



YMCA OF METROPOLITAN DALLAS

# GIVE WHERE YOU LIVE



## ANNUAL CAMPAIGN CAMPAIGNER'S HANDBOOK

Support the Y today, tomorrow and for generations to come.  
[ymcacampaigner.org](http://ymcacampaigner.org)



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# IN IT TOGETHER

## CAMPAIGN IMPACT

Your support with the campaign is making it possible for the Y to ensure that no one is turned away due to the inability to afford our services. Annually, the campaign will support thousands of youth, families, and individuals in our community through character building Y programs that help them learn, grow and thrive. More importantly, through your sharing of the Y story, you are perpetuating the cause and mission of our organization.

## CAMPAIGNER MANUAL

We hope that the materials in this manual and the training that you receive will give you the tools necessary to be successful in meeting or exceeding your goals.

Find more resources at [ymcacampaigner.org](http://ymcacampaigner.org).

# A GREATER IMPACT

## MISSION

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

## ACHIEVING MORE

We work to help children, families and individuals overcome barriers and achieve more in the areas of youth development, healthy living and social responsibility.

## THE Y COMMITS TO:

- **Making the Y Available To All:** The Y is committed to making our programs and memberships available to all regardless of their ability to afford the services.
- **Teaching Our Children to Swim:** Through Safety Around Water (S.A.W.) sites, the Urban Swim Initiative and Day Camp Lessons, we are committed to eliminating childhood drowning in Dallas.
- **Strengthening Community Health:** By providing programs like YMCA Diabetes Prevention Program, Families Improving Together and LiveStrong, we are making area residents healthier.
- **Creating Future Leaders:** Programs like Youth In Government, Model United Nations, and Achievers are making our area youth and teens prepared to become future leaders.



# CAMPAIGNER RESPONSIBILITIES

## Make Your Own Pledge

It is easier to ask others to donate if you are personally committed. Make a meaningful gift, secure a gift from your place of work and/or company matching gifts.

## Attend a Training Session

Training sessions are designed to help campaigners feel comfortable about asking people to support YMCA programs and services. You will be provided with the tools to be successful.

## Attend the Branch Kickoff and Report Meetings

You will receive your campaigner packet, meet other campaigners, and learn more about Y programs.

## Set up your Online Fundraising Page

Visit [www.ymcacampaigner.org](http://www.ymcacampaigner.org) and click on Online Fundraising for more information.

## Visit Y Programs

Schedule a Y program site visit. This is a great opportunity to see the impact of the Y firsthand.

## Personally Visit Prospects

Set appointments and personally visit each donor prospect to tell the Y story and secure their financial support. **Clear all your proposed prospects with the Y staff prior to scheduling appointments.**

## Communicate and Report

Communicate with your Team Captain or Staff Liaison on a weekly basis about pledges secured or prospects that declined.

# DONOR PROSPECTS

## WHERE DO I FIND THEM?

Studies show that people give to people that they know and trust before they give to a cause or organization. Knowing this, consider the following sources in the worksheet below when looking for prospects:

## DONOR PROSPECT WORKSHEET

|                    |                                                            |                                    |          |
|--------------------|------------------------------------------------------------|------------------------------------|----------|
| 1. _____           | <div>Neighbors</div>                                       | <div>Friends</div>                 | 1. _____ |
| 2. _____           |                                                            |                                    | 2. _____ |
| 3. _____           |                                                            |                                    | 3. _____ |
| 1. _____           | <div>Y Members &amp; Volunteers (Past &amp; Present)</div> | <div>Organizations/ Clubs</div>    | 1. _____ |
| 2. _____           |                                                            |                                    | 2. _____ |
| 3. _____           |                                                            |                                    | 3. _____ |
| 1. _____           | <div>Vendors/ Businesses (Work &amp; Home)</div>           | <div>Relatives</div>               | 1. _____ |
| 2. _____           |                                                            |                                    | 2. _____ |
| 3. _____           |                                                            |                                    | 3. _____ |
| <div>MY NAME</div> |                                                            |                                    |          |
| 1. _____           | <div>Work Associates</div>                                 | <div>Customers/ Clients</div>      | 1. _____ |
| 2. _____           |                                                            |                                    | 2. _____ |
| 3. _____           |                                                            |                                    | 3. _____ |
| 1. _____           | <div>Other</div>                                           | <div>Past Donors/ Supporters</div> | 1. _____ |
| 2. _____           |                                                            |                                    | 2. _____ |
| 3. _____           |                                                            |                                    | 3. _____ |

