



THE CRITICAL MIDDLE

YMCA ANNUAL FUND STRATEGY REIMAGINED

Presented by **YMCA of the North**

NAYDO Webinar Series | February 2025



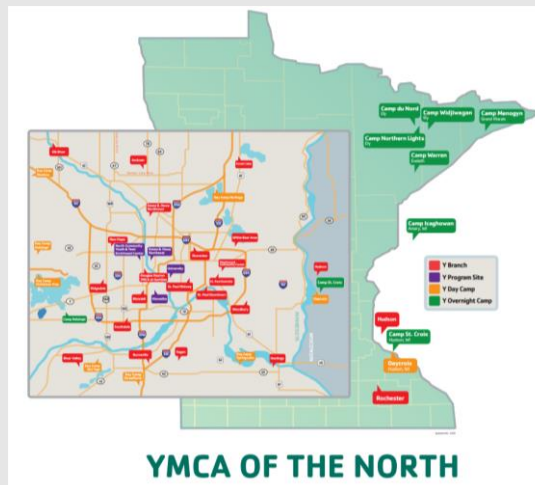
Monica Kenney built a career in higher education at UCLA and the University of Minnesota, designing fundraising initiatives to build a baseline of donor support, and pioneering the space of young alumni giving. In 2022, Monica took a role with the YMCA of the North as a **Mid-Level Gift Officer** and quickly fell in love with the mission-driven work. As her interest in the larger strategies grew, she jumped at the opportunity to move into an Annual Fund mass communication role and is now our **Director of Donor & Alumni Relations**.



Kurt Simer serves as the **Lead Philanthropic Partner** (Lead Mid-Level Gift Officer) at the YMCA of the North, overseeing donor engagement strategy for a four-person Mid-Level Gift Officer team which works with approximately 1,900 mid-level donors across 37 individual branch, camp, or program annual fund campaigns. Prior to moving into full-time fundraising work, Kurt held several roles in the Camping department of the YMCA of the North. If you have insight into accomplishing fundraising objectives while playing golf with your donors, please call Kurt!

