



Greater Cincinnati PLANNED GIVING COUNCIL

Annual Report
December 2023

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01. BOARD MEMBERS

OFFICERS

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

TRUSTEES

- Michelle Mancini Bachman
- Rhonda Curtis
- Daniel Flynn
- Mindy Hammer
- Megan Jackson
- Sara Kahmann
- Raynal Moore
- Donnie Naiman
- Mark Noel
- Carol Serrone
- Tiffany Porter Shabazz
- Conrad Thiede
- Dan Virzi

02. AUDIT COMMITTEE

MEMBERS

- Matt Hoffman, Treasurer
- Andrew Cole, President
- Michelle Mancini Bachman, Board Member
- Emma Chaney, Non-Board Member

SUMMARY

The committee met virtually on November 13, 2023, charged with the following duties, which were completed as noted:

Review the records maintained by the Treasurer for the prior year, in this case, 2022, 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:

- 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 and credit card payments greater than \$1,000 are approved by a member of Executive Committee.
- 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

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

2023 PROGRAM CALENDAR

Date	<i>Program Title, Program Presenter(s)</i>
January 18, 2023	Annual Meeting/Case Studies, GCPGC Officers & CGP President Michael Kenyon (virtual)
February 15, 2023	<i>Generational Donor/Prospect Strategies Primer</i> , Chuck Underwood (@ GCF)
March 15, 2023	<i>Generational Strategies for Philanthropy</i> , Chuck Underwood (half-day morning program) (@ CET)
April 19, 2023	<i>The Power of Productivity</i> , Lori Firsdon, Forte Organizers (@ GCF)
May 17, 2023	<i>Economic Update and Outlook</i> , Heidi Jark, Fifth Third Foundation, Kristal Renner, Fifth Third Bank, Hans Tinkler, Fifth Third Bank (@ GCF)
June 21, 2023	<i>Charitable Bequests Without the Fuss</i> , Craig Wruck, PGCalc (virtual)
July 19, 2023	<i>Metrics Made Manageable: Making Planned Giving Data Work for You</i> , Stacy Sulman and Conversation & Coffee Committee (virtual)
August 16, 2023	<i>Beneficiaries of an Estate or Trust: Understanding a charity's rights and the probate and trust administration process</i> , Margaret Kubicki, Katz Teller (@ GCF)
September 20, 2023	<i>Protecting Your Gifts and Assets - a Litigator's View</i> , Julia Meister, Taft (@ GCF)
October 19, 2023	<i>QCDs and CGAs: Stuff you may not know...</i> , Kara Morin, PGCalc (virtual)
November 15, 2023	<i>Preparing for and Optimizing Donor Visits: A Disciplined Approach that Yields Success</i> , Olga Briker, Haverford College (virtual)
December 13, 2023	Holiday Hootenanny (in memory of Heather Dare and in celebration of giving in Cincinnati) and GCPGC Annual Meeting (@ GCF)

03. CONVERSATION & COFFEE COMMITTEE (continued)

LOOKING AHEAD AT 2024

Date	Program Title, Program Presenter(s)
January 17, 2024	Advocacy Update (Tax Policy), Amina Saeed, Northern Trust (virtual)
February 21, 2024	ED/CEO + DoD – <i>the Importance of This Relationship in Fundraising</i> , Amy Cheney & Betsy Wilson, Crayons to Computers (@GCF)
March 20, 2024	<i>New Insights from Data on Planned Giving, Women and Philanthropy, Marketing Legacy Gifts</i> , Claudine Donikian, Pentera (virtual)
April 17, 2024	<i>Economic Update & Outlook</i> , Kristal Renner and Hans Tinkler, Fifth Third Bank (@GCF)
May 15, 2024	Organizing Topic TBD, Lori Firsdon, Forte Organizing (@GCF)
June 19, 2024	<i>Donor Surveys and Data</i> , Greg Warner, MarketSmart (virtual)
July 17, 2024	<i>CGAs: Solutions to Donor Problems / Should Your Organization Use Them</i> , Jeff Lydenberg, PGCalc (@GCF)
August 21, 2024	<i>Plan for Planned Giving</i> , Sue Ellen Stuebing and Dan Virzi, CET (@GCF)

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 => continuity
- Offer a half-day educational program in 2025
- 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
- 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

The committee spent time considering and revising the language used to describe who our ideal candidates are for the scholarships. The revised language focuses on members of historically marginalized communities; especially members of the BIPOC, AAPI, Latinx, LGBTQ+ and disability communities.

