



DEVELOPMENT DAY CHICAGO

Friday, September 14, 2018
Renaissance Chicago Downtown



THE NEW PLANNED GIFT

A fireside chat with leaders of the Chicago Council on Planned Giving (CCPG) about how we find ourselves with a new tax law that significantly decreases the use of the itemized deduction and state appropriations that have affected the cornerstone funding for many budgets. Super-sized organizations are able to harness planned giving tools in support of the strategic plans, but their successful deployment includes blended gift planners to meet the needs of blended gifts. Learn how the profile of a planned giving officer has evolved plus how and why nonprofits of all sizes must prioritize the use of planned gifts now.

PANELESTS:

Susan Mongillo, Vice President, Planned Giving, Advocate Charitable Foundation and President, CCPG
Sarah Rutledge, Major and Planned Gifts Officer, Lincoln Park Zoo
Chuck Van Hecke, Associate Vice President, School of the Art Institute

MODERATOR:

Andrew Hibel, Charitable Catalyst and Founder, Advise Us Foundation and Vice-President, CCPG



Andrew W. Hibel is the Chief Operating Officer and Co-Founder of HigherEdJobs. He holds a B.A. in Economics and a M.Ed. from the University of Illinois and a J.D. from Indiana University, Indianapolis. He has been a planned giving officer for Penn State University, Advocate Health Care and the Jewish Federation of Metropolitan Chicago. He serves The Advise Us Fund as an ex-officio member of the Investment and Giving Committees and President.

Mr. Hibel currently serves as the President of the Chicago Council on Planned Giving.



Susan M. Mongillo, JD - As vice president of gift planning and principal gifts for AdvocateAurora Health Foundations, Susan leads gift planning activities to benefit the hospitals and programs of AdvocateAurora Health. She helps donors incorporate charitable planning strategies to achieve philanthropic goals, as well as personal and financial ones.

Susan is the immediate past president of the Board of Directors of the Chicago Council on Planned Giving. She is also a member of the Chicago Estate Planning Council and the National Association of Charitable Gift Planners. Susan has spoken extensively to various Advocate internal and external constituencies as well as to local and regional professional associations.

Prior to employment in the not-for-profit sector Susan was a partner at the law firms of McGuireWoods and Ross & Hardies. She earned a J.D. from Northwestern University School of Law and a B.A. from University of Wisconsin-Madison. She is a member of the Illinois Bar.



Sarah Rutledge is the Major and Planned Gifts Officer at Lincoln Park Zoo. In this dual role, she focuses on both securing outright gifts for the zoo, as well as identifying, cultivating and stewarding deferred gifts. Sarah builds relationships with the zoo's high-level donors to develop a pipeline of support for the zoo's annual fund and \$135 million Pride of Chicago campaign. She also helps manage the zoo's robust planned giving program and Heritage Society, works with the zoo's Planned Giving Advisory Council and oversees all planned gift marketing.

Prior to joining the zoo, Sarah worked in the Office of Institutional Advancement at the School of the Art Institute. She is a member of the Board of Directors of the Chicago Council on Planned Giving and serves as co-chair of the group's Communications Committee. Sarah holds a B.A. in History and Psychology from University of North Carolina-Chapel Hill and a J.D. from DePaul University School of Law.



Chuck Van Hecke is the Associate Vice President for Institutional Advancement at the School of the Art Institute of Chicago (SAIC). He is a specialist in major and planned giving and is responsible for managing SAIC's first-ever fundraising campaign. The four-year campaign was recently completed, having raised over \$54 million, exceeding its \$50 million goal.

Prior to joining SAIC, Chuck was Associate Vice Chancellor for Development at the University of Illinois at Chicago (UIC). He served on the senior leadership team that organized and managed a ten-year \$675 million campaign, the most successful in UIC's history. Chuck also oversaw UIC's planned giving programs, which secured over 20% of the campaign's funding.

Chuck has raised major and planned gifts and managed small-scale campaigns in previous positions at Illinois State University and Gallaudet University during his 28-year career in philanthropic fundraising and management.

Besides being a development professional, Chuck is enrolled part-time in a PhD program at UIC. He is preparing a dissertation study entitled "Elite Philanthropy and the Effects of Social Capital." He holds an MBA in finance and investments from George Washington University; a B.S. in Marketing from Boston College; and is a non-practicing Certified Financial Planner (CFP).

Chuck believes strongly in the power of philanthropy to improve the human condition. He has been an active volunteer, donor and board member for a variety of professional organizations and service-based nonprofits in the Chicago area.