



### **What is the Wake Now Our Vision Collaborative Campaign?**

The Wake Now Our Vision Unitarian Universalist Collaborative Campaign is a joint effort of the Unitarian Universalist Association, the Unitarian Universalist Service Committee, Meadville Lombard Theological School, Starr King School for the Ministry, the Unitarian Universalist Ministers Association, and the Church of the Larger Fellowship. Gifts naming the Wake Now Our Vision Campaign will be divided among all these organizations.

### **What is the Legacy Challenge?**

In order to inspire new legacy gift commitments, a cash match and educational opportunities were made possible by a grant from the UU Congregation at Shelter Rock. New legacy gift intentions were eligible for a cash match of 10% of the legacy gift's estimated value (up to \$10,000 per donor.) If no approximate amount was supplied, or if the gift could not be accurately valued, it would be eligible for a flat match of \$1,000.

Additionally, the Legacy Challenge educated UU communities about the importance and possibilities of legacy giving. The resources developed and the learning opportunities made possible by the Legacy Challenge will continue to be available for Unitarian Universalists in the future.

### **What is a legacy gift?**

A legacy gift is a gift of cash, securities or other property that is received by the beneficiary after you die, for example through a beneficiary designation or your will.

### **When was the Legacy Challenge matching fund completely allocated?**

Qualifying legacy gift intentions exhausted the matching funds in late August 2018.

### **What happens to submissions received after funds were completely allocated?**

All submissions will be kept on file and should any earlier submissions be removed through the audit process; the next submission will move up in line.

### **When will we know for sure how much our congregation/ UU organization will receive in matching funds?**

We will send final reports with the first payment of matching funds in the fall of 2019.

### **When will our congregation/UU organization receive the matching funds?**

The grant funds will be released by the grant donor in four installments, in the fall of 2019, the winter of 2020, the spring of 2020, and the summer of 2020. The Wake Now Our Vision Campaign will send these funds to the receiving entities in four installments as the grant funds are made available.

### **Are there any restrictions on the matching funds?**

No. The matching funds from the Legacy Challenge will be unrestricted.

### **Will we receive a list of all individuals who participated from our congregation?**

As with the reports that we mailed in December 2018, we will include the names of people who gave us express permission to do so. People who requested anonymity or did not express a preference regarding the sharing of their names are not included in reports. Also, the names of donors from Legacy Challenge submissions that arrived after matching funds had been completely allocated will not be included in reports.

### **Will there be another Legacy Challenge?**

It is not certain when, or if, there will be another Legacy Challenge like this one in the future. A collaborative Legacy Challenge of this scope has never been attempted before in the world of philanthropy. We Unitarian Universalists have been breaking new ground and there are many non-profits watching us and hoping to learn from our example. There will be a necessary time of reflection on and evaluation of this Legacy Challenge before another can be proposed.

### **How can we promote legacy giving now that the Legacy Challenge is over?**

Legacy giving is always an important aspect of healthy stewardship in our UU communities. We will continue to offer monthly webinars addressing the basics of legacy giving, as well as building and sustaining a robust legacy giving program. For more information on how to attend a webinar, visit [uualegacy.org](http://uualegacy.org) and click on "Resources for my congregation," or email the UUA's Legacy Gifts team at [legacy@uua.org](mailto:legacy@uua.org).

### **Will you still offer support and resources for congregational legacy giving programs?**

The UUA's Legacy Gifts Office will continue to offer resources for you to learn about the various options, including online gift calculators, gift illustrations, sample bequest language, access to gift annuities, and webinars. Contact the UUA's Legacy Gifts team by emailing [legacy@uua.org](mailto:legacy@uua.org), calling (888) 792-5885, or visiting [uualegacy.org](http://uualegacy.org).

**More questions?** If you have additional questions, **Contact the UUA's Legacy Gifts team at [legacy@uua.org](mailto:legacy@uua.org)**. Please do not contact the six campaign partners or the grant donor with individual inquiries.