



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

BUILDING COMMUNITY



Phase II Volunteer Guide

Capital and Annual Campaign
WATERTOWN AREA YMCA

WHY ARE YOU IMPORTANT?

As a YMCA Capital and Annual Campaign Volunteer, you will spread the good news of the YMCA and its programs. You'll help others become a part of an exciting future for Watertown! That's important because people often don't know about the deeper meaning and true value of the YMCA and the people and programs that are impacted. You are the essential link between the YMCA and businesses and individuals in our community. You will make it possible for the YMCA to complete the next phase as part of the Collective.

WHY IS THIS CAMPAIGN NECESSARY?

The **Capital Campaign** will help assure that the YMCA can provide the very best facilities and equipment to meet our Mission. This campaign is about expanding the vision that The Collective has begun for the community.

The **Annual Campaign** helps keep youth membership and program fees reasonable by subsidizing some of the real costs. Even so, we know that some families will need financial assistance to participate in YMCA activities. The Annual Campaign helps to assure that the YMCA is indeed "FOR ALL."

YOUR ROLE IN THE CAMPAIGN

Every volunteer is an important part of a team that will help us raise the funds to complete the next phase of the YMCA and support critical programs for the YMCA.

Volunteers fill critical roles:

- **Lead Gifts Campaigners:** Ten to twelve volunteers that will seek pledges of \$25,000 or more for the Capital Campaign and Annual Campaign "Circle of Giving" donations.
- **Team Captains:** Five volunteers who will enlist campaigners and report team progress throughout the campaign. Set team and personal goals and solicit gifts to the campaign.
- **Staff Liaison:** Recruit and coordinate team captains, support their efforts and take responsibility for ensuring the success of the division.
- **Campaigners:** Set a personal fundraising goal and tell the YMCA story to friends, neighbors and business associates. Ask for their gift support.
- **Inner Family:** Leading the Board & Staff Campaign to secure 100% participation from key leaders of the YMCA.

When you ask others to join you in supporting the YMCA, you are helping create an exciting future for the Watertown Area!

THANK YOU!

STEPS TO SUCCESS

Make your own pledge first: This is the most important step you can take toward success. After you have made your own commitment, you can ask others with pride to "join me in supporting the Y."

Talk about the YMCA: Have face-to-face conversations about the good things the Y does and about your personal commitment. Telling the Y story will help you get ready to ask for donations and build a wide base of understanding and support for the future.

Ask your best prospect first: Practice by asking the easy ones! Ask people you know well to join you in helping kids and families through the YMCA Campaign.

Keep in touch with your team members: Their experience can help you and their success can inspire you. Throughout each phase of the campaign, we will have report meetings; be sure to attend. If you have questions or need assistance between meetings contact:

- Jon Lange, jlange@glcymca.org
- Taylor Walsh, twalsh@glcymca.org
- Kim Schooley, kschooley@glcymca.org

NUTS AND BOLTS — HOW TO ASK FOR AND RECORD PLEDGES

Solicit only if you have been assigned the prospect: There will be more than 30 volunteers working on this Campaign. We track the list of prospect to organize the campaign so that no donor is overwhelmed by multiple solicitations. Please talk with everyone about the YMCA and encourage their support, but ask for the gift only if you have been given the assignment. Think of someone you would like to ask? Contact Taylor Walsh or Jon Lange at the YMCA. They will act as a “clearinghouse” for selections.

Aim high and ask for a specific amount: When the time is right, ask for a specific amount and talk about the good things those dollars will do. People give to accomplish good for others.

Make friends for the YMCA: Not everyone will choose to donate, but try to make a friend for the YMCA -- even if they decide not to contribute now.

Encourage pledging: Most of us can give more when we make small payments over a period of time. Ask your prospects, “I hope you will consider joining me by contributing (\$5,000) per year over five years to help kids and families who need the YMCA?”

Watch the reports: Reports are published via e-mail during the campaign. Please call with progress reports and turn in your completed pledge forms promptly so your work will show on the reports.

Attend the scheduled meetings: We’ll learn from each other and celebrate successes. Each phase of the campaign will have scheduled report meetings.

FACTS ABOUT THE YMCA CAMPAIGN

- The Y’s Annual Campaign is a critical part of ensuring that no one is turned away due to inability to pay and key mission driven programs are maintained, such as: before and after school Y Care, Special Programs (serving individuals with disabilities), and programs for active older adults.
- The Watertown Area YMCA was formed as a successor to the Health & Wellness Center (HAWC) in 2008. The current facility, which originated as a High School, was re-imagined to create programs for all ages and is a “hub” for activity.
- The Collective, which includes the Y’s Ehlinger Center and Early Education Center, opened in the summer of 2023 and is designed to be an innovation center to inspire collaboration, mobilize resources, and encourage innovation. All with a mind to improving well-being.
- A new YMCA facility is envisioned on the campus of the Collective to assure YMCA programs area accessible for generations to come.
- Initial campaigning, which began in 2022 has been successful in raising \$12 million toward to the new building.

