



CAMPAIGNER WORKBOOK

YMCA Annual Campaign

YMCA ANNUAL CAMPAIGN OVERVIEW

» WHAT IT IS

Each year, the YMCA of Greater Cincinnati conducts its Annual Campaign to help make our mission a reality by allowing all that wish, to have access to Y programs and services.

For decades, our Y has pledged to turn no one away from its programs and services due to their inability to pay the regular fees for those activities. One way our YMCA honors that pledge is with the charitable support raised from our members and our community.

» WHO IT HELPS

When you give to the Y, you are providing children, teens, adults and families in our community the opportunity to learn, grow and thrive. Without the financial support of our donors through the Annual Campaign, we could not fulfill our mission that the Y is available ...**FOR ALL.**

In the past year, our YMCA has provided more than \$3 million in scholarships and fee subsidies for its programs/services to over 23,000 individuals in YMCA community.

» WHY IT MATTERS

The mission of the YMCA is to put Christian principles into practice through programs that build healthy spirit, mind and body for all.

The most important words in that mission are the last two, for all. The YMCA is for everyone regardless of age, race, religion or financial situation.

» HOW IT WORKS

The YMCA Annual Campaign is a coordinated, community-wide effort across all our YMCA branches and service sites. There are hundreds of YMCA Campaign Volunteers, just like you, engaged in this campaign across the community.

» WHEN IT HAPPENS

Cultivation, stewardship, and giving occur year-round. Staff and Board Members are asked for donations October-January.

Volunteers, like yourself, are typically recruited from November through January. Our forward-facing community campaign focus starts in mid-February and continues through April each year.

» YOUR ROLE

Throughout the year, and especially during the community phase of the Annual Campaign, we rely on our volunteers to be ambassadors and champions of our mission. This is achieved through sharing our stories, communicating our impact, connecting people to our cause and providing them the opportunity to give back to their community by volunteering and donating. This work is done many ways. During this unique time, we will rely on volunteer fundraisers to share their Y story and the impact of our mission in their personal circles of family and friends, as well as on social media. We have all the tools you will need to make this easy!

DATES TO REMEMBER

September 1 – Campaign begins

October 8 – Training: Hot Leads– Major Gift and End of Year Giving

February 7 – New Campaigner Training

February 20 – Training: Hot Leads– Community Campaign/Renewals

March 4 – YMCA Day of Giving

March 4 to May 2 – Community Campaign

May – Campaign Celebration

September/October– Keystone Awards

BENCHMARKS

25% of goal: November 1, 2024

50% of goal: January 10, 2025

75% of goal: March 4, 2025

100% of goal: May 2, 2025

CAMPAIGNER CHECKLIST

- ✓ **Make your own pledge before asking others:** After making a personal gift, it is much easier to ask someone else to join you to do the same. A Campaigner's pledge demonstrates commitment and belief in the YMCA.
- ✓ **Read through Campaigner Toolkit and watch training videos:** This information is designed to help Volunteer Campaigners feel comfortable asking people to support children, adults, and families in need through YMCA programs and services.
- ✓ **Plan for asks:** Training video and sample writings/scripts are available to help you raise funds through email and social media. Use the tools in this handbook to plan out who you will ask.
- ✓ **Volunteer (especially during the Month of Giving– March):** Assist in branches, make phone calls to renewals and prospects, make gratitude calls/write thank you letters, assist with campaign administrative duties, and more! Meet other volunteers, learn more about YMCA programs, be inspired to do your campaign work, and have fun. Be sure to sign up on Volunteer Matters.
- ✓ **Campaign (share stories and ASK):** Create your own donation link with your Y story and our impact on your personal social media pages, via email, and in person. Solicit new donors at branch events, through phone calls, or attend major gift meetings to ask for a contribution to the campaign.
- ✓ **Ensure the donor forms are filled out accurately and completely:** The information you secure on the donor forms allows us to properly acknowledge the gift and thank the donor.
- ✓ **Turn in donor forms each week:** Bring donor forms for those who have donated and those who have declined to give back to your YMCA! This allows us to thank donors quickly and remove those who aren't interested from the current year solicitations.
- ✓ **Attend campaign celebration:** The victory celebration is a time to thank volunteers for their commitment and hard work, as well as a way to celebrate the lives that will benefit from a successful campaign. Details of this event will be provided later in the campaign.

