

LIFE & LEGACY™ Process

(as of March 28, 2018)

1. Community submits application to participate in the HGF LIFE & LEGACY program.
2. Once selected, HGF sends Partner a **letter outlining next steps**.
3. **Partner sends HGF a signed copy of the letter along with:**
 - a. **proof of non-profit status**
 - b. **board resolution committing to provide matching funds for the program**
 - c. **a proposed preliminary program budget.**
4. HGF and Partner **schedule a series of training sessions** (described below) to take place in the first and second years.

Year 1

5. First **Year 1 workshop – “Why Legacy? Why Now?”** – discusses why local community organizations should participate in the LIFE & LEGACY program. The workshop is usually open to all Jewish organizations in the community (day schools, synagogues, social service organizations and other Jewish entities). At this session, Partner distributes an application form.
6. Organizations are generally given 2-4 weeks to apply, depending on how competitive a process Partner wants to undertake.
7. **Partner selects 10 – 20 Jewish community organizations** to participate in the program choosing those with strong lay leadership and the capacity to implement successfully.
8. Second **Year 1 workshop – “Writing Your Legacy Plan”** – trains Legacy Teams from local organizations to craft a case statement, list prospective target audiences, think through their marketing and stewardship activities, develop legacy commitment goals, and prepare an implementation plan.
9. **Local organizations prepare their Legacy Plans** (usually given 3-4 weeks).
10. **Legacy Plans submitted to HGF for review and comments** (minimum of a week to review). At the time of “The Legacy Conversation” workshop, Partner and HGF meet with each Legacy Team and discuss proposed revisions to their Legacy Plan if required.
11. **Final Legacy Plans submitted** to the Partner on an agreed upon date (2 – 4 weeks following review).
12. Once Legacy Plans are submitted, Partner uses the information provided to **set a Community Aggregate Goal** for legacy commitments to be secured in the first year. **A final Year 1 budget is developed and a “Launch Date” determined.** The “Launch Date” is generally the first day of the month immediately following the “The Legacy Conversation” workshop as now Legacy Teams are prepared to secure legacy commitments. The “Launch Date” is also the official beginning of Year 1 and determines the incentive grant payout dates for the 4-year program.
13. **Partner submits “Year 1 Aggregate Goal Submission Form” as well as Final Year 1 budget.**
14. **HGF issues a “Year 1 Acceptance Letter”** outlining goals and committing to Year 1 matching funds.

15. Third **Year 1 workshop - “The Legacy Conversation”** - trains members of the Legacy Team to go out and have legacy conversations with their organization’s constituents. At this workshop, **Partner distributes Community Letter of Intent form** for the documentation of Legacy commitments.
16. **Partner distributes the LIFE & LEGACY excel spreadsheet quarterly reporting form and instructions** to Legacy Teams. Individuals responsible for filling out the report are encouraged to watch webinar on jewishlifelegacy.org website. HGF staff holds a conference call to review how to fill out the form and respond to any questions. HGF also trains Partner on how to fill out a “merged” form and the Community Partner form that is submitted to HGF.
17. **Partner submits LIFE & LEGACY quarterly reports** according to the schedule outlined in the “Year 1 Acceptance Letter.”
18. Fourth and Fifth **Year 1 workshops - “Marketing Your Legacy Program”** and **“Effective Stewardship”** - trains Legacy Team members on how to create awareness of and create excitement about their legacy effort and effectively steward donors.
19. During community visits, **HGF reviews legacy commitment forms** to insure compliance with program requirements.
20. **At the end of Year 1, Partner submits** (preferably within 45 days of the end of Year 1):
 - a. **“Year 1 Check Request Form”**
 - b. **Year 1 actual budget**
 - c. **Final Year 1 report using quarterly report format**
 - d. **List of incentive grants due to participating organizations**
21. **HGF issues the first year’s matching payment** (4-6 weeks after receiving required paperwork).
22. **Partner holds a community-wide event** celebrating Year 1’s success in securing legacy commitments.

Year 2 ---

23. Prior to the end of Year 1, **HGF and Partner evaluate the program to date and develop a Year 2 Aggregate Goal.**
24. **Partner submits “Year 2 Aggregate Goal Submission Form” and the Year 2 budget.**
25. **HGF issues a “Year 2 Acceptance Letter”** outlining goals and committing to Year 2 matching funds.
26. First **Year 2 workshop – “From Letter of Intent to Formalized Gift”** – trains Legacy Teams to have a second conversation with those individuals/households who have signed legacy commitment forms to insure they have legally formalized their commitment. At this workshop, **Partner distributes Legacy Gift Confirmation Form** for documentation that formalization has taken place.
27. Second **Year 2 workshop – “Best Practices/The Integrated Ask”** – reviews best practices in the areas of marketing and stewardship and trains Legacy Teams on utilizing the integrated ask to secure annual, endowment and/or capital campaign gifts in conjunction with having the legacy conversation.
28. Third **Year 2 workshop – “Being Donor-Centric”** – stresses the need to change the way organizations think about their donors – evolving from a financial transaction mentality to one that puts the donor in the center of the organization’s efforts in order that all donors are engaged, feel valued, remain loyal and continue to invest in

the organization annually as well as maintaining their legacy commitment.

