



**Lift your
community**

Campaigner Toolkit

a relationship-centered guide to fundraising



YMCA OF GREATER CINCINNATI

Annual Campaign

Welcome & Thank You — A Letter from the President & CEO

Welcome — and thank you.

My name is Jorge Perez, and I am honored to serve as President and CEO of the YMCA of Greater Cincinnati, overseeing all of our Y's across the region.

At the Y, fundraising is not confined to a title or a single moment. It lives in relationships — and relationships are built every day by the people who bring our mission to life. Whether you are greeting members at the front desk, leading a program, serving on a board, volunteering your time, or inviting others to invest financially, you are an essential part of this work.

Because of you, our mission does more than endure — it reaches the children, families, and neighbors who need it most. Through your care, your conversations, and your commitment, doors are opened. Doors to confidence for a child learning to swim. Doors to stability for a family navigating a difficult season. Doors to connection for someone searching for a place where they belong.

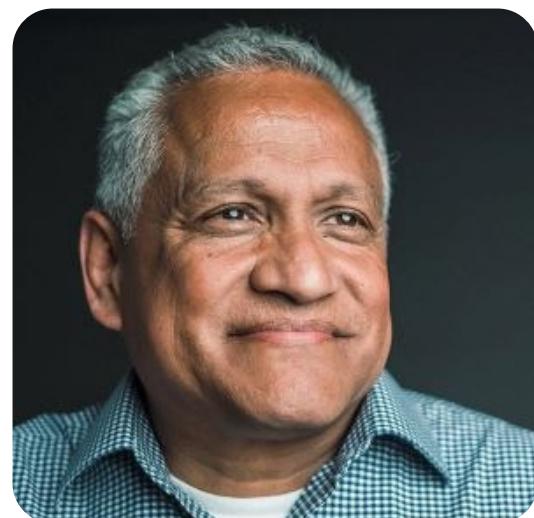
Each of us contributes in different ways — through generosity, philanthropic volunteerism, advocacy, and the everyday act of building trust within our community. Together, those efforts change lives and strengthen the fabric of our region.

As you begin, I offer one simple piece of advice: approach every conversation with curiosity and care. The most meaningful connections are formed when listening comes before speaking. Thank you for the relationships you build, the trust you earn, and the impact you make possible.

With gratitude,



Jorge Perez
President & CEO
YMCA of Greater Cincinnati



How to Use This Workbook

This workbook is for everyone who helps advance the YMCA's mission — staff, board members, campaign volunteers, and community leaders. At the YMCA, fundraising is a shared effort grounded in relationships and trust.

This guide offers simple tools to support a variety of roles — from leading conversations and making asks to serving as a connector or sharing why the Y matters.

Successful fundraising at the YMCA is rooted in authenticity, not perfection. There are no scripts to memorize and no single approach that fits every conversation. What matters most is showing up with purpose and listening with care.

Throughout this workbook, you'll see the YMCA's fundamentals of giving:

- Relationships come first
- Trust is built through authenticity
- Impact is shared, not sold
- Every conversation matters

Use this workbook as a reference and return to it as needed. When we stay rooted in our mission, each interaction helps ensure more people can experience achievement, build relationships, and find belonging at the Y.



You Are a Storyteller and a Bridge Builder

At the YMCA, fundraising begins with connection. As a campaigner, your role is to help connect people to purpose — by sharing the Y's impact and building relationships rooted in trust.

You are not expected to persuade or pressure. Instead, you serve as a bridge between those who care about this community and the opportunities that allow our mission to thrive. Through stories of children gaining confidence, families finding stability, and neighbors discovering belonging, you help others see how their support creates lasting change.

Every conversation is an invitation — to listen, to learn, and to share why the YMCA matters. Whether you are making a formal ask or simply opening the door to deeper engagement, your presence helps strengthen relationships and expand our collective impact.

When stories are shared with honesty and care, they inspire generosity, build trust, and move our mission forward.



Why Fundraising Matters at the YMCA

Fundraising makes the YMCA accessible to all. It ensures that our mission reaches children, families, and neighbors who might otherwise be unable to participate.

Gifts to the Y do more than support programs — they create opportunity. Fundraising provides swim lessons that save lives, early learning experiences that build confidence, wellness programs that improve health, and safe spaces where people can form meaningful relationships and find belonging.

