



HOSPITALS • RESEARCH • FOUNDATION

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



 **110%**
of goal



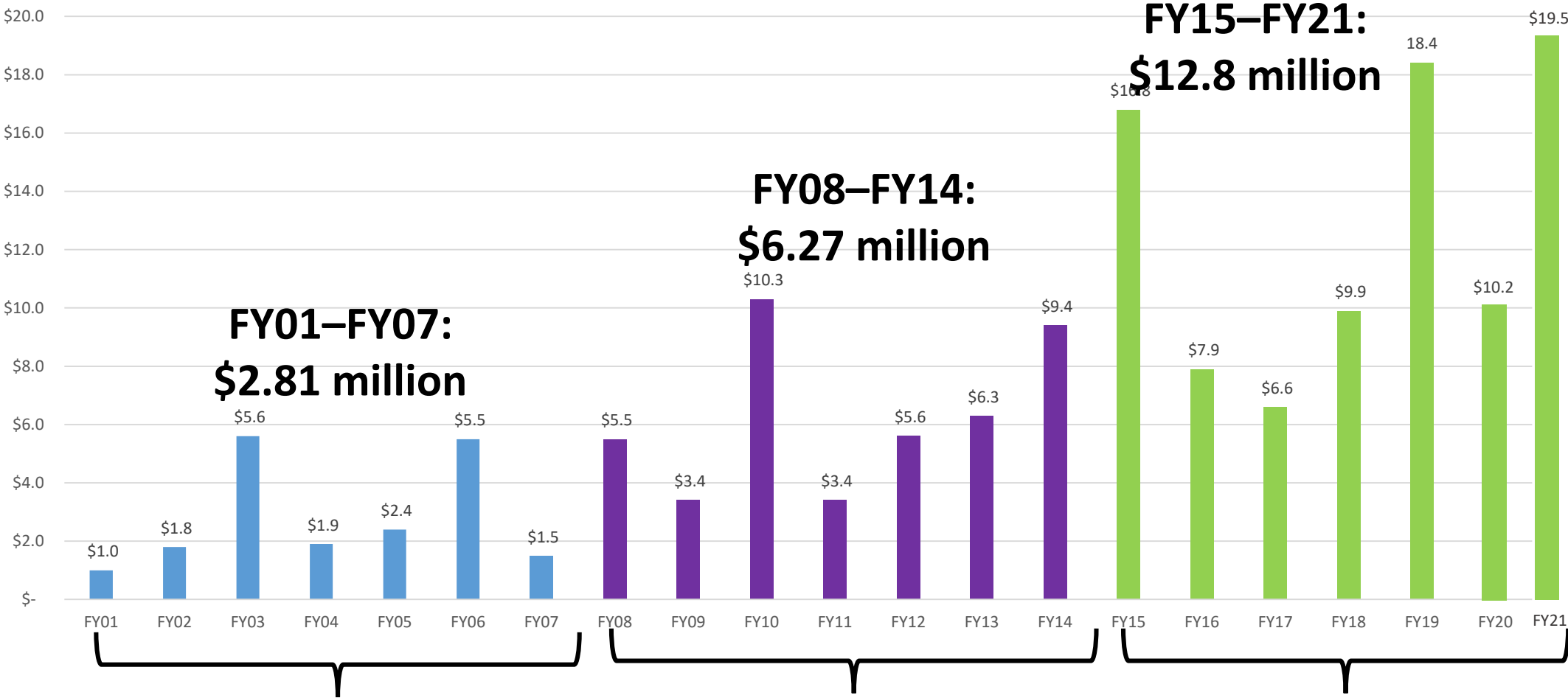
100,000

Nearly **100,000 Donors** in all **75 counties** in Arkansas and from all **50 states** gave to the *Campaign for a Healthier Tomorrow*

Arkansas Children's Campaign
for a **Healthier
Tomorrow**

GIFT PLANNING OVERVIEW

ACF Planned Giving Historical Snapshot



FY01–FY07:
\$2.81 million

Total Raised: \$19.7M
Gift Planning is 18% of total
(Bequests are 14% of GP total)

FY08–FY14:
\$6.27 million

Total Raised: \$43.9M
Gift Planning is 27% of total
(Bequests are 45% of GP total)

FY15–FY21:
\$12.8 million

Total Raised: \$89.3M
Gift Planning is 29% of total
(Bequests are 59% of GP total)



