospective members:

- Cultivating a new Tocqueville donor is a process that can occur in one day or take years.
- Consider volunteers or donors who are already supporting United Way.
- Consider professionals who would value being affiliated with this group of community leaders.
- Do they have the capacity to give at this level? Consider those with annual income of \$250,000 or more.
- Who is not already on the membership list but could or should be?
- People in your circle of influence or whom you've heard of in your network.

Let us know if you have other suggestions.

Please fill in the bottom and back of this sheet your suggestion(s) for the highest potential workplaces and any prospective members.

Thank you!

List Tocqueville Prospect Organizations Here. These are workplaces where we should target a Tocqueville/Leadership Giving initiative or event in 2014.

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

United Way *Tocqueville Society*

Prospect Referral Form

Completed by _____
Prospect Name _____
Address _____
Business/Profession _____
Job Title _____

1. Linkage/Connection

Do you have relationship with this person? _____ Yes _____ No

What is the nature of your relationship?

Personal Friend Family Colleague/Co-Worker Other: _____

Does this person have a relationship with United Way? _____ Yes _____ No _____ Unsure

What is their relationship with United Way?

Donor Volunteer Other: _____

Who among United Way volunteers, leaders, or donors has a relationship with this person?

What is their relationship with this United Way volunteer, leader or donor?

Personal Friend Family Colleague/Co-Worker Other: _____

2. Ability/Capacity

How would you rate this person's ability to give?

_____ High _____ Medium _____ Low

3. Interest/Motivation

How would you rate this person's interest in our community's Agenda for Change in Education?

_____ High _____ Medium _____ Low

How would you rate this person's interest in our community's Agenda for Change in Safety?

_____ High _____ Medium _____ Low

How would you rate this person's interest in our community's Agenda for Change in Health?

_____ High _____ Medium _____ Low

What is most important in their life?

Family Community Involvement Work/Career Friends

Other: _____

What is their religious affiliation/involvement? _____

To which charities do they give? _____

With whom do they socialize? _____

What are their hobbies outside of work? _____

4. Other Information

Can you share any other information that is helpful in relationship building?
