



LEADERSHIP *Retreat* 2023

FEBRUARY 7+8 | PONTE VEDRA BEACH, FL

AGENDA - Day One FEBRUARY 7



7:30 a.m. **SOCIAL BREAKFAST** - Stockton B

8:30 a.m. **WELCOME** - Stockton A

8:45 a.m. **OPENING SESSION:** Confronting a Challenging and Changing Environment
Speaker: Betsy Chapin Taylor

9:15 a.m. **The Golden Age of Giving Sciences**
Speaker: Nathan Chappell, Senior Vice President, DonorSearch

9:50 a.m. **Well-Being Insight:** The Power of Embracing Well-Being as a Leader

10:00 a.m. **BREAK**

10:15 a.m. Track One: **GRATITUDE** - Stockton A

Track Two: **LEADERSHIP** - Laguna

Rethinking Gratitude: Discovering the Personal Health and Well-Being Benefits

Speaker: Linda Roszak Burton

Amping Up Your Impact as a Health Care Executive

Speaker: Lori Counts

12:00 p.m. **SOCIAL LUNCH** - Stockton B

1:00 p.m. Track One: **GRATITUDE** - Stockton A

Track Two: **LEADERSHIP** - Laguna

Grateful Engagement Strategies:

PART 1: Recalibrating Clinician Partnerships

Speaker: Erin Stitzel

The Leadership Pivot: Game Plans and Course Corrections

Speakers: Lori Counts, Michelle Rovang

PART 2: Rethinking the Role of Data in Grateful

Giving Speakers: Debbie Ferguson, Nathan Chappell

PART 3: How Patient Philanthropy Can Drive Health Care Excellence

Speaker: Cindy Reynolds

2:30 p.m. **DAY ONE ADJOURNMENT**

2:45 – 3:45 p.m. **COOL-DOWN CONVERSATIONS**

Join us beachside for these casual but inspiring conversations:

- Advancing a More Thoughtful Approach to Gratitude with Linda Roszak Burton and Erin Stitzel
- Getting Started with Artificial Intelligence (AI) in Your Shop with Sarah TeDesco, Executive Vice President, DonorSearch & Dan Lantz, Director of Foundation Operations at Children's Minnesota
- Making the New Case for Health Philanthropy with Michael Beall and Craig Sorensen
- Surviving and Thriving as a Lone Wolf in a One-Person Shop with Cindy Reynolds

6:30 p.m. **SOCIAL DRINKS**

7:00 p.m. **SOCIAL DINNER** - Surf Club Patio

Well-Being Affirmation: Power and Purpose Remain Central

AGENDA - Day TWO FEBRUARY 8



7:30 a.m. **SOCIAL ROUNDTABLE BREAKFAST** - Stockton B

- Building a Syndicate of Loyal Donors *with John Donovan*
- Leadership Detractors: How to Stay on Track *with Lori Counts*
- Learnings from Computing 1,000+ Data Points on 40 Million Gift Transactions *with Bill TeDesco, Founder & CEO, DonorSearch, and Nathan Chappell*
- Rethinking Your Board's Structure and Impact *with Betsy Chapin Taylor*

8:30 a.m. **WELCOME** - Stockton A

8:40 a.m. **Well-Being Reset: Embracing Mindfulness as a Leader**

8:50 a.m. Track One: **GRATITUDE** - Stockton A

Track Two: **LEADERSHIP** - Laguna

Is Charity Your Greatest Asset and You Don't Know it? Elevating the Urgent New Case for Health Care

Speakers: Michael Beall, Craig Sorensen

Confronting the Excuses for Why You Can't Raise Major Gifts

Moderator: Heather Wiley Starankovic along with Accordant panelists

10:15 a.m. **BREAK**

10:30 a.m. Track One: **GRATITUDE** - Stockton A

Track Two: **LEADERSHIP** - Laguna

Excelling in Advancing Equity, Access Community Well-Being

Speaker: Amy Dorrill

Strengthening Bonds with Donors: Propelling Your Donors' Emotional Journeys

Speakers: Michael Beall, Jessica Carswell, Molly Davidson

12:00 p.m. **SOCIAL ROUNDTABLE LUNCH** - Stockton B

- Accelerating Your Major Gifts Program Now *with Heather Wiley Starankovic*
- Advancing Equity, Access and Community Well-Being *with Amy Dorrill*
- Amplifying Major Giving with Artificial Intelligence (AI) *with Bill TeDesco & Sarah TeDesco*
- Strengthening Infrastructure to Accept Non-Cash Assets *with James Gold*