Because of philanthropy, the YMCA can respond to real community needs, remove financial barriers, and adapt programs to serve individuals and families in every season of life. Fundraising allows the Y to meet people where they are — and to walk alongside them as they grow.

At its core, fundraising is about strengthening community. It invites others to invest in a mission that changes lives today and builds a healthier, more connected tomorrow.



Y Marketplace



Day Camp and Out of School Care



Senior Centers



Water Safety

The Donor-Centric Fundraising Cycle

Annual Campaign Overview

What It Is

Each year, the YMCA of Greater Cincinnati invites our community to come together through the Annual Campaign to ensure the Y remains a place where everyone can belong, grow, and thrive. For generations, we have held a simple promise: no one is turned away because of an inability to pay. The Annual Campaign brings that promise to life through the generosity of members, volunteers, and community partners who believe access to opportunity should never depend on circumstance.

2026 theme: Lift Your Community



Who It Helps

Gifts to the Annual Campaign create access to life-changing YMCA experiences for children, teens, adults, and families across our region. From swim lessons and childcare to wellness, leadership development, and community support, donor generosity opens doors for thousands each year. Through generous community support, the YMCA is able to provide financial assistance that helps individuals and families of all backgrounds, beliefs, and financial situations find support, connection, and a true sense of belonging.

How It Works

The Annual Campaign is a coordinated, community-wide effort across all YMCA branches and service sites, supported by staff, board members, and dedicated volunteers. At its heart, this campaign is about relationships — sharing why the Y matters and inviting others to be part of the impact.

Your Role as a Campaigner

As a campaigner, you are a bridgebuilder to the YMCA's mission. Your role is not simply to ask for support, but to share your Y story, communicate impact, build trust, and invite others to connect, give, and belong. Whether through conversations, outreach, or everyday moments with family and friends, your voice helps bring the Y's mission to life —your authenticity makes the difference.

Important Dates & Campaign Timeline

September 2025

Staff Campaign

The Annual Campaign began with YMCA staff making their own gifts. This phase reflected personal investment in the mission and set the tone of leadership and commitment for the broader community.

October 2025

Board Campaign

Members of the Governing Board of Directors and Advisory Boards were invited to make their gifts. Board giving demonstrated shared responsibility and leadership in ensuring the Y remains accessible for all.

February 2026

Volunteer Training

Volunteer training takes place at each branch, focusing on relationship-centered fundraising and effective storytelling. Training dates vary by branch; please connect with your Branch Executive Director for details.

Second Week of March 2026

Annual Impact Report

The 2025 YMCA Annual Impact Report is mailed to donors and community partners, highlighting the collective impact made possible through generosity, relationships, and shared commitment.

March 1 – May 5, 2026

Community Campaign

The community phase of the Annual Campaign runs during this period. Staff, volunteers, and community leaders share their Y stories, build connections, and invite others to support the mission.

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March 4, 2026

YMCA Day of Giving

A focused day of community-wide engagement and generosity, bringing supporters together around the impact of the Y.

April 2026

Volunteer Appreciation Month

Throughout April, we celebrate and thank volunteers for the time, energy, and heart they invest in strengthening our YMCA community.

Last Week of April 2026

Pop-Up Thank You Booths

Thank You Booths are held across branches to express appreciation to volunteers, donors, and members ahead of the campaign wrap-up.

May 2026

Campaign Celebration

A time to recognize the collective efforts of staff, volunteers, donors, and partners who helped make the campaign possible.

Campaign Benchmarks

25% of Goal: November 1, 2025

50% of Goal: January 10, 2026

75% of Goal: March 3, 2026

100% of Goal: May 5, 2026

Campaigner Checklist



Begin With Your Own Gift

Start by making your personal gift to the YMCA Annual Campaign. Giving first allows you to speak from experience and authentically invite others to support the mission. Your pledge reflects your belief in the Y and your commitment to keeping programs accessible for all.



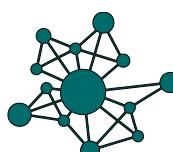
Reflect on Your YMCA Story

Take time to consider your personal connection to the Y — moments that shaped you, people you've seen impacted, or experiences that demonstrate achievement, relationships, or belonging. Your story does not need to be polished; it simply needs to be honest and meaningful.



