LEADERSHIP *Retreat* 2024

FEBRUARY 6+7 | PONTE VEDRA BEACH, FL

Accordant™

Get inspired!

Join us for the 2024 Accordant Leadership Retreat

FEBRUARY 6 + 7

PONTE VEDRA BEACH, FLORIDA

Are you longing for a truly educational health care executive retreat that will have you racing back to your organization with countless ideas and strategies? You've found it!

The Accordant Leadership Retreat explores pressing issues and promising opportunities in health care philanthropy including grateful engagement, communication, major gift strategies, governance, health equity, leadership integration and more. With the number of participants thoughtfully limited to create an intimate and highly-productive setting, this event provides a platform for collaboration and discussion that supports actionable takeaways.

Led by Accordant's team of experts, these two days will provide you with fresh insights into innovative strategies and emerging trends.

Learn more: accordanthealth.com/retreat

REGISTER TODAY

OVERVIEW

Who?

The executive leadership retreat is designed for health philanthropy leaders, board members, clinician leaders, health executives and allies. Select philanthropy directors may attend with the supporting nomination of the philanthropy executive.

What?

Engaging discussions will include:

- navigating current trends and issues in health care, philanthropy and governance.
- harnessing the incredible power of gratitude in advancing philanthropy and heath care.
- discovering innovative ideas for consistently capturing the right data points for your grateful engagement program to ensure you are communicating impact to all constituents.
- rethinking corporate and foundation giving.
- getting started and securing success in advancing health equity through philanthropy and grants.
- elevating leadership skills by viewing challenges through the lens of our colleagues' separate realities and learning how to bridge leadership gaps through shared understanding and persuasive communication.
- uncovering the pros and cons of donor communication strategies.
- ensuring the organization's suite of policies, guidelines, gift agreements and other critical documents are updated and user-friendly.
- launching a mid-level fundraising program while simultaneously launching a grateful patient engagement program.
- positioning hospitals to become a charity of choice for the next generation while maintaining relationships with their philanthropic parents and grandparents.
- mastering the power of Wave Campaigns™.
- rethinking partnership building, strategy, messaging and communication integrations.
- exploring the power of trust in philanthropy.

OVERVIEW

Where?

The event will be held at the beautiful beachside Ponte Vedra Inn & Club. The club is located at 200 Ponte Vedra Boulevard in Ponte Vedra Beach, Florida, and offers an Accordant block rate.

When?

February 6 + 7, 2024

Cost?

Investment: $995 per person

Tuition covers conference attendance, a variety of resources and meals, including breakfast, lunch and coffee breaks, as well as a Tuesday night reception and seated dinner crafted by the exceptional culinary staff of the resort.

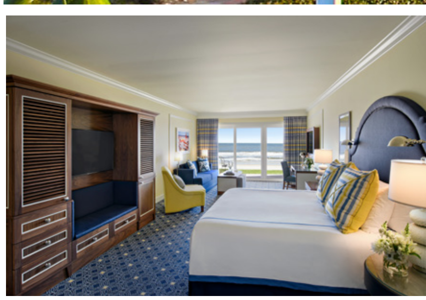
REGISTER TODAY

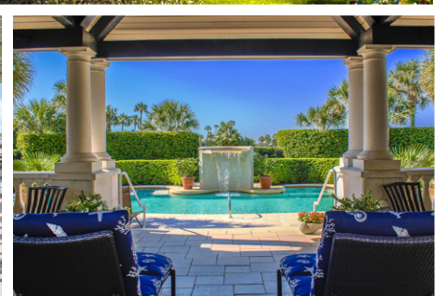
CEUs: 9 CFRE education points

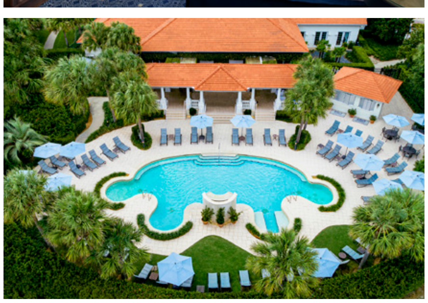
ACCOMMODATIONS

The event will be held at the beautiful beachside Ponte Vedra Inn & Club. The club is located at 200 Ponte Vedra Boulevard in Ponte Vedra Beach, Florida. Click here or call (888) 839-9145 to reserve your hotel room and mention that you are attending the 2024 Accordant Leadership Retreat to receive the special Accordant room rate. Retreat begins early Tuesday morning, so we recommend adding a Monday night room reservation to your stay.