1:00 p.m. **Conquer the Generosity Crisis Through Radical Connection** - Stockton A
Speaker: Nathan Chappell

1:45 p.m. **CLOSING PLENARY: Passion, Purpose & Philanthropy**
Speaker: Betsy Chapin Taylor

2:30 p.m. **CLOSING REMARKS: Rising to Meet the Road Ahead**
Speaker: Pam Maroulis

2:50 p.m. **Well-Being Commitment: Staying Connected Once You Leave**

3:00 p.m. **CONFERENCE ADJOURNMENT**

Combined Sessions

Day One / FEBRUARY 7

8:45 - 10:00 a.m.

Opening Session

Stockton A

Confronting a Challenging and Changing Environment

Combined Track Session

Speaker: [Betsy Chapin Taylor](#)

Explore the current data and trends shaping both health care and philanthropy.

During this session, leaders will:

- confront the financial challenges of nonprofit hospitals created by historically poor health care net operating margins due to spiraling supply, agency costs, low volumes and more.
- consider the challenges of advancing philanthropy in a time of declining generosity, poor investment returns and hyperinflation.
- identify practical and actionable solutions not only to navigate and succeed when working at the juncture of two complex and changing industries but also to continue to add new forms of value.

The Golden Age of Giving Sciences

Combined Track Session

Speaker: [Nathan Chappell, Senior Vice President, DonorSearch](#)

Is giving an Art of Science? With annual decreases in the percentage of Americans that give to traditional nonprofits, it's an easy conclusion that nonprofits must find ways to work smarter, not harder. With significant advances in artificial intelligence capabilities, private sector companies have leveraged machine learning to predict market demands, track consumer behavior and personalize service offerings. This same technology is now available to the nonprofit sector which holds the power to quantify connection in real time. In recent years we've learned more about the motivations of generosity than ever before in history thanks to big data and advanced computing, both of which are essential ingredients that are ushering in an exciting new era of Giving Sciences.

Track One: GRATITUDE

Rethinking Gratitude: Discovering the Personal Health and Well-Being Benefits

10:15 A.M. - Stockton A

Speaker: Linda Roszak Burton

Imagine being able to override the human brain's built-in negativity bias by cultivating a greater awareness of what's going well, of leading with personal strengths and the important role of positive emotions. This session will inspire and guide leaders in the understanding and adaptation of practicing gratitude while discovering how the latest research and evidence-based findings contribute to health and well-being. Reflective exercises, effective practice techniques and additional resources will help participants learn how to sustain these health and well-being benefits. Additionally, participants will begin to define a grateful leadership brand statement that supports their organization's vision, patient expectations and clinician interactions. While diving into the psychology and neuroscience of gratitude, we will examine the links between gratitude, well-being, burnout, emotional exhaustion and more. Leaders will return home with the practical implications for harnessing the power of gratitude in their organizations after learning to:

- translate the latest research and best practices in the science of gratitude and discover the associated health and well-being benefits.
- gain a greater understanding of the correlates of gratitude and neuroscience and the impact on improving relationships and team engagement.
- identify specific tools and techniques to support the adaptation of gratitude practices into personal leadership style and organizational culture.