TIPS FOR SUCCESSFUL FUNDRAISING

1 MAKE YOUR OWN PLEDGE FIRST

We can't ask others to give if we aren't willing to. It is easier to ask someone to give once you have made a commitment.

2 KNOW WHAT YOU ARE DOING AND WHY

A positive, confident attitude is the first and most important step. Be clear about your own commitment, be yourself, talk from the heart.

3 ONLY CONTACT PEOPLE IF YOU HAVE THEIR PLEDGE CARD

Assigning campaigners to donors ensures that an individual is only contacted by one volunteer. Contact your ED if you would like to add someone to your list.

4 ASK YOUR BEST PROSPECTS AND LAST YEAR'S DONORS FIRST

You'll gain confidence and momentum with an early yes.

5 KNOW THE DONORS GIVING HISTORY

Familiarize yourself with the donor's giving history with information from the pledge card. Ask staff for details.

6 MAKE IT PERSONAL

Examples of how the Y has impacted you or someone else make giving more meaningful to a donor.

As a Board Member - "You may not know this but I'm on the board at the YMCA. The reason is because _____.

One of the ways we support the mission is to raise money so everyone can participate!"

As a Young Person - "When I was young, the Y made a difference in my life and now I want to do that for someone else."

Programs you know about/are passionate about - "At our branch there are so many awesome stories about lives that have been changed at the Y. Do you have a minute so I can share one?"

- Ask open ended questions.
- Find a connection between the Y and their passions.
- Speak in terms of impact not dollars, for example Giving the gift of swim lessons to a child, not donating \$80.
- You are not asking for funds to pay staff salaries or facility fees.
- If you are asked a question you don't have an answer for, let them know you'll find out and get back to them.

7 AIM HIGH AND ASK FOR A SPECIFIC AMOUNT/IMPACT

"If you are interested, here is how you can participate."

"Last year your gift help _____ people, would you consider supporting _____ (increased number) people this year?"

"Would you consider a gift of \$ _____ that will do _____?"

"Would you join me in supporting _____?"

8 ENCOURAGE PLEDGING or MONTHLY GIVING

Many individuals can give a larger amount if they can pay over the course of 12 months.

9 ONCE A PLEDGE IS MADE

Confirm the pledge, verify contact information and thank the donor. Turn in pledge cards promptly and communicate any roadblocks. Campaign progress is reported on a weekly basis.

10 MAKE FRIENDS FOR THE YMCA

Not everyone will choose to give but you shared the great work that the Y does in our community!

11 MEET YOUR PROSPECTS IN PERSON WHEN POSSIBLE

Personal appointments send a strong message that you believe supporting the Y is important.

Campaigners who make it a point to use personal visits consistently secure larger gifts and produce more dollars relative to their investment of time. (See next page)

TIPS FOR SUCCESSFUL FUNDRAISING (cont.)

LADDER OF EFFECTIVE ASKING

(Adapted from Indiana University the Fundraising School)

MOST EFFECTIVE



- Personal: Face to Face
- Personal Letter WITH Phone Follow Up
- Personal Letter NO Phone Follow Up
- Personal Phone Call WITH Letter Follow Up
- Personal Phone Call NO Letter Follow Up
- Personalized Letter
- Phone Solicitation/Phonathon Impersonal
- Letter/Direct Mail Impersonal
- Phone/Telemarketing Fundraising
- Benefit/Special Event Door to Door
- Media/Advertising

LEAST EFFECTIVE

» DONATION METHODS

Cash or Check- Attach to pledge card and turn in to the branch within 48 hours.

Credit Card/EFT- Encourage donors who have a YMCA account to visit their account in Daxko to set up their payment method, as we are unable to write banking information down on their pledge form. There is also an option for donors to have us contact them to get banking information if we do not have it on file in our system. We can only accept MasterCard, Visa, and American Express in our system.

The easiest online giving options is through our website. You can make payments using all credit cards (including Discover), Apple/Goole Pay, Venmo, and PayPal.

Pledging- Donors can set up their payments in a variety of ways, including a one-time, monthly, or quarterly payment.

Matching Gifts- The Y is eligible to receive matching gifts which double or even triple contributions made by their employees or retirees. Visit <https://myy.org/match> to look up company matching gift programs. Please instruct the donor to obtain the appropriate forms from their human resources department.

