

Plannual Giving



HOSTED BY:
NATHAN STELTER, VP BUSINESS DEVELOPMENT
THE STELTER COMPANY

PRESENTED BY:

| | |
|--------------------------|-------------------------|
| RAY WATTS, CFRE | PATIENCE BOUDREAUX |
| ASSOCIATE VICE PRESIDENT | DIRECTOR OF MAJOR GIFTS |
| UNIVERSITY OF REDLANDS | UNIVERSITY OF REDLANDS |



Host



Nathan Stelter
VP of Business Development
The Stelter Company

- Product development, strategic partnerships, marketing consultation, client services and corporate marketing
- Lecturer at national and regional industry meetings on gift planning marketing trends, relationship building skills and donor and fundraising research
- Member of the Partnership for Philanthropic Planning and the Mid-Iowa Planned Giving Council.
- B.B.A. in marketing from the University of Iowa



Presenter



Raymond W. Watts, CFRE
Associate Vice President
University of Redlands

- Prior to current role, served as Director of Development for 5 years at the University of Redlands
- Served as Director of Annual and Special Campaigns for 4 years at Loyola Marymount University of Los Angeles
- BA in English Literature and MBA from Loyola Marymount University
- Received CFRE certification in 1999
- Adjunct faculty member for the School of Business at Redlands
- Currently completing the CSPG program at California State University Long Beach



Presenter



Patience Boudreaux
Director of Major Gifts
University of Redlands

- Prior to current role, served as Director of Annual Giving at the University of Redlands
- Served as Director of Annual Giving at Trinity University for 2 years
- Spent 6 years in annual giving and donor relations offices at Pomona College
- BA in Psychology from John Hopkins University
- MBA from Claremont Graduate University
- Currently completing the CSPG program at California State University Long Beach



Plannual Giving

PRESENTED BY:

RAY WATTS, CFRE
ASSOCIATE VICE PRESIDENT
UNIVERSITY OF REDLANDS

PATIENCE BOUDREAUX
DIRECTOR OF MAJOR GIFTS
UNIVERSITY OF REDLANDS

 STELTER

Plannual \ 'planyoōəl\
adjective

1. the integration of marketing for planned giving and annual giving offices.
2. the evolution of philanthropic outreach toward a donor centered approach

 STELTER

The future of planned giving marketing is integration, not separation.



Poll



Characteristics of Offices

Annual Giving

- Broad Communications
- Simple Gifts
- Expertise in Marketing, Systems, and Cycles

Planned Giving

- Personal Outreach
- Complex Gifts
- Expertise in Technical, Relationships, and Legal