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

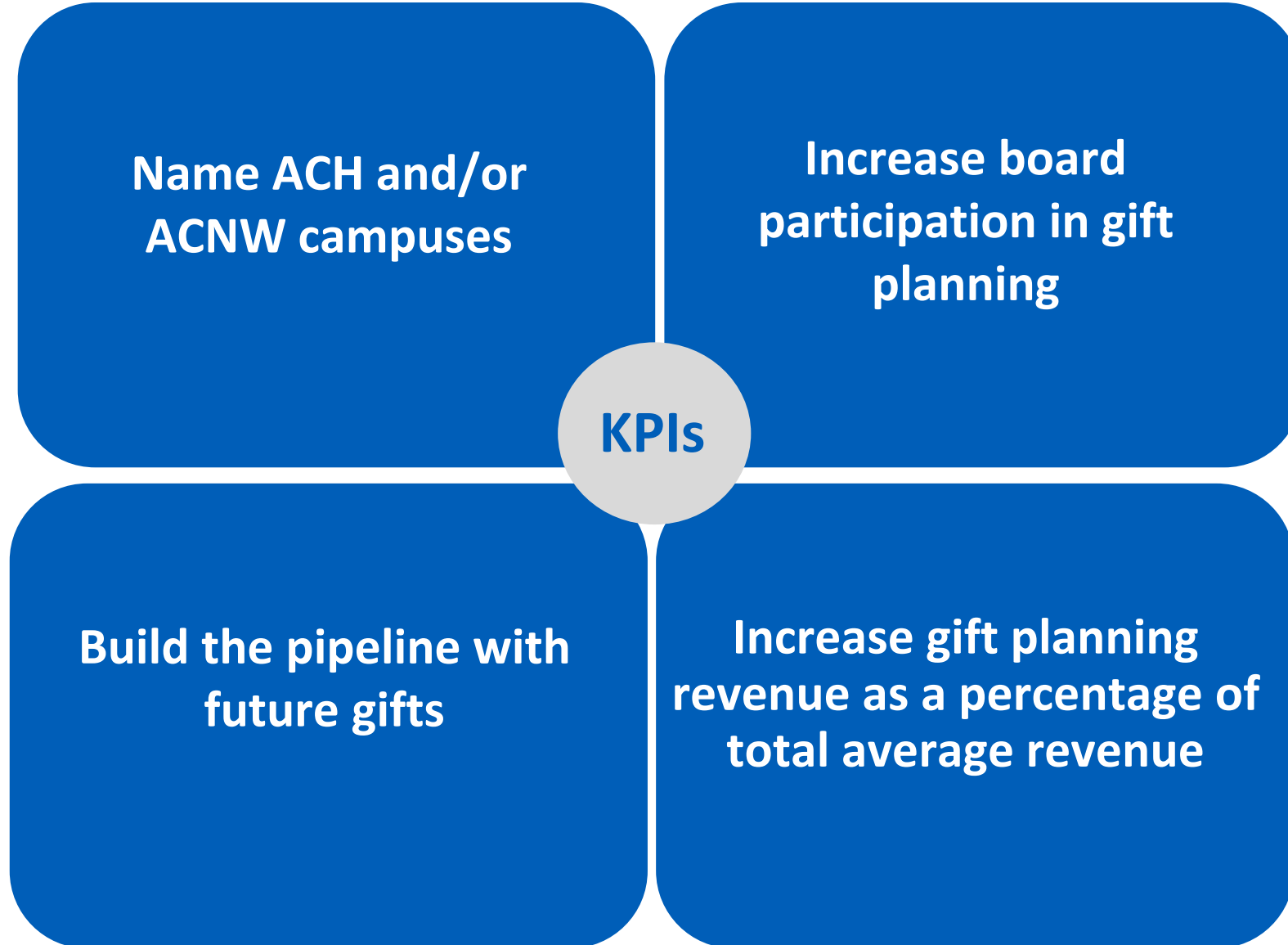
Separate cash & assets goal from: Major Gifts/Principal Gifts, Annual Gifts and Events

Sustain cash & assets revenue at \$31M average over 4 years

Campaign Timeline

July 2021-June 2025

Key Performance Indicators



Key Performance Indicators

Increase annual Records of Estate Intention (REIs)