Other options- We accept gifts of stock, mutual funds, bonds, annuities, securities, property, and more which often provide tax benefits to the donor. We also offer the option to impact generations through planned giving including wills, trusts, annuities, and property. To make a gift of this kind, please refer donors to our Financial Development Department at give@myy.org.

COMMUNICATE THE IMPACT AND INVESTMENT

» COMMUNICATE YOUR STORY

Share the unique and personal ways in which the Y has touched and enhanced your life. Why do you have a passion for this work? What's your Y story? Your story must be compelling and memorable.

- Did you or a family member learn important life skills at the Y?
- Did your child have their first overnight camping experience at the Y?
- Did you or your family benefit from financial assistance provided by the Y?

» COMMUNICATE THE Y'S STORY

Our Mission

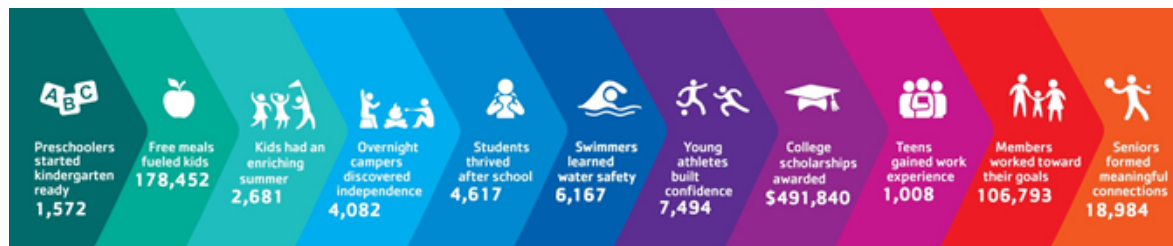
To put Christian principles into practice through programs that build healthy spirit, mind and body for all.

Our Cause

Strengthening community is our cause.

Our Position

The Y is the nation's leading nonprofit committed to strengthening communities through youth development, healthy living and social responsibility



GUIDELINES FOR A BEST PRACTICE “ASK”

- 1. Use a specific case for support with every contribution request.**
- 2. Ask for the benefit a specific gift amount provides.**
 - a. Ask new donors for a gift amount based on the case for support presented.
 - b. Ask renewing donors for an increased gift amount.
- 3. Complete the Donor Form.**

BUILDING YOUR CAMPAIGNER SCRIPT

1. INTRODUCE YOURSELF

“Hi, (prospective donor name), I’m (your name). As you may know, I’m a donor and volunteer with the YMCA Annual Campaign. Thanks for taking the time to talk with me about the great impact of the YMCA in our community.”

“I’m a volunteer in the Y Campaign because” (tell about your Y involvement, as appropriate)

“Do you have any experiences with the YMCA?”

- If “Yes”...“Tell me about your experience with the Y.” (Respond appropriately to the experiences related with positive statements about the Y’s values.)
- If “No”...“Are you familiar with all the work that the Y does in our community?” (Wait for response and respond appropriately.)

2. SELECT A CASE BASED ON THE DONOR’S EXPERIENCE OR YOUR PASSIONS.

3. MAKE THE ASK - Examples & Script

A) “You mentioned that your kids learned to swim at the Y. Mine did too. Learning safety around water is so important for kids. Did you know that drowning is the second- leading cause of death for children under 14 y.o.? I made my gift to help make swim lessons available to all kids. Would you be

willing to join me and help another child learn to swim? A \$50 gift could do that.”

B) B) “You were generous last year with a gift of \$XX to help send a kid to camp. Over 400 kids went to YMCA Camp Ernst last summer with help from people like you. This year, would you consider sending two kids for a week-long opportunity to gain self-confidence and make new friends? Your gift of \$1700 could make that happen. You could even spread it out over multiple payments until year- end.”

C) I’m helping my YMCA raise money for _____ that will/can _____. I believe this program makes a significant impact in our community. In fact, we know that this program can/will _____. Would you consider joining me in support of the Y by helping _____ with a gift of _____ ?”

(Supporting data)

(Evidence of progress)

(# of kids/adults/participants)

(ask for a specific \$ amount)

(Wait for the donor to respond...then proceed appropriately.)

4. THANK DONOR AND CONFIRM CONTACT INFO, THE GIFT/PLEDGE AMOUNT, PAYMENT METHOD AND SCHEDULE.

- “Thank you so much. You’ll receive an acknowledgement for your gift/ pledge of \$ ___ from the Y in the very near future.”
- “Let me make sure I have your correct contact information.”
- “Would you prefer to pay your gift in full or on some other basis?” “When would you like to be reminded to pay your pledge?”
- “Thanks again. The YMCA really appreciates your generous support, as do I.”

