



## IN-PERSON MEETING GUIDE

In-person meetings are the most ideal setting for soliciting a prospect. We appreciate the prospect's time, and hope to share with them the importance of the Y in our community and ask that they join us in making a charitable contribution to the Y.

### Speaking Points:

- Thank the prospect for taking time to meet with you about supporting the Y.
- Share why supporting the Y is important to you, and ask if the prospect has his or her own Y story.

*Use the Cause Card deck to help facilitate this discussion!*

- After the prospect has shared his or her story, let them know that you hope they might consider joining you in supporting the Y's Annual Fund. You may wish to share that you have already made your commitment to the Y this year, and ask that they do the same.
- Ask if they might be willing to renew or pledge new support for the Y. (For renewals, ask for more if you feel it is appropriate!)

*Once you ask – WAIT for an answer. Do not be the first to speak. Give them time to process what you have said and asked of them. Give them silence to process and respond.*

- If the prospect declines your request, thank them for their time and consideration. Let them know that they can give at any time to the Y throughout the year, and that there are many other ways to show support for the Y, including volunteering.
- If the prospect agrees to make a commitment to the Y, thank them for their much needed support. Let them know that it is only with the support of community leaders like them that the Y is able to deliver positive and lasting change in our community. Present them with a pledge form to confirm their commitment, and let them know that they can make an outright gift, arrange a recurring gift, or pledge a gift that can be paid any time throughout the year. The Y will send reminders for their pledge.
- Please reiterate your appreciation and thanks for their support of the Y.

**TIP:** LISTEN more than you speak. If you find you are speaking more than the prospect, ask them some open ended questions and LISTEN.

**After the Meeting:** Jot down any notes from your time with the donor. Give those notes and pledge form to your staff leader for input into our system.



## **IN-PERSON MEETING SAMPLE SCRIPTS**

### **Annual Campaign w/Combined Event Ask**

“Thank you for taking the time to meet with me today regarding your support of [INSERT YOUR YMCA BRANCH]. Supporting our YMCA is very special to me because (YOUR Y STORY). I would love to hear your Y story!

Because of our history with the Y, I would like to ask you in joining me to support their annual campaign. I have already committed to my 2021 gift, would you be able to commit to your gift today? Also, you have supported the [INSERT EVENT] in past years. We only want to solicit you one time this year so would you renew your event gift of \$5,000. You have several payment options: an outright gift paid by credit card or check now, a pledge to pay by year’s end, or set up a recurring gift using a credit card.

Thank you for supporting our Y. Together we are making a difference to families and kids in our community.”

---

### **Board Member Ask**

“Thank you [NAME] for meeting me for coffee today. I know our schedules are crazy so I’m glad this worked out for us. Supporting our YMCA is very special to me because (YOUR Y STORY). I would love to hear your Y story!

I wanted to share that as a Board member of the [INSERT YOUR YMCA BRANCH], I am proud to support an organization that gives back to [YOUR COMMUNITY] by helping kids participate in programs that they could otherwise not afford.

Because of our history with the Y, I would like to ask you in joining me to support their annual campaign. I have already committed to my 2021 gift. Would you be able to commit to your gift today?

---

### **Major Gift Renew w/Upgrade**

“Hi, [NAME] and thanks for meeting with me today. We are again meeting with community leaders this year to ask for your commitment to [INSERT YOUR YMCA BRANCH]. I see you supported the Y last year with a substantial gift and we are so very appreciative of your generous contribution. Your gift has been hard at work allowing us to (INSERT IMPACT).

More and more continue to rely upon the Y to provide critical programs and services and as a result—our community needs your gift again this year? Or, we could add 10%? Thank you for supporting our Y. Together we are making a difference to families and kids in our community.



## **ASK EXAMPLES**

**Based on the information you get from your opening conversation with a prospective donor, craft your ask specific for them.**

### **The “Join Me” Ask:**

You mentioned that your kids learned to swim at the Y. Mine did too. Learning safety around the water is so important for kids. I made my gift to make swim lessons more available to all kids. Would you be willing to join me and help another child learn to swim? A \$60 gift could do just that.

### **The “Cause” Ask:**

The Y offers programs to support to adults undergoing or recovering from cancer treatment through our LIVESTRONG® program. A \$285 contribution, will help a cancer survivor regain their strength and confidence through our 16 week program. Would you considering helping someone in this programs?

### **The “Renewal” Ask:**

You were generous last year with a gift of \$500 to send a kid to camp. Each summer nearly 350 kids go to YMCA Camp Ernst overnight camp with help from people just like you. We want to serve all the camp families that request assistance. This year, would you consider increasing your gift to \$750. You could even spread that out with \$250 over each of the next three quarters.

### **The “Considerate” Ask:**

“Our kids have played soccer together at the Y. Did you know that several of the kids playing on our teams, do so with the help of the Annual Campaign. I’m hoping you will consider a contribution of \$200 this year, or \$ 20 per month for 10 months. Would you consider that?”

**Remember to ask for a gift in terms of a benefit it provides.**



## PHONE CALL GUIDE

Call to prospects should be informative and impactful. Like an in-person meeting, we hope to share with them the importance of the Y in our community and ask that they join us in making a charitable contribution to the Y.

### Speaking Points:

- Identify yourself and let the prospect know you are calling on behalf of the Y.
- Thank the prospect for speaking with you. If they have donated in the past, thank them for their support.
- Let them know that you're calling to discuss support for the Y.
- Share why supporting the Y is important to you, and ask if the prospect has his or her own Y story.
- After the prospect has shared his or her story, let them know that you hope they might consider joining you in supporting the Y's Annual Fund. You may wish to share that you have already made your commitment to the Y this year, and ask that they do the same.
- If appropriate, ask if they might be willing to also renew or pledge new support for a local Y event.
- If the prospect declines your request, thank them for their time and consideration. Let them know that they can give at any time to the Y throughout the year, and that there are many other ways to show support for the Y, including volunteering.
- If the prospect agrees to make a commitment to the Y, thank them for their much needed support. Let them know that it is only with the support of community leaders like them that the Y is able to deliver positive and lasting change in our community. Inform them that that they can make an outright gift, arrange a recurring gift, or pledge a gift that can be paid any time throughout the year. The Y will send reminders for their pledge.
- Please reiterate your appreciation and thanks for their support of the Y.