

“Leadership Touch” Meeting
Community Leader/Employee Donor Questionnaire/Script

Key Questions to Ensure are Covered are Highlighted in Blue

THANK YOU for meeting with me/us today, and for your generous investments in United Way’s work as a Leadership giver to United Way.

In addition to saying thank you, we want to better understand you and your interests as a community leader so that we can be a better partner to you in your giving.

[If you are from a department other than Investor Relations, explain the department that you work in, and share that you are taking part in a new project we have undertaken as an organization to better understand our donors]

I’d like to ask you some questions in order to do that. Would that be OK with you? If yes, may I take notes?

1. What is your perception of United Way, or your history with United Way?

2. How long have you been giving?

3. Are you familiar with our new direction?

Take opportunity based on response to explain our Community Impact Agenda (see Donor Call Information)

4. On a personal level, why do you give? What is the most meaningful reason for you?

5. What in particular interests you about United Way’s Community Impact Agenda?

6. What other giving interests do you have? What other nonprofits are you involved with (if any)?

7. Are there particular United Way events and activities you would like to participate in that would make your involvement with United Way more meaningful?

8. On a scale of 1-10, 10 being the highest, how likely are you to recommend Orange County United Way to family, friends or colleagues?

If less than a 10, ask:

What would it take to get us to a 10?

9. Do you have any questions for me about United Way?

10. Do you have any suggestions on how we can be a better partner to you?

11. So we make sure we are communicating with you effectively and recognizing you correctly, I'd like to verify a few items:

What is your preferred mailing address?

What is your home address?

What is your preferred email address?

What is your home phone #?

What is your preferred phone #?

Is this your correct recognition name? _____
(have recognition name available)

What is your correct title?

Identify and summarize any FOLLOW UP points/items discussed:

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THANK YOU!!!!