



Greater Cincinnati
PLANNED GIVING COUNCIL

Annual Report
December 2021

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01. BOARD MEMBERS

OFFICERS

- Dan Virzi, President
- Mary Kay Koehler, Vice President
- Matthew Hoffman, Treasurer
- Andrew Cole, Secretary
- Raynal Moore, Immediate Past President

TRUSTEES

- Karen Amend
- Michelle Mancini Bachman
- Rhonda Curtis
- Mindy Hammer
- Kate Kennedy
- Kathann Koehler
- Kirsten Kolenich
- Mark Noel
- Megan Okun
- Lisa Roberts-Rosser
- Carol Serrone
- Tiffany Porter Shabazz
- Conrad Thiede
- Felicia Zakem

02. AUDIT COMMITTEE

MEMBERS

- Matt Hoffman, Treasurer
- Dan Virzi, President
- Mary Kay Koehler, Vice-President
- Kate Kennedy, Board Member
- Megan Jackson- Non-Board Member

SUMMARY

The committee met virtually on April 22, 2021, charged with the following duties, which were completed as noted:

Review the records maintained by the Treasurer for the prior year, in this case, 2020, examining to see that sound accounting principles were being followed and verify the existence of all assets of the Council. The review included the following:

- A comparison of bank statements to the checkbook and other financial reports
- Verification that bank statements are reconciled on a timely basis
- Verification that checks of \$1,000 or more are signed by two members of the board
- Verification that personal reimbursements were approved by committee chairs or Executive Committee member
- Identify any missing and voided checks
- Verification that invoices and/or receipts match payments
- Other items as deemed appropriate by members of the committee

A suggestion was made to explore the possibility of sending a recognition letter to vendors who donate goods or services in-kind. There currently is no formal recognition made by the Council to the vendors when these donations happen. This was discussed with the Executive Committee and Board Members where it was decided to be implemented.

RESULTS

With the information provided and reviewed, the audit committee found no discrepancies and found nothing of concern with the transactions.

03. CONVERSATION & COFFEE COMMITTEE

MEMBERS

- Conrad Thiede, Chair
- Amy Cheney
- Jeff Lydenberg

2021 PROGRAM LINEUP SUMMARY

Date	Program Title	Presenter(s)
January 20	<i>Annual Meeting and Case Studies</i>	GCPGC Officers and Michael Kenyon, CGP
February 17	<i>Navigating Working Remotely (and How to Manage Your Home Office)</i>	Lori Firsdon
March 17	<i>Economic Update</i>	Charnella Grossman, Fifth Third Bank
April 21	<i>The Case of Buster Mayberry</i>	Barbara Yeager, CGP, with Jim Friedman
May 19	<i>Planned Giving: The Bare Essentials,</i>	Craig Wruck
June 16	<i>From Pivoting to Positioning: Fundraising coming out of a lockdown</i>	Kathann Koehler, Jami Vallandingham, Dan Virzi, Felicia Zakem
July 21	<i>The Impact of Diversity on High Performing Teams</i>	Kelli Smith, Trina Olidge, Aquanetta Betts
August 18	<i>Accurately Acknowledging Gifts Other Than Cash</i>	Amy Cheney and Jeff Lydenberg
September 15	<i>How We Do It: Managing a Portfolio of Donors for Philanthropic Planning</i>	Lizabeth Chambers, Steve Clark, Robert Shafis
October 21	<i>Cues & Clues: What Prospects & Clients Tell You & What You Need to Say</i>	Pamela Davidson
November 17	<i>What's a Gift Planner To Do With a Bequest Snafu?</i>	Christopher J. Clay
December 15	<i>Holiday Hootenanny</i>	

CONVERSATION & COFFEE COMMITTEE (continued)

LOOKING AHEAD AT 2022

Date	Program Title	Presenter(s)
January 19	<i>GCPGC Annual Meeting / CGP Update</i>	GCPGC Officers and Michael Kenyon, CGP
February 16	<i>Tax-Smart Charitable Giving, Especially with Retirement Assets</i>	Christopher Hoyt
March 16	<i>Topic/Title TBD</i>	Pam Davidson
April 20	<i>Economic Update/Outlook</i>	Charnella Grossman

PROJECTED GOALS

- Continue to grow participant RSVPs
- Host 1-2 marquee and 2 regional presenters each year
- Survey members and program guests on topics and presenters, preferences and needs
- Seek, engage and include a diversity of presenters and topics
- Cultivate membership in GCPGC / Recognize new members & guests at monthly programs
- Continue to offer planned giving, fundraising, relevant legal and financial updates, and career advancement programming

PROJECTED OBJECTIVES

- Continue to offer every month, including during summers/holidays/lockdown => continuity.
- Request input from members and respond to member needs with respect to a variety of topics and speakers.
- Keep Conversation & Coffee free to members and prospective members.
- Maintain quarterly meetings of the committee.

