

PPGC 2024
SAN DIEGO

“Plannual” Giving

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Crescendo
Integrated Marketing for Planned Gifts

1




AGENDA

- **Acknowledgements**
- **“Plannual” Giving definition and application**
- **What we’ve learned over the years (and what we think we’ve learned)**
- **The Loyalty/Leadership/Legacy experiment**
- **Examples from you and your organizations**
- **Questions, conversation and a next step**

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2

2




ACKNOWLEDGEMENTS

- **Full credit to my friend and CSPG practicum partner Patience Boudreaux**
- **Both of us had served as Directors of Annual Giving**
- **I was AVP, she was Dir of AG, with an interest in PG**
- **Limited resources, innovative spirits, backed by VP**
- **Key question we asked ourselves...**
 - **“What if we ruled the world (or at least Redlands Development) and merged Annual Giving and Planned Giving into one unit?”**

3





PLANNUAL GIVING WAS BORN

Plannual \ˈplanyooəl\
adjective


The integration of marketing and outreach for planned giving and annual giving

The evolution of philanthropic outreach toward a much more donor-centered approach

The belief in the behavioral reality that frequency of annual giving was most important factor in predicting future planned giving







4




OUR CORE BELIEF (then...)

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



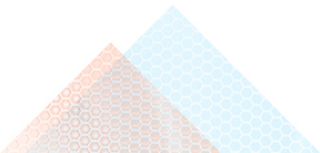


5




MY CORE BELIEF (now...)

For many places, the largest gifts you will ever receive are asset-based, planned/ultimate gifts from those who have been loyal supporters for many years






6




Evolution of “Plannual” Giving

- **What began as a CSPG practicum around the structure of offices and marketing plans has become the single-most important theory I practice in my work every day**
- **Backed by research AND by our stories**

TELL US A STORY...(I’ll go first)



7



EXTERNAL SOURCES



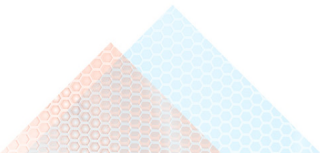
Russell James

William Sturtevant, the Artful Journey

CGP

AFP

Who else do you use/reference?



8




9

The Loyalty/Leadership/Legacy Experiment (The Ribbon Game)

- **History of using ribbons at events as visual manifestation of behavior**
- **Longest set of colorful ribbons represents the most engaged person**
- **Taking it further...**
 - **Most loyal annual donors (as you best define it)**
 - **Your leadership annual donors (as you best define it)**
 - **Your planned giving donors (now and future or as you best define it)**
- **Who's on one list?**
- **Who's on two lists?**
- **Who's on ALL THREE lists?**




PPGC 2024 SAN DIEGO 10

10




The Loyalty/Leadership/Legacy Experiment (The Ribbon Game)

- **This has been a GAME-CHANGER in the way I think about our donors**
- **Disneyland Example**
- **What can we do for those who are on ALL THREE lists?**
- **How can we reverse-engineer our processes to help achieve this goal?**








11




Examples from your organizations

- **Looking for examples of your “plannual” giving successes**
 - **Whether you used that word or not...**
- **Do you have internal (or external) roadblocks to implementing ideas like this?**
- **If you believe this premise, what might you do **on Monday** that brings this to life in your organization?**








12



Questions and Conversation

- I (personally) only enjoy sessions like these that are interactive and engaging, so thank you for this conversation
- I've found value in doing follow-up zoom calls to sessions like this.
- Tuesday, November 12 @ noon pacific time
 - Send me an email @ Raymond.watts@csusb.edu with the subject line **Plannual Giving** and I'll send you a link
- Very much appreciate your time and engagement today



13



SPEAKER EVALUATION

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14