



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

HERE **FOR** GOOD

2023 Annual Campaign
Guide for Volunteers & Staff



About Us

The purpose of YMCA of Orange County is to strengthen communities through programs committed to youth development, healthy living, and social responsibility throughout Orange County, East San Gabriel Valley, Pomona Valley, and Riverside County. With five Health & Wellness Centers, three program centers, 80+ Before & Afterschool Program locations, two special needs programs, and numerous community resources, the Y connects people to their potential, purpose, and to each other. Donations, grants, and legacy gifts ensure Y programs are open to all regardless of an individual's or family's financial circumstances. One hundred percent of donations received support our financial assistance program or subsidized Y programs for those most in need.

Our Commitment

Donations, grants, and legacy gifts ensure Our Commitment to keep "Open to All" regardless of an individual's or family's financial circumstances. 100% of donations support our Financial Assistance program or subsidized programs for marginalized populations.

Volunteers at the YMCA

Volunteering is one of the essential ways the Y engages people and helps them to be healthy, confident, and connected to others. Volunteers distinguish the Y as a place where everyone can take an active role in bringing about meaningful, enduring change in the community. Engaging volunteers is at the core of the YMCA Mission and has been a transformational part of our organization since 1887 when 24 volunteers established the first YMCA in Orange County. Volunteers have continued to play a vital leadership role throughout the years and today more than ever.

Your Support

The YMCA serves the entire community and is open to everyone. Donors enable the YMCA, a charitable, nonprofit organization in compliance with IRS code 501(c)(3), to offer Y program scholarships and free programs to those who need it most. All contributions are tax deductible, to the fullest extent allowed by law. YMCA Tax ID #95-1644055.

Annual Campaign Overview

The Role of Annual Campaign

As a nonprofit dedicated to strengthening community, the Y has a need to raise charitable funds. These funds ensure all community members have access to the Y and advance programs that address community needs in the areas of youth development, healthy living, and social responsibility. Charitable funds provide:

- Financial assistance to low-income individuals and families who cannot afford the full program rate
- Subsidy support for programs that reach marginalized populations (e.g. drowning prevention; obesity prevention)

The Annual Campaign is the Y's primary vehicle for raising sustainable charitable gifts from members and the community, but it's more than just a fundraising tool. The Annual Campaign brings together staff at all levels, committed volunteers, Y members, and donors to pursue a common objective: ensuring that each Y has the resources to make an enduring impact right in its own neighborhood.

Direct Benefits

- Secures meaningful gifts that allow the Y to expand programs and address community issues
- Creates ambassadors for the Y
- Builds passion for the Y's program impact in Y members and the community
- Grows staff and volunteer leadership skills
- Deepens relationships with and the loyalty of donors and volunteers

Indirect Benefits

- Strengthens the Y's partnerships with individuals and organizations
- Creates more committed Y members and program participants
- Enhances the Y's image in the community

A successful Annual Campaign requires year-round effort, even though the major activity of asking for donations is concentrated in February and March. More often than not, it is what happens before and after the active solicitation phase of the campaign that determines whether individuals give, give again, and increase their giving over time.

Implemented correctly, an Annual Campaign follows proven practices and involves year-round strategies that focus on cultivating current and prospective donors, asking for meaningful gifts, thanking the donor once a gift is received, and reporting back to donors and campaign volunteers on the impact of their gifts of time and treasure.

These strategies build donor and volunteer commitment that will result in loyalty to the cause and increased giving over time.

The goal of a well-run campaign includes making sure everyone involved (staff, volunteers, and donors) understands that, when they give to the Y or help raise funds, they help make lasting personal and social change in the lives of others in the community. The Annual Campaign ensures that, at the Y, every child, adult, and family has the chance to learn, grow, and thrive.

2023 Annual Campaign Timeline

November 2022: Staff Campaign Training & Staff Campaign

October – December 2022: Volunteer Recruitment

Week of January 9, 2023: Volunteer Trainings & Rally

January 2023: Major Gift Campaign & Quiet Phase

Week of January 30, 2023: Campaign Kick Off Events by Campaign

February 6–March 10, 2023: Community Campaign

Weeks of February 13, 20, 27: Campaign Report Meetings

Week of March 6, 2023: Final Push

Week of March 13, 2023: Victory Events by North County & South County

Year-Round: Stewardship/Recognition

- Quarterly Updates
- Donor Walls (updated in May)
- Major Donor Reception



The Keys to a Successful Campaign

You may need to modify these strategies to comply with current public health regulations.

MAKE YOUR GIFT FIRST.