Thank You

Fifth Third Foundation for sponsoring Conversation & Coffee



04. DIVERSITY AND INCLUSION COMMITTEE

MEMBERS

- Mary Kay Koehler, Chair
- Rhonda Curtis
- Kate Kennedy
- Susan Kulick
- Raynal Moore
- Tiffany Porter Shabazz

SUMMARY

The Diversity and Inclusion Initiative provides an opportunity for individuals considered to be diverse by ethnicity, gender identity, race, religion or sexual orientation to learn more about planned giving for their professional or volunteer work.

The Initiative awards up to three scholarships to Planned Giving on the Run, the introductory planned giving course, and seven memberships to the Greater Cincinnati Planned Giving Council that gives access to monthly educational meetings, networking events, webinars and more.

RESULTS

Recruitment efforts remained stunted this year due COVID-19 limiting most in-person events where we typically talk with potential candidates. However, the committee received three applications in 2021 from highly qualified professionals. All were awarded full scholarships to Planned Giving on the Run and memberships to the Council for the year. All awardees are engaged in Council meetings and have been attending the Planned Giving on the Run classes.

PROJECTED OBJECTIVES

Marketing efforts for the next scholarship cycle will begin in early 2022. The committee is committed to expanding our efforts and will partner with broader reaching organizations to recruit new applicants.

05. KNOWLEDGE @ NOON COMMITTEE

MEMBERS

- Kathann Koehler, Chair
- Karen Amend

SUMMARY

Again this year, our webinars have been delivered via the Zoom format. We had an average of 13-15 attendees. We took the answers from the last GCPGC questionnaire into account when we selected the topics and speakers for this year's offerings. All of our offerings were pre-recorded and none were live. We often stop the webinar for discussion among the attendees. We always capture the webinar to archive on our website. It is free to members to replay the webinars. We try to accommodate both experienced and novice gift planners with our webinars.

2021 PROGRAM LINEUP SUMMARY

Date	Program Title	Presenter(s)
March 10	Social Work of Fundraising - Meaningful and Frank Conversations that Lead to Great Gifts	Sherrie Beal
May 12	Bequest Marketing Everyone Should Do	Andrew Palmer
September 8	Strategic Conversations Lead to Major Planned Gifts	Karen E. Osborne
November 3	When You Can't Take Your Donor to Lunch	Stacy B. Sulman

RESULTS

We generally have 1-3 attendees over the course of the year who join the chapter. We also invite attendees to send suggestions for future webinars.

PROJECTED GOALS

Our goal is always more participation in chapter events and offerings. We encourage potential members to join GCPGC at the end of each webinar.

PROJECTED OBJECTIVES

Our objective is to increase membership in GCPGC by offering these webinars to all levels of planned giving professionals and to provide a better understanding and competence of planned giving in general.

06. MEMBERSHIP AND MARKETING COMMITTEE

MEMBERS

- Matt Hoffman, Co-Chair
- Kirsten Kolenich, Co-Chair
- Andrew Cole
- Whitney O'Neal
- Nune Sargsyan
- Dan Virzi

SUMMARY

The majority of the planned marketing efforts were put on hold and the primary focus was to retain members as our fellow committees navigated the transition of programs from in-person to virtual.

PROJECTED OBJECTIVES

- Resume activity to create templates, tools and resources for paid members only area on website, as appetite and budget allows
- Consider strategic e-campaign initiative around driving membership
- Send updated member survey
- Continued branding efforts for maximum communication effectiveness and brand awareness

07. NOMINATING COMMITTEE

MEMBERS

- Dan Virzi, President
- Mary Kay Koehler, Vice-President
- Ann Dempsey – Non-Board Member
- Rhonda Curtis – Board Member

SUMMARY

The Nominating Committee met one time and reviewed the following:

- Adding Daniel Flynn and Megan Jackson to the GCPGC Board of Directors.
- The GCPGC board members whose terms were expiring 1/19/22 are eligible to renew their terms. Renewing their terms are Rhonda Curtis, Kate Kennedy, Michelle Mancini Bachman, Lisa Roberts-Rosser, Carol, Serrone, and Conrad Thiede; Felicia Zakem will be filling the secretary position vacancy.