CAMPAIGN CALENDER

Lead Gifts Training..... Tuesday, November 7, 2023 at 4:30 pm

Report Meetings In Person or Via Zoom at 4:30 pm

- Tuesday, November 28, 2023
- Tuesday, December 12, 2023
- Tuesday, January 9, 2024
- Tuesday, January 23, 2024

Community Campaign..... February - April, 2024

Victory Celebration..... TBD

FREQUENTLY ASKED QUESTIONS

These are questions asked most frequently of volunteers working on the 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.

Q: Help me understand the difference between the Annual Campaign and the Capital Campaign... should I give to both?

A: The Capital Campaign will provide the resources to assure the success of this capital initiative. The annual support efforts of the YMCA will continue to be important as the YMCA seeks to meet the needs of the community. Financial assistance for YMCA programs will continue to be important on an ongoing basis. We would hope that you would consider a gift to both initiatives. Since we see this as a once in a generation opportunity, we would hope that your capital gift can be made in addition to your annual support. If you can only choose one, please continue your Annual Campaign gift.

Q: Why this campaign, and why now?

A: A new YMCA facility has been on the planning table for several years. Much work has been done to determine how the YMCA can become an even more significant community partner. After years of exploration (and some delay because of COVID) it is clear that now is the best time to move forward.

The recent opening of "The Collective" and the YMCA's critical role in this transformational project provides the opportunity to take the next step forward. The partnerships, the location, and the synergy of the partnerships will create a wonderful "hub" for the Watertown community.

Support of the YMCA's Annual Campaign is an ongoing need. Funds raised help keep YMCA programming affordable for all and ensure that everyone can be a part of the Y.

Q: When will the project be completed?

A: We will be raising funds from various sources over the next year. We are committed to being good stewards of the resources of the YMCA. With that in mind, we will not announce a construction schedule until we have raised sufficient pledges to make sure that we can accomplish our goals. Construction will take approximately 16-18 months. Our hope is to begin that process in the Spring of 2024.

Q: What happens if you do not meet your goals?

A: While we have every expectation of meeting our objective, we are realistic enough to know that a capital project with a multi-faceted funding mechanism has many pieces that must come together. Should circumstances change or the unexpected happen, we will keep donors informed at every stage along the way. If and when we have to change course, we will inform donors and ask for their advice about how to either use their gifts for an alternative plan or return the contribution. In all cases, we will honor the donor's wishes.

Q: Where does the money go when I make a contribution?

A: The YMCA has established a separate account to receive and track all Capital Campaign contributions to assure these gifts are segregated. These funds will then be appropriately allocated to the project. The YMCA will establish construction financing to manage cash flow while pledges are received.

Annual Campaign contributions will go directly into the YMCA's operations to assure that the YMCA programs and services are accessible to ALL.

Q: What will happen with the current building?

A: As part of our partnership arrangement, and in keeping with our complex "capital stack," the current facility and property will be returned to the public trust for an exciting next stage. This is a wonderful three-acre site within a neighborhood that qualifies for new market tax credits. The YMCA along with other city partners have discussed workforce housing and child care as potential uses for the site over the long term.

FILLING OUT THE PLEDGE FORM

Please make sure you complete this card as accurately as possible.

WATERTOWN AREA YMCA

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

the Y
BUILDING COMMUNITY
WATERTOWN AREA YMCA CAPITAL CAMPAIGN/ANNUAL CAMPAIGN PLEDGE FORM

Name: _____ Date: _____
Organization: _____ Date of Birth (Required): _____
Mailing Address: _____
City/State/ZIP: _____
Phone Number(s): _____
Email: _____

To share in the vision as set forth by the YMCA and in consideration of the gifts of others, I/We subscribe and promise to contribute an unrestricted gift to the Watertown Area YMCA as follows:

Capital Campaign Total Gift: \$
 Entire gift now
 Amount contributed (paid) at this time: \$ _____. The balance of my/our gift will be pledged over _____ years.
Please remind me: Annually Semi-Annually Quarterly Monthly
Beginning in (Month/Year): _____
 I am interested in fulfilling my pledge through a contribution of stocks, appreciated assets, insurance policy, IRA transfer, or required minimum distribution. Please contact me with information.

Annual Campaign Total Gift: \$
 I would like to join the Triangle Society* with a gift of \$ _____ for the next three years (2024, 2025, 2026). *Gifts of \$1,500/yr. qualify.
 I am interested in fulfilling my pledge through a contribution of stocks, appreciated assets, insurance policy, IRA transfer, or required minimum distribution. Please contact me with information.
 My gift will be matched by: _____
 Yes, I have/would like to make a gift to the Y in my will.

I/We wish to have this gift recognized as:
This gift should be recognized as: Anonymous In Honor of _____
 In Memory of _____

Contributor Signature: _____
YMCA Volunteer: _____ Date: _____

Please make checks payable to: Watertown Area YMCA
Mail to: WATERTOWN AREA YMCA CAPITAL CAMPAIGN, c/o YMCA Association Office, 1750 E Valley Rd, Oconomowoc, WI 53066