**ZIM REDEMPTION PROGRAM TEMPLATE INSTRUCTIONS**

**Below is a step-by-step guide to assist in the completion of a document for your ZIM redemption. Use this as a guide and after completion, submit pages 3 - 7 at your appointment.**

# **BIO -- Background and Motivation** Write 2 or 3 sentences about yourself, what your motivation is, and why you are a humanitarian. (\*If you have relevant/applicable background or experience—provide some detail.) This part should focus on how you want to ensure that your ‘folks’ are well taken care of, now and in the future, without compromising your broader humanitarian objectives.

# **Vision**

Write 2 or 3 sentences about how you see these projects impacting the world for the better.

# **1st Project**

# **PERSONAL HUMANITARIAN PROJECT Mission** Write 2 or 3 sentences about the intent of this personal humanitarian project. Consider providing financial assistance to elderly relatives, college educations for extended family, homes for siblings, appreciation financial gifts for those who have touched your life. This mission should satisfy your wants and needs and extend to all the individuals and organizations you choose to support.

# **Target Groups**  List groups that will benefit, i.e.: Nieces & Nephews, Children, Godchildren, “almost’ children, close family supporters, church groups, etc,

 **Objectives and Strategy Chart**  Succinctly list **what you hope to achieve** for those you have mentioned and **how you envision achieving each objective**.

**Future Growth** General statement of how you expect the yearly expenditures to change.

**Key points**  List any considerations that give your Project unique potential.

**Staff**  List staff/personnel who will be necessary for your project. If you’re not sure, look up similar family foundations online.

**Cost Estimates**

Remember, these are just estimates. Put in an estimate of what each collective group gets ($$) and when they receive. Your TRUST MANAGEMENT TEAM will be able to refine them when appropriate.

**Closing statement**

Write a sentence or two about your hope for the project and your appreciation for consideration.

In Gratitude,

(Signature)

# **2nd Project**

# **HUMANITARIAN PROJECT Mission** Write 2 or 3 sentences about the main, overall objective and intention of the project.

# **Target Groups**  List types of groups that will benefit, i.e.: Homeless, Low-Income, Indigenous, Environment, Animals, Trafficked, Mentally Challenged, Elderly, Orphaned, Disabled, etc.

 **Objectives and Strategy Chart**  Succinctly list **what you hope to achieve** with your project. State the different objectives and correlating strategies, **how you envision achieving each objective**.

**Future Growth** Year-by-year, list how your project may expand regarding its target group/s, locations and overall model. Remember, those who are considering your Project are looking for expansive, potentially international reach. Use your imagination here. Think big.

**Key points**  List any considerations that give your Project unique potential.

**Staff**  List staff/personnel who will be necessary for your project. If you’re not sure, look up similar companies/projects online and take note of their teams, leaders, and overall staff.

**Cost Estimates**

Remember, these are just estimates. AFTER YOU HAVE AN IDEA OF FIGURES, DOUBLE THEM! Your team will be able to refine them when appropriate. When the team calculates the total needed to fund your project, it will be for a larger amount, since only the interest will pay for the project.

**IF YOU ARE AT A TOTAL LOSS REGARDING COSTS, FILL IN WHAT YOU CAN AND ADD VERBIAGE LIKE THIS IN THE CLOSING STATEMENT**

Although I have very clear ideas about my project goals, I feel that I lack the appropriate knowledge to develop any realistic cost estimates. I have limited knowledge of the cost of materials, utilities, building leases, equipment, staff, and other resources. I have been told that when my project idea is submitted, folks far more knowledgeable than I can and will estimate the cost of my dream project.

I am passionately committed to this effort and grateful that a team can provide accurate estimates which will do my project justice.

**Closing statement**

Write a sentence or two about your hope for the project and your appreciation for consideration.

In Gratitude,

(Signature)

# **TRUST NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

TRUSTEE \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **BIO**

# **VISION**

# **1st Project -- PERSONAL HUMANITARIAN PROJECT NAME**

*ex. ALLY’S FAMILY AND FRIENDS SUPPORT PROJECT*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **PERSONAL HUMANITARIAN PROJECT MISSION**

# **TARGET GROUPS**

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**PROJECT OBJECTIVES**  **STRATEGY TO ACHIEVE**

*(these are examples only)*

|  |  |
| --- | --- |
| Educate  | * Scholarships
* Pay for education
 |
| Provide shelter | * Buy homes
* Pay rents
 |
| Provide transportation  | * Lease car
* Arrange for car services
* Flight assistance
 |
| End of Life assistance  | * Nursing home provisions
* Hospital endowments
* Burial and memorials
 |
| Assist meaningful organizations  | * VA
* College Alma Maters
 |

**FUTURE GROWTH**

**ADDITIONAL KEY POINTS TO CONSIDER**

**STAFF POSITIONS**

**COST ESTIMATES**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ITEM | YEAR 1 | YEAR 2 | YEAR 3 | YEAR 4 | YEAR 5 |
| Nieces/Nephews |  |  |  |  |  |
| Cousins |  |  |  |  |  |
| Community Center |  |  |  |  |  |
| Aunts/Uncles |  |  |  |  |  |
| Siblings |  |  |  |  |  |
| Grandchildren |  |  |  |  |  |
| Neighbors |  |  |  |  |  |
| Godchildren |  |  |  |  |  |
| Family friends |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| TOTAL |  |  |  |  |  |

**CLOSING STATEMENT**

# **2nd Project --- HUMANITARIAN PROJECT NAME**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **PROJECT MISSION**

# **TARGET GROUPS**

|  |  |
| --- | --- |
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**PROJECT OBJECTIVES**  **STRATEGY TO ACHIEVE**

|  |  |
| --- | --- |
| OBJ 1 - XXXX  | * YYYYY
* ZZZZ
 |
| OBJ 2 - XXXX  | * YYYYY
* ZZZZ
 |
| OBJ 3 - XXXX  | * YYYYY
* ZZZZ
 |
|  |  |
|  |  |

**FUTURE GROWTH**

**YEAR TWO:**

**YEAR THREE:**

**YEAR FOUR:**

*

**ADDITIONAL KEY POINTS TO CONSIDER**

**STAFF POSITIONS**

**COST ESTIMATES**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ITEM | YEAR 1 | YEAR 2 | YEAR 3 | YEAR 4 | YEAR 5 |
| STAFF/LABOR |  |  |  |  |  |
| EQUIPMENT |  |  |  |  |  |
| BUILDINGS |  |  |  |  |  |
| MATERIALS |  |  |  |  |  |
| FEES |  |  |  |  |  |
| OUTSIDE SERVICES |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| TOTAL |  |  |  |  |  |

**CLOSING STATEMENT**

FOR ANY ADDITIONAL PROJECTS – COPY 2nd project pages and add