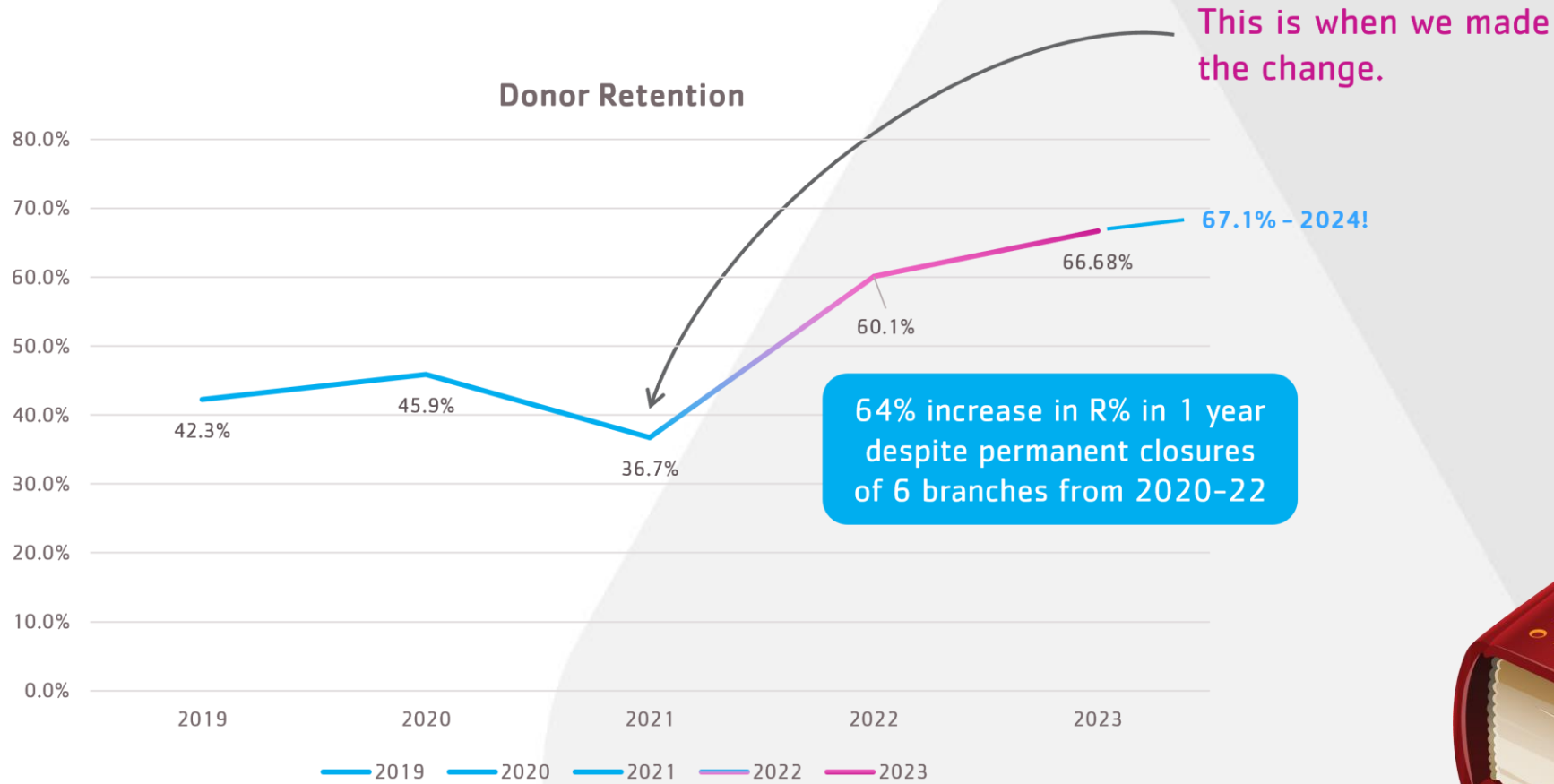


Shane Hofer, CFRE, got his start as a 16-year-old lifeguard at the YMCA's outdoor pool in Shoreview, Minn., and to this day he loves all things aquatics. He spent a decade-plus leading the White Bear Area YMCA, later serving as a vice president of operations supporting a dozen branches and programs. Today, Shane is **Senior Vice President of Philanthropy** for YMCA of the North, where he coaches a team of fundraisers that raised more than \$46 million annually in total philanthropy in 2025.

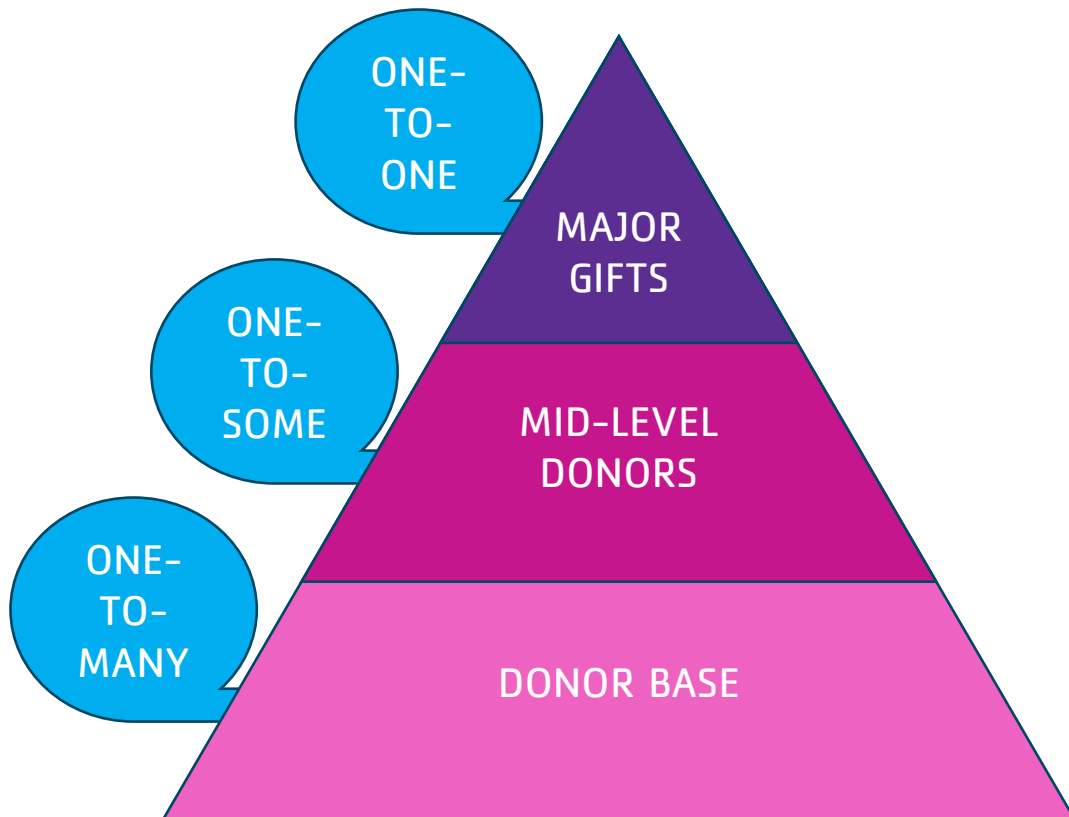


YMCA of the North
Minneapolis, Minn.

THE GOAL WAS STILL RELATIONSHIPS, BUT WE CHANGED THE STRATEGY



OUR LAUNCHING POINT



Defined As

Donors making an Annual Fund donation between \$500 to \$9,999, broken down into tiers A+, A, B, and C, based on giving totals.

The Primary Goals

Retain, and decrease attrition. Lift, and increase the revenue per donor. Accelerate the movement and number of mid-level donors to major gift programs.

Portfolio Time Management

With over 1,400 donors in this bracket, tiers were used to set the outreach cadence.

Top 4% are
Majors

Gift size \$10k and up

From 80%-96%
are Mid-Level

Gift size \$500-\$9,999

Donor
Base:
~10,000

Gift size under \$500

since 2022, for every local



a philanthropy team

Executive Director	Locally-assigned (Reserved)
Major Gift Officer	\$10k+
Mid-Level Gift Officer	\$500-\$9,999
Planned Gift Officer	Bequest, estate, endowment
Community Board & Volunteers	Connectors, stewardship, new gifts, locally assigned, < \$500

YMCA OF THE NORTH



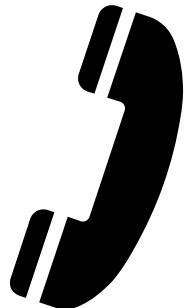
A MID-LEVEL DONOR PROGRAM

Is not unlike an Aquatics Program

FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

DONOR TOUCHPOINT PLAN: BUILDING A DONOR'S EXPERIENCE

Donor	Stewardship and Cultivation						Solicitation	
Tier	Wave 1: Donor Conversation	Wave 2: Custom Video Story	Wave 3: Impact Report	Wave 4: Thanksgiving Card	Gift Ack Call	Happy Bday Video Call	Phone Ask	Face-Face Ask w/ Proposal
Majors	Yes	Yes	Custom	Yes	Yes	Yes		Yes
Tier A+	Yes	Yes	Custom	Yes	Yes	Yes		Yes
Tier A	Yes	Yes	Custom	Yes	Yes	Yes	Yes	
Tier B	Yes	Yes	Yes	Yes	Yes		Yes	
Tier C	Yes	Yes			Yes		Yes	
Tier D	Yes				Yes		Yes	



BECKER FAMILY
DONOR IMPACT: BEACONS NEXT GENERATION

WHAT YOU HELPED US ACHIEVE
 Beacons Next Generation, a program that partners with Minneapolis College, provides wrap-around support for higher education—enabling participants to pursue their life and career goals. Voiced by the young participants, the Beacons program expanded from a K-12 model to K-Careers to further empower and impact young people and our communities. This program serves 86% students of color and 45% of first-year students, as they navigate adulthood. With your continued partnership, more young adults will receive vital resources to help build confidence and achieve their dream careers or lives.

1,800 <small>Touchpoints or resources utilized by students during academic year.</small>	211 <small>Students engaged through Beacons NextGen programming during the 2023-2024 school year.</small>	94% <small>Of participants believe Beacons helps with their student success.</small>
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MENTORING PROGRAM

- Mentoring in K-5 Centers, 8 college students provide 30 hours a week of service work during the school year and 30 hours each week in the summer.
- 8 young adults serving on a leadership team on campus, developing programming and providing peer mentorship to other students.

COLLEGE EXPLORATION

- 4 Beacons High Schools attended college tours.
- Hosted college tours to 20 additional High Schools interested in program.
- Provided 6 PSEO orientations, a program that offers college credit courses to 10th-12th graders.

“Joining Beacons at Minneapolis College has given me confidence, introduced me to a community, and connected me with resources for school. It feels like home when I’m around my Beacon’s family.”

YMCA of the North
 Jim and Cara, thank you for being a sustaining donor - or as we like to fondly think of you, a Steward of the North! Our work wouldn't be possible without you! Thank you for your ongoing generosity.

Watch Now >>>

SO, WHAT HAPPENED, AND WHAT DID THE DONORS SAY? A YEAR OF STEWARDSHIP & CULTIVATION

3,457

Stewardship touchpoints
made by phone in 2022

9k+

Recorded Gift Officer
donor contacts

837

Unique Gratavids with
custom-to-donor videos

” Thanks for the personalized message!

” Kurt, thank you for the nice thank you. I give to the Y because the Y has done great things for me and the people I love. Would you like a donation for Widji?

” Hi Monica, You can contact me at (612) 730-8789.

” Hello, Kurt ~ Thanks for the message! The YMCA has played an important part in my life since I was a child growing up in Kansas City, MO. My brothers and I attended summer camp, my sister was a camp counselor, and I learned how to swim at the Y. It's a lifelong skill that I still enjoy today at age 63! Because of the impact the Y had on my life, I feel compelled to help others access the great programming and healthy opportunities. I'm happy and privileged to be able to donate to Y Partners. Sincerely, Nancy Hanson

” Thanks for nice video pleas do not thanks we enjoyed at ymca work out people are great enjoy your summer love charu

” I treasure the YMCA and we will be making a donation again this year. Eric Reiner

” Hi Monica, yes, I am interested in making a video!

” Hi, Monica! This is wonderful. Love the special video messages, and how it can be tailored to fit the donor. Thank you so much for sending this example. I'm sure Glen will love to be part of this! Stay tuned! Shannon

” Got it! Thanks Cari. I will make a point of having our staff create a short video next week.

” Excellent job, thank you! Note - it went straight into Spam in Gmail. Great job.

MASS COMMUNICATIONS ALIGNMENT



Will you renew your annual donation today?

Thank you in advance for your renewed commitment to the University Y and the people we serve together!

DONATE ONLINE

To donate online, please use the QR code at the right or the URL below. You may also donate by check using the enclosed reply card and envelope.

ymcanorth.org/give/uy



Send **renewal communications** based on a donor's gift anniversary

Share **impact and mission** outcome stories twice in Q1 and Q4, and once in Q2 and Q3

Layer in **retention-boosting recognition** strategies, such as:

- First-time donor pathway
- Alumni communications
- Holiday specific dynamic content

LET'S SEE THIS IN ACTION

Bob

- Longtime Annual Fund Donor
- Not previously stewarded
- Capital Gift
- Planned Gift



What gets measured gets done,
what gets measured and fed back
gets done well, what gets
rewarded gets repeated.

John E. Jones III

MAKE A PLAN

“Measure” your donors:

- Define and segment: Where do you focus?
- Create tiers to facilitate engagement strategy
- Design an outreach plan, then track it

“Measure” your engagement:

- Number of Touchpoints for Each Donor by Tier (Cultivation, Stewardship and Solicitation)
- Personalize to Align with Donor Interests
- Identify Stakeholders to Complete the Work (Fundraiser, Operational Leader, Board Members, etc.)

BUILD YOUR TEAM

Donor Data Leader

- Helps identify donors
- Helps to identify ‘when’ to contact the donor

Fundraiser / Strategist

- Is the primary point of contact with the donor and does the most communication
- Reinforces the donor’s relationship with the organization

Mission Representative

- Can be program staff, volunteer, or executive
- Tells mission story
- Creates personal programmatic relationship with donor

FIND YOUR TOOLS & RESOURCES

1. Get data-centric
(Blackbaud for Y of the North)
2. Formal training is a great option.
[Veritus Mid-Level Training](#)
3. We love video storytelling with
[organizations like Gratavid](#)

blackbaud®



YMCA OF THE NORTH



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THANK YOU

FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY