



OCTOBER 23 - 26 , 2019

Conference Guide

Conference Guide Sponsor





Health Care Philanthropy's Most Comprehensive Firm



Transformative Philanthropy™

BEGIN YOUR JOURNEY

LEADERSHIP

C-Suite Engagement
Physician & Nurse Engagement
Board Engagement
Board Evaluation
Board Design & Development
Philanthropy Education
Executive Search
Executive Coaching

COMMUNICATIONS

Communications Strategy
Donor Communications
Case for Support
Mission Storytelling

STRATEGY

Strategic Planning
Project Selection
Systemization/Mergers
Population Health
Program Assessments

PROGRAMS

Campaign Planning
Campaign Management
Grateful Patient Engagement
Major Gift Strategy
Major Gift Training & Coaching
Planned Giving

Through the years, you may have come to know us as thought leaders. Today, we hope you'll see us for what we've become — the most comprehensive health care philanthropy firm in the industry.

AccordantPhilanthropy.com

Table of Contents

What You Need to Know	5
Meet the Leaders	8
Welcome from Leadership	11
Choosing Your Pathway	12
Schedule Overview	13
Special Workshops	16
Educational Sessions	17
Exhibitors	27
Sponsors	33
Session and Exhibitor Hall Maps	34
Index: Sessions by Topics	36
2020 Conference Registration Form	37



Websites



Software



Emarketing



Print



Analytics



Increase Your **Donor** Revenue

with Crescendo's proven solutions for
marketing **MAJOR & PLANNED GIFTS**

Identify your top donors, build donor relationships and close more gifts with Crescendo's suite of services. For a **free demo**, call 800-858-9154 or visit crescendointeractive.com.

Crescendo

Integrated Marketing for Planned Gifts

“ We have worked with Crescendo Interactive for over 17 years. Major, blended and planned gifts have steadily increased. In the last three years, Michigan Tech raised \$129 million! Crescendo Interactive is a great partner in building our giving program. ”

Karla Aho

*Director for Gift Planning
Michigan Tech University*

What You Need to Know

Welcome to the 2019 AHP Annual International Conference!

We're so glad you are with us. The next few days are packed with sessions, events, and learning labs that will address many of the challenges we're facing in healthcare philanthropy. To make your conference experience easier, take a look at the educational sessions sorted by Pathway—starting on page 17. This will help as you choose which session to attend based on your healthcare philanthropy experience. To find out which Pathway would be best for you, check out the guide on page 12. You can also choose sessions based on topics (page 36).

Badge and Security Requirements

Whether you're pre-registered or registering onsite, you can collect your conference badge at the Convention Registration Desk. Your badge is your ticket to the educational sessions, exhibit hall, and meals. Please wear your badge at all times during the conference.

Exhibit Hall Location and Hours

We have over 60 exhibitors excited to show you their wide range of products designed for healthcare philanthropy professionals! There will also be games (and prizes) for visiting the booths, so be sure to keep an eye out for those announcements. The exhibit hall will be open Thursday 7:30 AM – 4:30 PM and Friday 7:30 AM – 2:00 PM.

Download the App

The best way to be connected at the conference is through our conference app. On the app, you'll be able to:

- Access up-to-date schedule
- Customize your agenda
- Connect with other attendees
- Look up exhibitors
- Win some prizes!

To download the app, visit the App Store (for iPhone) or the Google Play Store (for Android). Search for **AHP International**, and download. Be sure to select “yes” to allow notifications, so you don't miss any of the ongoing announcements.

CFRE Point Tracker

Did you know every educational session counts towards your CFRE certification? You can keep track of the points you earn on our website at **ahp.org/certification**.

Social Media

Keep connected with AHP and your colleagues after the conference through social media. Share pictures and your favorite session quotes on our hashtag **#AHP19** and follow us on Twitter **@AHPIntl**.

Submit Your Feedback

It's important for us to know your thoughts about this year's speakers and sessions, so please take a moment to fill out your evaluations. Access our short surveys on the conference app and fill them out between sessions. Your evaluation is what helps us improve the experience for next year!



We partner with
nonprofits for
transformational
change.



For seven decades, CCS has empowered many of the world's greatest organizations to advance some of the most important causes in history. We plan, manage, and implement programs that achieve fundraising goals and mission impact. Together with our partners in the healthcare industry, we're delivering meaningful and measurable change for our communities and the world.

info@ccsfundraising.com | ccsfundraising.com

Meet the Leaders

We want to thank our 2019 International Conference Committee and Subcommittee members, all of whom worked tirelessly to put together this year's conference.

2019 INTERNATIONAL EXECUTIVE COMMITTEE MEMBERS

Bruce Bartoo, CFRE

COMMITTEE CHAIR

Senior Vice President & Chief
Philanthropy Officer, MedStar
Health

Serena A. Amerson, CFRE

Executive Director, Major Gifts and
Annual Giving, Eastern Virginia
Medical School

Donna Budak, MA, FAHP, CFRE

Vice President, Service Line and
Strategy, AMITA Health

Julie Cox, FAHP, CFRE

Vice President of Development,
LifeBridge Health

Nancy Gregovich

Foundation Operations Officer,
Intermountain Foundation
Central Office

Renee León

Donor Relations Officer, Henry Mayo
Newhall Hospital Foundation

Ashley Nall, CFRE

Senior Gift Officer, Program
Engagement, Johns Hopkins
All Children's Foundation

2019 INTERNATIONAL SUBCOMMITTEE MEMBERS

Paula Bragg

Director of Philanthropy, Mt.
Washington Pediatric Hospital

James DeLauro, PhD

Principal, DeLauro and Associates

Jill Feinberg

Vice President, Development and
External Affairs, Mt. Washington
Pediatric Hospital

Shawn Fincher

Director of Development, Providence
Health and Services

Nathania Fung

Associate Director, Annual Giving
VGH & UBC Hospital Foundation

Mary Hendricks, CFRE

Director of Philanthropy, The
Foundation for Barnes-Jewish
Hospital

Fran Petonic, CFRE

Senior Vice President, Philanthropy
Trinity Health

Alison Sadler

Vice President of Philanthropy
Operations, Sutter Health

Carmen Shipley, CFRE

Executive Director, St. Mary's
Hospital Foundation

Robin Venuti, CSPG, CFRE

Senior Development Officer,
Montage Health Foundation

Sandra White

Director of Individual Giving, Mercy
Health Foundation

Jan Wood, CFRE

President & CDO, Anne Arundel
Medical Center Foundation

Roel Yambao

Chief Operations Officer,
AdventHealth

We also want to thank the 2018-2019 Board of Directors for their leadership.

2018-2019 BOARD OF DIRECTORS

Randy A. Varju, MBA, FAHP, CFRE

CHAIR

President and Chief Development Officer, Advocate Aurora Health Foundations

Fred Najjar

VICE CHAIR

Executive Vice President and Chief Philanthropy Officer, CommonSpirit Health

Pamela Puleo, FAHP

SECRETARY/TREASURER

Executive Director, Concord Hospital Trust

Jory Pritchard-Kerr, FAHP

PAST CHAIR

Executive Director, Collingwood General and Marine Hospital Foundation

Flynn A. Andrizzi, Ph.D.

DIRECTOR

President, Hoag Hospital Foundation

David L. Flood

DIRECTOR

Senior Vice President, Chief Development Officer and President of Intermountain Foundation, Intermountain Healthcare

Sharon A. Jones, FAHP, CFRE

DIRECTOR

Vice President of Development, Haven Hospice

Mark Larkin, CFRE

DIRECTOR

President, Boca Raton Regional Hospital Foundation

Bridget Murphy, CFRE

DIRECTOR

Chief Philanthropy Officer, VNA Health Group

ASSOCIATION FOR HEALTHCARE PHILANTHROPY STAFF

Alice Ayres

President and Chief Executive Officer

Kim Alfaro

Coordinator of Event Registration and Services

Devin Barnes

Manager, Business Development

James Donlin

Manager, Event Services

Mary Ann Donlin

Executive Assistant, Foundation Assistant

Paul Fleming

Director, Research and Insights

Joan Florance

Administrative and Accounting Assistant

Norman Flores

Chief Financial Officer

Jasmine Jones

Manager, Research and Insights

Dana Krauss

Intern, Marketing

Dorothy Mitchell

Manager, Membership Development and Administration

Maddy Morris

Associate Principal, Membership

Becky Nadora

Vice President, Membership and Business Development

Sarah Park

Accountant

Ifdy Perez

Director, Marketing

Miles Tipton

Intern, Membership

John Wilson

Director, Education and Events

Congratulations and best wishes to

David L. Flood '89/M.A. '95

*Member of the Seton Hall University Board of Regents and
President, Intermountain Foundation; Senior Vice President and
Chief Development Officer, Intermountain Healthcare*

on receiving the **2019 AHP SI SEYMOUR AWARD**

*From Seton Hall University President Joseph E. Nyre, Ph.D.,
and the entire Seton Hall community*



Welcome to Washington, D.C. and to the 2019 AHP International Conference! We are thrilled to have so many people joining together for what we hope will be the best AHP International Conference yet. With over 40 educational sessions, three keynotes, five learning labs, Thursday's Si Seymour Award Dinner, and countless opportunities to spend time with old friends and make new ones—there is no shortage of things to do.

This is because of the incredible work of the 2019 International Conference Committee, led by

Bruce Bartoo, CFRE, Senior Vice President and Chief Philanthropy Officer of MedStar Health. We have been so fortunate to have such a dedicated group of leaders volunteer their time, energy, and expertise to ensure that this conference truly inspires, educates, and serves you as you transform healthcare through philanthropy. They deserve our sincerest gratitude.

I also want to thank each of you for making the time to be with us. It is a true gift that you chose to share yourselves with AHP these next few days. We are grateful for all our members, and look forward

to spending more time with you this year—in an expanded membership booth where you can network, find information, resources, and even charge your phones. (Stop by booth #223.)

If there is anything you need while you are here, the AHP staff is at your service. Please do not hesitate to approach any of us with suggestions, questions, or requests. We look forward to seeing each and every one of you!

Sincerely,

Alice Ayres, MBA
President and CEO, Association for Healthcare Philanthropy



Alice Ayres, MBA
PRESIDENT and
CEO, Association for
Healthcare Philanthropy



Bruce Bartoo, CFRE
COMMITTEE CHAIR
Senior Vice President
& Chief Philanthropy
Officer, MedStar Health

Dear Colleagues,

On behalf of the entire conference committee, welcome to the Nation's Capital and the 2019 AHP Annual International Conference. At this, the largest gathering of healthcare philanthropy professionals in the world, we trust you will find a sharing of innovative best practices, an exceptional network of colleagues, and opportunities to both grow your career and enhance your philanthropy program's results.

In addition to great education sessions, you'll have numerous

opportunities for interaction with sponsors and exhibitors, lots of professional networking time, and hopefully a chance to explore our great city—a special place that celebrates freedom in so many ways. If there is anything we can do for you during your time in Washington, D.C., please let us know. We are here to help ensure that this conference experience is one of the highlights of your career.

Please also take a moment to thank our colleagues who served on the 2019 AHP International Conference Planning Committee.

In partnership with an incredible AHP Staff and Board, they have worked diligently to plan for you an extraordinary schedule of events over the next several days. We challenge you to maximize your return on investment by taking advantage of every aspect of this conference.

Best wishes for a truly remarkable and enjoyable experience with us.

With sincere gratitude,

Bruce A. Bartoo, CFRE
Chair, 2019
AHP International Conference
Committee

Dear Colleagues,

Echoing Bruce and Alice's sentiment, I'd also like to welcome you to the 2019 AHP Annual International Conference in Washington, D.C.

Your participation in this conference, and in AHP, is what creates value in our community. By sharing our experiences, and learning from others through conferences such as this one, we are collectively elevating our organizations' philanthropy efforts and changing the healthcare landscape.

As you'll see in this year's educational sessions, a lot of work has been put into topics that will help you enrich your careers, and put these experiences and lessons into practice in your own organizations.

On behalf of the Board of Directors, we hope you have an extraordinary experience these next few days—one that you'll remember as a pivotal moment in your career development.

Sincerely,

Randy Varju, MBA, FAHP, CFRE
Chairman, AHP Board of Directors



Randy A. Varju, MBA, FAHP, CFRE
CHAIR
President and Chief
Development Officer,
Advocate Aurora Health
Foundations

Choose Your Pathway

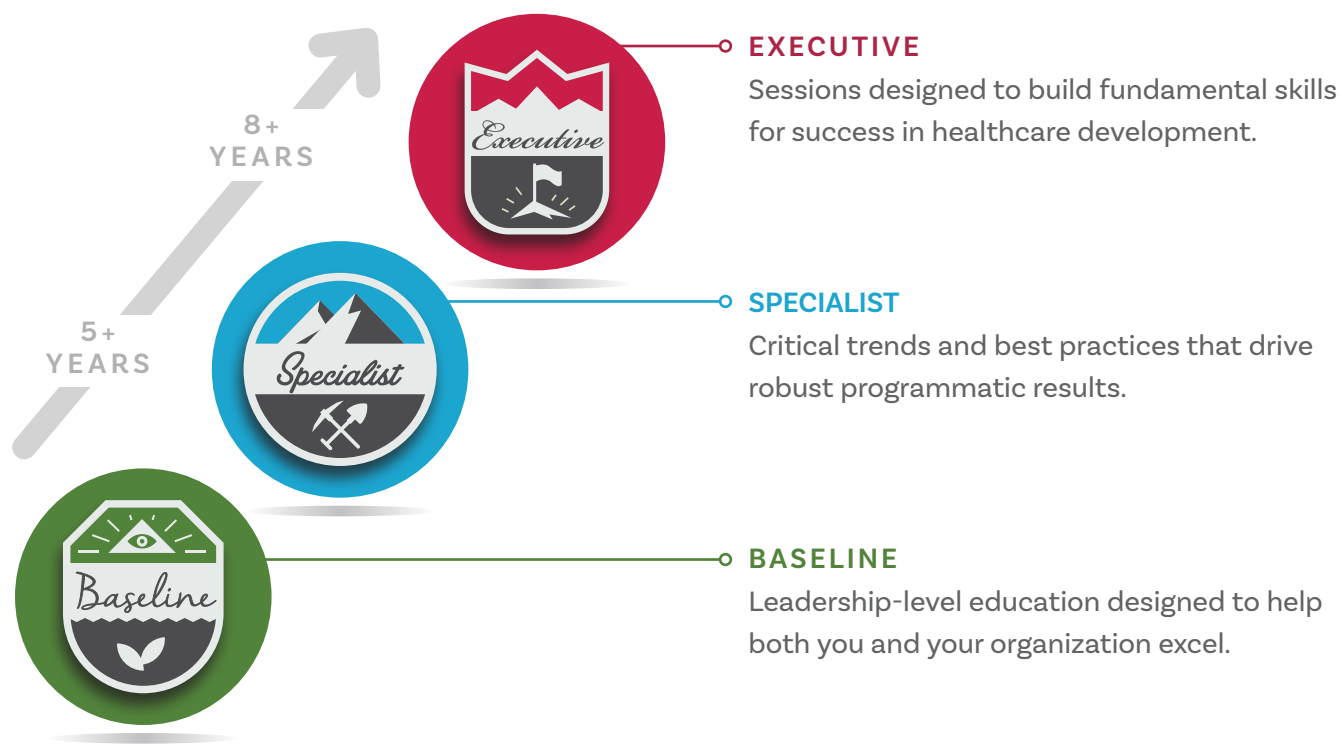
Our conference sessions—and this guide—are both designed to help you find the session that will best support where you are in your healthcare philanthropy career. Read the descriptions below, and find the Pathway that suits you best. Then look for the same symbols when choosing which sessions to attend under the Schedule Overview (next page), or as you're reading the session descriptions (starting on page 17).

Of course you're free to choose any session that interests you and will help you further your work. If you ever have any questions about Pathways, find an AHP staff member and we'll be happy to help.

YOUR PROFESSIONAL PATHWAY



Competencies for a Career in Healthcare Philanthropy



Schedule Overview

Organize your own agenda by checking off the sessions you're interested in participating. Each educational session is color-coded for the Pathway level to which they correspond. **Executive** is maroon, **Specialist** is blue, and **Baseline** is green. For more information on Pathways, see page 12. For further descriptions of the sessions, please see pages 16-24.

WEDNESDAY | OCTOBER 23

6:30 AM – 7:30 PM: REGISTRATION, *Convention Registration Desk*

8:30 AM – 1:00 PM: VISIT TO GEORGETOWN

- ❑ [\$] Exploring the MedStar Health/Georgetown University Philanthropy Partnership, Meet at 24th Street Entrance

2:00 PM – 4:30 PM: PRE-CONFERENCE WORKSHOPS

- ❑ [Free] Health System Development Forum, Washington Room 2
- ❑ [Free] Innovation Lab, Washington Room 3

OPENING WELCOME
PLENARY SPEAKER TY BENNETT
 Founder of Leadership Inc.
5:00 PM – 6:30 PM | Marriott Ballroom

6:30 PM – 7:30 PM: Opening Reception, *Marriott Ballroom Salon 1*

THURSDAY | OCTOBER 24

7:00 AM – 5:00 PM: REGISTRATION, *Convention Registration Desk*

7:30 AM – 4:30 PM: EXHIBIT HALL OPENS, *Exhibit Hall A*

8:00 AM – 9:00 AM: NETWORKING BREAKFAST WITH EXHIBITORS, *Exhibit Hall B North*

9:00 AM – 10:00 AM: EDUCATIONAL SESSIONS

- ❑ [Executive] Launching a Systemwide Comprehensive Campaign: A Case Study About Alignment & Integration, *Delaware B*
- ❑ [Specialist] Building Exceptional Teams, *Maryland A*
- ❑ [Specialist] From Blah to Blazing: How We Upped Our Grateful Patient Fundraising Game, *Maryland B*
- ❑ [Specialist] Portfolio Values: Expanding the Art and Science of the Solicitation, *Virginia B*

- ❑ [Specialist] Reach New Fundraising Levels, *Virginia C*
- ❑ [Specialist] Work Smarter, Not Harder: Integrated Donor Pipeline Development for Optimal Results, *Delaware A*
- ❑ [Specialist] The Perennial Millennial Conundrum: How to Reach this Elusive Prospect Base, *Virginia A*

10:10 AM – 11:10 AM: EDUCATIONAL SESSIONS

- ❑ [Executive] Beyond Cocktail Parties and Board Seats: Reinventing Your Principal Gifts Program, *Maryland C*
- ❑ [Executive] From Action to Value: The Future of Corporate Philanthropy, *Maryland B*
- ❑ [Executive] Spring Board: Elevating Your Board's Impact on Your Bottom Line, *Virginia A*
- ❑ [Specialist] Achieving Record-Breaking Levels of Physician Giving, *Maryland A*
- ❑ [Specialist] Bigger, Better, Smarter: Using Data-Driven Fundraising to Guide Strategy, *Virginia A*
- ❑ [Specialist] Making the Most of Your Technology Investments, *Delaware B*
- ❑ [Specialist] The Value of a Fresh Perspective: The When and the Why of Hiring a Consultant for Your Organization, *Virginia B*
- ❑ [Baseline] When Traditional Methods Fall Short: Creative Ways to Build the Mid-Level Major Gift Pipeline, *Delaware A*

11:10 AM – 11:30 AM: COFFEE BREAK WITH EXHIBITORS, *Exhibit Hall A*

11:30 AM – 12:30 PM: EDUCATIONAL SESSIONS

- ❑ [Executive] Artificial Intelligence and Major Gift Fundraising, *Maryland C*
- ❑ [Executive] Building a Community for Philanthropy Through Generative Leadership, *Delaware B*
- ❑ [Specialist] Breakthrough Fundraising: How Marketing and Fundraising Can Work Together to Drive Results, *Virginia C*

[\$] Additional fee required.



Schedule Overview

- **[Specialist]** From Blah to Blazing: How We Upped Our Grateful Patient Fundraising Game, *Maryland B*
- **[Specialist]** Integration of Fundraising Efforts Across a Hospital System with Multiple Partner Hospitals: Lessons Learned (and Still Learning), *Delaware A*
- **[Specialist]** Keys to Successful Employee Giving Campaigns in an Integrative Health System, *Virginia A*
- **[Specialist]** Leveraging the Power of Private Philanthropy, *Maryland A*
- **[Baseline]** What Do Millennial Millionaires Want? *Virginia B*

12:30 PM – 1:30 PM: LUNCH WITH EXHIBITORS, *Exhibit Hall B*

SPECIAL KEYNOTE SESSION WITH REPRESENTATIVE STEVE SCALISE (LA)

Jack Sava, MD, FACS, MedStar Health
Susan Kennedy, RN, BSN, MedStar Health
1:45 PM – 2:45 PM | *Marriott Ballroom*

2:45 PM – 3:15 PM: COFFEE BREAK WITH EXHIBITORS, *Exhibit Hall A*

3:15 PM – 4:15 PM: EDUCATIONAL SESSIONS

- **[Executive]** Riches in the Niches, *Maryland B*
- **[Executive]** Secure Your Hospital's Vision and Future with Philanthropy, *Virginia B*
- **[Executive]** To Integrate or Not: A System Approach to Philanthropy, *Delaware A*
- **[Specialist]** Achieving Record-Breaking Levels of Physician Giving, *Maryland A*
- **[Specialist]** Bringing Your Foundation into the Digital Age: How to Raise Real Money Online, *Balcony A*
- **[Specialist]** Grateful Patient Programs: The Next Generation, *Delaware B*
- **[Specialist]** It's Personal: Connecting the Dots Between Philanthropy, Business and the Patient Experience, *Maryland C*
- **[Specialist]** Vision 2020: Designing Impactful Campaigns in the Context of a Changing Healthcare Landscape, *Virginia A*
- **[Baseline]** A Lifetime of Fundraising: Lessons Learned Along the Way, *Virginia C*

6:00 PM – 7:00 PM: GRAND RECEPTION, *Marriott Foyer*

SI SEYMOUR AWARD DINNER HONORING DAVID L. FLOOD

President, Intermountain Foundation;
Senior Vice President and Chief Development Officer,
Intermountain Healthcare

7:00 PM – 9:00 PM | *Marriott Ballroom*
Purchase of a Dinner Ticket is Required

Sponsored by Advancement Resources
Plaque Provided by Eleven Fifty Seven

FRIDAY | OCTOBER 25

7:00 AM – 5:30 PM: REGISTRATION, *Convention Registration Desk*

7:00 AM – 8:00 AM: BREAKFAST, *Marriott Ballroom*

- How to Apply for Madison Faculty, *Virginia A*

7:30 AM – 2:00 PM: EXHIBIT HALL OPENS, *Exhibit Hall A*

PLENARY SESSION WITH KEYNOTE SPEAKER IAN MORRISON

Author, Consultant, Futurist
8:00 AM – 9:00 AM | *Marriott Ballroom*

9:15 AM – 10:15 AM: EDUCATIONAL SESSIONS

- **[Executive]** Crisis Averted! Being Nimble and Strategic, *Maryland B*
- **[Executive]** Transforming Your Donor Concierge Stewardship Program into a Cultivation Machine, *Virginia A*
- **[Specialist]** 3 CPOs: Learnings from Chief Philanthropy Officers, *Delaware A*
- **[Specialist]** Building Exceptional Teams, *Maryland A*
- **[Specialist]** Fundraising for Population Health, *Maryland C*
- **[Specialist]** Magic Happens: Campaigns, Estate Gifts and Donor-Focused Philanthropy, *Virginia B*
- **[Specialist]** Securing Transformational Gifts for Behavioral Health Funding, *Virginia C*
- **[Baseline]** What You Need to Know About Planned Giving: When Planned Giving Is Not All You Do, *Virginia A*

Schedule Overview

10:15 AM – 10:45 AM: BREAK WITH EXHIBITORS,
Exhibit Hall A

10:45 AM – 11:45 AM: EDUCATIONAL SESSIONS

- ❑ **[Executive]** Crisis Averted! Being Nimble and Strategic, *Maryland B*
- ❑ **[Executive]** Enhance Board Impact and Create a Better Board Experience, *Maryland A*
- ❑ **[Executive]** Using Data for True Impact, *Maryland C*
- ❑ **[Specialist]** 8 Great Ideas: Raising the Bar with Innovative Donor Stewardship, *Delaware A*
- ❑ **[Specialist]** Fundraising from Culturally Diverse Donors: How to Sensitively Cultivate New Americans & New Canadians from South Asia, China and Africa, *Virginia C*
- ❑ **[Specialist]** Lessons from a Panel of 40 Under 40 Awardees, *Delaware B*
- ❑ **[Baseline]** How We Built This: The Transformational Blended Legacy Gift, *Virginia A*

LUNCHEON USING DATA-DRIVEN FOCUS FOR AHP'S FUTURE

Speaker Alice Ayres, *President and CEO of AHP*
Randy Varju, *Chair of AHP Board of Directors*

Pamela Puleo, *Secretary and Treasurer of
AHP Board of Directors*

Jory Pritchard-Kerr, *Past Chair of
AHP Board of Directors*

12:00 PM – 1:15 PM | *Marriott Ballroom*

1:30 PM – 4:00 PM: POST-CONFERENCE
WORKSHOPS

- ❑ **Learning Labs**
 - ❑ Philanthropy Operations, *Delaware A and B*
 - ❑ Annual Giving, *Maryland A and B*
 - ❑ Hospice Philanthropy, *Virginia C*
 - ❑ Major Gifts and Planned Giving, *Virginia A and B*
- ❑ **[\$]** CDO Forum, *Maryland C*

3:30 PM – 4:00 PM: COFFEE BREAK, *Convention
Registration Desk*

[\$] Additional fee required.

4:00 PM – 6:00 PM: POST-CONFERENCE WORKSHOP

- ❑ **[\$]** AHP Development Primer Day 1, *Maryland C*
- ❑ **[\$]** AHP Advanced Course Day 1, *Virginia C*

SATURDAY | OCTOBER 26

8:00 AM – 1:00 PM: REGISTRATION, *Convention
Registration Desk*

7:00 AM – 8:00 AM: BREAKFAST FOR POST-
CONFERENCE COURSE PARTICIPANTS ONLY

- ❑ Development Primer Breakfast, *Virginia A*
- ❑ Advanced Course Breakfast, *Maryland A*

8:00 AM – 1:00 PM: POST-CONFERENCE
WORKSHOPS

- ❑ **[\$]** AHP Development Primer Day 1, *Maryland B*
- ❑ **[\$]** AHP Advanced Course Day 1, *Maryland C*

100% healthcare 100% of the time.

Health philanthropy is our expertise.

At Health Giving, we understand the nuances, and are practiced at navigating sensitive issues unique to healthcare—like working with physicians, and engaging grateful patients.

Major academic medical centers, community hospitals, aging care and hospice organizations all count on Health Giving for honest, expert counsel to create healthy philanthropic results.



www.health-giving.com

VISIT US AT BOOTH #126

Special Workshops

Boost your attendance with an extra (or two) special workshops before, during, and after the conference. Register onsite at the Convention Registration Desk.

WEDNESDAY | OCTOBER 23

Exploring the MedStar Health/ Georgetown University Philanthropy Partnership [\$]

8:30 AM – 1:00 PM

Join philanthropy colleagues from Georgetown University and MedStar Health as they share insights into the philanthropy team partnership they formed in 2018. Participants will enjoy hearing from the executive dean of the School of Medicine at Georgetown University, and the president of MedStar Georgetown University Hospital, as well as other key physicians, board members and philanthropy leaders. Limited to 65 attendees, and subject to an additional registration fee. Visit the Convention Registration Desk if you'd like to attend!

Health System Development Forum [FREE]

2:00 PM – 4:30 PM

In this free pre-conference session, the graduates of the 2018–2019 AHP Residency Program will present over a year's worth of learned insights about a specific need or area within their health systems. The Residency Program Cohort Presentations will address the latest topics in healthcare philanthropy development, including major gifts, best organizational practices, systems integration, and innovations in healthcare philanthropy.

Innovation Lab [FREE]

2:00 PM – 4:30 PM

Harness the power of collective wisdom using a variety of structured brainstorming and design-thinking tools in this highly interactive

discussion led by industry veteran Betsy Chapin Taylor, FAHP. It's time for philanthropy leaders to chart a bolder and brighter path toward the advancement of healthcare philanthropy. Uncover big ideas, confront progressive possibilities, craft new solutions, and identify how seemingly disparate dots connect while challenging conventional wisdom and best practices the industry has come to take for granted.

FRIDAY | OCTOBER 25

Teaching at AHP Madison Institute: FAQs and How to Express Interest

7:15 AM – 7:45 AM

Have you attended the Madison Institute and wondered how to become a faculty member? At this session, led by the chair and vice chair of the Madison Institute, learn what it means to serve on the Madison faculty and the process for expressing your interest in joining the faculty.

CDO Forum [\$] Sponsored by Blackbaud Healthcare Solutions

1:30 PM – 4:00 PM

What keeps you up at night? Merger issues? C-suite politics? Development staff, board, or medical staff issues? Come and describe your challenges to a seasoned panel of chief development officers and an audience of fellow CDOs—some of whom have faced similar circumstances. Long on conversation and short on presentations, this session will be driven by what you would like to talk about.

Learning Labs

1:30 PM – 4:00 PM

Back by popular demand, this year's Learning Labs have been curated to cover four impactful, in-depth explorations of key topics for healthcare philanthropy professionals. The four labs include Philanthropy Operations, Hospice Philanthropy, Annual Giving, and Major Gifts.

AHP Development Primer: Day 1 [\$]

4:00 PM – 6:00 PM *(Part two continues on Saturday, October 26 from 8:00 AM – 1:00 PM)*

This fast-paced, fundamental workshop is highly recommended for those new to healthcare philanthropy, and for support staff and board members who strive to understand the basic elements of healthcare development. You will review major topics including major and annual planned giving, capital campaigns, policies, marketing and more.

AHP Advanced Course: Day 1 [\$]

4:00 PM – 6:00 PM *(Part two continues on Saturday, October 26 from 8:00 AM – 1:00 PM)*

The AHP Advanced Course is a one-day, intensive program designed for healthcare professionals who have five or more years of experience in the field. The course will provide a quick and comprehensive overview of fundraising principles organized around the CFRE exam, allowing you to discover your strengths and weaknesses, and improve on what you know.

[\$] Additional fee required.

Session Descriptions

As part of your regular conference registration, you'll be able to attend these educational breakout sessions throughout Thursday and Friday. Use the Schedule Overview on pages 13–15 to organize your agenda for the conference, and refer to these pages for a details of the topic and speakers. These sessions are sorted by Pathway (**Executive**, **Specialist**, **Baseline**) and in alphabetic order within those categories.



EXECUTIVE

Artificial Intelligence and Major Gift Fundraising *Maryland C*

Adam Martel, CEO, Gravyty

Often overlooked by artificial intelligence (AI) professionals, the nonprofit industry boasts a wealth of data that can be used to build resources for missions, improve social accountability and expand the reach of world-changing organizations. Gravyty CEO Adam Martel explores how development work forces within healthcare are using AI and machine learning to achieve new milestones in philanthropic giving.

Beyond Cocktail Parties and Board Seats: Reinventing Your Principal Gifts Program *Maryland C*

Monica Taylor Lotty, EVP and CDO, Children's Hospital of Philadelphia

Kimberly Kicenuik Hubbard, Corporate VP, CCS Fundraising

Michelle Liberatore, Senior Director, CCS Fundraising

Nearing completion of its most successful fundraising campaign, Children's Hospital of Philadelphia began rethinking its approach to its highest-capacity donor prospects. Moving beyond traditional methods for cultivating these donors, the foundation established a comprehensive principal giving program, complete with new staff,

more thoughtful systems and innovative platforms for engaging top donors and hospital leaders in pursuit of \$1 million+ gifts. Learn more about the key components of CHOP's program and insights acquired along the way.

Building a Community for Philanthropy Through Generative Leadership *Delaware B*

Mark McCampbell, CFRE, Senior VP of Strategic Partnerships, Advancement Resources

Melanie Furlan, Senior VP and CPO, AMITA Health

Pamela Ross, CFRE, EVP, Sunnybrook Foundation

In this panel of health system leaders facilitated by Mark McCampbell, Senior Vice President for Strategic Partnerships at Advancement Resources, participants will discover how creating interactions between executive leaders integrates philanthropy into health system strategy. Discover how to become part of the conversation that translates vision into action. Take away principles for articulating philanthropic opportunities in the landscape of organizational change.

Crisis Averted! Being Nimble and Strategic *Maryland B*

Maggie Redmon, MBA, President, Commonspirit Health Mercy Foundation North

Julie Eckardt-Cantrall, MBA, CPO, Mark Twain Medical Center Foundation

Charlie Guida, President, Commonspirit Health St. Rose Dominican Health Foundation

In every corner of our country we are encountering natural disasters and man-made crises. When crisis hits a community, the impact is not only personal and community-wide, but also organizational. We invite you to learn how three foundations from varying locations and markets are moving through the response and recovery process to fulfill their missions. Hear how they responded to wildfires and shootings, and redeployed resources to survive for the future.

Enhance Board Impact and Create a Better Board Experience *Maryland A*

Lori Counts, CFRE, Principal Consultant, Accordant Philanthropy

Aline Lasseter, CFRE, Executive Director, Piedmont Columbus Regional Foundation

People join a healthcare foundation board because they want to

Session Descriptions

contribute to the greater good. They want to make their community a better place, and are willing to commit time and energy to board service. Yet, sometimes the experience is not what you or the board member thought it would be. In this session, we will examine the healthcare foundation board's role in advancing philanthropy, from selection to on-boarding to actual board engagement. We will discuss specific ways to enhance the board experience while building richer, more meaningful relationships that lead to greater philanthropic dollars.

From Action to Value: The Future of Corporate Philanthropy *Maryland B*

Grant Stirling, PhD, President and CDO, Ann & Robert H. Lurie Children's Hospital of Chicago Foundation

Robust corporate giving is crucial to any healthcare organization. Yet corporate motivation for philanthropy has radically shifted: corporate values rather than corporate ROI now dominate philanthropic investment decisions. But many of us in healthcare have been slow to catch on. This session will unpack the drivers of this change and provide specific examples of how we can all refine, refocus, and enhance our corporate engagement and giving programs to drive increased philanthropic revenue in our shops.

Launching a Systemwide Comprehensive Campaign: A Case Study About Alignment and Integration *Delaware B*

Brian T. Lally, SVP and CDO, Northwell Health

Nicole Thigpen Felix, Senior Director of Campaign, Northwell Health Foundation

Brett Mannes, SVP of Creative Practice Lead, August Jackson

Focusing on a narrative strategy composed of four overarching pillars, Northwell is in the midst of concisely communicating its transformative

plans to impact global medicine. We designed our campaign launch and subsequent regional launches to be highly immersive storytelling experiences that engage our donors in new ways while still maintaining a local feeling of community. You will leave this session with ideas for how best to integrate and inspire the loyal donor communities of individual hospitals around the mission of a broader health system.

Riches in the Niches *Maryland B*

Lee Pigeau, Director of Philanthropy, Queensway Carleton Hospital Foundation

What is the difference between your shop and your community's largest—other than tens of millions (or more) in revenue? Come to this interactive and informative session to find out! This session will be a practical guide on how your small shop can be successful alongside the larger players in your city. Discover the riches in the niches!

Secure Your Hospital's Vision and Future with Philanthropy *Virginia B*

Scott Lange, President, Visionary Philanthropic Consulting LLC

David Krause, FAHP, President, Parkland Foundation

Melanie Sabelhaus, Board Member, Johns Hopkins Health System

This session presents a case study approach to several breakthroughs philanthropy achieved in healthcare. It starts with strategic planning, the C-Suite, and the board. We will review the role the board plays in accelerating charitable giving, how to align resources based on philanthropic market analysis, how to engage donors, and how to access the significant financial power of women. Beyond providing resources for construction, research, education or equipment, embracing a culture of philanthropy improves patient treatment, prevention and innovation.

Spring Board: Elevating Your Board's Impact on Your Bottom Line *Virginia A*

Cory Davies, Executive Director, RMH Foundation

A case study of best practices in board development that enabled one foundation board to go from the proverbial rubber stamp to an engaged group of committed advocates who take ownership in affecting fundraising results. With a focus on board selection, recruitment and orientation, and creating engaging and meaningful board meetings, this seminar will help organizations set the stage for taking your organization to the next level by harnessing the power of your board.

To Integrate or Not: A System Approach to Philanthropy *Delaware A*

Crystal Hinson Miller, MA, CFRE, President, Indiana University Health Foundation

Laura Pickett, MHA, COO, Indiana University Health Foundation

In 12 months, IU Health incorporated 15 of its hospital fundraising teams into one system-level foundation. Learn the before-and-after of the process, including foundational steps beforehand, what challenges are still being faced and what the greatest outcomes of integrated activity have been after one year as a system foundation.

Transforming Your Donor Concierge Stewardship Program into a Cultivation Machine *Virginia A*

Maureen C. Kelly, Director, Friends of the Foundation, Meridian Health Foundation

Joseph E. Stampe, President and CDO, Meridian Health Foundation

Learn how one network has turned a donor concierge stewardship program into a cultivation machine for leadership gifts and higher. Hear

Session Descriptions

specific examples of how to drive development success by partnering with hospital administration, clinical leadership and patient experience teams ahead of and during members' patient experiences. We'll share four real life case studies of how the Friends of the Foundation program works at Meridian Health Foundation, and how significant additional giving grew

organically out of grateful patients' extraordinary experiences.

Using Data for True Impact *Maryland C*

**Sean P. Kramer, Senior VP and CDO,
Parkinson's Foundation**

This session will provide a case study of the Parkinson's Foundation and its

use of data analytics to drive business decisions and optimize fundraising. Results have been nothing short of fantastic. In two years, we've gone from raising \$22 million to over \$35 million. Learn what data to analyze, and how to implement a data plan to enhance your direct response, major giving, special events, and annual giving programs.



SPECIALIST

3 CPOs: Learnings from Chief Philanthropy Officers *Delaware A*

Amy G. Day, CFRE, Regional VP, Loyola Medicine, Trinity Health Illinois

Moirra McGinley, VP and CDO, Hazelden Betty Ford Foundation

David Wilke, CFRE, CPO, Loyola Medicine, Trinity Health Illinois

This is not a droid built by Anakin Skywalker. Rather, it is the learnings from healthcare fundraising leaders with a combined total of 60 years of experience. We'll explore the successes and mistakes of three Chief Philanthropy Officers and offer tips on talking to the C-Suite, leading organizational culture, and building a strong team. However, like C-3PO, we'll cover being "fluent in over six million forms of communication" to catch the attention of leadership, through adding value beyond philanthropy, to gain additional investment. This session will offer an opportunity for those interested in a Chief Philanthropy Officer position the opportunity to see our paths to a leadership position, to understand our priorities once we took on that challenge and learn from our mistakes and successes.

8 Great Ideas: Raising the Bar with Innovative Donor Stewardship *Delaware A*

Jennifer Segal, Director of Stewardship, Dana-Farber Cancer Institute

Jennifer Timmins, Senior Associate Director of Recognition, Dana-Farber Cancer Institute

Are you providing your major donors with what they really want when it comes to stewardship and recognition? Let's

dig into donor psychology and go beyond the basics with innovative approaches that will surprise and delight, build donor loyalty and move the relationship forward. From unique gifts and customized reporting to behind-the-scenes experiences that "wow," you'll come away with ideas you can use in your own cultivation and retention efforts for this specialized donor audience.

HAVE YOU SEEN WHAT WE CAN DO FOR YOUR CAUSE?



Cause and Solution, Inc.™
Your Cause > Our Solution

WWW.CAUSEANDSOLUTION.COM

 **Blackbaud
Partner Network**



Session Descriptions

Achieving Record-Breaking Levels of Physician Giving *Maryland A*

Andrew K. Sullivan, MD, Medical Director of ICU, Bozeman Health Deaconess Hospital

Debra Gill, MPA, CFRE, FAHP, SVP and Director Western Division, Ghiorso & Sorrenti, Inc.

Anna Smoot, CFRE, Manager of Individual Giving, Bozeman Health Foundation

Discover how one foundation successfully engaged physicians to enthusiastically give over \$1.1 million. Every shop, large and small, is challenged to meaningfully engage physicians, not only for their monetary contributions but to demonstrate a high percentage of giving and solidarity around philanthropic goals—especially during a campaign. This session will feature proven strategies for gaining trust, overcoming objections, and inspiring physicians to give generously. Learn from those directly involved including physician leadership, staff and counsel. Learn ways to effectively manage the medical staff division of a comprehensive campaign for maximum results.

Bigger, Better, Smarter: Using Data-Driven Fundraising to Guide Strategy *Virginia A*

Dana Casson, CFRE, VP and CPO, OhioHealth Foundation

Ryan Marshall, Director of Philanthropy Central Services, OhioHealth Foundation

Gregory J. Hagin, MBA, Managing Director, CCS Fundraising

Adam Miller, VP, CCS Fundraising

In today's philanthropic landscape, organizations can no longer simply rely on a strong mission or a previous connection with a donor for sustainable fundraising success. Fundraising strategies must be properly tailored to meet philanthropic objectives. In this

session, learn how effective use of data can support better decision-making and ultimately help raise more money by locating and properly engaging the best donors, motivating and measuring performance and strengthening relationships and stewardship activities.

Breakthrough Fundraising: How Marketing and Fundraising Can Work Together to Drive Results *Virginia C*

Kelley Stewart, EVP, Pursuant

Bente Weitekamp, VP of Development, Community Health Network Foundation

Bridging the gap between the marketing and fundraising department may not be impossible, but some days it feels like it. Challenges are vast: competing priorities, misaligned KPIs, limited resources, elevated donor expectations, high staff turnover and an expectation for an annualized ROI—and that's just to name a few. We believe that nonprofit leaders are uniquely equipped to change the world, and we've experienced firsthand the powerful impact that comes when they apply breakthrough fundraising. In this session, Pursuant's Kelley Stewart and Community Health Network's Bente Weitekamp explain how breakthrough fundraising has helped community health produce unprecedented results and how you can create the same mentality within your organization.

Bringing Your Foundation into the Digital Age: How to Raise Real Money Online *Balcony A*

Abha Tirtha, Senior Director of Development Operations, Scripps Health

John Simpson, President & Co-Founder, Digital Health Strategies

Your patients and your donors use digital platforms every day to communicate, research, and transact.