This is the most important thing a campaigner can do to be successful. It is difficult for campaigners to ask others to make a commitment to the YMCA before making their own.

KNOW THE YMCA AND YOUR PROSPECTS.

Campaigners demonstrate respect for their prospects by knowing how the prospect's interest and the YMCA's programs "fit".

REVIEW THE INFORMATION IN THIS GUIDE.

Absorb the information presented at the trainings and in this resource. Be able to not only describe the Y and how the community benefits from YMCA programs but also how campaign dollars expand access to these programs through financial assistance or subsidy. Be able to explain donor payment options. Most importantly, tell what the Y means to you.

VISIT YMCA PROGRAMS.

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

SHARE THE YMCA STORY.

Tell the value of the YMCA programs. Use stories of individuals to demonstrate community needs. Then relate the prospect's contribution as creating specific opportunities. By appealing to the self-interest of the donor, a campaigner is more likely to secure a favorable response when asking for a contribution.

PLAN YOUR APPROACH.

Strategize in advance why the prospect might desire to give and what would motivate him or her to make a "stop and think" gift. What things about the Y, 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 be best? Would four installments be more convenient?

AIM HIGH. BE SPECIFIC.

When the time is right, ask for a specific amount. Don't talk dollars; talk service. What will the gift accomplish? If they have donated in the past, encourage an increase in this year's gift. A \$300 gift last year may have the potential to be \$500 or more this year, allowing the YMCA to expand services to more children and families.

ENCOURAGE 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.

NEVER LEAVE THE PLEDGE CARD.

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

ONLINE GIVING

Utilize the YMCA's on-line fundraising tools and Facebook fundraiser pages to reach your family, friends and colleagues that you can't connect with in person.

SEE EVERY PROSPECT PERSONALLY.

The most successful way to campaign is face-to-face. By treating every visit as a special opportunity, 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% positive response rate.

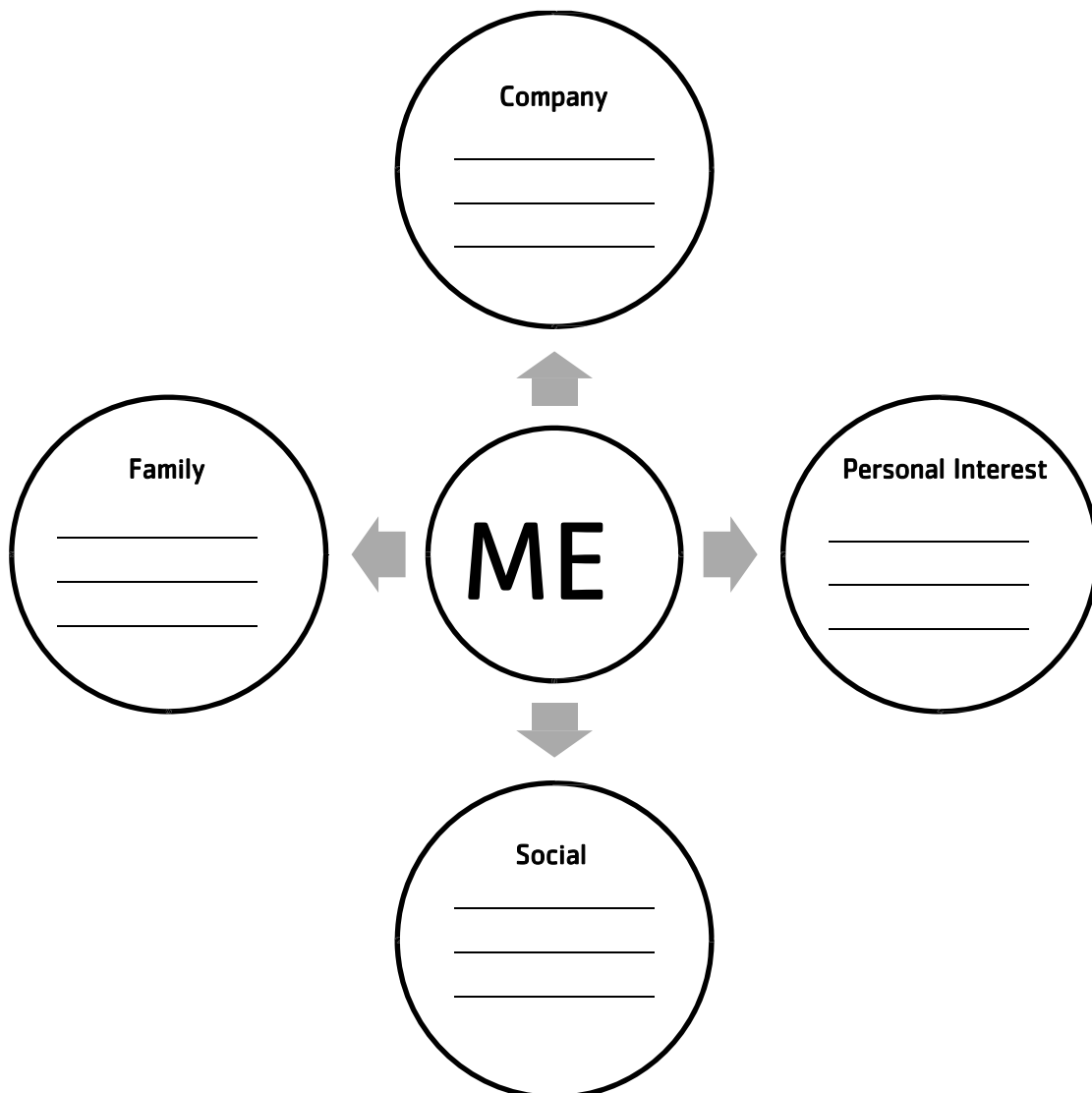
Prospects - Where do I find them?