The Ponte Vedra Inn & Club is located approximately 35 miles from the closest airport, Jacksonville International Airport. A car is not needed for the retreat as all sessions and meals occur on site.







AGENDA

Day One FEBRUARY 6

7:30 a.m. BREAKFAST

8:30 a.m. WELCOME

8:40 a.m. OPENING PLENARY: **Navigating the Future of Health Care Philanthropy, Governance and Partnership**
Speaker: Betsy Chapin Taylor

9:20 a.m. Keys to Unlocking Leadership: Insight One with Lori Counts

9:30 a.m. BREAK

9:45 a.m.

Track One: Advancing Philanthropy

Super Session: Opening the Aperture on Gratitude
Speakers: Betsy Chapin Taylor, Erin Stitzel, Susan Attwell, Linda Roszak Burton

Track Two: Leadership Issues and Opportunities

Super Session: The Brave New World of Accelerating Health Equity
Speaker: Amy Dorrill

Track Three: Intersection of AI and Generosity

Super Session: Intersection of AI and Generosity
Speaker: Scott Rosenkrans, *Associate VP, DonorSearch Ai*

12:00 p.m. SOCIAL LUNCH

1:00 p.m.

Tracking Your Grateful Patient Program for Innovative Impact Reporting
Speakers: Debbie Ferguson, Erin Stitzel

Understanding and Leading Through Separate Realities
Speaker: Lori Counts

Myth-Busting Grateful Patient Philanthropy Using 200 Million Clinical Encounters
Speaker: Scott Friedrich, MPA, *DSAi Solutions Architect, DonorSearch Ai*

2:15 p.m. BREAK

2:30 p.m. COOL-DOWN CONVERSATIONS

Join us beachside for these casual but inspiring conversations:

- Which Came First—the Campaign or the Case? *with Heather Wiley Starankovic and John Donovan*
- Donor Advised Funds: Old News or Cool Again? *with Debbie Ferguson and James Gold*
- How Do You Talk About Community Health Equity to Your Board and Donors? *with Amy Dorrill*
- Understanding and Leading Through Separate Realities (continuation from earlier session) *with Lori Counts*
- Defining Meaningful Engagement and How to Increase Dollars Raised
with Anna Savitsky, Account Executive, DonorSearch

3:30 p.m. ADJOURNMENT

6:30 p.m. SOCIAL DRINKS

7:00 p.m. DINNER

Day Two FEBRUARY 7

6:30 a.m. Hosted Morning Walk on the Beach

7:30 a.m. BREAKFAST (available at social tables or can be taken to Buzz Sessions)

8:00 a.m. BUZZ SESSIONS

- Time to Get Your Documents in Order: Revisiting Policies and Guidelines *with James Gold*
- Launching Mid-Level Giving at the Onset of a Grateful Patient Program *with Debbie Ferguson and Erin Stitzel*
- Every Awkward Question You've Ever Had About Philanthropy Communications *with Michael Beall*
- A Philanthropy Family Reunion Strategy for a Generational Transfer of Wealth *with Cindy Reynolds*
- Tapping Into Hidden Leadership Potential in a Campaign *with John Donovan and Heather Wiley Starankovic*

9:00 a.m. WELCOME

9:05 a.m. OPENING PLENARY: **Predictive AI vs. Generative AI: Understanding the Balance of the Two-Sided AI Coin** Speaker: Bill TeDesco, CEO, DonorSearch

9:35 a.m. Keys to Unlocking Leadership: Insight Two with Lori Counts

9:50 a.m.	**Track One:** Advancing Philanthropy	**Track Two:** Leadership Issues and Opportunities	**Track Three:** Intersection of AI and Generosity
	Mastering the Power of the Pivot in Wave Campaigning Speakers: Heather Wiley Starankovic, John Donovan	**Rethinking Corporate and Foundation Giving** Speaker: Amy Dorrill	**Making Your Disparate Data Work for You** Speaker: Brandon Lyons, *VP Strategic Partnerships, DonorSearch Ai*
10:50 a.m.	BREAK		
11:00 a.m.	**Perfecting the Public Phase** Speaker: Michael Beall	**Elevating Foundation Board Governance: A Path to Greater Impact** Speaker: Betsy Chapin Taylor	**Building Strong Foundations: Key Elements to Consider for AI Success in Nonprofit Fundraising** Speaker: Scott Rosenkrans, *Associate VP, DonorSearch Ai*

12:00 p.m. BREAK

12:15 p.m. NETWORKING AND BARCAMP LUNCH: Sessions Selected Live by the Audience

- Pump the Brakes: Rethinking Planned Giving Board Participation *with James Gold*
- Fundraising Together: Exploring Collaborative Models *with Amy Dorrill*
- The Major Gift Mindset *with Heather Wiley Starankovic*
- Two Big Keys to a Better Relationship with Marketing *with Michael Beall*
- Raising Support for Staffing, Really? *with John Donovan*
- Tips and Techniques for Thriving in a Small Shop *with Cindy Reynolds*

1:15 p.m. CLOSING PLENARY: **Exploring the Power of Trust** Speaker: Pamela Ronka Maroulis

1:45 p.m. Keys to Unlocking Leadership: The Path Forward with Lori Counts

1:55 p.m. CLOSING REMARKS

2:00 p.m. CONFERENCE ADJOURNMENT

PRESENTATIONS & SESSIONS

Day One / FEBRUARY 6

Opening Plenary

Navigating the Future of Health Care Philanthropy, Governance and Partnership

Combined Track Session
8:40 A.M.
Speaker: Betsy Chapin Taylor

Join Betsy Chapin Taylor for a provocative exploration of the evolving landscape in health care philanthropy, governance and partnership. In an era of unprecedented challenges and opportunities, this session delves into the critical trends and pressing issues reshaping the way we approach and advance our work.

Discover how organizations and leaders are adapting to meet the ever-changing needs of patients, donors, allies and communities. Gain insights into innovative governance models that drive engagement, leverage influence and support accountability. Unpack how collaborative partnerships between health care organizations, donors and community stakeholders can drive positive change and foster long-lasting impact. Finally, consider how organizations must rethink strategy and allocation of resources to leverage their potential—now.

Whether a health philanthropy professional, health executive or board member, this session will equip participants with actionable strategies and fresh perspectives to address the challenges and to harness the potential of health care philanthropy, governance and partnership in a rapidly evolving world.

Track One: Advancing Philanthropy

Super Session:
Opening the Aperture on Gratitude

9:45 A.M.
Speakers: Betsy Chapin Taylor, Erin Stitzel, Susan Attwell, Linda Roszak Burton

Health philanthropy leaders have avidly discussed the import and impact of gratitude on health care and philanthropy for 15 years. However, it is time to take a more expansive view of gratitude and its implications for advancing both health care and generosity. Join Betsy, Erin, Susan and Linda to explore not only the neuroscience and psychology of gratitude and how gratitude shapes health care outcomes, experience, partnership and philanthropy but also to break new ground. This fast-moving and provocative keynote session will leave philanthropy leaders with actionable insights to broaden your understanding of and to reshape how you think about harnessing the incredible power of gratitude in advancing philanthropy and heath care.

Tracking Your Grateful Patient Program for Innovative Impact Reporting

1:00 P.M.
Speaker: Debbie Ferguson, Erin Stitzel

Metrics are designed to drive behavior, but how do you know which behaviors are most meaningful when it comes to clinician partners? How do you determine which metrics are the most significant to leadership? How do you measure success while you are building your program versus when your program is well established? Should your metrics occasionally change or stay the same over time? This lively session will focus on innovative ideas for consistently capturing the right data points for your grateful engagement program to ensure you are communicating impact to all constituents—including clinician partners, patient donors, philanthropy officers and leadership. Participants will learn to:

- establish the baseline for grateful engagement metrics using both best practices and organization-specific rationale.
- ensure meaningful actions and behaviors are clearly and consistently captured by all relationship managers.
- customize metrics to meet quarterly targets and reporting needs.

Track Two: Leadership Issues and Opportunities

Super Session: The Brave New World of Accelerating Health Equity

9:45 A.M.
Speaker: **Amy Dorrill**

Today's health care landscape is changing and so are donor interests. This session will level set by defining how health equity is an essential part of the new health care agenda and how it fits upstream/downstream within the clinical landscape and throughout the community. Join Amy in learning how to get started and secure success in advancing health equity through philanthropy and grants. Participants will learn how to:

- select projects and establish a framework to help select the best health equity case for support.
- identify and engage the best prospects for your case from within current donor prospects.
- determine if a donor has interest in health equity.
- create the infrastructure for a meaningful program.

Understanding and Leading Through Separate Realities

1:00 P.M.
Speaker: **Lori Counts**

Traditionally, foundation leaders have been elevated to philanthropy roles due to outstanding fundraising performance, yet they face tremendous challenges when leading in a health care environment. In this session, we will elevate leadership skills by learning to view challenges through the lens of our colleagues' separate realities. Join Lori in examining various viewpoints and learning how to bridge leadership gaps through shared understanding and persuasive communication. In this multidimensional session, we will:

- explore tensions that exist between the operations and fundraising teams while integrating their work.
- understand how to balance the empowerment of staff and the delegation of work while maintaining accountability.
- establish impactful board engagement and productivity with clear expectations.
- bridge the divide over eminent communication control between the marketing team and foundation communications.
- balance the desire to be a team player in the C-Suite while advocating for more philanthropy resources when budgets are cut.

Track Three: Intersection of AI and Generosity

Super Session: Intersection of AI and Generosity

9:45 A.M.
Speaker: **Scott Rosenkrans,** *Associate VP, DonorSearch Ai*

The fundraising sector represents a half-trillion dollar industry, built extensively on trust. Building a Responsible AI Framework for fundraising that protects and prioritizes trust is the single greatest imperative facing the modern nonprofit.

Discover the transformative power of responsible Artificial Intelligence in nonprofit fundraising in this session. This enlightening talk will delve into why "Responsible AI" technologies is not just a buzzword but a game-changer for fundraising strategies. We'll also discuss the crucial role Responsible AI plays in streamlining operations, enhancing trust and fostering transparency within fundraising organizations. Don't miss this interactive opportunity to explore the cutting-edge nexus of technology and generosity!

Myth-Busting Grateful Patient Philanthropy Using 200 Million Clinical Encounters

1:00 P.M.
Speaker: **Scott Friedrich, MPA,** *DSAi Solutions Architect, DonorSearch Ai*

Grateful patients represent an incredible opportunity in healthcare philanthropy. However, outdated myths and misconceptions around patient outreach can erode clinical confidence and impede your grateful patient initiatives. This presentation will revolutionize your approach by myth-busting common GPP pitfalls. Using AI to analyze over 200 million clinical encounters, we've uncovered powerful insights that shed light on underlying patterns of grateful patients to help you:

- increase clinical confidence in impact-driven philanthropy where patients—not donations—are the focus.
- identify the right clinical ambassadors for your GPP.
- respect the sacred relationship between clinicians and patients.

Cool-Down Conversations

Combined Track Sessions

Join us beachside for these casual but inspiring conversations:

TOPIC 1: **Which Came First—the Campaign or the Case?**
with **Heather Wiley Starankovic and John Donovan**

"Campaigns" elevate giving and program performance and consequently are constructed even when not properly conceived. As the expression goes, form follows function but that is not always the situation when it comes to campaigns. We are told to campaign when too many signs say it is not time. This session will discuss means to unpack the case into priorities and a vision that warrants the "campaign" classification. Leaders will learn how to:

- move to campaign when the case is unclear by flipping the script.
- utilize the campaign case as an engagement tool and not a proposal.
- harness function to enhance form.

TOPIC 2: **Donor Advised Funds: Old News or Cool Again?**
with **Debbie Ferguson and James Gold**

Donor advised funds (DAFs) are nothing new. But with the recent shift toward more private foundation—rather than individual—giving, do you need a defined DAF strategy? James and Debbie will discuss the latest insights on DAF trends and suggest fail proof ways to ensure you are not missing out on some of your best prospects. Participants will learn how to:

- navigate current trends on DAF donor behavior and giving specific to health care philanthropy.
- identify existing DAF donors and track new ones.
- build a comprehensive strategy for DAF donor outreach and engagement.

TOPIC 3: **How Do You Talk About Community Health Equity to Your Board and Donors?** with **Amy Dorrill**

Whether your health care organization is prioritizing health equity as a significant strategy or focusing on a specific equity pocket (such as highest health care chronic users), most organizations have health equity as an initiative. Alongside the organizations, more donors are coming forward to discuss the issue. Health equity is a very compelling case for health care organizations but it does require staff members to: learn new information; understand why health care is in businesses such as transportation, food and housing; discover how it is connected to health outcomes for patients; and learn how a focus on community health equity is a better model for patients, community members and the organization. In this conversation, we will:

- review campaign models of health equity as the overall umbrella to a small portion of a more traditional campaign.
- understand the common barriers many foundation staff members face when sharing the health equity case.
- discover how to successfully deliver an inspiring and effective case for health equity.

TOPIC 4: **Discussion on Understanding and Leading Through Separate Realities**

with Lori Counts

Join Lori for a follow-up discussion on the Track Two afternoon session.

TOPIC 5: **Defining Meaningful Engagement and How to Increase Dollars Raised**

with Anna Savitsky, *Account Executive, DonorSearch*

In this conversation, we delve into the concept of meaningful engagement within the realm of health care philanthropy. We aim to explore what constitutes meaningful engagement for donors and prospects, considering the various facets that go beyond monetary contributions. We'll also focus on strategies and innovative approaches that health care organizations can adopt to increase engagement, emphasizing the importance of building lasting connections, leveraging storytelling, utilizing technology and fostering community involvement. Join us as we uncover the keys to fostering deeper engagement and maximizing financial support for your vital missions.

PRESENTATIONS & SESSIONS

Day Two / FEBRUARY 7 / 8:00 – 8:50 A.M.

Buzz Sessions

Combined Track Sessions

TOPIC 1: **Time to Get Your Documents in Order: Revisiting Policies and Guidelines** with James Gold

The neglected stepchild for many organizations is their own suite of policies, guidelines and gift agreements. These necessary and critical documents are the foundation of a philanthropy program yet are often only revisited once, maybe twice, per decade because of a pending gift laden with unrealistic donor expectations or a complex gift too difficult to accept. It's never too late to incorporate best practices into current operational documents and if nonexistent, it's much easier to start anew. In this session, we will:

- understand current trends in gift types and donor behavior that must be proactively addressed in policies, guidelines and gift agreements.
- examine core policies and guidelines such as gift acceptance, endowment, recognition/naming and campaign counting.
- explore tactics for educating and socializing updated or new policies for philanthropy teams.

TOPIC 2: **Launching Mid-Level Giving at the Onset of a Grateful Patient Program** with Debbie Ferguson and Erin Stitzel

Launching a mid-level fundraising program is a heavy feat, and so is launching a grateful patient engagement program. In this conversational session we will discuss the pros and cons of simultaneously implementing these two programs. Together we will:

- review data and operational needs for both programs.
- understand staffing considerations, constraints and pathways for mid-level philanthropy officers interested in patient engagement.
- explore relationship building with clinicians to deepen impact for new patient donors.

TOPIC 3: **Every Awkward Question You've Ever Had About Philanthropy Communications** with Michael Beall

Participants are encouraged to bring the "one thing" that is holding them back from communications being a more effective tool. Is it people, strategy, habits, process, budget, creative? This session is an opportunity to challenge the Accordant Communications Team and your fellow participant peers to help solve your current dilemma.

TOPIC 4: **A Philanthropy Family Reunion Strategy for a Generational Transfer of Wealth** with Cindy Reynolds

As donors age, they naturally develop more affinity for health care in their philanthropic priorities. They have more personal contact with physicians and hospitals, talk more about health matters with their friends and family, and have more direct and indirect reasons to deeply engage with the health causes that affect them, their friends and their families. Many health care philanthropy leaders dread the inevitable transfer of wealth to a younger generation—a generation whose demonstrated preferences lean more toward social causes than the traditional health care priorities of their parents. Many of our cultivation strategies either do not apply or do not resonate with a new generation of donors. How do you position your hospital or its programs to become a charity of choice for the next generation while maintaining your relationships with their philanthropic parents and grandparents? In this session, participants will learn how to:

- engage donor families who are passing control of some fund distribution decisions to the next generation during their lifetime.
- identify which programs and services typically appeal to the mature donor, and which health care initiatives can successfully engage the young social issues donor.
- help younger philanthropists connect with one another to build their own credibility and enhance the charitable appeal of your hospital in your community.

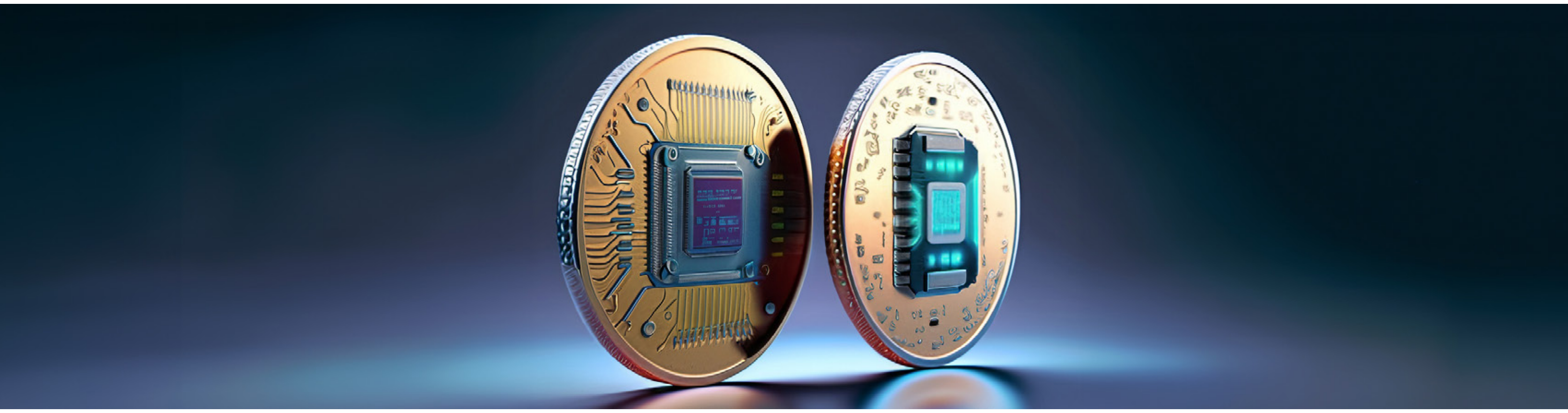
TOPIC 5: **Tapping Into Hidden Leadership Potential in a Campaign**

with John Donovan and Heather Wiley Starankovic

Campaigns are won or lost on leadership. No other attribute impacts the ultimate success, potential or failure. Yet we often allow our leaders to dictate their level of engagement in the cultivation and solicitation process. This session will explore ways in which leaders can be involved at elevated levels. John and Heather will discuss how best to inspire and engage leaders while they are also having fun. Together we will:

- understand the obstacles to full leadership engagement.
- discover tools to understand and tap into potential leadership.
- explore ways to make uncomfortable activities more enjoyable through elements and principles of gamification and best practice learning.

Opening Plenary



Predictive AI vs Generative AI:
Understanding the Balance of the Two-Sided AI Coin

Combined Track Session
9:05 A.M.
Speaker: **Bill TeDesco,** *CEO, DonorSearch*

Confused about the differences between Predictive AI, Machine Learning and Generative AI? Look no further. Bill will demystify AI in simple terms and provide information to evaluate the right type of AI for your organization, let alone impress your friends at dinner parties.

This discussion will give you the opportunity to:

- clearly understand the differences between Predictive AI, Machine Learning, Deep Learning and Generative AI.
- learn how to appropriately use Predictive AI with Generative AI with powerful fundraising use-cases for each type of AI.
- gain access to a simple but powerful worksheet to help you evaluate Responsible AI for your organization.
- "ask anything" about AI for your personal use, professional development or organizational purposes.

Track One: Advancing Philanthropy

Mastering the Power of the Pivot in Wave Campaigning

9:50 A.M.
Speakers: Heather Wiley Starankovic, John Donovan

Campaigns are complex, alignment is essential but unanticipated challenges are assured. These challenges are difficult to anticipate but there are means to diminish and neutralize obstacles in advance through positioning and planning. The session will discuss how to structure your campaign to be prepared for the unexpected, and how to pivot when challenges arise. Together we will:

- identify potential catastrophic pitfalls that impact campaign momentum.
- establish campaign structure to withstand unanticipated challenges.
- review solutions for managing course change in real-time during a campaign.

Perfecting the Public Phase

11:00 A.M.
Speaker: Michael Beall

Campaigns offer a foundation so much! Campaigns are funded with resources beyond what foundations receive on a day-to-day basis. But what are they doing with those resources? This unique window provides the opportunity to rethink partnership building, strategy, messaging and how communication functions. Yet we tend to stub our toes, unsure of what the public phase is or isn't, unsure of how much to ask for or what to do with the window for engaging the public. This session will offer clarity on how the public phase can change your communications approach and how your partners view your organization. Together we will:

- learn to become a valuable part of your brand ecosystem and benefit from reimagined partnerships with your marketing team.
- push new opportunities for pipeline through creative community engagement.
- discover how storytelling can be the fuel for success.

Track Two: Leadership Issues & Opportunities

Rethinking Corporate and Foundation Giving

9:50 A.M.
Speaker: **Amy Dorrill**

Corporate and foundation giving have changed from the vehicles used to support nonprofits to the needs and expectations. There is more pressure on community engagement with corporate responsibility and Environmental, Social, and Government (EGS) regulations. Non-profits must focus more on relationship-based, strategically aligned initiatives providing a win/win for the non-profits and the corporation. Together we will:

- identify how corporations are supporting non-profits in traditional and unique ways.
- discover the best way to get through the grant/funding gatekeeper.
- understand what to consider before making a corporate ask to best position yourself for success.

Elevating Foundation Board Governance: A Path to Greater Impact

11:00 A.M.
Speaker: **Betsy Chapin Taylor**

Unlock the potential of your foundation with this dynamic session on elevating foundation board governance. In today's philanthropic landscape, effective governance is the cornerstone of achieving meaningful impact. Join us as we delve into strategies and practices that empower foundation boards to excel in its mission.

During this high energy session, participants will explore the latest trends in philanthropic governance—from discovering diversity, equity and inclusion initiatives to innovative board structures and engagement models; confronting on-going challenges such as engagement in philanthropy, board selection and board accountability; and learning how to cultivate a board culture that fosters collaboration and engagement.

Through real-world case studies and expert insights, participants will also discover keys to navigating complex challenges and to optimizing board engagement in advancing philanthropy and advocacy.

Whether a philanthropy executive, health executive or board member, this session will equip participants with the knowledge and tools to elevate board governance, strengthen the foundation's impact and drive positive change in the communities served. Don't miss this opportunity to take your foundation to new heights of effectiveness and relevance.

Track Three: Intersection of AI and Generosity

DONORSEARCH

Making Your Disparate Data Work For You

9:50 A.M.
Speaker: **Brandon Lyons,** *VP Strategic Partnerships, DonorSearch*

A look into how integrated systems and AI can break down silos and further your fundraising efforts. Set up your organization for long-term success. Integrated technology empowers nonprofits to operate more efficiently, engage stakeholders better, optimize resource utilization and ultimately achieve their mission more effectively. Together we will:

- explore options for improved communication both internally and externally.
- understand how integrated systems improve efficiency.
- learn how integrated systems can improve the reach and impact of your organization's mission.
- discover the benefit of developing tailored fundraising strategies.
- identify how to improve transparency and accountability.

Building Strong Foundations: Key Elements to Consider for AI Success in Nonprofit Fundraising

11:00 A.M.
Speaker: **Scott Rosenkrans,** *Associate VP, DonorSearch Ai*

In an era where data and technology hold immense potential for making a difference, nonprofits face the exciting challenge of harnessing the power of artificial intelligence to drive fundraising success. During this talk, we will explore the critical components of AI readiness for grateful patient initiatives, emphasizing its cyclical nature. We will guide you through what leads to successful AI implementation based on years of experience implementing successful AI engagements.

Whether you're just beginning your AI journey or looking to enhance your organization's existing capabilities, this session will provide valuable insights and actionable strategies to elevate your nonprofit's fundraising game. Don't miss out on the chance to unlock the potential of AI for your cause.

Networking and BarCamp Lunch

Combined Track Sessions Selected Live by the Audience

TOPIC 1: **Pump the Brakes: Rethinking Planned Giving Board Participation**

with **James Gold**

Philanthropy leaders often struggle to gain traction when it comes to board planned giving participation, how to position it as an agenda item and how to provide education. This topic is often shelved or completely ignored, resulting in missed opportunities to create lasting legacies with established volunteer leaders. Assuming planned giving will hinder outright giving is a myth you must set aside if your organization will capture a fraction of the historical and significant transfer of wealth that has already occurred. Together we will:

- inspire exploration of new board champion(s) for planned giving.
- create a framework in which planned giving naturally becomes part of your strategy when meeting with individual board members.
- discover simple and actionable items to revitalize or launch your current planned giving and legacy society efforts—with your board leading, setting an example in the community and inspiring others.