In order to be successful in today's "digital age," you must meet your supporters where they are—with digital tools and content that make it easy to engage and take action online. In this interactive design thinking workshop, you will work together with other foundation colleagues to collaboratively map out an integrated patient-donor experience that encompasses both on and offline platforms, content and touch points to effectively acquire, cultivate, and convert your highest-value supporters. You'll learn proven "case study" examples of digital strategies and tactics from other health systems and brainstorm new solutions. Whether you're just getting started or you've been running a digital fundraising program for years, you'll walk away with a set of digital best practices as well as actionable insights to help you create, implement and optimize a successful digital fundraising strategy at your organization.

Building Exceptional Teams *Maryland A*

Stephen P. Testa, Jr., CFRE, President, Nationwide Children's Hospital Foundation

Gregory J. Hagin, MBA, Managing Director, CCS Fundraising

Determining the best characteristics of a fundraiser can be a challenge. Although development professionals are typically assessed through output measurements and key performance indicators, managing a team, working with a board/volunteers, and building sustainable donor engagement requires more than simply meeting numerical goals. This session will explore how intangible characteristics and emotional intelligence should be identified and cultivated alongside traditional metrics to ensure you are recruiting the right talent and building an exceptional fundraising team.

From Blah to Blazing: How We Upped Our Grateful Patient Fundraising Game *Maryland B*

Eli Jordfald, MPA, CFRE, ED of Healthcare Philanthropy, UNC Medicine

Gail Perry, MBA, CFRE, President, Gail Perry Associates, Inc.

You will hear from a group that was firing on all technical cylinders of grateful patient fundraising but not doing so hot on the “art” of executing. We will share how through peer-to-peer coaching and mentoring, we created a unique, low-cost model for improving MGO skills and comfort levels related to grateful patient work. You will learn hands-on practical techniques for implementing this highly interactive model that is certain to increase your fundraising results.

Fundraising for Population Health *Maryland C*

Amy Dorrell, MBA, FAHP, Associate Dean for Advancement, Emory University

Have you been tapped to raise money for population health and don't know where to start? Or have you been hearing conversations from the C-suite and want to be prepared to add value? This session will provide an overview of population health—what it means to the organization and how it will change (and not change) your case for support. The session will also cover community partners and what to consider before moving forward.

Fundraising from Culturally Diverse Donors: How to Sensitively Cultivate New Americans and New Canadians from South Asia, China and Africa *Virginia C*

Tom Wilson, MM, ABD, Trusted Advisor and Coach, Wilson Major Gift Fundraising, Inc.

Lamech Mbise, Senior Director of Development, University of Colorado Anschutz Medical Campus

In addition to our presenters' traditional fundraising careers, we have explored the new demographics of prospective donors from around the world who now reside in our hospital service areas. We've interviewed hospital fundraisers in North America asking for their tips. Focus group participants have shared their values. We'll share what we've experienced from the West Coast to the Midwest and Canada. An interactive component will encourage audience members to share their experiences.

Grateful Patient Programs: The Next Generation *Delaware B*

Susan Dolbert, PhD, President and CDO, Providence Foundations Southern California

Tim Gale, Senior Director of Development, Grateful Patient Programs, Providence Foundations Los Angeles Region

Ben Golding, President and CEO, Advancement Resources

Priya Jethwa, Associate Director, Grateful Patient Programs, Providence Foundations Southern California

Julia Alber, Associate Development Officer, Providence Little Company of Mary Foundation

This session is divided into two parts: a presentation followed by a panel discussion, focusing on grateful patient pipeline development. Whether your organization has a staff of 10 or 100, we will provide you with an overview of a staffing plan, process, and infrastructure proven to generate breakthrough results.

Integration of Fundraising Efforts Across a Hospital System with Multiple Partner Hospitals: Lessons Learned (and Still Learning) *Delaware A*

Michelle L. Glennon, Esq., Associate VP, The Fund for Johns Hopkins Medicine

Michael Hibler, MPA, ED of Development, Sidney Kimmel Comprehensive Cancer Center, Johns Hopkins Medicine

Carol Shannon, VP, Sibley Memorial Hospital Foundation

Over the past ten years, there has been a national trend of academic medical centers and larger systems acquiring and/or affiliating with community hospitals. As value-based purchasing and population health management evolve, this trend of “systemizing” healthcare is a new normal. This presentation will focus on: (1) how development programs are impacted by such affiliations, (2) key development components to evaluate, (3) suggested best practices for successful integration of the development programs, and (4) how to leverage the partnership between the medical center and the community hospital.

It's Personal: Connecting the Dots Between Philanthropy, Business, and the Patient Experience *Maryland C*

Loriana De Crescenzo, CFRE, CDO, Newport Hospital Foundation

Small shops can't do it alone. Through an interdisciplinary approach, communication and collaboration with marketing, business development and the patient experience program, small philanthropy shops will have an opportunity to increase outcomes exponentially. There is growing demand on the office of philanthropy to bring much needed capital to their healthcare organization to fund strategic priorities.

Keys to Successful Employee Giving Campaigns in an Integrative Health System *Virginia A*

Amy Thomas, Development Officer, WellStar Foundation

Alicea Glover, MBA, Communications Strategist, WellStar Foundation

Designed for fundraisers looking to create or build upon their employee giving program, these keys to success will help to enhance employee engagement, identify untapped resources, and provide practical steps to increase employee giving. Nearly every non-profit hospital/hospital system has some sort of employee

Session Descriptions

giving program. What are the "keys to success" to help your employee giving rise to the next level? We will share our learned experience of over 12 years that has grown team member giving from \$300K to over \$1+ million annually.

Leveraging the Power of Private Philanthropy *Maryland A*

Jai Kumar, MPH, Senior Director of Advancement, North Carolina Healthcare Association

Julia Wacker, MSW, MSPH, SVP, North Carolina Healthcare Association

Participants will learn how private philanthropy and endowments can help bolster and launch new programs in hospitals. This session will examine the differences between private and public philanthropy, and how to tailor your proposal to align with the goals of the funder. We will also review how private grants can strengthen hospital-community partnerships, thereby enhancing public trust and goodwill, and generate new sources of giving. Using real world examples from North Carolina, we will show how the North Carolina Healthcare Foundation (NCHF) transformed its partnership with private funders to grow our financial support. We will review how the NCHF set a new mission and vision to align with community needs, which attracted new investment into the foundation.

Magic Happens: Campaigns, Estate Gifts, and Donor-Focused Philanthropy *Virginia B*

Jason Smith, Chief Advancement Officer, Bozeman Health Foundation

Vince McElligott, FCEP, VP, Thompson & Associates

This dynamic session will explore how donor-inspired philanthropy and values-based estate planning helped propel Bozeman Health's comprehensive Caring Forward campaign past \$14 million of its \$15 million goal a full year ahead of

schedule. Jason Smith, Bozeman Health's Chief Advancement Officer and Vince McElligott, Vice President of Thompson & Associates, will provide an insider's view of their powerful (but potentially risky) partnership: how it builds trust, works to inspire donors, and unlocks transformative gifts and commitments.

Making the Most of Your Technology Investments *Delaware B*

Greg Workman, Director of Finance, Technology & Analytics, Spectrum Health Foundation

Will Curtis, System Director, Philanthropy Technology and Innovation, CommonSpirit Health

Greg Warner, Founder and CEO, MarketSmart

Matt McMahan, Director of Enterprise Solutions, Omatic Software

A roundtable discussion from the senior technology leaders of some of the largest healthcare organizations in the country, this session will address the trends and opportunities related to technology and innovation in healthcare philanthropy. Learn where your organization should be investing and how to leverage the investments you've already made.

Portfolio Values: Expanding the Art and Science of the Solicitation *Virginia B*

Jennifer Svihus, MBA, CFRE, President, CommonSpirit Health Sequoia Hospital Foundation

Julie Eckardt-Cantrall, MBA, Chief Philanthropy Officer, Mark Twain Medical Center Foundation

This session will share unique insights into the art and science behind successful relationship building, portfolio management, and ROI. The results and ideas for action will surprise and inspire you.

Reach New Fundraising Levels *Virginia C*

Kimberly Bellinger, CFRE, Development Director and Strategy Officer, John Muir Health

Kevin Hughes, CFRE, External Relations Director, John Muir Health

Gail D. Rudolph, CFRE, CEO, LIFT Leadership

Do you feel stuck? Does it feel like you can't get over a "funds raised" number that has hovered around the same spot for several years? Have you provided training and it still feels like you or your team can't make it over the hump? If any of these apply to you, then join us for practical, easy-to-implement tips that helped us reach a 36% increase in funds raised. Learn how we started a campaign, expanded our grateful patient program, increased funds raised, began working closely with the system marketing department, and succeeded in obtaining senior leadership's involvement in solicitation and education of our donors, all while having a decrease in our staff.