(Be sure to check the Frequently Asked Questions at the back of your workbook to help you respond to questions from prospective donors.)

SAMPLE LETTER/EMAIL

Dear [Name],

I am thrilled to share that, as a supporter of the YMCA of Greater Cincinnati, I am participating in this year's Annual Campaign to continue making the YMCA accessible to everyone in our community. [I became involved with the Y because (insert your personal connection, or why you personally support the Y)]. The Y's mission is important to me because I care about creating a place for everyone in our community to belong - to improve themselves, learn healthy habits and build new friendships. The Y makes that possible. The Y's reach is tremendous - and your support of the Annual Campaign will help ensure that everyone has access, regardless of financial ability.

[Insert case statement about a program from the Annual Report or other collateral. Your staff contact or Development Director can help you.]

My personal goal is to raise \$[insert goal] by April 30. Every donation makes a difference - no matter the amount. With these donations, we are able to make sure that everyone has access to programs and services regardless of financial ability. To contribute, you can donate online at <https://myy.org/give/>, or turn in a pledge card to pay now, set up a payment plan, or send in a future payment this year.

Sincerely,

P.S. If you'd like to learn more about the Y, let me know - I'd be glad to set you up with a 20-minute tour and show you how the Y is so much more than a gym. Thanks again for helping ensure that everyone in our community can access the Y.

Follow-up Email

Subject: [X] more weeks to reach my goal

Dear Friend,

As you may know, in [insert countdown, i.e. 14 days] the YMCA of Greater Cincinnati's Annual Campaign will reach its last day of the official campaign! While you can still give year-round, giving before April 30 is especially important to help us reach our goal by the campaign deadline. The YMCA is an important resource to so many individuals and families who benefit from access to afterschool care, early learning, senior health and fitness activities, and more. Financial assistance is important because it makes the Y accessible to everyone. When you give to the Y's Annual Campaign, you're helping your neighbors and community thrive. I choose to support the Y because it makes such a big difference in our area, and I hope you will too. Please consider contributing to my campaign, which you can find via this link: <https://myy.org/give/>. An incredible 100% of your contribution will be used towards financial assistance. And, no donation is too small - every dollar truly makes a difference.

Thank you in advance!

BEST PRACTICES FOR ONLINE FUNDRAISING

- 1 Online fundraising is a great option for family members, colleagues, or out-of-state friends who have a relationship with you but may not be connected with our YMCA.
 - A) Use the YMCA website to direct people who want to make their donation online: <https://myy.org/give/>
 - B) Create your own personal giving page on Classy to share your Y story and make asks.
- 2 Make calls to your assigned donors and prospects first – get commitment. Reach out to new donors after securing/connecting all renewal pledges.
- 3 Sending a link to our personal fundraising page is a good way to follow-up once you have made a personal ask for a specific dollar amount or if someone was hesitant about giving during your initial ask.
- 4 Email your donors and prospects pictures, videos, stories...which help educate and inspire them to give.
- 5 After the campaign ends, circle back around and let your donors know how much you raised online.
- 6 Best practice is to develop a long-term relationship that will encourage increased giving over time.

SAMPLE SOCIAL MEDIA POSTS/TEXTS

Annual Campaign Social Media Suggested Posts

Take a look at the below examples of social media posts. For greatest impact and post interaction personalize your posts. Tell people why the Y is important to you and your family. If you are comfortable share a photo of its impact.