STELTER

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

STELTER

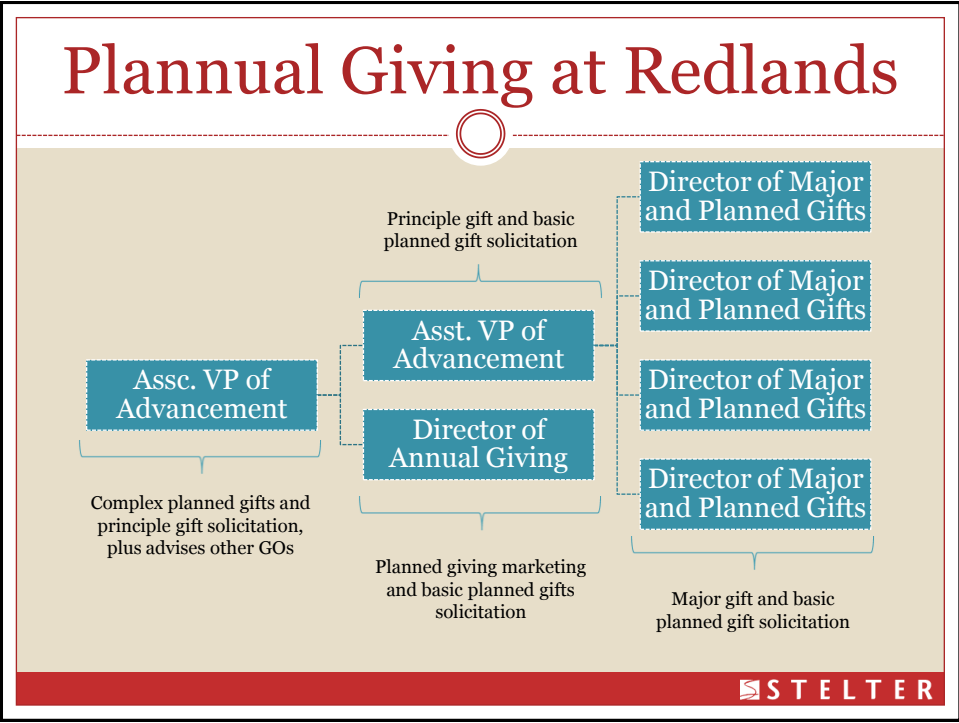
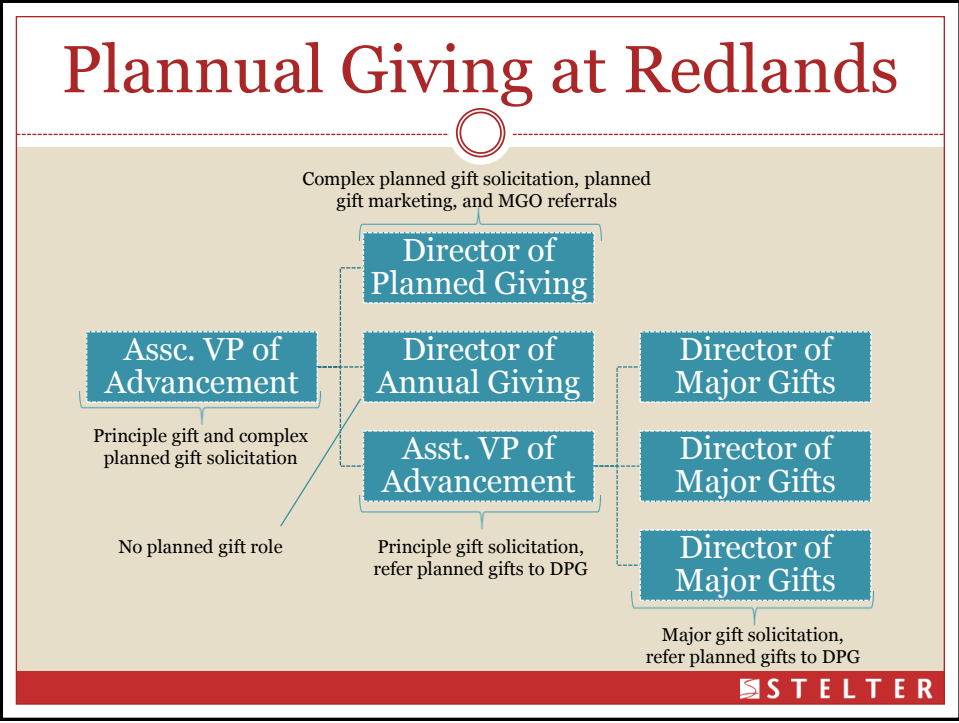
Poll

STELTER

Plannual Giving at Redlands

Integrated the Planned Giving
and Major Gifts Offices

STELTER



Plannual Giving at Redlands



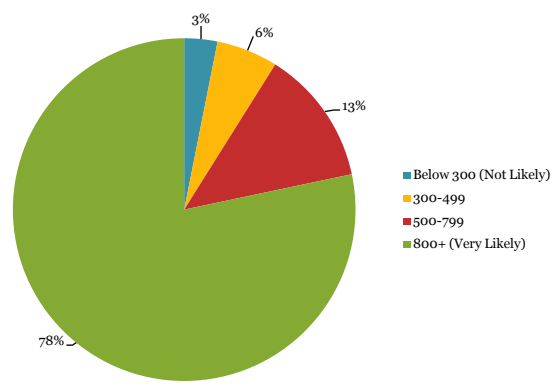
Transferred marketing effort to the Director of Annual Giving