Review Training Materials and Resources

Familiarize yourself with the training materials and tools provided. These resources are designed to help you feel prepared and confident in sharing impact, building relationships, and inviting others to participate in the YMCA's mission.



Plan Your Outreach With Intention

Use the guidance in this workbook to think about who you might invite to support the YMCA. Focus on people who already care about you, the Y, or the community, and consider how your story may resonate with them.



Share Stories and Extend Invitations

Share your YMCA story and the impact of the Annual Campaign through social media, email, text, and personal conversations. Use your own voice to invite others to support the YMCA and make a difference in the community.



Ensure Pledge Cards Are Completed Correctly

When someone chooses to give, ensure the pledge card is completed fully and clearly. Write your name in the bottom right-hand corner under "Campaigner." This helps ensure proper credit, thoughtful stewardship, and continued relationship-building.



Celebrate Together

Attend the campaign celebration to recognize the collective efforts of volunteers, staff, and donors, and to celebrate the impact made possible through shared generosity and commitment.

Tips for Successful Fundraising

Start With Connection

Fundraising at the YMCA begins with relationships. Your role is to connect, listen, and share — not to pressure. When people feel understood and inspired, they are more likely to support the mission in a meaningful way.

Be Clear About Who You Are

Begin by sharing who you are and your connection to the YMCA — whether as a staff member, board member, volunteer, or supporter. Being transparent about your role and relationship to the Y helps set expectations and keeps the conversation authentic and grounded.

Make It Personal: Stories Matter

Personal stories bring the YMCA's mission to life. Share how the Y has impacted you, someone you care about, or someone you've seen benefit from our programs. Stories create connection and make the invitation to give more meaningful.

Ask Open-Ended Questions — and Listen

A donor-centered approach starts with curiosity. Open-ended questions help you understand what matters most to others. Listening allows you to connect their interests to YMCA programs and impact.

Donor-Centered Is Not One-Size-Fits-All

Every conversation is different. Some people prefer a brief, straightforward approach, while others welcome deeper discussion. Respecting how people choose to engage is part of being donor-centered.

When the Invitation Comes First

In some situations — especially with returning donors — it may be appropriate to begin with a clear invitation. For example: "Last year, your gift helped provide opportunities through the YMCA. Would you consider making that same impact again this year by supporting the Annual Campaign?" An increased level of support may also be invited when appropriate.

Be Thoughtful About Who You Reach Out To

Share your YMCA story with your personal network. If someone may have already been contacted, please respect existing outreach and coordinate when possible.

Leverage Business and Organizational Connections

If you have connections to local businesses or organizations, that initiative is welcome. Please check in with your Branch Executive Director or the Development team at give@myy.org before approaching a business.

Honor Every Interaction

Not everyone will choose to give — and that's okay. Every conversation builds awareness, trust, and goodwill for the YMCA.

Follow Through With Care

When someone chooses to give, ensure their information is completed clearly and that your name is listed on the pledge card under "Campaigner." This allows for thoughtful stewardship and continued relationship-building.

Framework for Outreach

Rather than memorizing a script, use a structure you can adapt to any conversation:

Warm Opening — human and natural

Example: "Hi, this is [Your Name] with the YMCA — how's your day going so far?"

"Hi [Name], thanks for taking a quick call — is now still a good time?"



Clear Purpose — why you're reaching out

"I wanted to personally thank you for your connection to the YMCA and share a bit about how your support makes a difference." · "I'm reaching out to connect and learn more about what keeps you engaged with the Y."

Curiosity & Listening — invite them to share

"If you don't mind, I'd love to hear what originally drew you to the Y." "What's kept the YMCA meaningful to you over the years?"

Reflection — affirm what you hear

"That makes a lot of sense."

"I really appreciate you sharing that."

"It sounds like the Y has played an important role for you."

Next Step — an invitation, not pressure

"I've really enjoyed this conversation. At our next touchpoint, I'd love to share a bit more about how the YMCA is addressing some of the areas you mentioned."

"This has been helpful. If you're open to it, I'd welcome the chance to follow up and share more information about the Y's work and impact as we continue the conversation."

Write a few opening lines and questions in your own voice, then practice and adjust as needed.

Authenticity builds with time. The key is finding a style that feels natural to you and showing up as a real person. Remember, you're having a conversation with someone who cares about many of the same things you do — and that shared purpose is what makes this work meaningful.