**Remember to clear all your prospects with the Y staff before solicitation.**

## DID YOU KNOW?

In a recent national study, the researchers found that the biggest group of donors come from individuals.

## STUDY RESULTS:

- #1 Individuals—Make up 66% of all donations
- #2 Foundations—Make up 19% of all donations
- #3 Bequests—Make up 8% of all donations
- #4 Corporations—Make up 7% of all donations



# TIPS FOR A SUCCESSFUL CAMPAIGN

**Make Your Own Pledge:** The most important thing a campaigner can do to be successful is to make their own gift first. It is hard to ask others to give unless you have also supported the cause.

**Know your YMCA case for support:** Be familiar with how your Y is using the campaign funds. Be able to interpret the campaign and the need for it. Know the facts and figures and relate your prospect's contribution to creating specific opportunities with the YMCA.

**Visit the YMCA Programs:** Prior to the campaign, visit a few of the programs. Nothing can take the place of seeing actual participants enjoying the programs. A tour of some of these programs can be easily arranged with your branch staff.

**Make the easiest contact First:** Look through all your pledge cards and pick the sure bet. Make that contact first. The success will give you a boost and build confidence. It also gives you an opportunity to practice telling the YMCA story.

**Plan your approach for each prospect:** What is their relationship to the YMCA? What are their concerns about the community or youth? What are their interests? Plan how you will begin and end your request. Include information on programs that the donor might consider supporting. Know your donors past giving to the Y. Plan how much you will ask them to give or to increase their past pledge.

**See each prospect personally and privately:** The success rate is much higher when meeting face to face or meeting via video conferencing. This also lends an atmosphere of importance and sincerity.

**Share your Y story:** Share your own involvement with the YMCA and the impact that it has on you or your family. Also share stories about individuals and families that benefited from the YMCA's programs. Then relate the stories to how the donor's support can provide opportunities for others in the community.

**Don't leave the card with the donor:** Normally cards left with donors rarely are returned as donations. Offer to return at a later time if the donor has to think about it.

**Focus on people, not dollars:** When proposing a level of support, ask for the donor to consider connecting the donation to a program and/or number of people that would benefit from a gift. For example, ask the donor to consider sending 10 children to summer camp for a week, rather than asking for \$1000. Keep it focused on people, not dollars.

**Encourage pledging:** Encourage donors to consider a pledge paid over multiple \$5 per month would be only a \$60 pledge that covers swim instructions for a child. Form many, paying \$100 over 5 months is easier than a one time \$500 gift.

**Ask about Matching Gift Programs:** Ask your donor if they know if their employer has a matching gift program. This could double the size of their support.

**Thank them for their time and consideration:** Even if you do not get a contribution, make a friend for the YMCA. Thank them for their time and pass their concerns or criticisms on to the staff.