TOPIC 2: **Fundraising Together: Exploring Collaborative Models**

with **Amy Dorrill**

As organizations are increasingly coming together for strategies to support patients and the community beyond clinical care, there is an opportunity to create stronger synergy through philanthropy. From anchor institutions raising funds for other organizations to more collaborative models, there is an opportunity to raise our sights, raise more money, better serve our constituents and uplift smaller non-profits. This session will:

- examine various fundraising collaborative models.
- review considerations to determine the best fundraising model for your organization.
- identify unique properties of the various models and what needs to be in place prior to execution.

TOPIC 3: **The Major Gift Mindset**

with **Heather Wiley Starankovic**

The philanthropy major gift mindset is based on the deep understanding of donors, the cultivation of strong relationships and strategies to secure significant contributions. This mindset emphasizes the importance of aligning philanthropic goals with the donors' interests and values, fostering trust and transparency and maximizing the impact of major gifts to create lasting social change. During this session, participants will:

- understand donor motivations.
- learn to cultivate strong donor relationships, trust and credibility.
- discover effective philanthropy strategies to secure significant contributions.

TOPIC 4: **Two Big Keys to a Better Relationship with Marketing**

with **Michael Beall**

Too often we hear how Marketing "doesn't get us, handicaps our ability to communicate appropriately or doesn't offer enough resources or visibility." It's time to stop asking what they can do for us and time to start asking what we can do for Marketing. The reality is we offer something Marketing desperately needs and wants—the credibility in promoting the mission. Brands are built by trust and trust is built by excellence and mission. By learning to develop content that Marketing can use in promoting the mission, we gain visibility (real estate) and partnership with their team. There are two keys here; philanthropy storytelling and communication strategy. Together, we will:

- learn the process in becoming a part of the brand ecosystem.
- develop stories and messaging that are mission-centric.
- create a communication strategy that your donors and your community both love.

TOPIC 5: **Raising Support for Staffing, *Really*?**

with **John Donovan**

Support for staffing has always been a tricky sell. The focus is most often about "the program," but there is an elevated appreciation for the right people that determine impact. Funding for recruitment, retention and equity has never been a focus but it may be time to test those sentiments. Staffing may be headed for an unavoidable crisis and those that stay ahead of this tsunami will have cultures in place to thrive through adversity. We will discuss creative approaches and new innovation to access the unique philanthropic true north of some donors. Together we will:

- understand the potential for funding and supporting staff.
- learn how to identify and package the right staffing as a strategic priority.
- evaluate a case and donor approach for supporting areas once thought to be the sole responsibility of the organization.

TOPIC 6: **Tips and Techniques for Thriving in a Small Shop**

with **Cindy Reynolds**

Managing the myriad demands of health care philanthropy with a very small shop is a special challenge. You are required to tackle every operational, strategic, mundane and inspirational task—and no one is a master of every element. In this discussion, we will explore reasonable, realistic ways to:

- identify and adapt typical health care fund development opportunities to small shop realities.
- align with other hospital allies to expand your functional team.
- amplify your leadership impact.
- make the most of the tools at your disposal.

Closing Plenary

Exploring the Power of Trust

Combined Track Session
1:15 P.M.
Speaker: Pamela Ronka Maroulis

The decline in trust in our country is concerning, especially when we see how it impacts our organizations. A lack of trust leads to patients not seeking care, not believing they are receiving the best care possible, not investing in their hospitals for fear their money won't be used wisely and even unwillingness to help neighbors to effect change for the better. There is, however, encouraging news. Those of us in philanthropy can combat this growing trend of distrust and move the needle to a more positive state. In this interactive session, participants will:

- understand how the decline of trust has an impact on the success of health care organizations and, simultaneously, our philanthropy efforts.
- learn how to incorporate this knowledge into your grateful engagement work with physicians and grateful patients.
- realize the importance of relationship-building and the tools we have in philanthropy to reverse the decline in trust.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