PEOPLE GIVE TO PEOPLE

Many YMCA campaigners ask the question, "Where do I find prospects to give to the YMCA?" The answer to this question is in all the relationships that you have in your daily life. Studies have shown that people give to people that they know and trust before they give to a cause or organization. Knowing this, consider the following sources when looking for prospects to share the YMCA story with:

- YMCA Members & Participants
- Former YMCA Donors (Staff can provide lists)
- Current and Former YMCA Volunteers, Former Board Members
- Friends
- Relatives
- Neighbors
- Work Associates
- Vendors & Customers
- Community Organizations/Businesses

Individuals are the #1 donors nationally, not corporations and organizations.



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 to protect the prospect from being called more than once. Campaigners may request a certain person's card but should not call anyone without clearing and obtaining a pledge card first.

There are 2 different pledge cards that can be used when securing a donation. A blank pledge card can be found in the Annual Campaign brochure. If a donor has previously given, a pre-populated pledge card will be produced and given to the campaigner assigned to that donor.

COMPLETING THE CARDS

1. Verify the donor's name, address, phone numbers and email address. Note any changes on the card.
2. Ask if the donor's company matches gifts. If the company does match, please indicate the dollar amount.
3. Get the prospect's signature if he or she pledges. The signature emphasizes the commitment and is required!
4. Write in the donor's preference for making payments on their pledge.
5. Facility Members who are donors may also deduct their donation monthly from their bank account. Bank draft authorization forms will be provided by the YMCA staff.
6. Note billing instructions. For credit card charges indicate:
 - Visa, Master Card (M/C), American Express (AMEX) or Discover
 - Card number and expiration date
 - Name, as appears on card
 - Complete billing address
 - Signature
7. Do not leave the pledge card with the donor.
8. If not already indicated on the card, please write in your name as the Campaigner where indicated.
9. Donors can designate their gift on the "Gift Designation" line.

RETURNING THE CARDS TO THE YMCA

During the campaign, reports are published once a week. Please turn in your completed pledge cards promptly so your work will be reflected on the weekly reports. If you are unable to contact a prospect, return the prospect's card as soon as possible to the Y Campaign Manager or designated person, so someone else may have a chance to follow up.

*To download an electronic version of the pledge card, visit ymcaoc.org.

Printed Name, Business, or Organization _____	YMCA Member
Employer or Contact Name _____	Matching Gift Progrs
Mailing Address _____	
City _____ State _____ Zip Code _____	
Phone _____ Email _____	Designation (Branch or Program) _____
Pledge Amount _____	Signature (Required) _____ Date _____
I will fulfill my gift as follows:	
Cash enclosed \$ _____	Check (payable to Y of Orange County) _____ Invoice (\$25 minimum)
Credit Card: Visa Mastercard Amex Discover	
Card Number _____ Exp _____	Security Code (last 3 or 4 digits on the back of card) _____
Name on card (if different than above) _____	Signature _____
Billing Zip Code for card (if different than above) _____	Campaigner Name _____

YMCA of Orange County

YOC ASC :

Donor Information:
Jane Doe
 123 South Hope Street
 Los Angeles, CA 90071

United States
 Home Phone: (555) 555-5555

Bus. Phone (800) 123-4567
 Cell Phone:
 E-Mail: Jane_doe@yahoo.com
 Member ID: 123456

