



PLANNED GIVING ROUND TABLE OF ORANGE COUNTY

“PROJECT AWARENESS – HONORED CHARITY”

PLANNED GIVING ROUND TABLE

of Orange County

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A Program Designed To Highlight Charities in Orange County

In keeping with its mission to promote and increase philanthropy through planned giving, The Board of Directors of The Planned Giving Roundtable of Orange County is pleased to introduce a new program for the benefit of its membership - “**Project Awareness.**”

“PROJECT AWARENESS” PROGRAM OBJECTIVE:

“Project Awareness” is designed to educate members of PGRTOC about the variety of services and programs provided by our local charities for the benefit of Orange County residents. Each month, a representative from the Honored Charity will be given an opportunity to share information about their institution and provide literature for the future reference of PGRTOC members.

For example, a smaller, lesser-known charity (IE: Stop-Gap, ATSC) may decide to use this opportunity to discuss their institution’s mission statement, years in operation, operating budget, staffing levels and program needs. A larger, well known charity (IE: UCI, OCPAC, Hoag Hospital) may decide to share results of ongoing community benefit programs, provide a status report about an ongoing or pending capital campaign, or discuss recent accomplishment and achievements of their institution.

AWARENESS OPPORTUNITIES:

A representative from the Honored Charity will be given the opportunity to:

- Deliver a two minute oral presentation at the PGRT monthly breakfast meeting;
- Name of organization will be featured on the PGRT Web site Home page, with a link to your organization in the month that you have been selected;
- Distribute informational material at the monthly breakfast meeting;
- Invite three charity representatives/guests to the monthly breakfast meeting (IE: Chairman of Board, President, volunteers) at a reduced cost of \$15.00 each;
- A Membership Scholarship to be awarded to the Executive Director of the organization for a one-year term, if you so choose.

SELECTION PROCESS:

All paid members of PGRTOC are eligible to nominate their desired charity. A simple form must be completed and submitted to PGRTOC. This form must include the name the person who is responsible for representing the charity, your Web address for the PGRT Web site (pgrtoc.org) and provide the requested information to the PGRT Association Office. The Honored Charity will be selected randomly from the applicant pool.

QUESTIONS:

Please contact Arlin Penner, CIMA, ChFC, CAP, Honored Charity Program Chair
at: (800) 794-7682 with any questions regarding this program.

**PLANNED GIVING ROUND TABLE OF ORANGE COUNTY
PROJECT AWARENESS**

HONORED CHARITY NOMINATION FORM

Project Awareness was created by the board of directors of the Planned Giving Round Table Orange County in 1999 to acquaint and expose our membership to the wonderful people, programs and projects of our local charities. Honored Charities are selected by the board upon nomination by a member, and are given approximately 3 minutes at our monthly meeting to talk about their organization. You may also choose to distribute flyers, newsletters, etc.

Date: _____ **PGRT Member Sponsor:** _____

Charity Name: _____

Address: _____

Phone: _____ **E-mail:** _____

E-mail Address of Organization for PGRT Web site: _____

Web site of Organization for PGRT Web site: _____

Please provide a BRIEF description of the Charity organization and/or project you wish to present:

Name and title of person who would present a three-minute talk at the breakfast meeting:

You are encouraged to invite staff and board members from your organization to attend with you when you present. However, we do ask that all members from your organization planning to attend the breakfast meeting must make a reservation with the Association Office. Please call (866) 921-6440.
You are welcomed to bring 3 guests at a reduced price (\$15 each).

Please return completed form to:

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