The committee received two applications in 2023 from highly-qualified professionals. Both Quinton Jefferson and Cecelia "Cece" Tio were awarded full scholarships to Planned Giving on the Run and memberships to the Council for the year.

PROJECTED OBJECTIVES

Marketing efforts for the next scholarship cycle will begin in early 2024. The committee is committed to expanding our efforts and will partner with broader reaching organizations to recruit new applicants.

05. KNOWLEDGE @ NOON COMMITTEE

Members

- Carol Serrone, Chair
- Kathann Koehler

SUMMARY

This year we have offered four webinars, all were hybrid (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 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.

2023 PROGRAM LINEUP SUMMARY

Date	Program Title	Presenter(s)
2/1/2023	Marketing Testamentary Gifts	Carmen Tordiglione & Sam Samuels
5/3/2023	A Better Data-Driven Approach to Identifying Top Prospects	Matt Borden
9/13/2023	Success with Life Insurance Gifts	Craig Wruck
11/1/2023	Asking Your Donor for Their Largest Gift Ever: A Bequest	Anne Melvin, J.D.

RESULTS

- Feb. 1st: 17 Registered, 14 attendees
- May 3rd: 16 Registered, 12 attendees
- Sept. 13th: 9 Registered, 7 attendees
- Nov. 1st: 24 Registered, 16 attendees
- 33 unique attendees over the year.
- 10 non-member attendees over the year.

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
- Matthew Hoffman
- Kate Kennedy
- Whitney O'Neal

SUMMARY

Thanks to the Conversation & Coffee Committee, GCPGC had a remarkable opportunity to welcome new, prospective donors who attended the Chuck Underwood “Generations” lecture. The Membership and Marketing Committee reached out to lapsed members to encourage them to rejoin. The Committee also followed up with non-members who attended the lecture.

This fall, the Membership and Marketing Conversation & Coffee Committees focused on lapsed members. We were pleased with the number of members who rejoined as we learned of staff transitions and retirements. Reaching out to past members enabled us to update our database for future communications.

Our hope is to focus on prospective members in 2024. We will develop lists of prospective members from all sectors where we currently have representation (e.g. the arts, higher education, social services, etc.).

PROJECTED OBJECTIVES

- Continued branding efforts for maximum communication effectiveness and brand awareness
- Reconnect with lapsed members
- Develop a “peer-to-peer and infinity group” marketing plan
- Convert non-member attendees to council members
- Send updated member survey

07. NOMINATING COMMITTEE

MEMBERS

- Andrew Cole, President
- Kate Kennedy, Secretary
- Quinton Jefferson, Non-Board Member

SUMMARY

The Nominating Committee met for the first time on September 25, 2023 where we discussed candidates to fill open board positions and what an officer slate might look like. Our work took several weeks due to the nature of the conversations with many conversations prolonged. Many proposed nominations of current board and non-board members were not accepted due to many different dynamics – personal & professional – including Tiffany Porter Shabazz who declined to renew but will remain an active member and committee member.

Conversations were then scheduled and occurred with both Lisa Roberts-Rosser and Emma Chaney. Lisa notified the nominating committee that she would like to step out of the officer line. Emma Chaney agreed to serve as a new trustee member. The committee turned to the Executive Committee for guidance on how to fill the vacancy since there was no precedent to refer to. In the interest of maintaining stability, the Executive Committee proposed that all Executive officers remain in their positions for one more year and a new Secretary would be added as usual. Multiple conversations occurred with officers who opted to serve again due to a vacancy in the line.

At the time of the November 17 GCPGC Board Meeting the 2024 proposed officer slate consisted of Mary Kay Koehler (past-president), Andrew Cole (president), Kate Kennedy (vice president), Matt Hoffman (treasurer), Sara Kahmann (secretary).

The Nominating Committee updated the list of board members and officers to reflect the committee's recommendations. The 2023 GCPGC Board of Directors confirmed all the Nominating Committee's recommendations at the 11/17/23 GCPGC Board Meeting to be presented for a Council vote at the 2023 GCPGC Annual Meeting scheduled for 12/13/23.

Post the November board meeting, incoming Vice President Kate Kennedy resigned from the GCPGC Board and Mindy Hammer was nominated and accepted to join the officer line and serve as vice president. This was confirmed by the nominating committee on November 27.