Grateful Engagement Strategies:

1:00 P.M. - Stockton A

PART 1: Recalibrating Clinician Partnership

Speaker: Erin Stitzel

It's time to move from a one-sided, self-interested approach to physician engagement to a mutually beneficial approach to physician partnership. With clinician burnout being one of the top issues plaguing health care today, health care philanthropy professionals must go beyond the traditional one-way, one-sided clinician engagement. No longer can you simply provide gratitude training to clinicians and allies, followed by holding out your hand allies develop a shared purpose where both parties in the ally relationship benefit from the partnership. Data and case study examples will be shared to support the strategies and techniques recommended. We'll look at the needs and desires of physicians today alongside the needs and opportunities for grateful giving to consider a bolder, better path forward together.



PART 2: Rethinking the Role of Data in Grateful Giving

Speakers: Debbie Ferguson, Nathan Chappell

Data is about far more than wealth screening. It is time to take a broader view of what data can tell us about donor engagement and inclination. It's also imperative to take a systematic approach to how data is collected, analyzed, used and maintained. This session will connect all the dots around the next generation of data including AI, machine learning and more. Leaders will:

- learn how to ensure data is moving smoothly through the analysis process.
- discover how to move from a flood of data to a targeted approach based on engagement instead of simply wealth as well as explore the various questions to ask around data.
- learn strategies needed to right-size grateful engagement initiatives based on both data and team size.

PART 3: How Patient Philanthropy Can Drive Health Care Excellence

Speaker: Cindy Reynolds

Health care organizations can no longer afford to relegate philanthropy dollars to extras, nice-to-haves or non-strategic expenditures. We'll discuss how to partner with clinical leaders to improve quality metrics and patient experience metrics through strategic use of philanthropy and communications with grateful families. It has never been more critical to learn how to:

- demonstrate that grateful families can partner with health care teams to elevate outcomes and experiences.
- choose projects that will engage the executive team, physicians, nurses, patients and families in a joint quest for excellence.
- partner with the CMO and CNO to champion the use of philanthropy funds to improve quality measures.

Track Two: LEADERSHIP

Amping Up Your Impact as a Health Care Executive

10:15 A.M. - Laguna

Speaker: Lori Counts

Many leaders are faced with the daunting task of raising funds with challenges such as unrealistic goals, not enough qualified staff, not answering directly to the CEO or not being part of C-Suite interactions. How can health philanthropy executives overcome these types of challenges to be a successful health care leader? We will discuss new ideas and strategies to remove barriers that keep executives from achieving their leadership best. By bolstering executive presence through strengthening influencing skills, strategic voice and emotional intelligence, philanthropy leaders will be better positioned to:

- increase credibility by working with the C-Suite.
- cast the organization's vision, demonstrating how philanthropy can provide solutions.
- serve as a well-balanced, joyful, purpose-driven leader for the team, articulating worth not only as a philanthropy executive but also as a health care executive.

The Leadership Pivot: Game Plans and Course Corrections

1:00 P.M. - Laguna

Speakers: Lori Counts, Michelle Rovang

There is a critical role in developing a strong philanthropy team with dynamic leaders and vital internal and external partnerships. Whether following classic theorists such as MIT's Edgar H. Schein, Daniel Coyle or Malcolm Gladwell, there are blueprints for high-performing organizations and partners, as well as for those that fail. At the root of high-performing groups is a strong culture with clarity, a compelling mission and a shared goal. While the focus on mission is critical, the risk of rigid game plans has been at the root of failures for sports teams, NASA operations and even Fortune 500 corporations. What can we learn from them? Success includes the ability to develop clear metrics and change plans when the environment shifts. In this session, leaders will:

- learn how to embed elements from the Baldrige Excellence Framework in the philanthropy organization.
- uncover methods to help course correct midstream when priorities change.
- explore how to pivot when a critical internal or external player leaves the team.



Cool-Down Conversation

Combined Track Sessions

Join us beachside for these casual, but inspiring conversations:



CONVO A: **Advancing a More Thoughtful Approach to Gratitude**

with Linda Roszak Burton and Erin Stitzel

Let's dig deeper into the topic of Rethinking Gratitude from the morning session (no worries if you didn't get to attend). This conversation will prompt leaders to reflect on what's about to emerge for them and their organizations, where building and broadening a culture of gratitude can become a greater asset. Learn the importance of and how to acknowledge, explore and celebrate the gratitude of physicians, clinicians and nurses. This often-missed step is key when focusing on patient stories of gratitude and can lead to deeper and more meaningful relationships with physician, clinician and nurse partners. We'll explore, refresh and innovate by identifying:

- the greatest asset of the organization.
- the relationships needed to build on or strengthen in the next six months.
- what new abundance is being experienced now that perhaps was seen as scarcity before.
- how gratitude plays a role in personal practice, as a member of the organization and within the overall culture.
- how to discover the gratitude of physicians, clinicians and nurses within the organization.