To access examples, templates and additional resources, visit:

<https://myy.org/give/campaign-toolkit/>

Workbook Reminder

You don't need to have the perfect words. Use the tools provided, trust your relationships, and lead with authenticity. Meaningful conversations build meaningful impact.

Meeting Guidelines & Making the Ask

Every meaningful ask is built on trust, shared values, and genuine connection. The purpose of an in-person meeting is not simply to secure a gift, but to strengthen a relationship and invite deeper partnership with the YMCA's mission.

Core Principle

Always lead with relationships. Successful fundraising requires listening deeply and recognizing when you have earned the right to ask — and when the moment calls for learning, stewardship, or continued cultivation. How we frame our work matters. Language that suggests urgency or fragility can create pressure and undermine confidence. Most donors want to invest in organizations that are strong, sustainable, and capable of long-term impact. The YMCA is that organization — trusted, stable, and deeply rooted in our community.

Before the Meeting: Prepare with Intention

Do Your Homework

- Understand their connection to the Y
- Review past giving or engagement, if applicable
- Identify interests aligned with YMCA impact
- Confirm who the decision-makers are

Key question: Who needs to be in the room to move forward?



Clarify the Purpose

- Is this a discovery, cultivation, or ask meeting?
- Have we earned the right to ask?
- Who is best positioned to lead the conversation?

Sometimes you are the right person to lead; other times, a colleague with a stronger relationship should be included.

During the Meeting: How to Show Up

- Lead with gratitude and presence
- Acknowledge past support or connection
- Set a tone of curiosity, not urgency

Listen more than you speak. If needed, pause, ask a question, and listen.

Questions That Invite Connection

- What experiences have shaped your connection to the Y?
- What causes or issues feel most personal to you right now?
- When you think about impact, what does that look like?
- How do you typically like to engage — giving, volunteering, learning, or something else?
- What does a meaningful partnership look like to you?

These questions help build understanding and naturally guide the conversation forward.

Reading the Room: Knowing When to Ask

Signals that you may have earned the right to ask include:

- Questions about impact, scale, or sustainability
- References to past giving or future interest
- Clear alignment with the mission
- An open, engaged, forward-looking conversation

If these cues aren't present, continued stewardship is often the right next step — and that is a successful outcome.

Meeting Guidelines & Making the Ask (cont.)

Making the Ask

When the time feels right, make the ask clear, confident, and grounded in the conversation. An effective ask:

- Reflects what you've heard
- Connects the donor's interests to YMCA impact
- Invites partnership, not obligation

Keep the ask simple and direct. For example:

- "Based on what you've shared, would you consider supporting this work with a gift of ___?"
- "Would you be open to continuing your support this year at a level that feels meaningful to you?"
- After making the ask, pause. Give space for reflection and response. Silence is not discomfort — it is respect.

Responding to the Answer

If the Answer Is Yes

- Thank them sincerely and acknowledge their generosity
- Clarify next steps (amount, timing, method of giving)
- Reinforce the impact their support will make

A simple response might be:

"Thank you so much — your support truly makes a difference. We're grateful for your partnership."

If the Answer Is No

- Thank them for their honesty and time
- Remove all pressure and express appreciation

Keep the relationship intact

For example:

"Thank you for sharing that — I really appreciate your honesty. I'm grateful for the conversation and for your connection to the Y."

Do not take a "no" personally. It happens often and usually means the person isn't ready or interested right now — and that's okay.

Regardless of the Answer, the Relationship Continues

Your work does not end with the answer.

Whether someone says yes or no, stewardship is essential. And there should always be a next step you set in place. Please continue to:

- Share impact stories and updates aligned with their interests
- Provide outcome data and community insights
- Invite them to stay connected to the YMCA's work

A "no" today does not mean "no forever." Many strong relationships begin or deepen after someone initially declines. Continued communication helps foster trust, connection, and a shared sense of community.

Final Reminder

Fundraising at the YMCA is about inviting people into impact — not extracting dollars. When we lead with confidence, listen deeply, and honor readiness, we build lasting partnerships and strengthen a community where achievement, relationships, and belonging can flourish.

Donation Methods

Ways to Give

The YMCA offers a variety of giving options so individuals can choose what works best for them. Your role is simply to share these options and help make giving as easy and comfortable as possible.

