

2019 TRAINING CALENDAR

2019 Seeds of Planned Giving Series

Jan. 10 | Planned Giving 101: Donor-centered Gifts

Gift planning techniques that provide for charity in ways that maximize the gift and minimize the impact on the donor's estate.

Feb. 7 | Gifts Through Wills & Trusts (Bequests)

Simple ways to help your donors make charitable gifts through their will or trust.

March 7 | Crescendo Planned Giving Marketing Seminar

Best practices for marketing additional giving options to your donors.

April 11 | Charitable Gift Annuities (CGAs)

Charitable gifts that benefit your organization and yield annuity payments to your donors.

May 9 | Charitable Remainder Trusts (CRTs)

Charitable gifts that create a lifetime income stream and tax savings for donors.

June 13 | Advanced Planning

Creative giving strategies including charitable lead trusts and retained life estate gifts.

July 11 | Marketing Donor-centered Gifts

Marketing tips and techniques to connect with your donors and inspire them to think about additional giving options.

Aug. 8 | Case Studies

Review real case studies to understand how to work with a donor to determine the best type of giving vehicle to recommend and why.

All Sessions

Time: 11:30 a.m. - 1 p.m., lunch provided.

Location: Oklahoma City Community Foundation, 1000 N. Broadway Ave., Oklahoma City

Cost: FREE for charitable organization endowment program participants, must register to attend.

To Register: Visit occf.org/coetraining or contact Jennifer Meckling at j.meckling@occf.org or 405/606-2951.

Focus on Endowment

Jan. 16 | Strategies to Keep your Endowment Working for You

Is your endowment a forgotten resource? Learn how to breathe life into your endowment strategy with new policy, board engagement and marketing ideas.

March 27 | Why Endowment? Case Studies & Successes

Join us as we review success stories of stellar endowment growth and masterfully handled gifts. Pick up a few tips or launch a complete campaign based on these real-world examples of organizations that are killing it at the endowment game!

May 15 | Guide to DonorCentral: Keeping Up With Your Endowment

A technical session on how to use DonorCentral to keep up with your endowment value, pull reports and tap into your donor list.

July 17 | Your Endowment Resources

Learn how you can further engage with OCCF through planned giving resources, grants and matching gifts. Helping you help the community!

Sept. 18 | Who Will Carry the Torch for Your Cause?

How do you institutionalize success? Learn how to put an endowment growth program together: identify individuals already within your organization to lead the charge, inspire renewed action and develop a culture of legacy and sustainability.

GiveSmartOKC

Feb. 20 | Grants and GiveSmartOKC

How to make your GiveSmartOKC profile appeal to funders.

Extended session: Is your profile expiring? Bring your laptop and join us from 1-2:30 p.m. for a hands-on workshop to update your profile.

April 17 | Put GiveSmartOKC to Work for You

Ways to use your GiveSmartOKC profile to promote your organization and inform donors.

June 19 | Value of Transparency

Simple ways to build trust through transparency with your GiveSmartOKC profile.

Aug. 21 | Keeping it Current

Learn more about the annual updates that need to be made to your GiveSmartOKC profile to keep it current and relevant.

Extended session: Is your profile expiring? Bring your laptop and join us from 1-2:30 p.m. for a hands-on workshop to update your profile.

Nov. 6 | Using GiveSmartOKC to Build Your Endowment

Tips on how to use GiveSmartOKC as a development tool to build your endowment.



2019 Seeds of Planned Giving Series

*Exclusively for organizations with endowments at the Oklahoma City Community Foundation, the **Seeds of Planned Giving Series** will help you design and execute a planned giving program to boost your development efforts and provide long-term stability.*



Focus on Endowment

*Exclusively for organizations with endowments at the Oklahoma City Community Foundation, **Focus on Endowment** workshops will teach you how to build and sustain your endowment fund to become a vital resource for your nonprofit's future.*



GiveSmartOKC

*Open to all organizations with a **GiveSmartOKC** profile, these sessions will help you learn how to use this powerful resource to share your nonprofit's story and stand out from the crowd.*



OKLAHOMA CITY
COMMUNITY FOUNDATION
1000 N. Broadway Ave., Oklahoma City, OK 73102
405/235-5603 | occf.org

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SAVE THE DATE:

2019

CHARITABLE ORGANIZATION ENDOWMENT
TRAINING CALENDAR



Seeds of Planned Giving



Focus on Endowment



GiveSmartOKC



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