29. **Partner submits LIFE & LEGACY quarterly reports**, using forms provided by HGF to be filled out by local organizations and the Partner, according to the schedule outlined in the “Year 2 Acceptance Letter.”
30. During HGF community visits, **HGF reviews legacy commitment forms** to insure compliance with program requirements.
31. **At the end of Year 2, Partner submits** (preferably within 45 days of the end of Year 2):
 - a. **“Year 2 Check Request Form”**
 - b. **Year 2 actual budget**
 - c. **Final Year 2 report using quarterly report format**
 - d. **List of incentive grants due to participating organizations**
32. **HGF issues the second year’s matching payment** (4-6 weeks after receiving required paperwork).
33. **Partner holds a community-wide event** celebrating Year 2’s success in securing legacy commitments.

Year 3

34. Prior to the end of Year 2, **HGF and Partner evaluate the program to date, develop goals for Year 3** and schedule two workshops to take place in each of Years 3 and 4.
35. Prior to the end of Year 2, **Partner submits a Year 3 and 4 Proposal which includes annual budgets**, using format provided by HGF.
36. **HGF issues “Year 3 (and 4) Appendices”** to the original next steps letter outlining goals and committing to Year 3 (and 4) matching funds.
37. **First Year 3 workshop – “Stories, Stewardship and Formalization”** emphasizes the importance of donor testimonials, reviews the concept of stewardship, provides a template for the Year 3 Stewardship Plan and reviews the formalization process. This workshop is scheduled as close to the beginning of Year 3 as possible.
38. **Second Year 3 workshop** – usually **individual team meetings**, but if it is determined that another presentation would be beneficial for your community, we will accommodate this request. This session generally takes place 6-9 months after the start of Year 3.
39. **Partner submits LIFE & LEGACY quarterly reports**, using forms provided by HGF to be filled out by local organizations and the Partner, according to the schedule outlined in the Year 3 Appendices.
40. During community visits, **HGF reviews legacy commitment forms, legacy confirmation forms, stewardship plans and related materials** to insure compliance with program requirements.
41. **At the end of Year 3, Partner submits** (preferably within 45 days of the end of Year 3):
 - a. **“Year 3 Check Request Form”**
 - b. **Year 3 actual budget**
 - c. **Final Year 3 reports using quarterly report format**
 - d. **List of incentive grants due to participating organizations**
42. **HGF issues the third year’s matching payment** (4-6 weeks after receiving required paperwork).

43. **Partner holds a community-wide legacy event.**

Year 4

44. Prior to the end of Year 3, **HGF and Partner evaluate the program to date and review goals and a budget for Year 4.**

45. **HGF issues “Year 4 Appendices” to the original next steps letter outlining goals and committing to Year 4 matching funds if not done in Year 3.**

46. First **Year 4 workshop** is **“Sustaining Your Legacy Program”** – provides reminders of recommendations for integrating legacy into the culture of the organization so the initiative and stewardship continue in perpetuity.

47. **Second Year 4 workshop is determined by the specific needs and interests of the community partners.** It generally consists of individual team meetings but can also focus on celebrating the legacy team’s accomplishments.

48. **Partner submits LIFE & LEGACY quarterly reports,** using forms provided by HGF to be filled out by local organizations and the Partner, according to the schedule outlined in the “Year 4 Acceptance Letter” or “Requirements of Extension Participation Letter.”

49. During community visits, **HGF reviews legacy commitment forms, legacy confirmation forms, stewardship plans and related materials** to insure compliance with program requirements.

50. **At the end of Year 4,** Partner submits (preferably within 45 days of the end of Year 4):

- a. **“Year 4 Check Request Form”**
- b. **Year 4 actual budget**
- c. **final Year 4 reports using quarterly report format**
- d. **List of incentive grants due to participating organizations**

51. **HGF issues the fourth year’s matching payment** (4-6 weeks after receiving required paperwork).

52. **Partner holds a community-wide legacy event.**

53. **Legacy giving is integrated into the culture of the community and participating organizations.**

54. **HGF remains in contact with Partner, continuing to provide support, share best practices and promote legacy giving.**

55. **The Partner may apply for a Year 5 grant of \$10,000 to assist them in sustaining their legacy initiative.**

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