- **Cash or Check**
 - Donors may give by cash or check. Checks should be made payable to the YMCA and attached to a completed pledge card. Please turn these in to the branch promptly so the donor can be thanked and acknowledged in a timely manner.
- **Credit Card or Electronic Funds Transfer (EFT)**
 - Many donors choose to give using a credit card or bank draft. If a donor already has a YMCA account, they can securely set up their payment method through their online account in Daxko. For privacy and security reasons, banking information should not be written on pledge cards. If payment information is not already on file, donors may request that a YMCA representative follow up directly to complete the process. The YMCA accepts MasterCard, Visa, and American Express through our internal system.
- **Online Giving**
 - One of the easiest and most flexible ways to give is through the YMCA website. Online giving allows donors to use all major credit cards, including Discover, as well as Apple Pay, Google Pay, Venmo, and PayPal.
- **Pledges and Recurring Giving**
 - Donors may choose to give in a way that fits their budget and preferences. Options include one-time gifts, monthly giving, or quarterly payments. Spreading a gift over time often allows donors to make a larger impact in a way that feels manageable.
- **Matching Gifts**
 - Many employers offer matching gift programs that can double or even triple a donor's contribution. Donors can check eligibility at myy.org/match and obtain the necessary forms through their employer's human resources department.
- **Gifts of Assets and Planned Giving**
 - The YMCA accepts a variety of non-cash gifts, including stock, mutual funds, bonds, securities, property, and other assets, which may offer tax advantages to the donor. Planned giving options such as wills, trusts, annuities, and property gifts are also available. For guidance, please refer donors to the YMCA Financial Development team at give@myy.org.

Workbook Reminder

You are not expected to be an expert in every giving method. When questions arise, your role is to listen, provide reassurance, and connect donors with the appropriate YMCA staff for support.

The Pledge Form

Completing this form accurately helps ensure proper stewardship, clear communication, and a positive donor experience. Even when a donor chooses to give online, completing the pledge form remains important.

Step 1: Donor Information

Verify and record the donor's full name, address, phone number(s), and email address. For renewing donors, the form may include their previous giving amount and the name of the last campaigner who connected with them. Please review and update this information as needed.

Step 2: My Gift

Confirm and record the donor's gift or pledge amount. Donors may designate their gift to a specific program, branch, or to areas of greatest need. If the donor's preferred recognition name differs from their legal or billing name, please indicate that clearly on the form.

Step 3: Payment Options

Donors may choose the payment option that works best for them. Options include cash or check, credit card on file, or requesting that YMCA staff follow up to collect or update credit card information. If staff follow-up is requested, please indicate this clearly on the form.

Giving Online via QR Code

If a donor gives using the QR code, they will enter their payment information, select the branch they would like their gift to support, and then submit the donation. Even when a gift is made online, please ensure a donor form is completed so the YMCA can properly credit and steward the gift.

Additional Ways to Give

Such as matching gifts, stock gifts, or planned giving. If a donor indicates interest in any of these options, a member of the YMCA Development team will follow up directly.

Step 4: Authorization

Please obtain the donor's signature on the form. This confirms their intent and allows the YMCA to process the gift or pledge accurately.



When you give to the Y, you lift your community—fueling achievement, deepening relationships, and creating a place where everyone belongs, no matter their background or ability to pay.

YOUR INFORMATION

FIRST AND LAST NAME

DATE OF BIRTH

STREET ADDRESS

CITY, STATE, ZIP

EMAIL

PHONE

DONOR RECOGNITION NAME (i.e. John Smith, Mr. & Mrs. Smith, Dr., ABC Corp. etc.)

I prefer to remain anonymous in

PLEDGE

I would like to pledge a total gift of \$ _____ to the 2026 Annual Campaign

PAYMENT INFORMATION

- Invoice me
- Quarterly
- Annually
- EFT (contact me)
- New Credit Card (contact me)

- Cash enclosed
- Check payable to the YMCA of Greater Cincinnati enclosed
- Charge credit card on file ending _____

INFORMATION

- Blue Ash YMCA
- Clippard Family YMCA
- Powel Crosley, Jr. YMCA
- Campbell County YMCA
- Gamble-Nippert YMCA
- R.C. Durr YMCA
- Central Parkway YMCA
- Highland County YMCA
- YMCA Camp Ernst
- Clermont County YMCA
- M.E. Lyons YMCA
- YMCA of Greater Cincinnati / Metro

AUTHORIZATION (REQUIRED)

DONOR SIGNATURE

DATE

FOR
OFFICE
USE

Entered by _____

Campaigner / Branch _____

Enter date _____

Why This Matters Completing the donor form ensures accurate gift crediting, proper recognition, timely acknowledgement, thoughtful stewardship, and continued cultivation of the donor relationship.