Securing Transformational Gifts for Behavioral Health Funding *Virginia C*

Kevin Causey, VP and CDO, Montage Health Foundation

Ted Blackburn, Managing Director, CCS Fundraising

Millions of people are challenged with mental illnesses, yet our providers struggle to fund programs that facilitate upstream interventions and provide long-lasting treatments. Policymakers and providers are needing to allocate more resources to behavioral health and substance abuse prevention as part of treating the whole patient. Health systems are designing transformational giving opportunities to fund behavioral and mental health initiatives. We will hear the stories of two hospitals who have secured transformational gifts for mental health and addiction initiatives.

Session Descriptions

The Value of a Fresh Perspective: The When and the Why of Hiring a Consultant for Your Organization

Virginia B

Jessie Rosenberg, Executive Director, Piedmont Health Foundation

Sarah Batts, Executive Director, Shepherd Center Foundation

Robert J. Di Vito, JD, CFRE, Owner, Di Vito Consulting

This session will explore the reasons why hiring an independent consultant could be invaluable for your organization. Two hospital foundation executive directors will share their experiences with their utilization of external consultants, the benefits the outside perspective provided to the professional development of their teams and how it advanced their strategic priorities. You will also hear the perspective of the independent consultant who partnered with the two hospital foundations represented.

Vision 2020: Designing Impactful Campaigns in the Context of a Changing Healthcare Landscape

Virginia A

Thomas Kissane, Principal and Managing Director, CCS Fundraising

John Haley, VP of Development, New York-Presbyterian

Samantha Vigliotta, VP of Foundation and External Affairs, Peconic Bay Medical Center Foundation

Roshma Azeem, MPA, Deputy Chief Development Officer, The Mount Sinai Health System

As 2020 approaches, health organizations face a rapidly changing world. Donors are becoming more and more savvy, the economy is positive yet unpredictable, the upcoming election season underscores significant volatility, and hospitals continuously face the challenges of an evolving healthcare landscape. It is increasingly critical that the mission, vision, and execution of fundraising efforts and stewardship strategies adapt to our landscape and resonate with donors.

Work Smarter, Not Harder: Integrated Donor Pipeline Development for Optimal Results

Delaware A

Jan Wood, CFRE, President and CDO, Anne Arundel Medical Center Foundation

Elizabeth Gross, Director of Advancement Services, Anne Arundel Medical Center Foundation

It keeps us up at night—what gifts will come in and when? Can we optimize ROI with limited staff? Learn how Anne Arundel Medical Center Foundation created a systematized, integrated donor pipeline that provides accurate projections for the Foundation team, administrative leaders, and Board Members. Learn how you can use this process to track and prioritize asks, plan for timing and dollars raised, and develop accurate conversion rates to effectively achieve goals and set expectations.



BASELINE

A Lifetime of Fundraising: Lessons Learned Along the Way

Virginia c

Claudia Looney, FAHP, CFRE Senior Consultant, CCS Fundraising

How did a girl who grew up on an orange ranch snag a full-time fundraising position at just 20 years old, and eventually end up leading a \$1 billion campaign for Children's Hospital Los Angeles with a staff of 100 fabulous fundraisers? Claudia Looney will tell her career story while sharing lessons learned from mistakes made along the way, and victories celebrated. This

program is dedicated to those who are, or strive to be, serious fundraisers committed to being the best that they can possibly be.

How We Built This: The Transformational Blended Legacy Gift

Virginia A

Nicole Kinard, Director of Behavioral Health Philanthropy, Inova Health Foundation

Jennifer McGihon, Executive Director of Philanthropy, Inova Health Foundation

Don't know where to start in cultivating and closing a transformational gift? This case study about how the Inova Health Foundation team cultivated and closed a transformational blended legacy gift totaling over \$16 million (to support addiction services, no less!) will provide a step-by-step guide for you on how to gain key internal buy-in, cultivate, close and most importantly, steward a transformational blended legacy gift. Hear their lessons learned, and avoid the same mistakes yourself.

Session Descriptions

Lessons from a Panel of 40 Under 40 Awardees *Delaware B*

Colin Hennigar, VP of Major Gifts, SickKids Foundation

Erin M. Stitzel, CFRE, FAHP, Principal Consultant, Accordant Philanthropy

Megan Tregunno, CFRE, VP of Philanthropy, Centre for Addiction and Mental Health Foundation

Roel Yambao, COO, AdventHealth Foundation

Alice Ayres, MBA, President and CEO, Association for Healthcare Philanthropy

Are you interested in advancing your career in healthcare philanthropy but need a little advice and guidance? Join four members of the 2018 AHP 40 Under 40 class for a panel discussion moderated by Alice Ayres, president and CEO of the Association for Healthcare Philanthropy as they discuss topics like mentorship, creativity and leadership. No matter where you are in your career, you'll hear how to work cross-generationally, spark innovation, and elevate philanthropy in your organization.

The Perennial Millennial Conundrum: How to Reach this Elusive Prospect Base *Virginia A*

Matthew R. Ghorsi, MBA, VP for Strategy and Operations, Ghorsi & Sorrenti, Inc.

Martin Richman, CFRE, Executive Director of Advancement, UMass Memorial Medical Center

There are nearly 80 million millennials in the U.S. and most remain on the giving sidelines. Can they be persuaded

to make meaningful gifts? This session features personal commentary by actual millennials who have developed a social media platform and e-fundraising app that appeals to millennials on their turf, along with a group discussion on your experience in reaching the elusive perennial millennial donor market.

What Do Millennial Millionaires Want? *Virginia B*

Sarah Landman, M.A., Senior VP, Insightful

Abigail Wright, Partner, JWright Companies and FanX Salt Lake Comic Con Convention

Be part of a firsthand discussion on the motivations and expectations of millennial millionaires. Hear directly from two millennial millionaires as they share their own philanthropy stories, and the stories of their financial and generational peers. The session will cover generational shifts in communication, engagement, and expectations as well as real world stories of successful and failed philanthropic relationships.

What You Need to Know About Planned Giving: When Planned Giving Is Not All You Do *Virginia A*

Timothy Logan, FAHP, ACFRE, Associate VP, Barton Cotton

Planned giving can be pretty daunting if it is not your primary development responsibility—estates, trusts, CRATs, CRUTs, NIMCRUTs with a flip provision. But there are ten things every development officer needs to know about planned giving. In this session, we will look at the most common

types of planned gifts, discuss their properties and look at the donor characteristics associated with each gift. In addition to coming away with the tools to identify the gift planning technique that meets your donors' needs, you will also learn the best way to market these gifts. Whether you run a one-person shop or you're an MGO looking for a blended gift, this session will help you understand the basics of planned giving that you need for your job—and help you develop a love for planned giving.

When Traditional Methods Fall Short: Creative Ways to Build the Mid-Level Major Gift Pipeline *Delaware A*

Danielle Hickson, MBA, Grateful Patient Officer, Hackensack Meridian Health

Marisa M. Medina, MCIS, Senior Development Officer, Hackensack Meridian Health Riverview Medical Center

Developing a robust major gift prospect pool is critical to the success of many nonprofit organizations but can be a challenge for mid-level gift officers. Learn about incorporating new cultivation opportunities for today's donor: individuals who seek exclusive access and real-world benefits, and who want to see the impact of their giving. In this session, you'll also examine how events and cultivation opportunities can serve as meaningful stewardship to strengthen relationships between donors and the clinical and administrative teams.



*Your strategic partner to drive meaningful philanthropy
for your donors, your organization, and your career.*



ENHANCE
FUNDRAISING SKILLS



DEEPEN DONOR
ENGAGEMENT



CREATE A
MEMORABLE EVENT

Visit our website to learn more.
www.advancementresources.org



Cultural Preparation	Clinician Engagement	Needs Analysis	Strategic Event Support
Customized Curriculum	e-Learning	Orientation Tools	Storytelling
Digital Communication Strategies	Individual Coaching	Public Workshops	Video Capture

Exhibitors

AASP Booth 241

aasp is the preeminent network of current and aspiring leaders in advancement services who inform the strategy and direct the operations that fuel and fund nonprofit organizations. aasp members come from every nonprofit sector, including: Healthcare, Higher Education, Arts/Culture, Human/Social Services, Religion, and Environment/Wildlife.

Accordant Philanthropy Booth 213, 215



Accordant Philanthropy is health philanthropy's most comprehensive consulting firm. We not only advance grateful engagement, campaigns, leadership engagement and communications but also address issues from driving systemization to funding community health impact. Harness our team's thought leadership, progressive approach and deep-frontline experience in health care philanthropy to elevate your impact.

