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Mid-America
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MACGP ANNUAL REPORT

We will likely never experience a year like this again.

The pandemic that hit our country hard in March seemed to energize and fuel our members in ways unimaginable, leading to a year of many accomplishments and highlights that brought us closer together as an organization around its central purpose. Our programs, meetings and annual conference became virtual. Online tools became effective communication vehicles for learning and exchanging ideas. Unique virtual education opportunities were offered through our membership with the National Association of Charitable Gift Planners.

A special thank you to the chairs and members of our nine committees and the board who showed great flexibility, extraordinary effort, and an occasional sense of humor meeting and exceeding every challenge they faced.

I realize especially now after a year like this what an honor it was to serve as president. There is nothing more satisfying than leading dedicated professionals who want to be the best they can be making Kansas City one of the most caring philanthropic communities in our nation!

-John Goodwin, 2020 president

WONDERFUL PROGRAMMING

MONTHLY MORNING MEETINGS

TYPICALLY THE SECOND FRIDAY OF EACH MONTH
VIRTUALLY OR AT THE KAUFFMAN FOUNDATION

- Charitable Gift Planning
- Financial Advising Topics
- CLE and CFRE Credits on occasion
- Networking and Collaborating
- Marketing Strategies
- Retirement Assets
- National Experts
- And much, much more!

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 WERE HARD AT WORK IN 2020. HERE IS A BRIEF REPORT OF ALL THAT WAS ACCOMPLISHED. PLEASE REACH OUT IF YOU WOULD LIKE TO BE A PART OF ONE OF THESE GROUPS.

Advocacy - Cole Eason, JD

Throughout the year, we have engaged with The National Association of Charitable Gift Planners (CGP) to advocate for our members and promote charitable gift and tax policies favorable to donors. After new major tax legislation is passed there is customarily some fine-tuning, however, congressional priorities in 2020 did not favor revisions to the SECURE Act or the CARES Act. A more generous Uniform Charitable Deduction (UCD) remains a primary legislative goal for the non-profit community and, since this appears to have bipartisan support now, we anticipate a big push for this in the next Congress.

Building Blocks - Donna C. Watson, JD

Our Building Blocks Committee pivoted and delivered MACGP's first virtual all-day conference with 148 registered attendees. The 25th Annual Building Blocks event included 7 presenters, including keynote speaker, Dr. Russell James, III. The Conference also included a panel of local professionals discussing the impact of COVID-19 on nonprofits, social and networking time for attendees, CFRE and CLE credits.

Communications & Marketing - JT Cattle, MBA

We continue to spread the word of MACGP in our eBlasts, on Facebook and LinkedIn. Please engage with us digitally and share news and updates with your networks and those who could benefit from our mission. We keep the community informed of upcoming meetings, and we get to promote the fun events and work of all our members. We welcome Kathy Sims to the administrator seat, and we congratulate Cheryl Hanback on her retirement! Thank you for all your marketing and website work for MACGP through the years.

MACGP & AFP Partnership - Justin Elder

This year marked MACGP's second year presenting the Legacy Giving Award in partnership with Association of Fundraising Professionals (AFP) - Greater Kansas City Chapter for National Philanthropy Day. Several excellent nominations were submitted, and this year's award was given to Pamela Miller and Michael Cummings. Despite the pandemic forcing the event to go virtual, National Philanthropy Day was very well attended, and the awardees were able to have meaningful interactions with attendees via breakout rooms. We look forward to continuing this partnership next year and eagerly anticipate learning about future nominees and the excellent philanthropic work they have done in our community.

Membership - Malcolm K. Jackson, JD

Despite the challenges with retention due to COVID-19, membership has remained strong. MACGP presently consists of 118 members. This can largely be attributed to the exceptional work of Bill Eckert and his team. Bill served as Membership Chair over the past several years, only recently stepping aside in the Spring. Bill and his team laid a truly remarkable foundation for the membership committee that has resulted in consistent growth and seamless transition for new leadership. Instrumental in the continued success of the Membership Committee was Monica Tiffany who served as co-chair. Monica's personal touch played a significant role in maintaining our membership through these difficult times. Although COVID-19 has changed some aspects of our membership, we still strive for the same personal, meaningful engagement that we believe will lead to retention, and eventual increase in membership.



MID-AMERICA Charitable Gift Planners

Program - John Goodwin, CAP®, CLU® & Kristin Shore

What started out as a normal year with nine breakfast programs in person events along with two summer socials and a holiday event at KC Symphony turned into mostly virtual events but with no less value to our members and guests. We had to postpone our summer socials and our Holiday Event was done virtually, but was still quite a treat presented by the Kansas City Symphony. Planned Giving 101 event chaired by Jim Cole was rescheduled for the spring, 2021. We discovered the Zoom medium was very effective for exchanging ideas and promoting Q&A during the event and we were able to obtain national speakers such as Patrick Schmitt from FreeWill, Jeff Gionnotto with Market Smart, and Jay Weisman, CAP with Legacy Financial Group. During the spring we provided lunch presentations through National CGP, with excellent attendance. We want to give special recognition to several of our members who prepared extensively and gave outstanding presentations: Stephanie Smith, Jim Hart, Kirby Gould, Bill Riek, Ed Roberts and Michael Calabria.

