Plannual Giving

HOSTED BY:
MINNESOTA PLANNED GIVING COUNCIL

PRESENTED BY:
JOSH HANSON
MARKETING CONSULTANT
THE STELTER COMPANY
Josh Hanson
Marketing Consultant
The Stelter Company

Prior to current role, founder of Nfinity Performance Group, a sales training and consulting practice that worked with Fortune 500 Companies.

Loves Hot Tamales and other cinnamon gummy candies.

BBA in Finance, University of Iowa

Follows the MASH principle to life.

Loves coaching youth sports, playing golf, skiing and traveling with my wife Michelle and three boys, Drake, Cooper and Nash.
Plannual \( \text{ˈplanyəʊəl} \) adjective

1. the integration of marketing for planned giving and annual giving offices.

2. the evolution of philanthropic outreach toward a donor centered approach
The future of planned giving marketing is integration, not separation.
## Characteristics of Offices

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<td>• Broad Communications</td>
<td>• Personal Outreach</td>
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<td>• Simple Gifts</td>
<td>• Complex Gifts</td>
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<td>• Expertise in Marketing, Systems, and Cycles</td>
<td>• Expertise in Technical, Relationships, and Legal</td>
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What does the Plannual Giving model mean?

- Applications for shops of all sizes.
- Separate and amplify two very different types of communication:
  - Broad-Based
  - Specific
Poll
Plannual Giving at Redlands

Integrated the Planned Giving and Major Gifts Offices
Plannual Giving at Redlands

Complex planned gift solicitation, planned gift marketing, and MGO referrals

- Director of Planned Giving
  - Asst. VP of Advancement: Principle gift and complex planned gift solicitation
  - Director of Annual Giving
    - Asst. VP of Advancement: Principle gift solicitation, refer planned gifts to DPG
  - Director of Major Gifts
    - Director of Major Gifts: Major gift solicitation, refer planned gifts to DPG
  - Director of Major Gifts
    - Director of Major Gifts

No planned gift role
Plannual Giving at Redlands

- **Asst. VP of Advancement**: Principle gift and basic planned gift solicitation
  - **Director of Major and Planned Gifts**: Major gift and basic planned gift solicitation
  - **Director of Major and Planned Gifts**: Major gift and basic planned gift solicitation
  - **Director of Major and Planned Gifts**: Major gift and basic planned gift solicitation

- **Director of Annual Giving**: Planned giving marketing and basic planned gifts solicitation
  - **Asst. VP of Advancement**: Principle gift and basic planned gift solicitation
  - **Director of Major and Planned Gifts**: Major gift and basic planned gift solicitation

- **Assoc. VP of Advancement**: Complex planned gifts and principle gift solicitation, plus advises other GOs
Plannual Giving at Redlands

Transferred marketing effort to the Director of Annual Giving
Bequest Very Likely

Looking at our most likely bequest donors, we see that 78% have a high likelihood of making an Annual Giving gift.

Annual Giving Likelihood of Bequest
Very Likely Prospects

Note: Based on Target Analytics analysis of constituents.
Annuity Very Likely

Looking at our most likely annuity donors, we see that 61% have a high likelihood of making an Annual Giving gift.

Note: Based on Target Analytics analysis of constituents.
Plannual Giving at Redlands

Create metrics for Gift Officers and Annual Giving which incorporate credit for Planned Giving success
Plannual Giving at Redlands

**Annual Giving**
*TODAY*

- Current operations, programming, student experience
- Everyone asked to participate at all levels, commensurate with ability
- Leadership Donors are lifeblood of annual giving each year

**Special Giving**
*TOMORROW*

- New construction, new endowments, future student experience
- Continually looking for leadership from key constituents
- Goal is to match philanthropic passions with University priorities

**Deferred/Legacy Giving**
*FOREVER*

- Wills and trusts, bequests, planned gifts to build permanent endowment for generations to come
- All are asked to consider Redlands in estate plans
- After family considerations, we ask constituents to evaluate Redlands’ place in their overall philanthropic plans
Plannual
Giving in Action

Leadership Giving and Classes of 1969 and older receive testimonial featuring language about CRT and consistent giving.

Reply includes Planned Giving information option on front of reply device.

In 2000, I made a great decision. I set up a Charitable Remainder Trust that provides lifetime income for me and my wife. It also supports Redlands. Since then, I've continued to support U of R as a President's Circle donor and volunteer because Redlands provides many personal and intellectual growth opportunities for students.

Please also send me more information about:
- Gifts that Pay You Income
- Bequests
- Other Tax-Smart Gift Ideas
Plannual Giving in Action

Redlands Fund online giving page incorporates questions about planned giving.
Plannual Giving in Action

Mixture of planned giving info and Redlands Fund-style donor stories and testimonials.

Included an envelope and a survey, which also asked for a gift.
Most successful planned giving piece ever!

- Received 53 responses
  - 9 with Redlands Fund gifts
- Prior five pieces had between 8-10 responses each
  - Responses were just requests for brochures—never a gift!
- Identified opportunities for further improvement
  - Clearer Annual Fund ask
  - Matching segments to stories with specific action items
  - Familiar vs. technical language
Other Plannual Giving Ideas

- Consecutive Donors Societies
- Volunteer Outreach
- Student Phonathon Asks
- Legacy Annual Fund Gifts
- Recognition of Aspirational Behaviors
Challenges

- Leadership
- Budget
- Habits
- Structure/Silos
- Goals/Metrics
Special thanks to Ray Watts and Patience Boudreaux for allowing us to share their presentation.
Q & A
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Thanks!