



Greater Cincinnati PLANNED GIVING COUNCIL

Annual Report
December 2022

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01. BOARD MEMBERS

OFFICERS

- Mary Kay Koehler, President
- Andrew Cole, Vice President
- Matthew Hoffman, Treasurer
- Lisa Roberts-Rosser, Secretary
- Dan Virzi, Immediate Past President

TRUSTEES

- Michelle Mancini Bachman
- Rhonda Curtis
- Daniel Flynn
- Mindy Hammer
- Megan Jackson
- Kate Kennedy
- Kathann Koehler
- Raynal Moore
- Mark Noel
- Megan Okun
- Whitney O'Neal
- Carol Serrone
- Tiffany Porter Shabazz
- Conrad Thiede

02. AUDIT COMMITTEE

MEMBERS

- Matt Hoffman, Treasurer
- Andrew Cole, Vice President
- Kathann Koehler, Board Member
- Ann Dempsey, Non-Board Member

SUMMARY

The committee met virtually on October 26, 2022, charged with the following duties, which were completed as noted:

Review the records maintained by the Treasurer for the prior year, in this case, 2021, 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- Due to the change in banking institutions from Fifth Third to PNC, we lost the ability to view cashed checks on our statements. The images are available on-line and the Treasurer began making copies of checks prior to mailing. There were four checks in 2021, where copies could not immediately be viewed to verify the presence of a second signature. This issue was self-identified by the Treasurer and an action plan has been established to ensure the issue does not continue to exist.
- Verification that personal reimbursements were approved by committee chairs or an 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

The committee recommended a shared file where images of invoices and check requests could be accessed by the committee members for verification. This option will be explored if the next Audit Committee meeting needs to be held virtually versus in person.

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

2022 PROGRAM CALENDAR

Date	Program Title	Presenter(s)
January 19	<i>Annual Meeting and Case Studies</i>	GCPGC Officers and Michael Kenyon, CGP
February 16	<i>Tax-Smart Charitable Giving</i>	Christopher Hoyt
March 16	<i>Simpler Gift Plans All Charities Can Understand and Promote</i>	Pamela Davidson
April 13	<i>Economic Update & Outlook</i>	Charnella Grossman, Anna Coutts & Hans Tinkler
May 18	<i>How a Pandemic Magnified the “Why” in Planned Giving</i>	Nathan Stelter
June 15	<i>Charitable Gifts of Cryptocurrency: A Panel Discussion</i>	Danny Ferrell, Phillip Lanham & Jeff Lydenberg
July 20	<i>What's Working...(Planned Giving Ideas That Are Working)</i>	Andrew Cole, John Schrantz & Kendra Struthers
August 17	<i>This Stuff Matters: The New ACGA Rates and the New IRS Mortality Table</i>	Bill Laskin
September 21	<i>Professional Advisors Share “What We’re Hearing.”</i>	Rachael Cruse, Megan Okun & Aliya Riddle
October 19	<i>Life Hacks for Fundraisers: Simple Techniques for Donor Interactions</i>	John Bromels
November 16	<i>What Should My Planned Giving Program Look Like?</i>	Kathann Koehler, Amanda Miller & Jeff Lydenberg
December 14	<i>Holiday Hootenanny</i> (in memory of Heather Dare and in celebration of giving in Cincinnati)	

03. CONVERSATION & COFFEE COMMITTEE (continued)

LOOKING AHEAD AT 2023

Date	Program Title	Presenter(s)
January 18	<i>GCPGC Annual Meeting / CGP Update</i>	GCPGC Officers and Michael Kenyon, CGP
February 15	<i>Generational Donor/Prospect Strategies primer</i>	Chuck Underwood
March 8 or 15	<i>Generational Donor/Prospect Strategies (½ day program)</i>	Chuck Underwood
April 19	Forte Organizer presentation	Lori Firsdon

PROJECTED GOALS

- Continue to grow participant RSVPs
- Host 1-2 marquee and 2 regional presenters each year
- Solicit members, presenters and guests on topics and presenters, preferences and needs
- Seek, engage and include a diversity of presenters and topics
- Cultivate membership in GCPGC by recognizing 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
- Offer a half-day educational program in 2023
- Request input from members & respond to member needs with respect to variety of topics & speakers
- Keep Conversation & Coffee free to members, prospective members and guests
- Maintain quarterly committee meetings

