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## YMCA Annual Impact Fund “Call Script/Process”

This script is designed to guide you through a successful fundraising conversation for the YMCA Annual Impact Fund. The goal is to build a meaningful connection with the donor, share the Y’s impact, and invite them to make a difference in our community.

### Seven Steps to a Good Fundraising Visit

- 1) Greeting
- 2) Share Purpose of Visit
- 3) Share Y Story & Ask About Theirs
- 4) Present Reasons to Give (Case)
- 5) Ask for Support (People vs. Dollars)
- 6) Answer Questions
- 7) Thank Them!

Setting A Meeting/Call – It is a good idea to schedule a meeting/call in advance that is convenient for the donor.

Follow up the day before the meeting to confirm the visit.

1) Greeting (Intro. Get to Know Donor and/or Catch Up). – It is important to establish a rapport with the donor. The visit should be natural and conversational.

Solicitor – “Thanks for taking the time to visit with me today. How are things going with your (You, Family, Friends, Business, Social/Sports)?”

Donor Response – Listen carefully to the donor’s responses, as they may set the tone for their giving frame of mind or their possible areas of focus for giving.

### 2) Share Purpose of Visit

Solicitor – “I am helping the local Y with their annual fundraising efforts. I would like to talk to you about the Annual Impact Fund and update you on the wonderful things that the YMCA is doing for our community. After I have shared the impact of the Y. Are you familiar with the Y’s Annual Impact Fund?” Donor Response – If they are familiar with the Annual Impact Fund (AIF), move on to section 3.

Would you consider changing a child’s life by giving them the opportunity to experience the joy, friendships, and confidence-building moments that come from attending YMCA camp? ·

If they are not familiar with AIF, give them a general overview and timeline. (Ex. Share the purpose/goal of AIF, dates, that it is volunteer driven, that 100% goes to the programs and services inside and outside of the Y walls, and that 100% stays within our association)

### 3) Share your Y story & Ask about their Y experiences

Solicitor – “I have been a Y member and/or volunteer for the last \_\_\_\_ years and I have been able to see and hear first-hand the impact that the YMCA has on our youth and families. The stories of impact from this past year alone, are amazing”

Share your particular story of Y involvement or background. “Do you or your family have any history or background with the Y or its programs?”

Donor Response –

If they have no Y history, have them talk about history or background with other community organizations (Boys & Girls Clubs, Rotary, Etc.). Use this information to relate to the Y’s case and support. The Y has many collaborative relationships.



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If they do have a Y history, listen carefully for the areas of the Y’s programming that seem to mean more to them (Kids, Camp, Sports, Health, Etc.). Use this information later to relate to the Y’s current case and support needs.

### 4) Present the reasons to give (Case)

Solicitor – “I am not sure if you are aware of this, but one of the main goals of our Y Mission and Annual Impact Fund is to make sure that everyone in our community can participate regardless of their ability to pay.” Give some specific statistics of your Y’s support through the Annual Impact Fund. Last year, Maria, a single mother, was struggling to find a safe place for her daughter after school. Because of donors like you, she was able to enroll in our afterschool program, where she made friends, got homework help, and felt supported every day. Stories like Maria’s are why we work to ensure that financial barriers never prevent families from accessing Y programs.

Donor Response –

Give the donor an opportunity to reflect or respond to your presentation of the case and ask questions if needed. If no response, move to the next section.

### 5) Ask for support! – Support a person/program rather than a \$ figure.

Solicitor – Focus in on the donor’s area of interest in requesting a donation. If no focus was given, just use one of the programs in the case to make your request. Example – “I can tell that camp has meant a lot to you and your family over the years. Would you consider making a donation to provide an opportunity for to send a child to camp next year?” Also, refer to your own gift and the fact that you have invested in the program personally. Donor

Response –

If yes, explain what the costs would be to support the area that you mentioned (I.E. – A \$895 donation would cover the cost associated with sending a child to overnight camp). Complete a pledge card. · If no, ask if there is another amount they were considering or if there is another case area they would rather support.

If still no, see if they have any concerns with making a donation to the Y. If you cannot get them to consider a gift, thank them for their time.

### 6) Answer Questions or Concerns.

Solicitor – Even after agreeing to make a donation, the donor may have questions about their donation.

Even if they do not ask any, please ask if they have any questions?

Donor Questions - How can they make payment? Is the donation Tax Deductible?; or I already give to the United Way, so why should I give again? Most of these answers can be found on the FAQ sheet provided in your packet.

7) Thanks!

Solicitor – “Thanks for making a difference in the lives of youth and families in our community through your support! I would love to have you visit the Y in the future to see how your gift is making a difference?” Follow up after the visit with a personal thank you note.