

YMCA ANNUAL CAMPAIGN CAMPAIGNER HANDBOOK

FOR A BETTER US.

YMCA OF GREATER LOUISVILLE

THANK YOU FOR VOLUNTEERING!

Without your personal story, participation and time, we could not conduct a successful Annual Campaign. We thank you for helping us build relationships in our community, for your willingness to share stories and open our doors to everyone regardless of their ability to pay. Your contributions of time, talents and treasures are greatly appreciated.

ABOUT THE YMCA OF GREATER LOUISVILLE

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.

The YMCA is a cause-driven charitable organization, designated as a 501 (c) (3) organization by the IRS. Strengthening communities is our cause with our focus on youth development, healthy living and social responsibility.

At the Y, we believe that lasting personal and social change happens when we all work together. Every day, we work side-by-side with our neighbors to make sure that everyone, regardless of age, income or background has the opportunity to be healthy, confident, connected and secure.

WHAT IS THE Y'S ANNUAL CAMPAIGN?

Each year, the YMCA of Greater Louisville 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.

In the past year, our YMCA has provided more than \$6.5 million in scholarships and fee subsidies for its programs/services to over 19,000 individuals in YMCA community.

The YMCA Annual Campaign is a coordinated, community-wide effort across all our YMCA branches and service sites. There are over 700 YMCA Campaign Volunteers, just like you, engaged in this campaign across the community.

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.**

TOP TEN REASONS PEOPLE GIVE

- #10 Charitable gifts are tax deductible.
- #9 It makes them feel good to do something for others in their community.
- #8 They have a desire to protect others and make their community better.
- #7 They feel morally or socially obligated to do something for people in need.
- #6 You demonstrated your commitment with your gift.
- #5 They respect you, the person asking them.
- #4 They believe in the objectives and future direction of the YMCA.
- #3 They have received something from the Y and now want to "give back."
- #2 They have a personal involvement with the Y.
- #1 **BECAUSE SOMEONE ASKS!**

YOUR CAMPAIGN RESPONSIBILITIES

1. Make a pledge before asking others:

After making a personal gift, it is much easier to ask someone else to do the same. A Campaigner's pledge demonstrates commitment and belief in the YMCA.

2. Attend training:

This session is designed to help Volunteer Campaigners feel comfortable asking people to support children, adults and families in need through YMCA programs and services.

3. Attend the campaign kickoff:

February 21st; Meet other volunteers, learn more about YMCA programs, be inspired to do your campaign work and have fun.

4. Campaign: Make personal calls on cleared /assigned prospects telling the YMCA story and asking for a contribution to the campaign.

5. Turn in pledge forms each week:

Bring pledge forms for those who have pledged and those who have declined to give back to your YMCA.

6. Please make sure pledge forms are filled out completely.

The information you secure for the pledge forms allows us to properly acknowledge the gift and thank the donor. The Solicitor's Section is new this year. We ask that you record the amount you "ask" for, how the gift was secured and what specific case was used.

7. Attend victory 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. 2

KEYS TO SUCCESS

Make your gift first.

This is the most important thing a Campaign Volunteer can do to be successful. It is difficult for you to ask others to make a commitment to the Y before making your own commitment.

Know the Y and your prospects.

Campaign volunteers that understand the impact of the Y on individuals, families and the community will be successful in their campaign roles. Before you begin, take the time to review the stories in the YMCA Annual Report and, the branch story in your branch campaign brochure. You could even check out ymcalouisville.org to see other stories from around our Association. Getting to know how our Y strengthens our community is a key to communicating the benefit to potential donors. Each potential donor will have a different perspective of the YMCA. They may have taken swim lessons as a kid, or gone to camp. Their kids may play in our seasonal youth sports leagues. They may use the Y facilities to get or stay healthy now. Regardless, you need to know their perspective of the Y in order to find the program or service that they will most relate to and hopefully support with a contribution.

Review the information in this guide.

Learn the information presented at the training and the kickoff. Be able to describe the Y and how the community benefits from YMCA programs. Understand donor payment options and most importantly, tell what the Y means to you.

Visit YMCA programs.

Get to know the programs firsthand. Meet the YMCA staff and ask questions.

Share the Y story.

Giving is largely a matter of education and connection. Use your story or the stories of others to which a potential donor may connect to demonstrate how our Y positively impacts people and the community. Explain that their gift will provide a specific benefit or opportunity for another child, adult or family. By appealing to the interest of the potential donor, it is more likely that you will receive a positive response when asking for a contribution. Your enthusiasm is contagious.

See every prospect personally.

The most successful way to campaign is face-to-face. By treating every visit as a major event, a campaigner will secure the maximum pledge. Statistics show that a carefully done mail campaign has less than a 1% response; telephoning is a little better at 5%; campaigning face-to-face, however, has a 75% response.

Emphasize pledging.

The advantages are obvious. Most people can give more over a period of time than at any given moment. A generous gift of \$1,000 becomes four payments of \$250.