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 to COVID-19 limiting most in-person events where we typically talk with potential candidates. However, the committee received two applications in 2022 from highly-qualified professionals. Both Hannah Freedberg and Rhonda Starghill were awarded full scholarships to Planned Giving on the Run and memberships to the Council for the year. Both 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 2023. 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
- Carol Serrone

SUMMARY

This year we have offered two virtual webinars and two hybrid webinars (both in-person and via Zoom). 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 and make it available to members free of charge to replay at their convenience. We try to accommodate both experienced and novice gift planners with our webinars. We generally offer two "soft skill" and two technical webinars per year.

2022 PROGRAM LINEUP SUMMARY

Date	Program Title	Presenter(s)
February 9	Focused Donor Advised Fund Fundraising	Renee Kurdzos
May 4	Effectively Promoting Your Planned Giving Program	Jonathan Steele and Andrew Palmer
September 14	Important Year-end Charitable Giving Strategies	Dr. Russell James
November 2	Checklists to Make the Gift Happen	Craig Wruck

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 and discuss the benefits of membership.

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

- Raynal Moore, Co-Chair
- Dan Virzi, Co-Chair
- Andrew Cole
- Megan Okun
- Whitney O'Neal

SUMMARY

The Membership and Marketing Committee connected with all committee chairs to assess their current needs. The Committee will continue to establish and roll out several plans to personally connect with prospective and lapsed members.

There will be a concentrated effort to promote the Chuck Underwood "Generations" events led by the Conversation & Coffee Committee.

PROJECTED OBJECTIVES

- Continued branding efforts for maximum communication effectiveness and brand awareness
- Reconnect with lapsed members
- Convert non-member attendees to council members
- Send updated member survey

07. NOMINATING COMMITTEE

MEMBERS

- Mary Kay Koehler, President
- Andrew Cole, Vice President
- Rhonda Curtis, Board Member
- Megan Jackson, Board Member
- Ann Dempsey, Non-Board Member
- Rhonda Starghill, Non-Board Member

SUMMARY

The Nominating Committee met twice (once in May to replace the Secretary position and once in October to review the 2023 slate) and reviewed the following:

In May, the Nominating Committee convened to select a nominee to replace Felicia Zakem who stepped down from the Secretary position. In October, the committee discussed adding Lauren Copeland, Sara Kahmann and Donnie Naiman to the GCPGC Board of Directors.

The GCPGC board members whose terms were expiring 1/19/23 are eligible to renew their terms. Renewing their terms are Raynal Moore and Mark Noel. Megan Okun declined to renew but suggested another member from Taft as a potential nominee to take her place.

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 Kate Kennedy to ask to serve as secretary during the 2023 term. The Committee contacted her and she agreed to serve as incoming secretary.

The Nominating Committee reviewed a list of GCPGC non-board members and selected three Council members to fill the board vacancies. All three Council members (Lauren Copeland, Sara Kahmann and Donnie Naiman) agreed to serve a three-year term on the GCPGC Board of Directors effective 1/19/23.

The Nominating Committee updated the list of board members and officers to reflect the committee's recommendations. The 2022 GCPGC Board of Directors confirmed all the Nominating Committee's recommendations at the 11/18/22 GCPGC Board Meeting to be presented for a Council vote at the 2023 GCPGC Annual Meeting scheduled for 1/18/23.

PROJECTED GOALS

Increase board members and board member diversity

08. PLANNED GIVING ON THE RUN COMMITTEE

MEMBERS

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

SUMMARY

The Committee successfully planned and executed our Planned Giving on the Run (PGOTR) class in-person and via Zoom this year. 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 (2021) graduated ten students, most of whom we have never met in person and all of whom participated via Zoom. This year's class (2022) has 17 registered.

This year, our in-person meetings are being held in the Alumni Center of Xavier University. It offers a central meeting place, free parking, and a classroom atmosphere.

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.

08. PLANNED GIVING ON THE RUN COMMITTEE (continued)

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 GCPGC board and membership. Mentors were assigned and introduced to their mentee prior to 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.