New Address: _____

New E-Mail: _____

New Phone: _____

Giving History: As of 8/1/2016

Campaign	Pledged	Paid
Fullerton ASC 2016	\$1,000.00	\$1,000.00
Mission Viejo Golf 2016	\$1,500.00	\$1,500.00
MV CHILDCARE ASC 2016	\$2,200.00	\$2,200.00
Yorba Linda Placentia ASC 2016	\$100.00	\$100.00
Mission Viejo ASC 2015	\$600.00	\$600.00
YOC ASC 2015	\$2,150.00	\$2,150.00
Mission Viejo ASC 2014	\$200.00	\$200.00
YOC ASC 2014	\$2,000.00	\$2,000.00
Mission Viejo ASC 2013	\$1,200.00	\$1,200.00
Reach Out Gala 2013	\$250.00	\$250.00

**TOP PORTION FOR CAMPAIGNER USE;
 LOWER PORTION TO BE SHARED WITH DONOR**

Campaigner: **Jane Doe**
 Pledge Amount: _____

Matching Gift: Yes No
 Company: _____
 Amount: _____

Will give Send information
 Undecided Change e-mail
 Declined to give Remove e-mail
 Remove from mailing list

Profile:

Suggested Follow-up and Comments:

Suggested Giving Amount: _____



Make checks payable to:
 YMCA of Orange County
 13821 Newport Avenue, Suite 200
 Tustin, CA 92780
 United States
 (714) 549-9622

Jane Doe
 123 South Hope
 Los Angeles, CA
 90071
 United States 123456
 Member ID:
 Home Phone:
 Business Phone: (800) 123-4567

Campaigner: Jane Doe
 Total Pledge Amount: _____

Payment Options:
 I wish to pay in full.
 I wish to set up an auto draft for my payments.
 Don't draft me; please send a reminder for my pledge payments.

Payment Method:
 Credit Card: Visa MC AMEX Discover
 Acct #: _____ Exp Date: _____
 Bank Draft (Attach voided check)
 Full Payment Enclosed

Payment Schedule:
 Weekly Monthly Quarterly
 Semi-Annually Annually
 Start Date: _____ End Date: _____
 Donor Signature: _____

Frequently Asked Questions

What is the YMCA?

The YMCA is a private nonprofit, human service organization funded by membership, and program fees, and contributions from YMCA friends, corporations, foundations, grants and United Way support. The YMCA operates day and resident camps, family programs, youth programs, senior programs, childcare and after-school sites and much more. Each YMCA center is unique and responds to the needs of its own community.

Doesn't the YMCA receive funds from the United Way?

The YMCA of Orange County is a designated-only member of the United Way of Orange County. We only receive funds if donors request that their UW donation goes to the YMCA.

How does the campaign fit into the budget?

Each YMCA participates in the Annual Campaign. The money raised in the campaign is allocated to our Financial Assistance Program and subsidy support for programs that reach high need (e.g. obesity prevention, drowning prevention, etc). Contributions are used to serve youth and families through programs and financial assistance for those who otherwise might not be able to participate.

Are gifts to the YMCA tax deductible?

Yes, charitable gifts to the YMCA are tax deductible to the fullest extent of tax laws. YMCA Tax ID #95-1644055.

Why should I give money to the YMCA? I already pay membership dues.

Your dues cover the costs of Y membership, but additional dollars are needed to subsidize community and youth programs and provide financial assistance to families and individuals who cannot afford to participate. The YMCA needs your support in this campaign to reach into the community and provide safe, high quality, character-building programs for all.

Why should I give to the Y? I'm not a member.

Your support is still needed! You benefit by having a strong YMCA in your community that provides meaningful opportunities to help young people grow into responsible adults, and assists families in being stronger. The YMCA makes your community a better place to live and work.

I gave to the YMCA last year. It's 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.

Do the funds we raise for our YMCA benefit our local communities?

Yes. All funds raised for your local YMCA are distributed through the local branch and child care centers.

Have a question you can't answer?

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

NOTES

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 **Our Mission**

To put Christian principles into practice through programs that build healthy spirit, mind, and body for all.

 **Our Vision**

To improve lives and strengthen character through youth development, healthy living and social responsibility driven by passionate staff and volunteers.

 **Our Values**

Respect, Responsibility, Caring, and Honesty – Our values are celebrated by staff and members and provide a positive foundation for all Y programs and a healthy connection with others.

 **Our Commitment**

To keep programs open for all. The Y is a nonprofit, charitable organization that serves the entire community. Donations support our scholarship program and Our Commitment.

 **Our Cause**

Strengthening the foundation of communities.

YMCA OF ORANGE COUNTY

Orange County • Riverside County • East San Gabriel Valley • Pomona Valley