



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

EXHIBIT 4-3: PLANNING AN ANNUAL CAMPAIGN SOLICITATION VISIT

Planning ahead for an in-person solicitation visit with a prospective donor is critical. Follow the steps below to prepare.

STEP 1: MAKE YOUR OWN MEANINGFUL GIFT FIRST

Donors make the best solicitors. Your donation underscores your commitment to the Y cause and serves as an endorsement of the work the Y does to strengthen the community.

STEP 2: MAKE AN APPOINTMENT

Making an appointment allows you have a meaningful two-way conversation with the prospective donor. Use the tips that follow to overcome any resistance you may face in scheduling a meeting:

- Stress the importance of meeting face-to-face to discuss a critical YMCA effort that affects the prospective donor and the community.
- Call (rather than email) the prospective donor to set the meeting date and time. Give options (e.g., Can we meet for coffee at 2:00 p.m. on Thursday or 7:30 a.m. on Friday?) instead of asking an open-ended question (e.g., What times works best for you?).
- Set appointments early in the campaign process. Congratulations! Half your job is done.
- Call the prospective donors you are more confident of securing a donation from first to gain momentum.

STEP 3: KNOW WHO TO BRING WITH YOU

Consider taking a partner on visits to current donors who are being asked to increase their donations or prospective donors with long-term potential. Doing so demonstrates to the prospective donor the importance of the request and can deepen his or her relationship with others who share a passion for the Y's work.

STEP 4: KNOW YOUR ROLE, YOUR PURPOSE, AND YOUR GOAL

As an ambassador of the Y, be prepared to do the following:

- Test the prospective donor's perception of the Y
- Share the Y story
- Report back to campaign personnel on the results of the solicitation, either the reason the donor chose to give or what the Y needs to do to secure a gift from the donor prospect in the future

STEP 5: KNOW THE Y CAUSE AND YOUR YMCA'S CASE FOR SUPPORT

Be prepared to share how financial support from members and the community allows the Y to positively impact individuals in the areas of youth development, healthy living, and social responsibility. Provide evidence to support the community needs outlined in your case for support and share stories that describe the way the Y addresses those needs.

STEP 6: KNOW THE PROSPECTIVE DONOR

Ideally, prospective donors will be someone you know or have something in common with. Tailor each visit to the prospective donor. Talk to others beforehand to obtain important information, if you don't know it already:

- What is the prospective donor's link to the Y (e.g., programs, camp, activities, community concern)?
- Why might the prospective donor be interested in helping the Y make an impact?

Determine ahead of time the amount of the gift you hope to secure. Be prepared to highlight what the specific donation amount you plan to request can accomplish in people's lives. Also investigate how the Y's work positively impacts issues of particular interest to the donor prospect.

STEP 7: UNDERSTAND THE FLOW OF A CAMPAIGN SOLICITATION VISIT

Successful solicitation visits follow a natural flow:

- **Greet.** Use the greeting to find common ground. Get the individual to smile and feel comfortable. Start with casual conversation about mutual interests, individuals, programs your kids are in together, and so forth.
- **Share the purpose of your visit:**
 - To discuss the important work the Y does in the community
 - To determine how the prospective donor can contribute to the Y's efforts (use this time to ask questions to find out the individual's understanding of the Y and its work)
- **Share your commitment.** Share your personal commitment to the Y. If the prospective donor trusts your opinion, he or she will believe you when you say the request for funds is important and worthy.
- **Present the philanthropic opportunity.** Explain, using specific language and examples, the positive impact a gift will make on individuals and the community.
- **Pose questions and listen to the answers.** Use questions and answers to assess the prospective donor's level of interest and preempt any concerns he or she may have. Let the prospective donor talk more than you do. And remember, you don't need to have all the answers. Say you will refer any questions you can't answer to someone at the Y who can follow up.
- **Ask.** Ask the donor prospect to consider a gift of a specific amount. If you can share that you have pledged to give the same or more and why, that is powerful.

Sample language: "Through this campaign we are working to ensure a brighter future for the community. Together, we can address significant challenges. Doing so requires gifts in the range of [predetermined range]. Your gift will help young people achieve their potential, empower



community members of all ages to lead healthier lives, and encourage people to help their neighbors. Will you join me in giving \$[predetermined amount] a month toward our goal? It would be an enormous help and encouragement to others."