# 10 STEP PLAN FOR A SUCCESSFUL ASK

- 1** Introduce yourself and the purpose of your visit. State that you are a volunteer doing this out of your personal belief in the Y and your strong conviction about its importance to the community. Share your feelings and tell your story of why the Y is important to you.
- 2** Ask questions that establish the prospect's understanding of the Y. Examples: What has been your experience with the Y? Do you and your children or friends use the facility and/or enjoy the programs? What do you think are the important roles that the YMCA serves in our community? Do you know someone who has personally benefited from the Y?
- 3** Share your personal convictions about the Y and its importance in the community. Make it a two-way conversation by sharing your story, then pausing so that the prospect can contribute too. Example: tell why you think the Y is important and share what your involvement has been.
- 4** State this year's case for giving. Become familiar with the Y's current case statement and use it to explain how the community will be better because of this valuable community asset.
- 5** Ask about the prospect's area of interest. What aspect of the Y do they feel most strongly about and why?
- 6** Take out the pledge card only after they have agreed to contribute.
- 7** Ask for the gift. Refer to your own gift, and ask them to join you in giving. Use information from the prospect's area of interest to ask for a specific amount or range. Talk about program purpose, not just dollars. After asking, be silent and wait for the prospect to respond to your request.
- 8** Ask about matching gifts. Many companies match gifts to the Y. Check with the Y office if they have questions about this process.
- 9** Confirm their commitment. Complete the pledge card with the donor to ensure all information is accurate. Ask the donor to sign and date the pledge card. Feel free to write additional information on the pledge card as needed.
- 10** Thank the donor for their generosity. You've done it!



# HOW TO USE THE PLEDGE CARD

The pledge card is critical to the campaign operation. Every effort is made to ensure there is only one card per prospect. Campaigners may request a certain donor's card, but shouldn't call to set up an appointment with the prospect until getting approval from staff. This is done to ensure that each prospect only gets solicited once.

## COMPLETING THE CARDS

- 1 Ensure your name is on the campaigner's name line so the gift will be credited to you and your team.
- 2 Verify the donor's name, address, phone numbers and email address. Note any changes on the card.
- 3 Ask if the donor's company matches gifts. If the company does match, please indicate company/organization in the space provided.
- 4 Get the prospect's signature if he or she pledges. The signature emphasizes the commitment and is required.
- 5 Indicate the donor's wishes to be recognized in printed material by filling in their request for acknowledgment.
- 6 Fill in the details of payments if the donor wishes to pay in installments.
- 7 Note if the donor would like to pay by credit card, they can give online at [www.donatetohey.org](http://www.donatetohey.org) or they can contact the branch or Development office with the number provided. If more convenient, the YMCA office can also follow up with them for the information. NOTE: Do not take credit card information.
- 8 Gifts of stock and securities are graciously accepted by the YMCA. See [ymcadallas.org/donate](http://ymcadallas.org/donate) for more information.

## WAYS TO GIVE

- **Make a Pledge to Pay Later** – Commit today and fulfill your gift at a future date.
- **One-Time Gift** – Give a single donation that makes an immediate impact.
- **Pay Over Time** – Spread your gift into manageable installments.
- **Stock Donations** – Contribute appreciated assets for added tax advantages.
- **Matching Gifts** – Double or triple your impact through employer matching.



# FREQUENTLY ASKED QUESTIONS

## **WHAT IS THE YMCA?**

The YMCA is a private not for profit, human service organization funded by membership and program fees, contributions from YMCA friends, corporations, foundations and grants. The YMCA operates day and resident camps, family programs, youth programs, senior programs, childcare, community outreach sites, after-school sites and so much more.

## **DOES THE YMCA RECEIVE UNITED WAY FUNDING?**

Funds that are received from the United Way are used for specific programming needs that are not funded by the Branch's campaign funds.

## **WHY SHOULD I DONATE TO THE YMCA? I ALREADY PAY MEMBERSHIP DUES?**

Your dues only cover the costs of Y membership. Additional dollars are needed to subsidize programs and provide financial assistance. The YMCA needs your support in this campaign to reach into the community and provide safe, high quality, character building programs for all.

## **ARE GIFTS TO THE YMCA TAX DEDUCTIBLE?**

Yes, the YMCA is a 501 c 3 tax exempt organization. Charitable gifts to the YMCA are tax deductible to the fullest extent of tax laws.

## **I AM NOT A MEMBER, WHY SHOULD I GIVE TO THE YMCA?**

Your support is still needed. The YMCA provides meaningful opportunities for young people to grow into responsible adults and provides every participant a safe and loving environment. The YMCA makes your community a better place to live and work.

## **I GAVE LAST YEAR. IS IT TOO SOON TO BE ASKING AGAIN?**

Each year contributions help the YMCA deliver vital programs and services. You can pledge now and pay later in the year. The YMCA can bill you one time or in installments.

