



2008 Annual Report to Members

The mission of the Greater Cincinnati Planned Giving Council (GCPGC) is to increase the quantity and quality of planned giving in our community by providing a forum for education, training, and networking among various professional disciplines involved in gift planning, in accordance with The Model Standards of Practice for Charitable Gift Planners.

GCPGC is a local council of the 130 nationwide councils that make up the National Committee on Planned Giving (NCPG). With a current membership of nearly 200 professionals, GCPGC is proud to be recognized as one of the largest and most active planned giving councils across the nation.

Committees

Membership

GCPGC has a total membership of 183 and welcomed 27 new members in 2008. Recognizing how important it is to get new members engaged right away, new members are greeted with a personal phone call and a welcome letter highlighting the benefits of GCPGC membership. The letter also directs new members to the GCPGC website, invites new members to Conversation and Coffee and provides instructions on how to contact board members.

Mary Alice Koch, Laura Raines and Nune Kraterman served as Co-Chairs for the committee with Mary Alice Koch moving to the Marketing Committee in June.

Marketing

The Marketing Committee has been working with a webmaster throughout the year developing a new GCPGC website that will go live in 2009. It will be more personalized and allow GCPGC members to upload graphics, such as LEAVE A LEGACY® logos, pdfs and word documents.

To promote LEAVE A LEGACY and community wide awareness of the Council, GCPGC purchased four full-page, full-color advertisements in *Cincy Business Magazine* that included a GCPGC profile in the December 2008 issue. Additional advertisements will continue to appear in *Cincy Business* throughout 2009. The GCPGC also purchased a full-page, full-color advertisement in the June 2008 issue of *Cincinnati Magazine* promoting the upcoming Voices of Giving event. Whitney O' Neal served as marketing chair person, joined mid-year by Mary Alice Koch.

LEAVE A LEGACY®

LEAVE A LEGACY is a public awareness campaign designed by the National Committee on Planned Giving and promoted by GCPGC to encourage people from all walks of life and all income levels to leave a charitable legacy by making a bequest or other planned gift to non-profit organizations. In a 2008 survey of GCPGC members, 96.6% of respondents were aware of LEAVE A LEGACY and 79% used some portion of the material. Whitney O' Neal served as marketing chair person, joined mid-year by Mary Alice Koch, overseeing the activities, promotions and materials for LEAVE A LEGACY.

The LEAVE A LEGACY® initiative is integrated into the GCPGC's marketing efforts including adaptation of the sun burst as GCPGC's logo on all printed material and web page. More than 84 of non-profit organizations in the Greater Cincinnati area have signed a partner agreement and now actively use some portion of the LEAVE A LEGACY materials. Marketing material is available at no cost to member organizations through Association Connection or can be downloaded from the GCPGC website. The Marketing Committee purchased advertisements that promote gift planning to the general public throughout the 2008 calendar year. The full page, full color LEAVE A LEGACY ads were published as follows:

- February 2008, *Cincy Business* (Power 100 issue)
- June 2008, *Cincy Business* (Love Cincy issue)
- June & August 2008, *Cincinnati Magazine*-for Voices of Giving event
- October 2008, *Cincy Business* (Estate Planning issue)
- Nov./Dec. 2008, *Cincy Business* (Guide to Planned Giving issue)

Audit Committee

An audit committee is appointed each January to review the previous year's financial transactions. The committee consists of the past president, current treasurer and one independent person who is not a GCPGC Board member. The 2008 Committee included Gina Weitzel, Rusty Richardson and Mark Maxwell. The audit report showed no inconsistencies and the Balance Sheet was approved as presented.

Governance Committee

The Governance Committee is charged with updating the bylaws and in recommending a slate of candidates for election to serve on the Board. The 2008 Committee consisted of Patty Rosely, Barbara Schaefer, Mary Alice Koch, Mike Murray, Steve Hegge and Margaret Gaither.

Strategic Planning Task Force

On September 14, 2007 Tanya Howell Johnson, President of NCPG, facilitated a strategic planning retreat for the GCPGC Board hosted by *Phi Delta Theta Educational Fraternity* at their facility in Oxford, Ohio. The quest for the retreat was how to improve the Board's ability to govern and to develop a plan to anchor the on-going strategies of the Council.

Highlights of the retreat recognized the growth and accomplishments of GCPGC since its inception in 1989, identified strengths and weaknesses and the key issues facing the Council in the next three years. As a result of the strategic planning retreat, a Strategic Task Force was formed to meet with each committee chair to implement the new strategic plan over the next three years. Strategic Task Force members are Karen Kruer and Steve Hegge.

