



LIFE & LEGACY™ Year 3 and 4 Proposal Requirements

Approximately two months prior to the end of Year 2, please submit a **Year 3 and 4 Proposal** containing the following items:

- 1) A **2-3 page description** of the impact the LIFE & LEGACY program has had on your community to date; the challenges that still need to be addressed in order to truly integrate legacy giving into your organizational culture; your proposal as to how to address these challenges in Years 3 and 4 and your proposed incentive grant structure (minimum incentive may be ½ of what incentive was in Year 2)
- 2) **List of organizations** committed to participating in Years 3 and 4
- 3) Year 3 and 4 proposed **budget** (see attached form)
- 4) Optional: Matrix outlining Year 3 and 4 incentive grant requirements

HGF has the following **minimum requirements for Years 3 and 4:**

- 1) **Formalization** – in Year 3 each organization, and the community as a whole needs to document that a minimum of 50% of the letters of intent secured in Years 1 and 2 have been legally formalized; In Year 4 each organization, and the community as a whole, needs to document that a minimum of 75% of the letters of intent secured in Years 1 and 2 have been legally formalized
- 2) **Stewardship** – Each organization must prepare and implement a Stewardship plan that includes a minimum of the recommended touches per year (Personal touch, Donor Listing/Testimonials, Event specifically for legacy donors, event honoring legacy donors amongst organizational community)
- 3) **New Legacy Conversations** – Each organization must have a minimum of 8 new legacy conversations a year
- 4) **New Legacy Commitments** – Each organization must secure a minimum of 4 new legacy commitments a year
- 5) **Continued Quarterly Reporting** - Of conversations, new commitments, marketing, stewardship and formalized commitments
- 6) **Trainings/Meetings** - Attendance at one HGF training and team meeting per year

Other Potential Year 3 and 4 Organizational Requirements:

- 1) Number of people required for a team
- 2) Specific number of team meetings per year
- 3) Written Gift Acceptance and/or Endowment Policies
- 4) Specific marketing activities
- 5) Specific number of board reports and/or meeting with Federation/Foundation Legacy staff
- 6) Additional meetings with Legacy Coordinator/attendance at training sessions