## **WHAT DO I DO IF SOMEONE HAS A COMPLAINT?**

Listen to and record the complaint. Assure the individual that you will follow up with the YMCA and that someone will get back with them. The YMCA will respond to any concern. Once people feel their concerns have been heard, they will be more likely to listen to your request for support.

## **HOW WILL MY DONATION BE USED WITH THE BRANCH'S BUDGET?**

100% of the campaign money raised through our campaign stays in our community. Also, 100% of your donation is used directly to support subsidized programs and scholarships and no portion of the money is used for administrative costs.

## **HAVE A QUESTION YOU CANNOT ANSWER?**

For assistance, call your local campaign leaders or branch staff.



# ONLINE FUNDRAISING PAGES

## Get Started

Visit [ymcacampaigner.org](http://ymcacampaigner.org) for a link to create your personal Online Fundraising Page and begin fundraising by promoting your Online Fundraising Page to family and friends by sharing in emails, texts and social media!

### Step 1: Set-up Guide

1. Click "Become a Fundraiser"
2. Fill in your information and submit
3. Click "Personalize my Page"

### Step 2: Personalize your page

1. Upload a picture of yourself
2. Set your personal fundraising goal
3. Personalize your message
4. Click "Save" to go to your page or "Join or Create a Team" if you are part of a team

### Step 3: Share your page

1. Share your page with your network by clicking on Facebook, Twitter or Email icons to automatically create a message with a link to your fundraiser page.

### Step 4: Revise your page

1. Save the confirmation email for the link to edit or update your page
2. It also includes your personal URL, social share buttons, and keyword and shortcode for sharing

## Best Practices for Sharing Online Fundraising Page

1. Conduct personal visits with your top prospects first.
2. Carefully select your list of prospects for electronic solicitation.
3. Don't mass email. If possible, send personal messages to each prospect.
4. Keep your message short. This is especially important when posting on Facebook. Long posts get overlooked.
5. Include a link in your email or social media post to direct them to more information on your eCampaigner page where they also can donate.
6. Send a follow up email in a couple of weeks after the first message to highlight progress and/or denote urgency.
7. Online donors receive an automated thank you and donation receipt email from the YMCA of Metropolitan Dallas. Campaigners are encouraged to follow up with a personal email of thanks as well.
8. Prioritize donors for future cultivation.



# THE THANK YOU

Right after your conversation, take a moment to jot down a few notes specific to your discussion with the prospective donor. We encourage you to send a quick thank-you note to everyone you speak with — both those who make a gift and those who simply take the time to meet with you. Express your appreciation for their time, interest, and consideration.

## Suggestions for notes when a contribution is made

- Thank you for supporting the YMCA Annual Campaign. Your gift makes a difference.
- We really appreciate your support. It provides us the resources to offer financial assistance to those in our community who would not otherwise be able to participate in Y programs.
- Your generosity will afford us the resources to support a community member who wishes to become a member.
- It was great speaking with you. Thank you for your contribution.
- Thank you for changing the life of someone in our community.

## Suggestions for when they have declined to make a pledge

- Thank you for taking the time to hear the YMCA story. I hope that you will be able to support the Annual Campaign at a later time.
- I enjoyed visiting with you. Thank you for being a member of the YMCA.

Address your notecard and give it to a YMCA staff member. We are happy to mail these important notes on your behalf.

# RECOGNITION

There are many ways we thank all donors. Please check with your branch for specific ways they thank donors. All annual donations of \$1,200 or more to the Annual Campaign qualify the donor for membership in the Chairman's Round Table. This very special group of individuals, companies, organizations and foundations are recognized for their generous support through the banner recognition program at each branch.

## RECOGNITION LEVELS

White = \$1,200 - \$2,499

Green = \$2,500 - \$4,999

Blue = \$5,000 - \$9,999

Purple = \$10,000-\$24,999

Red = \$25,000 & above



[www.YMCACampaigner.org](http://www.YMCACampaigner.org)

YMCA Mission: To put Christian values into practice through programs that build healthy spirit, mind and body for all.