The Nominating Committee contacted board members whose terms were expiring to ask that they serve another term. All board members who were contacted renewed their terms. The Nominating Committee also contacted the board officers and confirmed that they would progress to the next officer level positions.

The Nominating Committee reviewed a list of current GCPGC Board Members and selected a member to ask to serve as secretary during the 2022 term. The Committee contacted this person and she agreed to serve as incoming secretary.

The Nominating Committee reviewed a list of GCPGC non-board members and selected two Council members to fill the two board vacancies. Both Council members agreed to serve a three-year term on the GCPGC Board of Directors effective 1/19/22.

The Nominating Committee updated the list of board members and officers to reflect the committee's recommendations. The 2021 GCPGC Board of Directors confirmed all the Nominating Committee's recommendations at the 11/12/21 GCPGC Board Meeting to be presented for a Council vote at the 2022 GCPGC Annual Meeting scheduled for 1/19/22.

PROJECTED GOALS

Increase board members and board member diversity

08. PLANNED GIVING ON THE RUN COMMITTEE

MEMBERS

- Kathann Koehler
- Jeff Lydenberg
- Mark Noel
- Rhonda Curtis

SUMMARY

The Committee successfully planned and executed our Planned Giving on the Run (PGOTR) class virtually in the Zoom format. The Zoom format is easy to record and easy to attend but does not have the same feel as far as in-person instruction. Since the class goes from September to February, we span two different calendar years. Last year's class (2020) graduated about seven students, most of whom we have never met in person. This year's class (2021) has 10 registered although we have only "met" nine via Zoom.

Jeff Lydenberg handles the marketing aspect of planned giving. His presentations are always topical and practical. Mark Noel handles the legal side of planned giving stressing that no one has to be an expert in tax law or other technicalities. His handouts are great to keep as reference should you need it. Rhonda Curtis matches our students with experienced planned giving professionals who are available to ask questions of or consult on a variety of topics. Kathann Koehler is the practitioner. She brings real-life situations and problems to the students and we try to discuss the best approach to a good result. All of us can chime in to enrich the discussion.

RESULTS

We have produced several graduates who have joined the GCPGC chapter and gone on to become valued board members.

PROJECTED GOALS

Our goal is to educate fundraising professionals on the basics of planned giving and to encourage them to remain as a member of GCPGC after their sessions are over. Our mentor program has been successful in encouraging dialog and participation in other chapter programs.

PROJECTED OBJECTIVES

The course's purpose is to provide class attendees a strong overview of various and essential topics associated with gift planning. It helps the student gain a basic understanding of gift planning and its importance and place in a fundraising/development program. Course topics include a definition of gift planning (what it is), gift planning vehicles, marketing, identification of prospects, policies, integration, stewardship and ethics, building a sustained program, etc. A mentor is assigned to each student from the PGC board and membership. Mentors were assigned and introduced to their mentee at the very first meeting. This was very helpful to the students in one-on-one learning as well as to encourage participation in other GCPGC events.

08. PLANNED GIVING ON THE RUN COMMITTEE (continued)

2021 PROGRAM LINEUP SUMMARY

Date	Program Title
September 8	Getting to Know You & Each Other; sharing questionnaire response Foundations for Gift Planning Mentor introductions
October 5	Are you Ready for Planned Giving? Tax Primer for Gift Planning Estate Gifts from Wills and Trusts
November 2	Identifying Prospects and Building Relationships; Working with Professional Advisors? Charitable Gift Annuities
December 7	Marketing Planned Gifts Stewardship and Ethics Designing a Program that Fits; Policies Affecting Planned Gifts – Part 1 Retirement Account Planning
January 4, 2022	Legacy Society Designing a Program that Fits – Part 2 Charitable Remainder Trusts
February 1	Lead Trusts and Other Planned Gifts Strategies to Sustain Your Program Course Recap and Q&A

09. SOCIALS COMMITTEE

MEMBERS

Judy List-Sweeney, Co-Chair
Michelle Mancini, Co-Chair

SUMMARY

GCPGC's Social Committee was created to foster after work networking opportunities for members and non-members to socialize, learn more about local organizations and elevate awareness of the GCPGC. Our goal is to foster an inclusive, fun experience for our members.