Financial Report-separate handout at Annual Meeting

A special thanks to Mark Maxwell for serving as Treasurer and preparing the monthly statements and year end financial report.

Events

Voices of Giving

On June 18, 2008, the Council welcomed 102 guests to GCPGC's 10th Annual **2008 *Voices of Giving*** reception held at the Taft Museum of Art. Eighteen individuals were honored for making a planned gift that will benefit non-profit organizations. Press releases were circulated to local and community newspapers and promotions for the event were aired by WLW and CET, resulting in positive media exposure for the Council. A special thanks to Dan Carroll who served as Master of Ceremonies. Event Chair was James Friedman and planning committee members were Steve Hegge and Melissa Robich.

National Philanthropy Day

The 22nd Annual National Philanthropy Day (NPD) celebration was held November 6, 2008 at the Hyatt Regency Hotel. Approximately 550 people attended the luncheon, hosted jointly by GCPGC and the Association of Fundraising Professionals (AFP). Two hundred volunteers and donors were recognized for their support of local non-profit organizations. Ellen van der Horst, was the featured speaker and Barbara Kellar served as the master of ceremonies. Co-chairs were Casey Betz of AFP and GCPGC Board member Mary Newman. Committee members were Connie Conwell, Christa Flueck, Mindy Hammer, Andrea Herzig, Kathy Hunt, Mark Maxwell, Fran Sack and Gina Weitzel. The numerous event sponsors are listed in the Sponsors Section of this report.

Memorandum of Understanding with AFP

GCPGC and AFP, after years of working collaboratively to make NPD a great success, entered into a formal Memorandum of Understanding regarding the operations of the annual event. The provisions in the agreement govern the development and implementation of the event including specific roles for each organization for planning, fiscal responsibility, insurance, budgeting, date and location, marketing and sponsorship. A special thanks to Barbara Schaefer for drafting the agreement.

Educational Programming

Conversations and Coffee is a monthly educational program and forum held the 3rd Wednesday of each month from 7:30 to 9:00 am at the Playhouse in the Park. On average 44 people attended each of the monthly sessions for a total of 556 over the year—a 7.7% increase over 2007. Programs in 2008 included the following topics and 20 guest speakers with the attendance number in parentheses:

- January (48) Annual Meeting with Gina Weitzel, President GCPGC
- February (43 rsvps) *Charitable Lead Trusts* with Michael Barnes, Johnson Investment Trust
- March (60) *Can't Have one Without the Other* with Larry Stelter, Stelter Company
- April (52) *Building Family Culture* with Terry Hunt, a guest of Resonate
- May (46) *Planned Giving Boot Camp: Case Studies* with Jeff Lydenburg, PG Calc
- June (33) *Economics 101* with John Augustine from Fifth Third Bank
- July (44) *A (Mostly) Honest Conversation with a Trust Advisor*, with Margaret Johnson
- August (64) *Talking with Clients & Donors About Personal & Family Values in Estate and Charitable Planning* with Daniel Hoffheimer
- September (26) *Family Love Letter* with Glynnis Reinhart, AXA Advisors
- October (42) *Estate Logistics, A Paralegal Recounts a Gift* with Renee (Renee Cipriani) from Frost Brown Todd
- November (30) *How Large and Small Shops use LEAVE A LEGACY* with Margaret L. Gaither, Jim Friedman and Whitney O'Neal.
- December (XX) *How to Chat with Seniors About Planned Giving* with Mary Ann Jacob

The hard work of Committee, Co-chairs Heather Dare and Conrad Thiede and Committee members Patty Rosely and Mindy Hammer, assure quality programs and professional speakers. The Committee wishes to thank the sponsors, Fifth Third Foundation, The Greater Cincinnati Foundation, United Way of Cincinnati and special thanks to The Playhouse in the Park for hosting the program at their facility.

The Development Seminar was held on October 16, 2008 at the Millennium Hotel in Cincinnati. The seminar, *Donor Centered Fund Raising*, opened with 'breakfast with a board member' and then featured Penelope Burk, President of Cygnus Applied Research, who addressed an audience of 78 development professionals. Congratulations to Committee Chair Heather Dare for putting together this educational and informative

seminar. The Committee wishes to thank the sponsor, Fifth Third Foundation, who has committed to three year funding for the program.

Planned Giving on the Run is in its third year. Developed in 2005 by GCPGC Board member Jeff Stec, the program is an eight-session class on the basics of planned giving. It is designed for development professionals who are new to the field of planned giving. The goal is to give participants the nuts and bolts of Planned Giving so they can start a Planned Giving program without additional expense or personnel. Each participant is matched with a mentor, usually a member of the GCPGC Board. Currently 15 people are enrolled in the program.