CONVO B: **Getting Started with Artificial Intelligence (AI) in Your Shop**

with Sarah TeDesco, DonorSearch & Dan Lantz, Children's Minnesota

Discover how employing AI in your philanthropy efforts empowers your team and strategy. Spend time with experts who have paved the road before and are seeing the benefits of greater connections to donors, clinicians and community.

CONVO C: **Making the New Case for Health Philanthropy**

with Michael Beall and Craig Sorensen

Most health care foundations desire greater visibility within their community, wish prospects better understood that health care needs their investment and ultimately agonize over creating a compelling case for support. Time is often spent in the weeds on project details when we have yet to make a compelling case for the "why" of health care. We'll use this time to examine ways to think more broadly about case for support that is compelling, clear and inspiring. Together, we will:

- explore organizational examples and best practices.
- discuss leader's specific challenges for group feedback.
- learn how to create greater awareness and greater love for the foundation's mission.

CONVO D: **Surviving and Thriving as a Lone Wolf in a One-Person Shop**

with Cindy Reynolds

How can you do it all when you have to do it all by yourself? In these days of health care budget woes, it is all too common to experience a short-staffed philanthropy office. Leaders will explore:

- simple strategies for success in a lone wolf shop.
- how to recognize the need for a thought partner and where to find one.
- resources and hospital colleagues you may be overlooking.
- thoughts from other attendees who are facing a similar working environment.

Social Roundtable Breakfast

Combined Track Sessions

Advance Sign-Up Required



TABLE 1:

Building a Syndicate for Loyal Donors with John Donovan

Our most loyal and generous donors are investors in their communities, are often business leaders and entrepreneurs and understand the power of leverage to be catalysts for change. This session will explore the harnessing aspects of venture philanthropy in our programs, including a review of the characteristics of these donors, the outcomes desired and the collaboration necessary to be successful with donor investors. We will discuss the concept of building early consensus among a handful of donors in advance of conducting a campaign (or even before a campaign planning study) and the impact such advance work will yield in building excitement, credibility and elevating campaign potential. Together we will:

- understand the goals and objectives of venture philanthropy including impact investing and building scale.
- review the importance of building a case that is collaborative and clear on impact.
- explore the steps necessary to engage an early syndicate of donor investors to jump-start a campaign.
- review a case study comparing an initial traditional capital campaign that morphed into an enterprise initiative that infused 4X more philanthropy.

TABLE 2:

Leadership Detractors: How to Stay on Track with Lori Counts

As executives, we know what needs to be accomplished to best lead our teams and to represent our organization at the highest level. But do we know what we must give up to accomplish our maximum level of excellence? This breakfast session allows for conversation around common detractors and how to remove these barriers. We will discuss how to:

- prevent burnout through delegation.
- hold others accountable by providing timely and concise feedback.
- be swift and confident when making difficult decisions and handling challenging tasks.

TABLE 3:

Rethinking Your Board's Structure and Impact with Betsy Chapin Taylor

Governance is about more than rules—it sits at the heart of the organization. The governing board of directors provides the context for the foundation's purpose, culture and mission. Like ethical practices, it should not be something discussed once a year but continuously as a living, breathing and sometimes evolving aspect of who we are and what we do. It's time to elevate your board leaders' roles, purpose and impact. Together we will discuss:

- the reasons effective and engaged governance is essential.
- how to implement an impactful, successful governance structure.
- when and how governance should change and steps to get started.

TABLE 4:

Learnings from Computing 1,000+ Data Points on 40 Million Gift Transactions

with Bill TeDesco and Nathan Chappell, DonorSearch

What really drives philanthropy and giving among your current and potential donors? Giving propensity is much more than simply the capacity to give. Truly understanding the connections that create each gift can help you identify those people truly engaged in your cause and mission.

Track One: GRATITUDE



Is Charity Your Greatest Marketing Asset and You Don't Know It? Elevating the Urgent New Case for Health Care

8:50 A.M. - Stockton A

Speakers: Michael Beall, Craig Sorensen

Our donors and communities must see, feel and believe why investing in health care is urgent and rewarding. Health care touches everyone—rich or poor, young or old—throughout every phase of our lives. A health care organization is a community anchor directly elevating every financial and cultural aspect of thriving communities and may be the only place people feel safe in the toughest neighborhoods. Now, however, people are often perceiving health care organizations as simply big business rather than a crucial member of the community. In the quest to improve patient satisfaction, grow brand perception, establish loyalty and foster team culture, hospitals and health systems often gloss over their greatest asset—their charitable mission and position. What can hospitals learn from world-class health care marketers like St. Jude and Sick Kids that could result in exceeding KPIs and doubling fundraising goals? Most hospitals began as philanthropic endeavors seeking to fill a need in the community. We will discuss how this position still has great power today. We will also share results of nearly a decade of research and experience around the charitable positioning of not-for-profit health care and how hospitals and their systems could leverage this information to help meet operating, retention and fundraising goals. Together we will:

- examine how we might create a more complete perception of the impact health care has in communities.
- create messaging designed to elevate the cause and community aspects of health care.
- explore strategies to implement complete messaging with marketing and leadership.

Excelling in Advancing Equity, Access and Community Well-Being

10:30 A.M. - Stockton A

Speaker: Amy Dorrill

It's time to move beyond capital campaigns to raise funds for more programmatic initiatives beyond the walls of the hospital. Philanthropy has the ability to advance an organization's DEI, community health and CHNA initiatives. Many hospital foundations are missing the opportunity to align with the health care organization's values-based strategies. Donors, both individual and corporate, are searching for ways to make an impact, fulfill philanthropic mission and contribute to the overall well-being of the community. While the majority of corporations and foundations may be prioritizing DEI and other social/community initiatives, it is becoming more difficult for foundations to find and connect with these funders. Together we will:

- discuss the importance of aligning philanthropic and health organization goals.
- learn how partnerships are changing, including grant proposals, core business contributions and beyond.
- discuss strategies to help leaders ensure foundation board members embrace a shift to DEI, access and community well-being, as well as share best practices for foundation and corporate partnerships.

Track Two: LEADERSHIP



Confronting the Excuses for Why You Can't Raise Major Gifts

8:50 A.M. - Laguna

Moderator: Heather Wiley Starankovic along with Accordant panelists

"We don't have a prospect pool to raise major gifts," is a frequent objection shared within health care philanthropy. In every instance this is a false statement. A prospect pool may need to be built and work done to overcome objections; however, prospects do exist. With a careful plan to identify individuals, qualify them as prospects and overcome objections, any program can advance their philanthropy efforts. Whether a one-person shop or a team of 100, each program can grow major gift efforts and impact from simple fundraising to transformational philanthropy. This panel session will address excuses for why people feel they can't raise major gifts and provide strategies to overcome them. Together we will:

- identify truths for philanthropy and understand how they can inform major gifts programs.
- learn, understand and rectify the source of the many misconceptions.
- address ways to overcome the most frequent obstacles encountered in major gift initiatives.

Strengthening Bonds with Donors: Propelling Your Donors' Emotional Journeys

10:30 A.M. - Laguna

Speakers: Michael Beall, Jessica Carswell, Molly Davidson

For too long, we have been satisfied by the stewardship commandment to "just tell good stories." While stories are the key factor to connecting donors to your organization, they are not an overall strategy for engagement. Let's turn storytelling on its ear. We will discuss how donor stewardship should be a journey we want each donor to take with us, as health care philanthropy leaders serve as tour guides. We will discuss strategies to determine the emotions that help drive donors and their experiences throughout the year. We will discuss how donors are hungry for relationships that grow and provide them outlets for gratitude and meaningful contributions. Our conversations will help leaders deliver those experiences and stories through creative and thoughtful stewardship resulting in transformational gifts. Together we will:

- create a map for donor journeys with emotional experiences.
- write actionable content calendars for each participant's top five donors.
- build the "playbook" for a true team effort around stewardship.