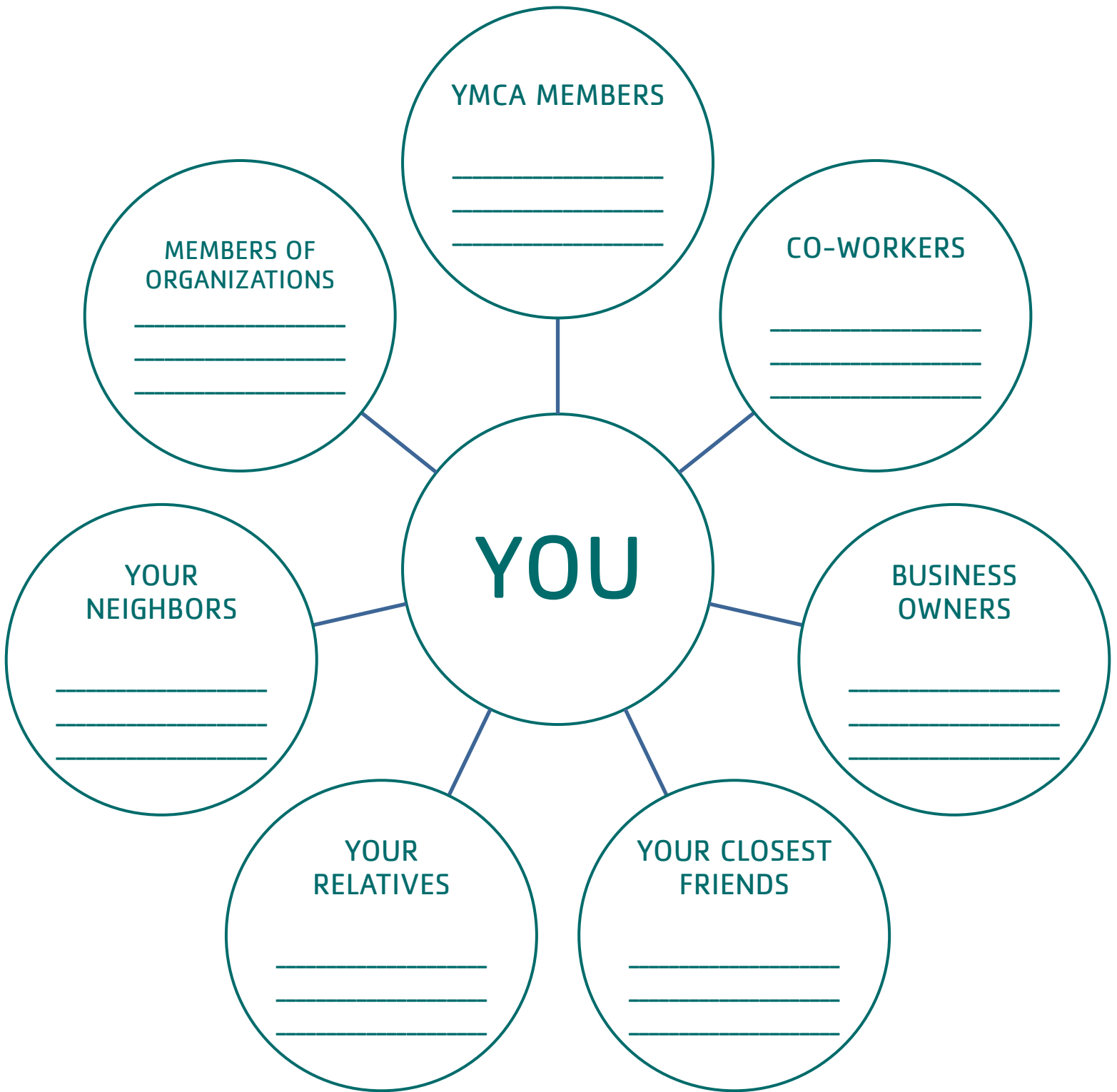
"I work/volunteer at the Y and I see first-hand the difference we are making in the community! Join me in supporting the (insert branch name) Annual Campaign: (insert direct URL)"

Online Giving Links can also be shared via social media. Each campaigner can create a personalized online giving link. You can replace the general giving link with your personal link if you would like.

Check out Appendix B at the end of this handbook for suggested Social Media posts and texts!

Be sure to like and follow your local branch and the YMCA of Greater Cincinnati on all social media outlets (Facebook, Twitter, Instagram) for the biggest reach .

CIRCLE OF INFLUENCE



THE DONOR FORM

The donor form is critical to the campaign. Every effort is made to ensure there is only one form per prospect to protect him or her from being called more than once. Volunteer campaigners may request a certain person's form but should not call anyone without obtaining a donor form first.

STEP 1. Donor Information

Verify the donor's name, address, phone numbers and email address.

Renewal forms will include the previous giving amount and the last gift solicitor.

STEP 2. My Gift

Verify and record the donor's gift/pledge amount.

Donors may designate their gift to specific programs or greatest need.

If the donor's preferred recognition name is different from the donor information, please indicate here.


STEP 3. Payment Options

Invoice based on preferences on preferred schedule. Pay now with cash or check.

