

Mid-America Charitable Gift Planners

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MACGP ANNUAL REPORT

A LOT of wonderful things have happened this year, all thanks to YOU and all of our valued members and guests throughout the year. Our primary goals are to provide the most relevant topics on planned giving and development practices, as well as to offer unmatched networking opportunities among allied professionals throughout our entire region; I think we have done just that!

We changed our name to be more all-inclusive of our mission and what we stand for. We are a proud member of the National Association of Charitable Gift Planners (CGP) and privileged to be the 2018 Council of the Year. As it has been in the past, CGP remains dedicated to its essential core value: To support the professionals who practice the art and science of charitable gift planning.

Our annual education event, the Building Blocks Planned Giving Conference, was held on September 28, 2018, at the Kauffman Foundation Conference Center with two stellar keynote speakers: Dr. Russell N. James and Karen E. Osborne. We had a record turnout and owe a big thanks to our Board and the Building Blocks Committee for their time and hard work of planning.

Continue to let us know how we can best serve you, and thank you for ALL that you do.

-Pat Smithson, president

WONDERFUL PROGRAMMING

MONTHLY BREAKFAST MEETINGS

THE SECOND FRIDAY OF EACH MONTH AT
THE KAUFFMAN FOUNDATION ON ROCKHILL RD.

- Charitable Gift Planning
- Financial Advising Topics
- CLE and CFRE Credits on occasion
- Networking and Collaborating

OUR MEMBERS

Our growing membership consists of development professionals from charitable organizations, financial planners, estate planning attorneys, accountants, trust officers, and other professionals who regularly practice in the charitable gift planning field.

OUR COMMITTEES HAVE BEEN HARD AT WORK IN 2018 AND HERE IS A BRIEF REPORT OF ALL THAT WE HAVE ACCOMPLISHED. PLEASE REACH OUT IF YOU WOULD LIKE TO BE A PART OF ONE OF THESE GROUPS.

Advocacy - Joy Mistele

The Advocacy Committee has been watching, reviewing, and discussing with interest the changes and impact on charitable giving for all individuals and organizations due to the new tax law. The direct impact is still unknown and may be so for the next few years as donors decide how they want to react. Committee members continue to promote the value of charitable gift planning to elected officials and its importance to society as a whole. Moving into 2019, we advocate for legislative consideration of a universal charitable deduction available to all taxpayers, whether they itemize or not.

Building Blocks - Cole Eason

In 2018 our Building Blocks Committee worked closely with the Sponsorship Committee to solicit event sponsorships for the first time. Due to our success, we were able to attract two internationally known keynote speakers this year and, in keeping with our mission, we were able to keep the price of attendance down so that smaller nonprofits would be able to benefit from this high quality local training program.

Communications & Marketing - JT Cattle

We have launched a new website and taken on a new name and logo! Through continued outreach in our newsletters and online updates, we serve our members and keep everyone informed of upcoming meetings and important updates. We promote events (such as our 30th Anniversary Celebration), design invitations, and work with all the committees to ensure streamlined efforts among the organization. A huge thanks to the committee, and a special thanks to Cheryl for all her design work and attention to detail.

Hospitality & Welcoming - Mary Zahner Bauer

This committee serves as greeters at each meeting, arriving early to welcome all in attendance. In addition, this committee welcomes all new members by reaching out via phone or email once a member has joined.

MACGP & AFP Partnership - Jonathan Klem

In 2019, for the first time, MACGP will team up with the Mid-America Chapter of the Association of Fundraising Professionals to present a charitable gift planning award at AFP's National Philanthropy Day event at Starlight Theatre. This is indicative of the further evolution of the partnership and collaboration between MACGP and AFP that already includes educational opportunities and social gatherings.

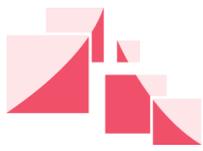
Membership - Bill Eckert

Membership is the lifeblood of an organization. We're blessed to live in a city where generosity defines us as Kansas Citians. MACGP experienced double-digit growth in membership for the last several years thanks to the hard work of the Membership Committee. Our organization now stands at 117 members. We introduce our guests at every event and follow up with a warm personal phone call to thank them for attending. Meaningful engagement, and delivering on the investment each member makes when they join, is leading to steady growth.

Program - Pat Smithson

We hosted eight breakfast meetings and three special events; Founders Day, A Spooky Social at the Alexander Majors House, which was co-hosted with the local AFP Chapter and we ended the year with a breakfast gathering at the Kansas City Ballet. We brought a new opportunity forward this year, a group hosted Live Webinars by NACGP which was held at UMKC. This was an opportunity for our members to listen and dialog over the lunch hour. Another new addition this year was hosting several breakfast meetings online, (using Zoom) for the NACGP Chapter in Kansas. Attendance at all of our events was 815 for the year, averaging 62 at breakfast meetings and we had 90 visitors who came to try us out as our guest.





MID-AMERICA Charitable Gift Planners

Scholarship - John Goodwin

We offer three scholarship opportunities to those in development, planned giving, or in allied professions who lack financial resources or are new to the profession. The Committee offers an annual scholarship to MACGP breakfast meetings (\$150 value); another scholarship for free attendance to the annual Building Blocks conference in the fall; and one scholarship for attending the National Conference in the fall, including reimbursement of trip expenses.

Sponsorship - John Martin

Sponsorships increased for the third year in a row to \$25,220 in 2018. The increase can be attributed to MACGP's focus on continuing education and networking, as well as the successful implementation of high-quality programming. Support came from affiliated businesses, local nonprofits, current board members, past board members, and even current members. The total dollar amount does not include significant in-kind contributions.

Treasurer - Michael Calabria

For 2018, the Board has made a conscious decision to utilize operating reserves to both invest in the future of MACGP and celebrate the past 30 years of our organization. We began the year with \$50,388 in Total Assets, consisting entirely of cash in our Commerce Bank operating account. A net operating loss of -\$4,635 is projected as of December 31, 2018, and an ending cash balance of \$45,753. Based on projected revenues and expenses, the Board has again approved a deficit budget for 2019 in the amount of -\$4,242. To maintain current reserves in the new year will require an increase in dues, sponsorships, Building Blocks registration, or the reduction in program costs. An active and engaged member base may be asked to provide increased funding to help maintain our reserves and continue the high-quality programs and professional growth opportunities we are currently able to offer.



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