Bequest Very Likely

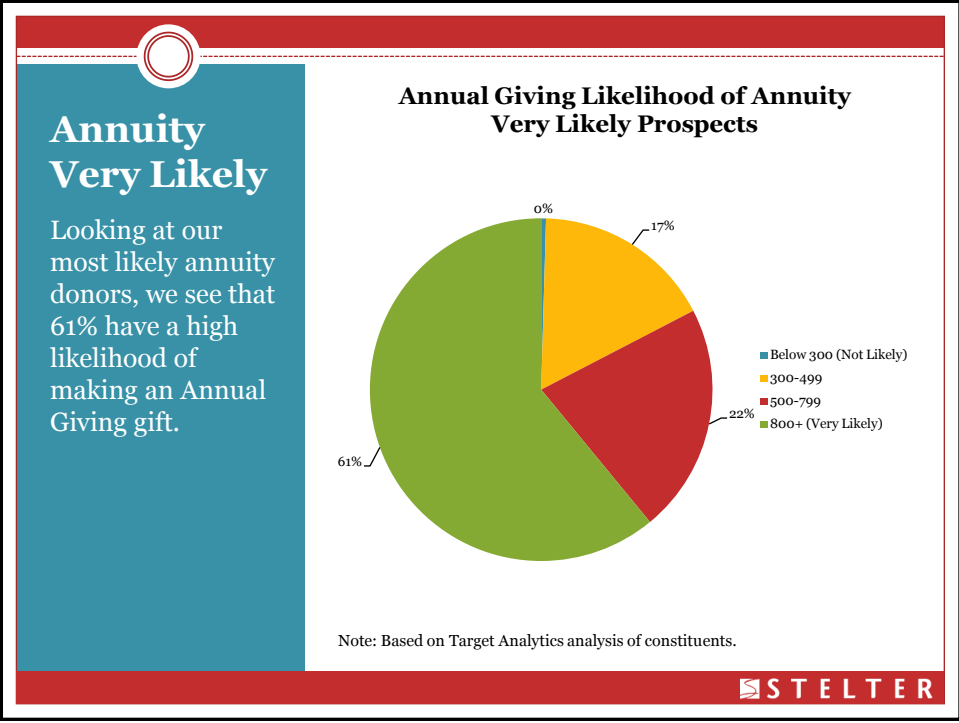
Looking at our most likely bequest donors, we see that 78% have a high likelihood of making an Annual Giving gift.

Annual Giving Likelihood of Bequest Very Likely Prospects



Note: Based on Target Analytics analysis of constituents.





Plannual Giving at Redlands

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

STELTER

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.

The Redlands Tradition





Frank Hungerford '64

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.

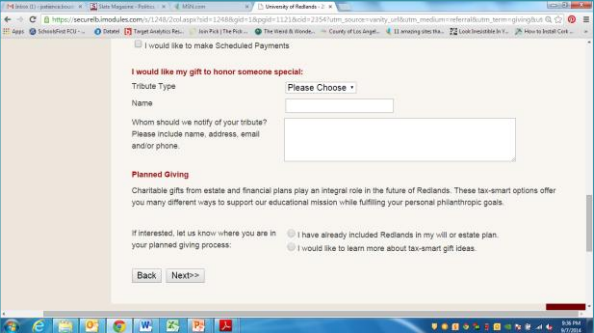
Please also send me more information about:

● 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.




Planned Giving
Charitable gifts from estate and financial plans play an integral role in the future of Redlands. These tax-smart options offer you many different ways to support our educational mission while fulfilling your personal philanthropic goals.

If interested, let us know where you are in your planned giving process:

I have already included Redlands in my will or estate plan.
 I would like to learn more about tax-smart gift ideas.

[Back](#) [Next>>](#)



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.



2-MINUTE SURVEY
Thank you for providing your feedback! If you would like to support the Redlands Fund this year, please feel free to include a check with this survey in the enclosed envelope or visit www.redlands.edu/giving to donate online.

LET US KNOW (Please check all that apply)

What information would you most like to see in future issues of Redlands Legacy?
 How people like you support Redlands Where your money goes What we are accomplishing Types of donation options Profiles on students you are helping

What part of our future most interests you?

2-MINUTE SURVEY
Thank you for providing your feedback! If you would like to support the Redlands Fund this year, please feel free to include a check with this survey in the enclosed envelope or visit www.redlands.edu/giving to donate online.

Please tell us why you support the University of Redlands.

Name—Please print: _____ Telephone: _____ Email: _____
 Address: _____ City: _____ State: _____ ZIP: _____

We request your personal information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.



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

 STELTER

Other Plannual Giving Ideas

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

 STELTER

Challenges

- Leadership
- Budget
- Habits
- Structure/Silos
- Goals/Metrics



STELTER
The Personal Philanthropy Company



UNIVERSITY OF
Redlands



Q & A

 STELTER

Our Contact Information



Ray Watts
(909) 748-8358
Ray_Watts@Redlands.edu

Patience Boudreaux
(909) 748-8354
Patience_Boudreaux@Redlands.edu

Nathan Stelter
800-331-6881
Nathan.Stelter@stelter.com

 STELTER

Following the Webinar

In a few days you will receive an email giving you instructions on how to access:

- The recording.
- The presentation slides.

 STELTER

Thanks!

 STELTER