The board confirmed the revised officer slate by a virtual vote on 11/29/2023.

PROJECTED GOALS

Increase board members and board member diversity. Begin process earlier in the year.

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 this year. Since the class goes from September to February, we span two different calendar years. Last year's class (2022) graduated 17 students. This year's class (2023) has 14 registered.

For the second year in a row, 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 PGC 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.

2023-2024 PROGRAM CALENDAR

Date	Program Title
September 19	Getting to Know You & Each Other; sharing questionnaire response Foundations for Gift Planning Mentor introductions
October 3	Are you Ready for Planned Giving? Tax Primer for Gift Planning Estate Gifts from Wills and Trusts
November 7	Identifying Prospects and Building Relationships Working with Professional Advisors Charitable Gift Annuities
December 5	Marketing Planned Gifts Stewardship and Ethics Designing a Program that Fits; Policies Affecting Planned Gifts – Part 1 Retirement Account Planning
January 9	Legacy Society Designing a Program that Fits – Part 2 Charitable Remainder Trusts
February 6	Lead Trusts and Other Planned Gifts Strategies to Sustain Your Program Course Recap and Q&A

09. SOCIALS COMMITTEE

MEMBERS

Megan Jackson, Chair
Michelle Mancini Bachman, 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 2023, the Committee hosted a social on May 30, 2023 at Braxton Brewing in Covington. This event was well attended and received positive feedback. Our social 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!

LOOKING AHEAD AT 2023

The committee is looking to host 3 social events with one being a joint event with AFP Greater Cincinnati again. If your organization is interested in hosting an event, please contact a member of the Committee. Please make sure to mark your calendars for next year's Socials when the dates are released in 2024!

10. VOICES OF GIVING COMMITTEE

MEMBERS

Lauren Copeland, Co-Chair
Emma Chaney, Co-Chair
Michelle Mancini Bachman
Elizabeth Berk
Sarah Byrd
Daniel Flynn
Misty Griesinger
Lisa Roberts-Rosser
Carol Serrone
Tiffany Porter Shabazz
Sue Ellen Stuebing
Dan Virzi

SUMMARY

The 25th annual Voices of Giving awards continued the 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 was held at the Greater Cincinnati Foundation and provided a wonderful environment for our honorees. John Lomax served as the Emcee once again, and Greater Cincinnati Planned Giving Council, Matthew Hoffman was one of the honorees this year.

RESULTS

In 2023, we honored 26 local philanthropists and their contributions to 17 organizations. The event generated contributions from 25 sponsors, organizations, and individuals, as well as in-kind contributions. The reported net revenue was \$10,181.

2023 SPONSORS

PLATNUM SPONSORS

Greater Cincinnati Foundation
New Riff Distillery

GOLD SPONSORS

Bethesda Foundation
Bricker Graydon, LLP
ITA Audio Visual Solutions
Jewish Federation of Cincinnati
PNC Bank
The Yunker Group

SILVER SPONSORS

Anne Maxfield, LLC
ArtsWave
Brighton Center, Inc.
CET
Cincinnati Zoo & Botanical Gardens
Freestore Foodbank
Learning Grove
Maple Knoll Communities, Inc.
Porter Wright Morris & Arthur, LLP
St. Vincent de Paul, Cincinnati
Sterling Cut Glass
University of Cincinnati Foundation
VonLehman CPA & Advisory Firm

10. VOICES OF GIVING COMMITTEE (continued)

Taft Museum of Art

FRIENDS OF VOICES OF GIVING

Cincinnati Public Radio

St. Joseph Home

St. Xavier High School

PROJECTED GOALS

Our goal for 2024 is to continue to provide a wonderful experience to the honorees being recognized for their contributions. We will begin planning for the event in 2024 by sending out sponsorship requests before the end of 2023. With the landscape of local media changing, we have moved from sending press releases out to each of the individual newspapers after the event to sending a press release out to local media outlets prior to the event. This will help to generate awareness of Voices of Giving, encourage local media to cover the event, and recognize these incredible individuals in the community and the organizations that have honored them. The Committee will continue to reach out to existing nominating organizations and to new organizations to continue to increase the number of individuals honored.

PROJECTED OBJECTIVES

Additional objectives for 2024 include increased outreach to organizations and sponsors to share about GCPGC and how they can get involved with Voices of Giving. We were able to add several new members to the VOG Committee and will continue to seek out opportunities for more to engage as a part of the planning committee.

NOTES

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