Take advantage of opportunities to increase the odds of a positive response and a larger gift:

- Discuss how payments can be broken down (e.g., \$20–\$100 a month allows someone to give a larger gift than they might think).
- Discuss easy payment options your Y offers (credit or debit card, bank draft, check, PayPal, etc.).
- Ask if the prospective donor's company matches gifts to organizations like the Y.
- If another donor to the campaign has pledged to match new or increased gifts from other donors, mention the terms.
- If applicable, explain any opportunities donors have to designate how their gift will be used to address a specific community need.
- **Wait.** Be silent and wait for a response. The individual needs time to process what you have said and ask follow-up questions.
- **Respond to concerns and questions.** Empathize with any concerns and ask, "If those concerns could be addressed, would you be willing to join me and others in supporting this effort?" Summarize the way the prospective donor's concern will be dealt with and when he or she can expect someone to get back to them about it. Confirm how the prospective donor would like to be contacted related to the issue (e.g., phone, email, letter). Such attention to concerns makes a future gift more likely, even if the donor prospect does not choose to donate to the current campaign. Offer to return at a later date if the individual needs more time to decide. This reinforces the importance of the gift and gives you a reason to follow up, if necessary.
- **Thank.** Express gratitude, even if the individual does not give gift. Remember that *no* doesn't usually mean *not ever*. If you have told a compelling story of how the Y impacts community issues, you have accomplished an important objective.
- **Confirm.** If the prospective donor pledges to give a gift, record all necessary information on a pledge form (see exhibit 4-4, "Annual Campaign Pledge Form Template") and have the donor sign it. Let the donor know that he or she will receive a reminder prior to the payment due date.
- **Report back on the visit outcome and thank formally.** After receiving a pledge or gift, immediately send the information to the campaign office for recording and official acknowledgment. After the visit, send a personal note of thanks for their time and consideration.

No matter the outcome of the visit, take pride in what you have done. Many individual lives are touched by the Y annually because of people like you!

FREQUENTLY ASKED QUESTIONS

Personalize questions and answers for your YMCA and add any other common questions and answers pertinent to your Y.

These are questions asked most frequently of volunteers working on a Y annual campaign. If you get a question you can't answer, offer to find the answer and call back. Then ask a YMCA staff member for help: [Name and contact information of staff person].

“Why should I give to the Y?”

Your support is integral to helping the Y provide quality programs to everyone, regardless of their ability to pay. Charitable donations allow the Y to address the most pressing needs of our community and, in the process, make it a better place to live and work.

“I already pay membership or program fees. Why does the YMCA need more money?”

Membership fees cover the cost of maintaining and operating YMCA facilities for members. Donated dollars support programs for everyone in the community, particularly children and underserved populations. Charitable gifts also provide financial assistance for individuals and families who cannot afford the Y, but who still want and can benefit from our services.

“Doesn’t the YMCA receive funds from United Way?”

Yes, but those funds are restricted to programs primarily serving [customize for your y]. United Way funds cover less than [%] of our annual budget. Because of the generosity of Y and community members giving to our campaign, last year we were able to provide services to [#] individuals in Y programs who would otherwise not have had the opportunity to participate.

“What is the YMCA’s annual fundraising cost?”

On average, approximately [%] of our revenue is spent on fundraising. We are able to keep this figure low because of tremendous volunteer support in our fundraising efforts.

“Does the money raised in the Y annual campaign stay at our Y (or branch)?”

Yes! Donations from people in your community support your local YMCA. Some donors ask us to use their gifts for specific programs or activities outside of their branch and, of course, we honor their wishes.

“I gave last year. Why are you asking again so soon?”

Your contributions to last year’s campaign helped the YMCA deliver vital programs for people in our community that needed a helping hand [list one or two relevant examples]; however, the Y can’t sustain these programs without continued support. If you prefer, you can pledge now and pay later in the year.

“Somebody already contacted me. Why are you calling me again?”

Occasionally this happens if you or another family member participates in activities at more than one branch or if you know volunteers affiliated with another branch. Many people wish to contribute to multiple branches and doing so is an option for you.

“Now is not a good time—can I give later?”

As a donor, you can choose to contribute smaller amounts monthly, quarterly, or semiannually, or give one lump sum later in the year. Pledging your support now and making a payment later is often the preferred way to give generously.

“Will my contribution qualify as a tax deduction?”

Yes! The YMCA is classified by the Internal Revenue Service as a publicly supported 501(c)(3) nonprofit, and donations are tax deductible as allowable by law.