Handling Common Questions & Tough Conversations

Conversations about giving can naturally bring up questions, hesitation, or uncertainty — and that is completely normal. At the YMCA, our goal is never to be aggressive, to “poke and prod,” or to pressure someone into giving. We always lead with respect.

If someone chooses not to give, thank them sincerely for their time and consideration. In fact, some of the strongest relationships begin when someone initially declines to give but remains connected — learning more about the YMCA through impact reports, stories, and ongoing communication. Often, questions or hesitation come from not fully understanding the YMCA’s role or impact — not from a lack of care.

Every interaction is an opportunity to build trust, clarity, and understanding, regardless of the outcome.

Below are common responses you may hear, along with guidance on how to respond in a way that reflects the YMCA’s values.

“I’ve already been contacted about this.”

What they might mean:

They may be feeling overwhelmed, confused, or concerned about being asked more than once.

How you might respond:

“Thank you for letting me know — I appreciate you sharing that. I certainly don’t want to overwhelm you. I’ll be sure to pass that along, and thank you for taking the time to talk with me.”

If appropriate, you may also add:

“I wanted to connect because of our personal relationship, but I completely understand.”

“I actually work with someone at the Y — why are you reaching out?”

What they might mean:

They may be unsure about roles or concerned about duplicate outreach.

How you might respond:

“That makes total sense — thank you for flagging that. I appreciate you letting me know, and I’m happy to defer to that relationship so we stay coordinated.”

“Our financial situation has changed, and we’re no longer able to donate.”

What they might mean:

They are being honest and setting a boundary — often a difficult one.

How you might respond:

“Thank you so much for sharing that — I really appreciate your honesty. I completely understand, and please know there’s absolutely no pressure. We’re grateful for your past support and for taking the time to talk with me.”

If it feels appropriate, you may also add:

“The Y is here to support the community in many ways, and I truly appreciate your connection to it.”

Handling Common Objections & Tough Questions (cont.)

"Isn't the YMCA just a gym? Why does it need donations?"

What they might mean:

They may not realize the YMCA is a nonprofit organization.

How you might respond:

"That's a really common question. While fitness is part of what we do, the YMCA is a nonprofit focused on youth development, healthy living, and social responsibility. Donations help ensure access — especially for individuals and families who might not otherwise be able to participate."

"I already pay membership dues — isn't that enough?"

What they might mean:

They want clarity about how funds are used.

How you might respond:

"That's a great question. Membership dues help cover operating costs, but donations make it possible to provide financial assistance and community programs. The Annual Campaign helps extend the Y's impact beyond membership alone."

"I need time to think about it."

What they might mean:

They may be genuinely considering the invitation or simply not ready right now.

How you might respond:

"Of course — I really appreciate you taking the time to consider it. Please don't feel rushed. If it's okay, I can follow up later, or you're always welcome to reach out if you have questions."

If Someone Declines

If someone says no — for any reason — how the conversation ends matters most. A simple, gracious close might be:

"Thank you so much for your time and for hearing me out. I truly appreciate it."

Final Reminder

Questions and hesitation are not rejection — they are part of meaningful dialogue. When we lead with empathy, listen generously, and respond with respect, we build long-term goodwill and trust, even when the answer isn't yes.

Every conversation helps strengthen the YMCA's relationship with our community.

A Final Word of Gratitude

As you step into conversations and connections throughout this campaign, remember that your presence matters more than any single outcome. Every respectful conversation, every moment of listening, and every relationship you nurture helps strengthen the fabric of our community.



When people come together with shared purpose, we create spaces where children discover confidence, families feel supported, and neighbors find a true sense of belonging. That is the heart of this work — and it is why your role matters.

Thank you for showing up with care, integrity, and belief in what's possible. Through your commitment, the YMCA continues to be a place where achievement is unlocked, relationships are built, and belonging is found.

Together, we lift our community.



Swim Lesson Instructors



YMCA Camp Ernst



Wellness



Swim Team



Teen Volunteers



Preschool