Steward and retain donors

KPIs

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

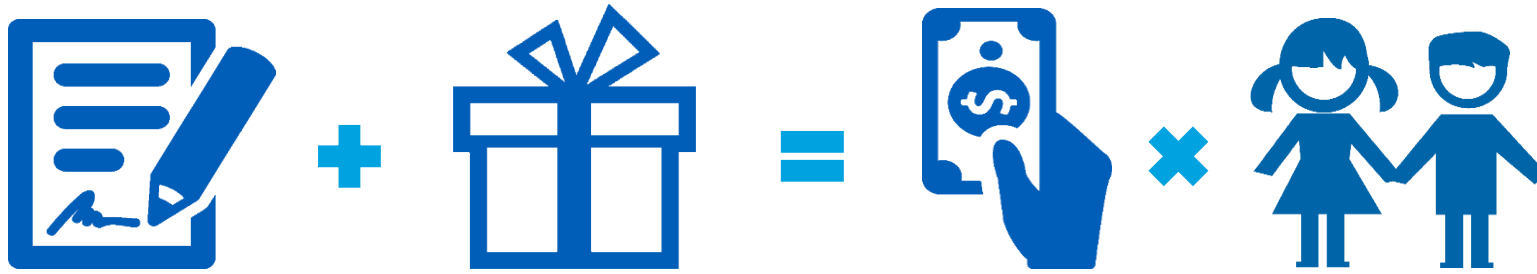
Match Pool:
\$5,000,000

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 Public Rollout

Silent Rollout

All Board Email
March 28

Key Stakeholders Email
AC Volunteers & 20+year team members; CCC;
April 12

Key Stakeholders Email
Top Gift Planning Prospects Auxiliary
April 14

Public Launch

Direct Mail #1
April 22

Legacy Challenge Champions Ad
Late April

Ongoing FY22 Outreach

Public Launch Email
April 28

Direct Mail No. 2/LC Survey
May 25, 2022



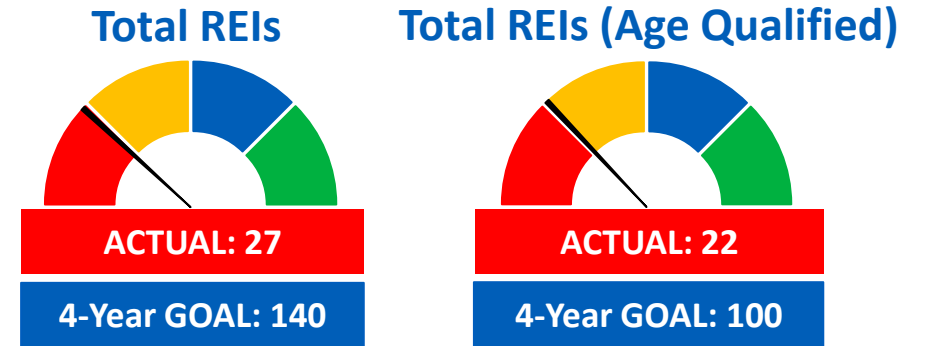
Measuring Success

Legacy Challenge

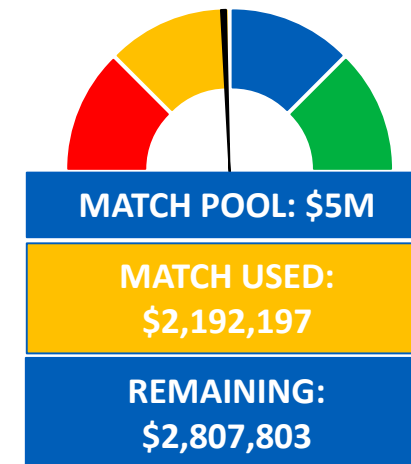
Strategic Priorities

Strategic Priority	Match Cap	Total Matched
Advance Patient Care	\$5M	\$312,500
Arkansas Children's Northwest	\$5M	\$1,417,500
Behavioral Health	\$5M	\$80,947
ACRI, Research Integration & Innovation	\$5M	\$12,500
CEO Strategic Initiative Fund	\$5M	\$275,000
Talent Acquisition	\$5M	\$6,250
Primary Care	\$1M	\$25,000
First 2,100 Days of Life	\$1M	\$62,500
Digital Transformation	\$1M	\$0
Diversity, Equity & Inclusion	\$1M	\$0

Gift Planning Campaign Snapshot










Legacy Challenge Match



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:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
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? _____