

# Santa Monica Family YMCA Annual Community Giving Initiative

## “Call Script/Process”

### Seven Steps to a Good Fundraising Solicitation 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 – It is a good practice to set a meeting 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 community giving initiative. I would like to talk to you about the initiative and update you on the wonderful things that the YMCA is doing for our community. After I have shared the impact of the Y, I would like you to consider joining our efforts in making sure all in our community can benefit from the YMCA’s programs. Are you familiar with the Y’s Annual Community Giving Initiative?”

Donor Response –

- If they are familiar with the Annual Community Giving Initiative, move on to section 3.
- If they are not familiar with the initiative, give them a general overview of the initiative and timeline. (Ex. Share the purpose/goal, dates, that it is volunteer driven, that 100% goes to the needy and programs, and that 100% stays local)

- 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 firsthand the impact that the YMCA has on our youth and families.” 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.

- 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, Guides & Princesses, 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 Community Giving Initiative is to make sure that everyone in our community can participate regardless of their ability to afford it." Give some specific examples of your Y's support through the Initiative. More importantly, share a true story relating to one of the case areas. Try to focus case and story around their areas of interest indicated earlier.

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 scholarship five needy kids 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 \$500 donation would scholarship the 5 kids mentioned to camp). Have them fill out a pledge card and sign 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, just 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?

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.