Plan your approach.

Judge in advance why the prospect would wish to give and what would motivate him or her to make the largest gift possible. What things about the YMCA, its programs, needs and impact on the community will appeal most to?

the prospect? Consider the prospect's giving capacity. What size gift should be solicited? Would a lump sum or installments be convenient?

Aim high; be specific.

When the time is right, ask for a specific amount. Don't talk dollars; talk impact, what those dollars will do for people. If the person has donated in the past, encourage them to double their or increase from year's gift. A \$300 gift last year may have the potential to be \$600 or more this year, allowing the Y to expand services to more children and families in our community.

Never leave the pledge form.

Experience shows that only one prospect in 100 who says, "Leave the form; I'll mail it in," actually does. If you cannot get a decision on the first visit, take the form with you when you leave. Tell the person you'll call back on a specific date. Feel free to leave a campaign brochure.

Ask about matching gifts.

Ask the donor if his/her employer has a matching gifts program. Many will match a gift if asked. It is an easy way to double your success. The donor may request the matching gift form from his/her company.

Suggest a gift of stock.

For some individuals, gifts of appreciated securities such as stocks, mutual funds and bonds can provide attractive benefits, including avoidance of capital gains taxes and charitable deductions.

Close each contact with gratitude.

Thank all prospects for their time.

THE PLEDGE FORM

The pledge 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 pledge form first.

STEP 1. Donor Information

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

If the donor's preferred recognition name is different from the donor information, please indicate that at the top of the form.

Review gift history

Soft Credits recognize a donor for a gift they did not make personally, but to which they were connected, i.e. company matching gift.

STEP 2. Payment Options

Verify the donor's gift/pledge amount.

For **invoices**, indicate whether they would like to be billed monthly, quarterly or one-time.

Pay now with cash or check

For **credit card charges**, donors will provide an email address to receive an encrypted link.

STEP 3. Gift Information

Donor's may designate their gift to specific programs

➔ **Get the donor's signature to emphasize their commitment.**

STEP 4. Solicitor's section

Record the amount you "ask" for, how the gift was secured and what specific case was used.

STEP 5. Check the form for completeness and sign it before returning it to your branch.

DONOR FORM

2019 ANNUAL CAMPAIGN

YMCA OF GREATER LOUISVILLE



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

STEP 1: DONOR INFORMATION

Mr. Mrs. Ms. Other _____ Individual Business/Corporation Board Member

Donor First Name _____ MI _____ Donor Last Name _____ Date of Birth _____

Organization Name _____ Contact Person _____

Mailing Address _____ City, State, Zip _____

E-Mail Address _____ Phone Number _____

STEP 2: PAYMENT OPTIONS

2019 Gift Total: _____

Pay Now..... Cash Check (payable to YMCA of Greater Louisville)

Please Bill Me..... One Time in _____ Quarterly (Mar,Jun,Sept,Dec) \$ _____/x4 \$ _____/Monthly

Credit Card Please provide E-Mail to receive a secure payment link: _____

Donor and/or Spouse's company will match the gift

Company Name _____ Company Contact Person _____ Company Phone Number _____

STEP 3: GIFT INFORMATION

Designation:
 Area of Greatest Need Other/Special Instruction: _____

➔ **DONOR SIGNATURE:** _____ **DATE:** _____

Recognition Name : _____ Do not publish my name

SOLICITOR USE ONLY:

Solicitation Method (choose one) Face-to-face Phone Call E-mail Other _____

Ask Amount \$ _____ Case Presented: _____

OFFICE USE ONLY:

Add constituent only. Gift received at branch.

Reviewed By _____ Scan Date _____

- Return all completed pledge forms and any cash or checks to your branch promptly.
- If you are unable to contact a prospect, return the card as soon as possible to your branch so someone else may have a chance to make contact.

FREQUENTLY ASKED QUESTIONS

Is the YMCA a charitable organization?

Yes. The YMCA of Greater Louisville is a not-for-profit organization classified by the Internal Revenue Service as a 501(c)(3) corporation. Based on that designation, all contributions to the YMCA are considered tax-deductible. The YMCA of Greater Louisville 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, unlike private, for-profit health clubs, 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, expressing our 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 an 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 scholarship programs to reach out into the community and help those less fortunate. These programs are possible only through 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.

Who contributes to the YMCA?

More than 7,000 individuals, businesses, foundations and civic groups contribute funds each year to further the work of our YMCA.

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 2% 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.

What are my payment options?

The YMCA is pleased to handle contributions in any manner the donor wishes. The pledge form is used to indicate which billing arrangements are most convenient. The donor may wish to spread payment of their contribution over the year on a monthly, quarterly or semi-annual basis. Most credit cards are accepted and bank drafts can also be arranged.

Can I make a gift online?

If a donor wants to make a gift online, please direct the person to www.ymcalsouthern.org where he or she will find further direction.

Will the YMCA 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 toward the Annual Campaign goal.

NOTES: