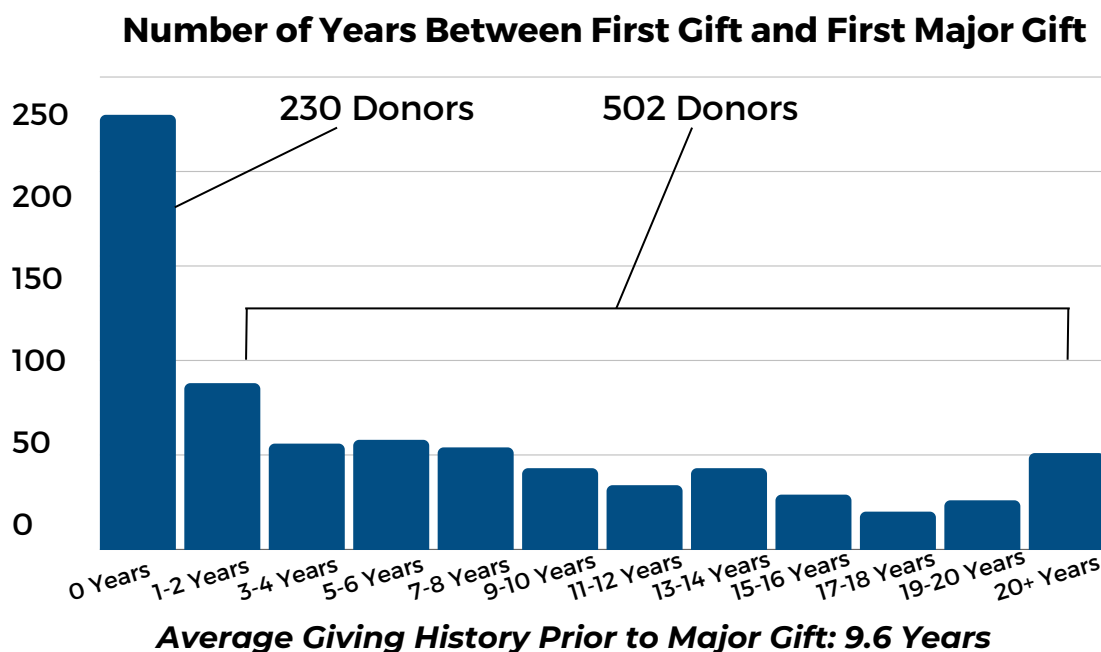


# **WORKBOOK: Crafting the Multi-Year Giving Ask**



*Multi-year giving strengthens donor pipelines, increases retention, and accelerates major gifts. Prioritizing this strategy is crucial, as consistent donors are more likely to become your major donors. Consider this data from CCS Fundraising as you embark on turning more everyday donors into multi-year, and eventually major donors.*



Source: <https://www.ccsfundraising.com/insights/how-small-donors-become-major-donors-analyzing-major-donor-pathways/>

As we navigate the ever-changing landscape of nonprofit fundraising, it's crucial to stay on top of the latest trends, especially when it comes to building major and planned gift pipelines. This is true even in the best of fundraising climates.

Unfortunately, research shows us that small and mid-size donors are disappearing, which is precisely where best fundraising practices tell us to look to in order to build the major and planned giving pipelines.

Recent research, released by CCS Fundraising analyzes the giving history of donors between their first gift and their first major gift. CCS's data reveals a valuable trend: **by fostering a culture of multi-year giving, organizations can significantly enhance their major gift pipeline and overall fundraising effectiveness**, effectively and sustainably overcoming the challenges that harm the financial wellbeing of so many organizations.

# ***PILLARS:***

## **For Successful Multi-Year Giving Strategies**

## Pillars for a Multi-Year Giving Strategy

### Before



BEFORE

- **Identify the Who and Start Small**
  - Anyone Volunteering/Board
  - Annual Fund (LYBNT/SYBNT)
  - Parents or Other Specialty Group
  - Managed Donors
- **Establish the Why**
  - Vision for Future
  - Programs
  - Micro-Campaigns/Strategic Priority

### During (THE ASK)



DURING

- **Establish the Building Blocks**
  - Easier for teams to make the ask when there is clarity
- **Tell a story that supports a multi-year ask**
  - Future vision
  - Strategic priority/the shift
  - Gain time to grown donor base
- **Transparency with donors on what it will look like**
  - Easy backend paperwork - one and done
  - Increased communication and focus on impact stories

### After (THE PROCESS)



AFTER

- **Create Workflows**
  - Streamline back-end processes to eliminate paperwork to make life easier for YOU, THE DONOR and YOUR TEAM
- **Auto-pilot is OKAY**
- **Build out a “Touch” toolbox**
  - Grow your donor relationships
  - Steward and show impact vs. YOY Ask

***HOW TO:***

**Succeed with Multi-  
Year Asks**

## How to Create and Succeed with Multi-Year Asks

### 1. Establish a Multi-Year Ask Strategy

- Make it simple to eliminate pushback from your development team.
- Build a long term vision script versus a year-to-year ask.
- Get the team involved via brainstorms. Share resources and ideas.

### 2. Start Small

Leverage your previously engaged donor groups.

- Annual Fund Donors
- Volunteer Boards
- Managed Donors (assigned to gift officer portfolios)
- Specialty Groups (ie - parents, grateful patients, volunteers, etc.)

### 3. Communicate Your Story

- Focus on the **impact** the donor will be making.
- Align the donor with the organization's **strategic priorities**.
- Share that you are **growing the donor base** to progress the vision.

### 4. Process

Consider how you can treat **every donor** like a million-dollar donor.

- Use systems and tools that streamline and **personalize** communications – from solicitations to stewardship, stewardship to impact, and even all of the paperwork in between.
- Be **transparent** throughout the process, because changes can and do occur, especially when donors are committed to the long-term vision.

# ***WORKBOOK:***

## **Sample Multi-Year Ask Statements**

## **Multi-Year Giving Workbook**

### *Most Importantly...*

*When you are making a multi-year ask to a donor, explain to them that securing their future commitment now helps your organization plan for the future, understand where they have resources to commit to the future of the initiative early, and ultimately ensures financial well-being that empowers leadership to make the most impact.*

*Additionally, when a donor commits to a multi-year gift, touchpoints become more about stewardship and impact, rather than continuous solicitation cycles.*





## **Multi-Year Giving Workbook**

### *Sample multi-year ask language for Leadership and Annual Giving*

*Our goal here at **[name of organization]** is to \_\_\_\_\_, \_\_\_\_\_, **and** \_\_\_\_\_ over the next **3 years**. This growth is fueled by our annual fund. Last year you made a gift of **\$500**. Would you consider making a **3-year commitment of \$750** a year to help support this \_\_\_\_\_?"*



## **Multi-Year Giving Workbook**

### *Sample multi-year ask language for Partnerships*

***“I’m thrilled that we’ll be working together and staying in close communication over **the next three years**. Now, you and I can focus our time and attention on putting your generous commitment to work versus having this identical conversation year-over-year.”***



## **Multi-Year Giving Workbook**

### *Sample multi-year ask language for Strategic Priorities*

***“As an organization, we’re striving for a 50% increase in multi-year commitments and we hope you’ll consider a multi-year commitment of \$1,000 for five years to support the vision of [state vision]. This will ultimately allow our organization to reach more donors 1-1 throughout the year, expand our resources (getting the most ROI from your gift), and spend more time putting your generosity to work.”***



## **Multi-Year Giving Workbook**

*Sample multi-year ask language for  
Programs and Affinity Groups*

*“I’m excited to share with you our new donor recognition society, the **[name of society]**. Donors who commit to multi-year gifts of **[number of years]** will be recognized for \_\_\_\_\_ and receive \_\_\_\_\_.”*

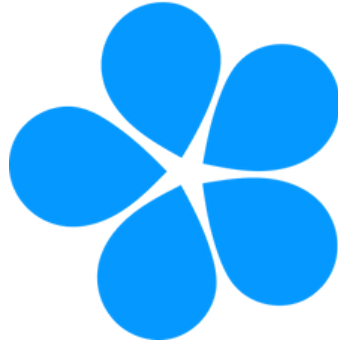


# ***CONCLUSION:***

## **Crafting the Mutli- Year Giving Ask**

## **CONCLUSION: Crafting The Multi-Year Giving Ask - Final Thoughts**

- 1. Build a Future Vision Script**
- 2. Take 1-2 Days to Craft Multi-Year Giving Messaging around the Annual Fund and Existing Funds - include your team.**
- 3. Start Small, Scale Large.**
- 4. Identify Subsets of Donors to Engage NOW.**
- 5. Build a Workflow to Scale Your Strategy.**
- 6. Ensure Open, Regular, and Transparent Communication with Donors.**



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*Intelligent Gift  
Documentation  
Management*