RESULTS

GCPGC's Social Committee was created to foster networking opportunities for members and non-members to socialize, learn about local organizations, and elevate awareness of the GCPGC. Our goal is to create an inclusive, fun experience for our members. In 2021, the Committee continued to operate with the challenges of Covid. The Committee continued our Socials through a virtual platform. The Committee hosted two virtual events. These events were well attended and received positive feedback. In addition, the first in-person Social was held in conjunction with the Association of Fundraising Professionals (AFP). We continued to invite our Planned Giving on the Run graduates, new members, current members, and non-members to our Socials. The events allowed further engagement for current members, recruitment of new members, and provided additional visibility and partnerships with our member organizations. In addition, these events provided an additional opportunity to promote other GCPGC initiatives and programs. As we look to 2022, we hope to have a hybrid approach to our Socials, providing both virtual and in-person events to meet the needs of our members. Thank you to all those who have attended and supported our Socials! We value the connections and we look forward to another productive year of networking.

The Committee would also like to recognize and celebrate our remarkable Co-Chair, Judie List Sweeney, who retired this year. Our immense gratitude to all Judie has done to serve not only this Committee, but also GCPGC and her community.

LOOKING AHEAD AT 2022

If your organization is interested in hosting an event, please contact the committee chairs. Please make sure to mark your calendars for next year's Socials when the dates are released in 2022!

10. VOICES OF GIVING COMMITTEE

MEMBERS

Felicia Zakem, Co-Chair
Michelle Zeis, Co-Chair
David Harris
Michelle Mancini
Lisa Roberts-Rosser
Carol Serrone
Sue Ellen Stuebing
Lauren Copeland
Dan Virzi

SUMMARY

The 23rd annual Voices of Giving awards continued its tradition of honoring donors who have committed to a planned gift to a local nonprofit and the professional advisors who assist them. Despite the pandemic we managed to execute another successful virtual event, building upon lessons learned from 2020. This year's event included a live welcome and closing by GCPGC President, Dan Virzi, and live chat from participants during the event. This created a sense of being together and it contributed to the overall feel of the event.

RESULTS

In 2021, 13 separate organizations honored a total of 14 unique individuals, households or advisory firms. John Lomax volunteered as MC for the event, which raised \$14,400 from 23 sponsor organizations or individuals, as well as in-kind gifts from two event vendors. The reported net revenue was \$4,419. It was difficult to measure how many people tuned in to watch the event, which was free, but we received very positive feedback from honorees and the nominating organizations.

2021 SPONSORS

PLATINUM SPONSORS

Greater Cincinnati Foundation
Katz Teller

GOLD SPONSORS

Bethesda Foundation
The Christ Hospital Foundation
Graydon
Maple Knoll Communities, Inc.
The Salvation Army
The Yunker Group
SpotOn Productions (in-kind support)
Sterling Cut Glass (in-kind support)

10. VOICES OF GIVING COMMITTEE (continued)

SILVER SPONSORS

Anne M. Maxfield, LLC – Non-profit
Consultant
ArtsWave
Cincinnati Zoo & Botanical Garden
Freestore Foodbank
Jewish Cemeteries of Greater Cincinnati
Magnified Giving
Meals on Wheels Southwest OH &
Northern KY
Mount St. Joseph University
PG Calc
VonLehman CPA & Advisory Firm

FRIENDS OF VOICES OF GIVING
Cincinnati Public Radio
Whitney O’Neal – Ohio Living
St. Vincent de Paul – Cincinnati
St. Xavier High School
Taft Law

LOOKING AHEAD AT 2022

Our goal for 2022 is to return to an in-person event, or possibly, a hybrid version. We will be able to "pivot" if needed but we see this break from in-person as an opportunity to build upon the success of the past. For example, we are reconsidering the program delivery and may include elements from the virtual experience that everyone enjoyed, like the slide show and sponsor spotlights.

We began fundraising in late November with the hopes of increasing donations in 2022 back to pre-2021 levels. We anticipate increased costs for an in-person event and would like to net at least \$5,000.

2022 Voices of Giving Committee Members include:

Felicia Zakem - Co- Chair
Lauren Copeland - Co-Chair
Emma Chaney
Misty Griesinger
David Harris
Deanna Hillard
Michelle Mancini Bachman
Tiffany Porter Shabazz
Lisa Roberts-Rosser
Carol Serrone
Sue Ellen Stuebing
Dan Virzi
Michele Zeis

10. VOICES OF GIVING COMMITTEE (continued)

PROJECTED OBJECTIVES

Additional objectives for 2022 include encouraging the nominations of more donors of color and nominations by organizations who have not participated in the past. We are also considering adding an additional award recognizing a family, group or young adult. The Voices of Giving committee would also like to update the logo, replacing the stock image with a custom logo created by a local designer.

Lauren Copeland will chair the committee in 2023 and will select a co-chair at the close of the 2022 event.