Scholarship - John Martin, CLU®, CAP®, CLTC

Thanks to a substantial, ongoing commitment from Pamela Miller and Michael Cummings we provide multiple scholarships to those who work in development, planned giving, or in the allied professions who lack financial resources to fully participate in the activities and educational opportunities of the MACGP. We provide four scholarships for MACGP annual membership dues, two scholarships that cover the cost of attending the annual Building Blocks conference; and one scholarship for attending the National Association of Charitable Gift Planners Conference in the fall which includes reimbursement of trip expenses.

Sponsorship - Bill Riek, CFRE

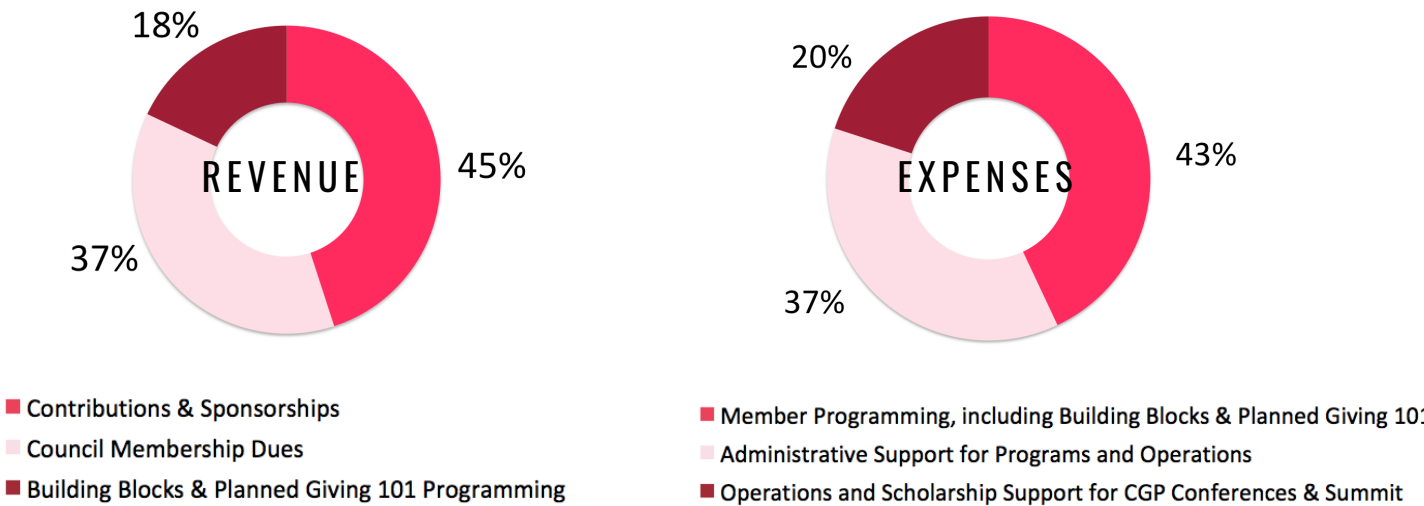
Thanks to the generosity of many returning donors, acquiring new donors, and the efforts of an exceptional Sponsorship Committee we were able to declare this year a success. We engaged creativity to create new sponsorships to correspond with the virtual environment as well as chartered new sponsorship paths by partnering with AFP on National Philanthropy Day. Sponsorship dollars allowed us to bring our membership excellent national speakers and launch the Emeritus Program.

Treasurer - Cynthia A. Randazzo, CFRE

Despite the challenges due to COVID-19, MACGP had another strong financial year due to the generosity of those that continued to provide sponsorship support totaling \$25,550 in 2020.* This compares to \$26,400 in 2019 sponsorship. Total revenue for the year including sponsorships, membership dues and registration fees was \$46,839, with total expenses at \$30,772. As a member of the MACGP board since 2013, I have found sponsorship support has truly allowed MACGP to expand programming and networking opportunities for our council members. Thank you to all that make an annual contribution to support MACGP!

*Includes \$3,000 in sponsorship support received in 2019 for the 2020 Building Blocks conference.

2021 MID-AMERICA CHARITABLE GIFT PLANNERS BUDGET



SAVE THE DATE

PLANNED GIVING 101
FRIDAY, APRIL 30, 2021

A 1/2 DAY CONFERENCE
TO LEARN THE BASICS

26TH ANNUAL BUILDING BLOCKS
FRIDAY, SEPTEMBER 17, 2021

FEATURING KEYNOTE SPEAKERS
AND MUCH MORE