Jeff Stec was joined by Susan Kulick and Andrea Herzig as course instructors. A special thanks to Bartlett & Company, as the presenting sponsor, and the Greater Cincinnati Foundation for hosting the course at their office.

GCPGC Governing Board

GCPGC's Board consists of 15 to 21 council members who maintain contact with the National Committee on Planned Giving, oversee all activities, programs, governance and fund raising of the council. The Board meets on the second Friday of every month to conduct current business. Board members serve for a three-year, renewable term and are assigned to a program or committee.

For their faithful service on the Board, a special thanks to the Board members who's terms expire in 2008: Jeff Stec, Barbara Schaefer and Gina Weitzel (past president for two consecutive years).

The 2008 GCPGC Board members are listed on the Page 6 and the proposed candidates for consideration for the 2009 Board are on Page 7.

2008 Board Members

Margaret Gaither
President

The Greater Cincinnati Foundation

Whitney O’Neal
Vice President
Villa Madonna Academy

Mark Maxwell
Treasurer
Chicago Province for the Society of Jesus

Andrea Herzig
Secretary
Girl Scouts – Great Rivers Council, Inc.

Heather P. Dare
Fifth Third Bank

James J. Friedman
The Jewish Federation of Greater Cincinnati

Steve Hegge
Campbell Lodge Boys Home

Mary Alice Koch
PNC Bank

Mary Newman
Cincinnati Zoo and Botanical Gardens

Laura Raines, J.D.
The University of Cincinnati Foundation

Mary Rust, J.D.
Taft Stettinius Hollister LLP

Barbara Baumann Schaefer, J.D.
Robert M. Butler Memorial Foundation

Jeffrey Stec, J.D.
Inspired Community Change

Conrad F. Thiede
Phi Delta Theta Educational Foundation

Jeff Lydenburg (complete term of Steve Horn)
PG Calc

Melissa Asfahl Robich
Merrill Lynch

Gina Weitzel
GCPGC Past President
University of Cincinnati

Karen Zerhusen Kruer
Northern Kentucky University Foundation

Nune Krayterman
Santa Maria Community Services

Proposed Board Members for 2009

Andrea Herzig
President

Girl Scouts – Great Rivers Council, Inc.

Karen Zerhusen Kruer

Vice President

Northern Kentucky University Foundation

Anne Maxfield

Clovernook

Mark Maxwell

Treasurer

Chicago Province for the Society of Jesus

Mary Newman

Cincinnati Zoo and Botanical Gardens

Secretary

Open

Whitney O’Neal

Villa Madonna Academy

Heather P. Dare

Fifth Third Bank

Laura Raines, J.D.

The University of Cincinnati Foundation

James J. Friedman

The Jewish Federation of Greater Cincinnati

Mary Rust, J.D.

Taft Stettinius Hollister LLP

Steve Hegge

Campbell Lodge Boys Home

Sue Ellen Stuebing

CET

Susan Kulick

SGK Consulting

Conrad F. Thiede

Phi Delta Theta Educational Foundation

Mary Alice Koch

PNC Bank

Sarah Alspaugh, CAP

Margaret Gaither

Past President

The Greater Cincinnati Foundation

Nune Krayterman

Santa Maria Community Services

Jeff Lydenburg (complete term of Steve Horn)

PG Calc

Sponsorship

Throughout 2008, each program committee chair and co-chair worked with the President and Vice President to acquire sponsors for each individual event or program. The sponsors are recognized by inserts in event programs, signage and a public announcement at each activity/event they have sponsored, on GCPGC's web sight, and in GCPGC's annual report. Through the generous support of sponsors, GCPGC is able to attract qualified speakers and provide quality educational programs to its membership.

The Council along with the President and Vice President gratefully acknowledge the generous financial support of the following companies and organizations in 2008.

Conversation and Coffee

The Fifth Third Foundation, The Greater Cincinnati Foundation, United Way of Cincinnati and a special thanks to the host, The Playhouse in the Park.

Development Seminar

The Fifth Third Foundation

National Philanthropy Day

The Otto M. Budig Family Foundation, Cincinnati Children's Hospital Medical Center, Duke Energy, Adrian Durban Florist, Fifth Third Foundation, The Fine Arts Fund, InterAct for Change, United Way of Greater Cincinnati and The University of Cincinnati Foundation. Special thanks go to CET Express, student volunteers from Cincinnati Christian University, Joseph Mazzei of Super Signs & Banners and the West Clermont By Request Vocal Ensemble directed by Jeffrey Riel.

Planned Giving on the Run

Bartlett & Company, with a special thanks to the host The Greater Cincinnati Foundation.



United Way
of Greater Cincinnati



BARTLETT

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