2022 PROGRAM CALENDAR

Date	Program Title
September 13	Getting to Know You & Each Other; sharing questionnaire response Foundations for Gift Planning Mentor introductions
October 4	Are you Ready for Planned Giving? Tax Primer for Gift Planning Estate Gifts from Wills and Trusts
November 15	Identifying Prospects and Building Relationships Working with Professional Advisors Charitable Gift Annuities
December 6	Marketing Planned Gifts Stewardship and Ethics Designing a Program that Fits; Policies Affecting Planned Gifts – Part 1 Retirement Account Planning
January 10, 2023	Legacy Society Designing a Program that Fits – Part 2 Charitable Remainder Trusts
February 7	Lead Trusts and Other Planned Gifts Strategies to Sustain Your Program Course Recap and Q&A

09. SOCIALS COMMITTEE

MEMBERS

Michelle Mancini Bachman, Chair
Megan Jackson, Committee Member

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 and increase awareness about the benefits of the GCPGC for non-members.

RESULTS

In 2022, the Committee hosted two Socials as we resumed in-person events for the first time since 2019. These events were well attended and received positive feedback. Socials this year allowed further engagement for current members, recruitment of new members, and provided additional visibility and partnerships with our member organizations. The events included invitations to our Planned Giving on the Run graduates, new members, DEI scholarship recipients, current members, and non-members to our Socials. All are always welcome!

The first Social was held in conjunction with the Association of Fundraising Professionals (AFP). The event was at Beeline on the Levee and was well attended. Thank you to AFP for their continued partnership. The second event was held at one of our member organizations, ArtsWave and was very successful. We are grateful to ArtsWave and Board Member Kate Kennedy for the hospitality and generosity in serving as a host for the event. 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 welcome our newest member, Megan Jackson, and thank her for her leadership.

LOOKING AHEAD AT 2023

If your organization is interested in hosting an event, please contact a member the Committee. Please make sure to mark your calendars for next year's Socials when the dates are released in 2023!

10. VOICES OF GIVING COMMITTEE

MEMBERS

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

SUMMARY

The 24th 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. This year's event welcomed the return of an in-person event after having been virtual for the past two years. This year's event was held at a new venue, Greater Cincinnati Foundation, and provided a wonderful environment to celebrate the honorees.

RESULTS

In 2022, we honored 17 individuals. John Lomax volunteered as MC for the event, which raised \$20,000 from 20 sponsors organizations and individuals, as well as in-kind contributions. The reported net revenue was \$10,004. There were 141 in attendance at the event.

2022 SPONSORS

PLATNUM SPONSORS

Greater Cincinnati Foundation
Katz Teller
PNC Bank

GOLD SPONSORS

The Christ College of Nursing &
Health Sciences
Graydon
Jewish Federation of Greater
Cincinnati
Maple Knoll Communities, Inc.
New Riff Distillery
The Salvation Army
Sterling Cut Glass (in-kind support)

SILVER SPONSORS

Brighton Center, Inc
CET
Cincinnati Playhouse in the Park
Jewish Cemeteries of Greater
Cincinnati
Learning Grove
Mount St. Joseph University
St. Joseph Home
VonLehman CPA & Advisory Firm

FRIENDS OF VOICES OF GIVING

Cincinnati Public Radio
Cincinnati Zoo & Botanical Garden

10. VOICES OF GIVING COMMITTEE (continued)

PROJECTED GOALS

Our goal for 2023 is to continue to provide a wonderful experience to the honorees being recognized for this incredible contribution. We are in the initial planning phase of identifying a venue, soliciting sponsorships, and creating a buzz around the 25th anniversary of this event. We have considered updating the Voices of Giving logo to call attention to the 25th anniversary and sending media releases earlier to generate additional community will for this great event. We anticipate some increased cost, as the cost of doing business has increased over the past year, so we are focused on securing sponsorships, increasing outreach, bringing on new committee members, and finding in-kind contributions to reduce expenses. We would like to net at least \$5,000.

PROJECTED OBJECTIVES

Additional objectives for 2023 include increased outreach to organizations and sponsors to share about GCPGC and how they can get involved with Voices of Giving. We added a new category last year to the nominations and will continue that again this year as an opportunity to highlight multi-generation honorees. The Committee will work hard on outreach and marketing the event.