For credit card charges, donors will need to make their gift online or be contacted by staff to obtain payment information.

STEP 4. Authorization

Get the donor's signature to emphasize their commitment.

**YMCA OF GREATER CINCINNATI**
Annual Campaign · Community Pledge Form

MY INFORMATION Account Number: _____

This gift is on behalf of an organization _____
ORGANIZATION OR COMPANY NAME

FIRST NAME LAST NAME / / D.O.B.

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 publications

MY GIFT Previous Gift to the Y: _____

I would like to make a one-time gift of \$ _____ in _____ 2024
(month)

I would like to make a monthly gift of \$ _____ beginning _____ & ending _____
(month) (month)

I would like to make a quarterly gift of \$ _____ x four (4) months

Total Gift Amount \$ _____


PAYMENT OPTIONS

Pay Now Cash enclosed
 Check payable to the YMCA of Greater Cincinnati enclosed
 Charge Credit Card on file ending _____
 Call me for new Credit Card

Pay Online Scan this QR code or visit www.myy.org/give

Mail me an Invoice (available for pledges \$10.00 and greater)

Payment will be coming from a third-party _____



DONOR PREFERENCES

Please designate my gift to the following YMCA Branch or Program: _____

I would like to speak with someone at the Y about planned giving and/or the YMCA Endowment Fund.

My employer matches gifts

AUTHORIZATION (REQUIRED)

DONOR SIGNATURE (REQUIRED) DATE

FOR OFFICE USE

Entered by Campaigner / Branch Enter date

FREQUENTLY ASKED QUESTIONS

Is the YMCA a charitable organization?

Yes. The YMCA of Greater Cincinnati is a not-for-profit organization classified by the Internal Revenue Services as a 501(c)(3) corporation. Based on that designation, all contributions to the YMCA are considered tax-deductible. The YMCA of Greater Cincinnati is reviewed annually and maintains an Accredited Charity designation by the Better Business Bureau

What is the difference between a health club and the YMCA?

The YMCA has a purpose and philosophy built into its programs, recognizing that there is more to achieving good health than just strengthening muscles. Our mission is an essential component of every YMCA program. We focus on character development, demonstrating Christian principles through the core values of caring, honesty, respect and responsibility. Moreover, the YMCA is an inclusive organization and turns no one away because of race, religion, gender, physical ability or inability to pay.

Why should I contribute when I already pay dues as a member?

Your membership dues cover the cost of your facility or program membership but do not support the additional cost of our scholarships to reach out into the community and help those in need. Access for all is possible only through the additional funds we raise from Y friends and members like you who want to help others.

Do contributors receive special membership privileges?

Donors receive recognition as YMCA supporters, and their gifts will qualify as charitable deductions under the guidelines of the Internal Revenue Service. However, contributors do not receive any special membership or program privileges because of their charitable contribution.

How much of what is contributed stays in the community?

All contributed dollars are used for programs and services in the communities served by the YMCA of Greater Louisville. Our Y prides itself in keeping our administrative and fundraising expense at about 12%, well below the standards for accredited charitable organizations.

Doesn't the YMCA already receive additional funding from the Metro United Way?

The Metro United Way is a valued supporter of the YMCA; however, it currently contributes less than 1% of our budget. Metro United Way encourages the Y to solicit money from its friends and members to increase its services to the community.

Who decides how contributions are used?

The YMCA is a volunteer-driven, volunteer-led community service organization. It is governed by a board of directors from the community who serve out of dedication to the mission and purpose of the YMCA.

Volunteer board members approve the YMCA's annual operating budget and regularly monitor revenues and expenses over the course of each fiscal year.

Will the Y accept an in-kind gift?

Yes. The needs of the YMCA are not just monetary. YMCA programs also benefit from contributions of equipment such as computers, video equipment and tools. The fair market value of donated items is tax-deductible. However, the value of in-kind contributions does not count in the Annual Campaign total.

APPENDIX: A--My Campaign Planning/Tracking

Prospective Donors	Last Year's Gift	This Year's Target	Method of Ask/Solicit	Case for Support	This Year's Gift/Pledge

My Campaign Goal: _____

Weekly Progress	Week 1	Week 2	Week 3	Week 3	Week 4	Week 5	Week 6	Total
# of Asks								
# of Gifts/ Pledges								
\$ Sum of Gifts/ Pledges								
% of my Campaign Goal								

Be sure to turn in your gifts/pledges each week.