

# Mid-America Charitable Gift Planners

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## MACGP ANNUAL REPORT

Flexibility, technology, and engagement have been three key words to describe how Mid America Charitable Gift Planners was able to remain successful and valuable during 2021. As the pandemic waves peaked throughout the year, we had to be willing to make the adjustments needed on short notice. With vaccinations in sight, we looked forward to the opportunity to meet together in person. However, our first in person event of 2021 didn't occur until Building Blocks in September. It was so fantastic to be together and enjoy the networking that virtual meetings aren't as good at accommodating. The Kauffman Foundation has been extremely flexible with adjusting our schedule as we continued to be very conservative with meeting in person. We continued our partnership with UMKC for our virtual programming component of both the PG101 and Building Blocks. Finally, our membership has been incredibly supportive by continuing to attend our virtual breakfast programs and being engaged in volunteering for the organization.

A special thank you must be extended to our sponsors. Their financial support of MACGP is profoundly important. Thank you also to our dedicated board members and committee members we appreciate all of the talent this organization has. Lastly, I want to thank Kathy Sims and Cynthia Randazzo. Kathy is our MACGP Administrator, she continues to keep the ball rolling in all areas of the organization throughout the year. Cynthia served on the National CGP Board and was the Conference Chair for the National CGP Conference in Orlando during October 2021. Not only did she lead the planning for the conference on-site, but she also coordinated the virtual conference that was held several weeks before. Cynthia - thank you for representing. Your work and dedication is appreciated immensely.

*-Kristin M. Shore, president*

## WONDERFUL PROGRAMMING

### MONTHLY BREAKFAST 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 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 2021 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.

#### **Building Blocks – Brynne C. Brown, J.D., LL.M., M.B.A.**

Our Building Blocks Committee (with the assistance of UMKC CLE) navigated the ever-changing COVID environment with its first hybrid (live in-person and virtual) offering of the all-day conference. 120 total attendees; 58 attended in person and 62 attended virtually. Brian Clontz, this year's keynote speaker, kicked off six presentations by nine professionals, including a duo and a panel presentation. CLE and CFRE credit made available.

#### **Hospitality & Welcoming - Donna C. Watson, J.D.**

During 2021, MACGP continued the work of educating and supporting gift planning in the Greater Kansas City community by conducting monthly meetings and annual programming via zoom. The Hospitality & Welcoming Committee welcomed over 126 guests via email and through phone calls to create engagement. The committee sent over 125 MACGP branded masks to the membership, so members could represent the organization while complying with the mask mandates imposed in our region. We greeted guests at our 26th Annual Building Blocks Conference, which was our first hybrid event since the beginning of the pandemic. We also welcomed guests during the Holiday Social held at the Shirley Bush Helzberg Symphony House on December 15, 2021.

#### **Membership - Malcolm K. Jackson, J.D.**

Although membership continues to be impacted by the pandemic, our numbers remain strong. MACGP presently consists of 105 members. The membership committee has undergone several changes over the past year. Tim Dodge, the prior co-chair relocated to Jackson, Wyoming. Fortunately, Kelsey Johnson came onboard and has been an incredible addition. Although COVID-19 continues to change some aspects of our membership, we hope that in the coming months we can return to meaningful, in person engagement. We believe this type of personalized interaction will lead to continued retention, and eventual increases in membership.

#### **Scholarship - Pat Smithson**

Thank you for the wonderful support from Pamela Miller and Michael Cummings which allow MACGP to provide support for training and development for people in our community via our scholarships. This year we established a year-long training opportunity for three scholarship recipients instead of the previous scholarships for each event we host. The committee consisted of Dianna Stelter, Lori Feek, and Chad Clark and Pat Smithson, Chair. The committee put a great deal of thought into this year's program and created a new tool for measuring all applicants against pre-determined criteria.

The three individuals selected as scholarship recipients received membership in MACGP for 2021-22, (value \$150), attendance for the James Cole Building Blocks Conference in September 2021, (value \$125), and receive a spot for the Spring Planned Giving 101 training (Value \$30). The new mentorship program for the year was set up to help assimilate what the recipients learn into their daily work environment and help them get questions answered by a seasoned professional. This year the three recipients were; Sharon Ramsey of Kansas City Kansas Community College Foundation; Erin Aldridge of The Library Foundation in Topeka and Christy Wineland of Newhouse. Volunteer mentors are: Cole Eason, Andy Morrison and Melody Messner.

Each year we provide one lucky member the opportunity to attend the National Charitable Gift Planners Conference, the value of that scholarship includes a two-day training, transportation, lodging, and registration (Value up to \$2000). This year's chosen candidate was Andrew Lang of Starlight Theatre.