Social Roundtable Lunch

Combined Track Sessions

Advance Sign-Up Required



TABLE 1: **Accelerating Your Major Gifts Program Now**

with Heather Wiley Starankovic

No matter where you are in your program development, there are tools and strategies you can develop to advance major gifts. In this roundtable discussion, we will share best practices and explore the best way to start, increase or advance major gift programs no matter your philanthropy run rate or your staffing structure. Together we will:

- learn the universal truths for major gifts.
- discuss the best launch point to advance a major gift program.
- share strategies to support growth in major gifts programs.

TABLE 2: **Advancing Equity, Access and Community Well-Being**

with Amy Dorrill

Let's dig deeper into the topic of equity, access and community well-being from the morning session (no worries if you didn't get to attend). We will further discuss how donors are looking for ways to contribute to better their communities and what strategies and conversations can help elevate these initiatives. Together we will:

- discuss ways to align philanthropic and health organization goals for greater well-being.
- learn how to search for and identify partners who have aligned missions and goals.
- discuss strategies to help philanthropy teams engage partners to fund community initiatives.

TABLE 3: **Amplifying Major Giving with Artificial Intelligence (AI)**

with Bill TeDesco & Sarah TeDesco

What are the relationships, connections and beliefs that inspire someone to make a major or transformational gift? How can AI help you identify those people in your community and sphere of influence that are most connected to your mission and what exactly connects them. Discuss how employing and AI strategy can help you understand and act on those connections.

TABLE 4: **Strengthening Infrastructure to Accept Non-Cash Assets**

with James Gold

Within the last decade there has been a significant shift towards donors making gifts of non-cash assets. Surprisingly, many organizations receive very few gifts beyond the checkbook and never truly tap into the true potential of their donor base. Together we will:

- discuss why there has been a significant shift to non-cash assets and the need to revisit the ability to accept these gifts with better-trained, relationship-based philanthropy officers.
- determine why it is critical to dust off the gift acceptance policy and make sure all philanthropy officers understand the process and potential alternatives to navigate more complex gifts.
- create simple action items to better address the organization's current non-cash asset acceptance situation and opportunities for future growth and impact.

COMBINED SESSION

Day Two / FEBRUARY 8

1:00 - 3:00 p.m.

Closing Session

Stockton A

Conquer the Generosity Crisis Through Radical Connection

1:00 P.M.

Speaker: Nathan Chappell, Senior Vice President, DonorSearch

The number of Americans making charitable gifts has reached an all-time low and statistics indicate the percentages of people giving to charity annually could decline into the single digits within 49 years.

This presentation will discuss the changing definition of generosity, shedding light on the unprecedented competition for connection facing modern nonprofit organizations. To this end, nonprofits must develop a renewed appreciation for connection and learn to leverage technology once only used by for-profit organizations. Using current data and analysis, attendees will learn the importance of measuring and prioritizing connection as well as which technologies can help them to work smarter, not harder to help overcome the competition for connection.

Passion, Purpose & Philanthropy

1:45 P.M.

Speaker: Betsy Chapin Taylor

Generosity is rooted in the rich soil of values, experiences and other-centered intentions. This session explores a mix of insights, inspiration and practical magic as we discuss the power of passion, purpose and philanthropy in this inspirational and thought-provoking closing plenary address.

Rising to Meet the Road Ahead

2:30 P.M.

Speaker: Pamela Ronka Maroulis

We'll review the important takeaways from the last two days that will help springboard your organization to success upon your return home. Knowing where to place your focus will help you implement what you have learned and position you for achieving best practices with your philanthropy initiatives.