The Journey to a Healthier Tomorrow

How a Renewed Focus on Gift Planning is Advancing the Mission of Arkansas Children’s
CAMPAIGN FOR A HEALTHIER TOMORROW

Campaign Results

$274.9M
against a goal of $250M

110% of goal

100,000

Nearly 100,000 Donors in all 75 counties in Arkansas and from all 50 states gave to the Campaign for a Healthier Tomorrow
Building the Case:
Reviewing and implementing industry best practices
BUILDING THE CASE

Best Practices

1. Data Integrity/Policy
2. Gift Planning Outreach & Stewardship
3. Team Trainings
4. Professional Advisor Outreach
5. Estate & Trust Administration
Making the Case: Moving from ideas to action
MAKING THE CASE
Ideas to Action

1. Engaging Internal Leaders
2. Involving Team Members
3. Developing Campaign Strategy
4. Pitching the Campaign
Launching the Campaign
LAUNCH

Campaign Format

Deferred Giving Campaign
Advance gift planning program and production in order to fuel the FY20-25 strategic plan
Gift Planning Production: $75M

Non-comprehensive Campaign
Separate cash & assets goal from: Major Gifts/Principal Gifts, Annual Gifts and Events
Sustain cash & assets revenue at $31M average over 4 years

Campaign Timeline
July 2021-June 2025
GIFT PLANNING

Key Performance Indicators

- Name ACH and/or ACNW campuses
- Increase board participation in gift planning
- Build the pipeline with future gifts
- Increase gift planning revenue as a percentage of total average revenue
GIFT PLANNING

Key Performance Indicators

Increase annual Records of Estate Intention (REIs)

Steward and retain donors

Sustain bequest realized revenue

Increase gift planning notifications
Legacy Challenge
LEGACY CHALLENGE
What is it?

The Legacy Challenge encourages supporters to make and share future gift commitments—fueling the future of Arkansas Children’s while allowing donors to champion children today through a $5 million gift match.

Framework

Match Pool: $5,000,000

Match Limit: Match all documented REIs up to 25% of the value up to $1,000,000

Match Timeline: 24 Months
LEGACY CHALLENGE
How it works

Document your future gift using the Legacy Challenge Gift Confirmation form

25% of your future gift commitment is matched, up to $1 million, right now

A better today for children in need: Legacy Challenge Matching funds are immediately directed to your choice of 10 strategic priorities

A healthier tomorrow for Arkansas: Your planned gift will have a future impact on child health

Gift Match Strategic Priorities
1. Advancing Patient Care
2. Arkansas Children’s Northwest
3. Primary Care
4. First 2,100 Days of Life
5. Behavioral Health
6. Arkansas Children’s Research Institute, Research Integration & Innovation
7. Digital Transformation
8. Team for the Future-Talent Acquisition
9. Diversity, Equity, and Inclusion
10. CEO Strategic Initiatives Fund
Campaign Rollout
LEGACY CHALLENGE

Launch

Legacy Challenge Launch
July 1, 2021

All 5 Boards
April 2021 - March 2022

Public Launch
March/April 2022
Measuring Success
### Legacy Challenge

#### Strategic Priorities

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>Match Cap</th>
<th>Total Matched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance Patient Care</td>
<td>$5M</td>
<td>$312,500</td>
</tr>
<tr>
<td>Arkansas Children’s Northwest</td>
<td>$5M</td>
<td>$1,417,500</td>
</tr>
<tr>
<td>Behavioral Health</td>
<td>$5M</td>
<td>$80,947</td>
</tr>
<tr>
<td>ACRI, Research Integration &amp; Innovation</td>
<td>$5M</td>
<td>$12,500</td>
</tr>
<tr>
<td>CEO Strategic Initiative Fund</td>
<td>$5M</td>
<td>$275,000</td>
</tr>
<tr>
<td>Talent Acquisition</td>
<td>$5M</td>
<td>$6,250</td>
</tr>
<tr>
<td>Primary Care</td>
<td>$1M</td>
<td>$25,000</td>
</tr>
<tr>
<td>First 2,100 Days of Life</td>
<td>$1M</td>
<td>$62,500</td>
</tr>
<tr>
<td>Digital Transformation</td>
<td>$1M</td>
<td>$0</td>
</tr>
<tr>
<td>Diversity, Equity &amp; Inclusion</td>
<td>$1M</td>
<td>$0</td>
</tr>
</tbody>
</table>

#### Gift Planning Campaign Snapshot

- **Total REIs**
  - **ACTUAL:** 27
  - **4-Year GOAL:** 140
- **Total REIs (Age Qualified)**
  - **ACTUAL:** 22
  - **4-Year GOAL:** 100

#### Legacy Challenge Match

- **MATCH POOL:** $5M
- **MATCH USED:** $2,192,197
- **REMAINING:** $2,807,803
LEGACY CHALLENGE

Wins

- Gift Planning solicitations
- Collaboration across teams
- Blended gift solicitations
- Training across all teams
- Strong case for support across all marketing channels
- Deeper engagement with professional advisors
- Complex gifts secured
LEGACY CHALLENGE

Takeaways

• Buy in from your executive team is critical!

• Gift planning is the L O N G game

• Integrated foundation wide effort

• Campaign Counting is KEY

• Multichannel marketing

• Be flexible, Be nimble!
PRACTICAL PLANNED GIVING CONFERENCE  
SPEAKER EVALUATION  

Date: ___________________  Speaker: ________________________________________  

Name (optional): __________________________________________________  

Please rate the following: 

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Neutral</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.  OVERALL</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Were your major objectives for this session met? Was the content of the session vital, timely, substantive?  
Comments:________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

II. RELEVANCE    | 5         | 4    | 3       | 2    | 1    |

Was the subject matter directly related to the requirements of your job?  
Comments:________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

III. VALUE       | 5         | 4    | 3       | 2    | 1    |

Do you believe the benefits of this session were worth the time, effort and cost?  
Comments:________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

IV. SPEAKER      | 5         | 4    | 3       | 2    | 1    |

How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?  
Comments:________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

V. MATERIALS     | 5         | 4    | 3       | 2    | 1    |

Were the materials clear and organized and appropriately helpful for the session?  
Comments:________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

VI. What did you like the most about the session?  
______________________________________________________________________________________
______________________________________________________________________________________

VI. Any suggestions to improve future sessions?  
______________________________________________________________________________________
______________________________________________________________________________________

XII. How many years of gift planning experience do you have? _______