#### **Sponsorship - John K. Goodwin, CAP, CLU**

The sponsorship contributions this year represented the largest number of donors in MACGP history which is a good sign as we sought to broaden the support across the community. Pamela Miller & Michael Cummings led as Presenting Sponsors, followed by eight Platinum (\$1,000), four Gold (\$500), four Silver (\$250) and ten Bronze (\$100) sponsors. MACGP also benefited from several notable Building Blocks Conference Sponsors and a Planned Giving 101 Conference Sponsor. Sponsorships are critically important to underwrite our national speakers, the Emeritus Program and our social events allowing members to develop deeper relationships with each other.





# MID-AMERICA Charitable Gift Planners

## Program - Kristin M. Shore

Our monthly programming remained online throughout the year and although we were all able to find value in the programming, we missed the comradery of being together in person. Topics ranged from the current economic climate, board strategies for planned giving, marketing, communication strategies, gifts of land, the history of planned giving, the corporate trustee, principles for success and IRA knowledge. The final event of the year was a Holiday Social at the KC Symphony where we were able to share drinks and appetizers at the Helzberg Symphony House and attend the final dress rehearsal of the Christmas Festival at Helzberg Hall in the Kauffman Center for the Performing Arts. Many thanks to all of our presenters and the KC Symphony for the donation of their time and talent and facility! Presenters for monthly meetings included Donna Watson, Kevin Conley, Karlye Stedman, Phil Purcell, Monica Tiffany, Merritt Engel, Nathan Stelter, Ron Brown, Bob King, Dalia Pineda, Lance Woodbury.

## PG 101 - Jim Cole

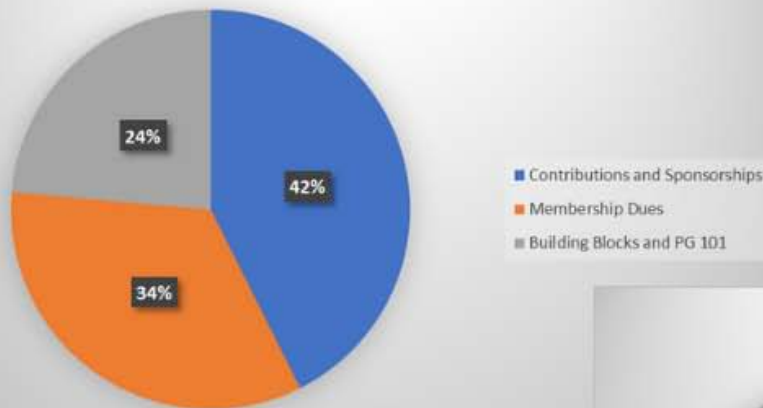
The first Planned Giving 101 Program (PG101) was held on Friday, April 30, 2021 on a virtual platform through Zoom. There were 61 registrants. Sponsorship from Children's Mercy Kansas City enabled us to partner with UMKC School of Law to host the program. The one-half day program consisted of five presentations and a Q/A panel. The program was geared toward planned giving fundamentals, and offered topics ranging from estate planning basics to how to identify planned giving prospects. Both Missouri and Kansas Continuing Legal Education Credits were offered for two presentations. The entire program qualified for 4.75 CFRE credits. A total of fifty people from more than thirty organizations attended the inaugural PG101.

## Treasurer - Stacey Winkelbauer

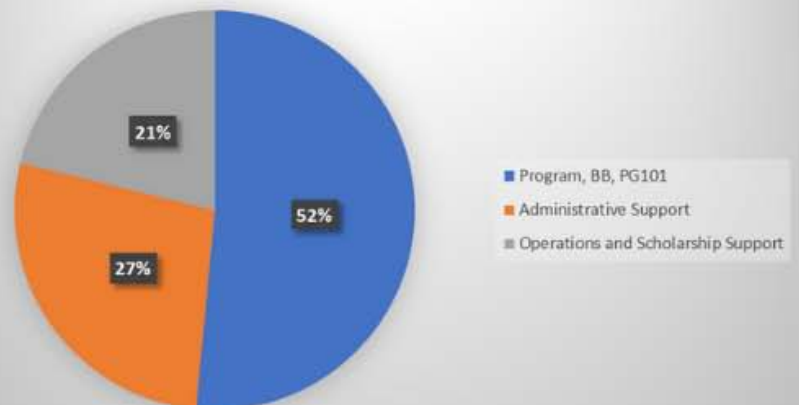
MACGP had a strong financial year due to the generosity of those that continued to provide sponsorship support totaling \$20,945 in 2021. Total revenue for the year including sponsorships, membership dues and registration fees was \$41,539, with total expenses at \$35,379. Thank you all for the continued support, so we can continue to provide outstanding programming and networking for our council members

## 2022 MID-AMERICA CHARITABLE GIFT PLANNERS BUDGET

### Revenue



### Expenses





## PRESENTING SPONSOR

# Pamela Miller & Michael Cummings

## BUILDING BLOCKS LUNCH, BREAKFAST, AND BREAKOUT SPONSORS



Virtual experience in cooperation  
with UMKC School of Law



## PLATINUM SPONSORS



**JIM & LINDA COLE**

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