



## **HOW TO BE A SUCCESSFUL CAMPAIGNER**

Planning and preparation are important first steps to be a successful Campaigner. Take the time to give some careful thought to your campaign effort BEFORE you meet with a prospective donor. Follow the steps outlined here and on the next few pages with every potential donor to maximize the result of your campaign effort.

### **1. Create your prospect list:**

- Identify 5-7 prospects.
- Consider family members and friends.
- Consider business colleagues and acquaintances.
- Choose names from an existing prospect list at your YMCA.

### **2. Plan and prepare for each contact with a prospective donor:**

- Learn as much as possible about their connection with the Y. Previous donor? Is their family involved in Y activities? Are they interested in certain programs, camp, youth activities, disease prevention programs, etc.?
- Determine your conversation openers based on what you know about the prospect.
- Plan to ask for a specific amount based on their capacity and connection from the information available.
- Who should be involved in the meeting? Should you take someone with you? Consider inviting a board member.
- Best location for the meeting?
- How will you handle objections/concerns? What questions might they ask? Review the Frequently Asked Questions in this guide for helpful information.

### **3. Arrange a time to speak with your prospects:**

- When you are ready to begin, call on your best prospects first. This gets you off to a good start psychologically.
- Face-to-face meetings are preferred and most effective for fundraising. If that's not possible, a planned and carefully conducted telephone call can also be successful.
- Larger gift requests should generally be done in face-to-face meetings.
- Let your prospect know that you are working with the Y and ask for 10 minutes or so of their time.
- Be prepared to have a few alternative time options available, in case your first choice doesn't fit your prospect's schedule.



## HOW TO ASK FOR A CAMPAIGN GIFT OR PLEDGE

### 1. Open the conversation with questions about the prospect's connection with the Y.

- Pose questions based on your findings in preparation for the contact.
- Ask open-ended questions that allow the prospect to elaborate.
- Listen closely for information about perceived benefit and impact of Y programs.

### 2. Relate your personal YMCA experiences.

- Talk about several YMCA programs and note which program appeals to the prospect.
- Explain the value of the YMCA programs to the community.
- Your enthusiasm will be contagious.

### 3. Explain the purpose of the Annual Giving Campaign.

- Explain that YMCA programs and services are available to all in our community.
- Give examples of scholarships provided and programs supported with campaign contributions based on your branch's needs for support.
- Elaborate freely, using examples that you know from experience, when possible.
- Explain that you are a donor and a volunteer with the Campaign because you want to support access to YMCA programs.

### 4. Ask your prospect to join you in supporting the YMCA.

- Customize your request of each prospect based on the information you know about their Y connection.
- Use the Campaign brochure to demonstrate the benefits of gifts to the Y.
- Ask for a specific amount based on their interest and capacity to give.  
(The average campaign gift is just over \$100)
- Remember multiple payment options. Donors who elect to make multiple payments over the year can often make a larger donation.
- Don't forget about the monthly giving program.  
"You mentioned your kids took swim lessons at the Y. Would you consider helping two kids learn to swim and be safer around the water? Your gift of \$100 would do just that. Could you do \$50 now and \$50 in the fall?"
- After asking, wait for the prospect to respond to your request.
- If your prospect is not prepared to respond immediately, make arrangements to follow-up before your discussion ends.
- Keep the pledge form and record the follow-up date and time. *Note: If you are seeking a pledge renewal, please be sure to ask for a gift increase of 10-15 percent over last year's pledge.*



**5. Confirm the pledge details and get a signed commitment, when possible.**

- Confirm or fill in the prospect information on the pledge form.
- Record the pledge amount and payment method.
- Agree upon and confirm the pledge billing schedule.
- Get the donor's signature on the form, when possible.

**6. Close each contact with gratitude.**

- Thank all prospects for their time.
- Accept all contributions and pledges with a heartfelt "Thank you" and reinforce the benefit that their gift will provide to someone that needs help.
- If a gift or pledge was made, let them know that the YMCA will send an acknowledgement.
- Thank each donor for being a partner in the mission of the YMCA.

**Handling Objections**

Don't forget – if potential donors are objecting then at least they are talking. Silence is worse than objections because objections give you insight into what the potential donor is thinking.

{Possible script: We would like to earn your support but regardless of that I would appreciate the chance to inform you about what the Y does in our community and how your support would help (youth, healthy living, social responsibility example based on their interest.)}

The YMCA accepts monetary and in-kind donations throughout the year, and the donor can designate the pledge and give instructions for billing to start at any time.

The YMCA Annual Support Campaign provides an opportunity to tell the story of the YMCA. Every effort is productive. Even if someone doesn't contribute, you have raised awareness about what the YMCA does in your community.