Advancement Resources Booth 205, 314

Advancement Resources is a global leader in research-based professional education, implementation services, and breakthrough thinking in philanthropy. Since 1999, our company has trained over 80,000 professional fundraisers and partners during this time. Leveraging expertise in medical, academic, and nonprofit philanthropy, we partner with organizations to help them realize their full philanthropic potential.

Allegiant Direct Booth 121



Allegiant Direct, Inc., is a full-service agency specializing in the planning and creation of successful direct marketing fundraising programs for nonprofit healthcare organizations. Specialties include: Results-oriented direct mail copy and design plus insightful results analysis. Other services include voice messaging..."Donor Intelligence" donor analytics...and membership/giving programs. For more information, contact Shannon Russell at shannon@allegiantdirect.com, or visit www.allegiantdirect.com.

August Jackson Booth 208

Alignment. Strategy. Message. Go! Our Campaign Readiness team of strategic communications advisors delivers a highly evolved approach to help you inspire today's donors to invest in your mission. Before your campaign launches, we help align leadership around the mission, prepare for an efficient campaign, and focus resources in ways that will engage constituents.

Ascend Fundraising Booth 233

Ascend Fundraising Solutions is disrupting the donor acquisition model. Our platforms enable charitable organizations to raise recurring funds, build on their donor datasets and glean insights into participant's activities. Our core fundraising products include industry leading 50/50 raffles, UK lotteries and national sweepstakes.

Beth Interactive Booth 112



Beth Interactive is a digital marketing and fundraising agency in Chicago specializing in online strategy and consultation, e-fundraising, email marketing, SEO and website design. We excel at using digital strategies to build major gift pipelines, launch digital Grateful Patient Programs, streamline donor communications for our clients—and more! We pride ourselves on building dynamic partnerships with healthcare foundations that improve donor engagement and increase online ROI. More at bethinteractive.com.

Bentz Whaley Flessner Booth 236

With thirty-plus years of experience, Bentz Whaley Flessner consultants bring expertise to make the most impact for their client's immediate and future needs. The principal team, including Joshua Birkholz, Mark Marshall and Katrina Klaproth, partner with our clients on a wide range of advancement services.

Blackbaud Healthcare Solutions Booth 105

Blackbaud is the world's leading cloud software company powering social good. Our purpose-built solutions for healthcare enable your organization to engage existing patients, drive better outcomes and increase philanthropic giving. With 35 years of expertise, Blackbaud provides unmatched data intelligence that enables healthcare organizations to connect with grateful patients and potential donors.

Exhibitors

Borns Group/VDM Booth 212

"Annual Giving Solutions that make a difference for you!" "We blend your needs and expertise with our proven strategies for Fundraising Success. Using an industry leading, fact-based approach, our fundraising consultants work for you to uncover fundraising opportunities and eliminate unproductive spending." -Analytics - Strategy - Campaign Design - Execution

Brook Global Booth 134

BrookGlobal offers a best-practice, holistic engagement methodology for non-profit's that increases donations, improves donor retention and enhances the philanthropic culture. Website: www.brookglobal.com.

Bryant Group Booth 240

For more than 30 years, BRYANT GROUP executives have recruited development leaders to hospitals, medical centers and health systems. Serving clients in the US and abroad, we now also offer talent development and leadership consulting services focused on enriching and retaining strong teams and effective leaders.

Campbell & Company Booth 127

Campbell & Company is a national nonprofit consulting firm that helps organizations create greater impact through fundraising, communications, executive search, and strategic information services. Since 1976, we have partnered with institutions across the healthcare sector on their journey to change lives. With offices and consultants across the country, we match the depth of our experience with the breadth and vision of a national firm—no matter where you are. To learn more, please call (877) 957-0000 toll-free, email info@campbellcompany.com, or visit www.campbellcompany.com.

Classy Booth 300

Classy is a leading mobile and online fundraising platform for nonprofits, trusted by organizations of all types and sizes, including The Salvation Army, The Trevor Project, ProPublica, and Shriners Hospitals for Children. Started by a group of passionate fundraisers, Classy's beautiful, flexible, and performance-driven software modernizes the giving experience to help organizations raise more money and scale their impact. Our website is www.classy.org. For more information please contact Brooke Hearn, Event Coordinator at Bhearn@classy.org

Cause and Solution Booth 206



Cause and Solution provides Managed Services that alleviate the administrative tasks that can often consume a development program's time. This provides foundations the opportunity to spend more of their limited resources on revenue generating activities while receiving the accuracy of data management, gift processing and reporting necessary to be successful.

CFRE Booth 234

Commit, excel, lead. Become a CFRE. Join the thousands of fundraising professionals worldwide who have become a Certified Fund-Raising Executive (CFRE). As the first globally recognized fundraising credential, CFRE indicates leadership, confidence, and ethics. Stop by our booth to learn how becoming a CFRE can benefit your career. For more information please visit the website is www.cfre.org or contact succeed@cfre.org.

Community Funded Booth 325

Community Funded is a customizable online giving platform that empowers organizations to connect their constituents to the meaningful causes they care most about through white-label fundraising pages, crowdfunding platforms, and giving day initiatives.

CCS Fundraising Booth 108, 110



CCS is a strategic fundraising firm that partners with nonprofits for transformational change. We plan, manage, and implement programs that achieve fundraising goals and mission impact. CCS proudly serves the world's leading academic medicine, research, hospitals, children's hospitals, cancer centers, voluntary health organizations, and hospices.

C.I. Partners Direct Booth 311

C.I. Partners Direct, is a national fundraising and consulting agency, specializing in strategic planning and implementation of multi-channel direct response programs for many nonprofit organizations. We partner with our clients to provide customized programs to achieve their fundraising goals, while providing them with exceptional results and an excellent customer service experience.

Consonant Custom Booth 315

Consonant Custom Media provides engaging, original and strategic storytelling for health systems, nonprofits and foundations. Our print and digital content platforms can help make more meaningful connections with your communities of interest and share the "real stories about real people" that will get you to your goals. Visit us at consonantcustom.com.

Crescendo Interactive Booth 113, 115

Serving the planned giving industry for 30+ years, Crescendo Interactive provides all the tools and services to market major and planned gifts. Our fully integrated marketing system features custom and mobile websites, e-newsletters for donors and advisors, marketing literature, bequest campaigns, social networking, analytics, proposal software, training and more. Visit CrescendoInteractive.com for more information.

The Donor Attitude Study and Survey Booth 125

The Donor Attitude Study and Survey is a cooperative effort among philanthropy professionals to measure and compare those attitudes which most affect giving and attendance. Join over 300 foundations who have participated in the Study and Survey to connect donor giving values, experiences and perceptions to your philanthropic opportunities, development communication strategies, and attendance. For more information please visit <https://donorattitudestudy.org> or contact Tom Troegel at ttroegel@pegltld.com

DonorSearch Booth 232

The DonorSearch mission is to provide more accurate, comprehensive, and actionable data to help nonprofits of all types achieve better fundraising results. Using sophisticated modeling and analytics, DonorSearch provides development staff with prospect research services that help them identify, qualify, and build relationships with 30% more potential major gift donors.

Digital Health Strategies Booth 200

Digital Health Strategies is a Washington, D.C.-based communications and technology agency that develops digital fundraising and engagement programs for some of the nation's largest healthcare organizations. Our programs educate patients about the role of philanthropy, inspire them to give and cultivate your supporters into high-value donors over time provide a comprehensive set of digital services – anchored by our Honor Your Caregiver digital platform – including strategy, design, content and web development, and advanced analytics. Our team has worked with leading non-profits both in and outside of healthcare and our clients include some of the most prestigious healthcare organizations in the country, such as Scripps Health, Geisinger, Johns Hopkins Medicine,

Hackensack Meridian Health and Good Samaritan Hospital. Visit their website at <http://digitalhealthstrategies.com>.

Eleven Fifty Seven Booth 135

Don't have a Donor Recognition Playbook? That's okay. We'll develop a strategy to: elevate your foundation within the system, save valuable time and resources, and provide consistency to strengthen your brand without sacrificing your foundation's culture. Let's get your game plan in place to recharge your donor recognition program!

EverTrue Booth 139

EverTrue is a leading advancement software that supports fundraising efforts at educational institutions. By connecting institutional data with dynamic insights from LinkedIn, Facebook, Zillow, the U.S. Census, and more, EverTrue provides advancement offices with the modern data and tools they need to engage alumni, raise support, and measure team progress.

Gift Clarity Booth 218

Gift Clarity partners with nonprofits to strengthen their fundraising efforts. Based on our years of expertise, we developed a strategic roadmap that ensures gift officers are connecting with the right donors at the right time, day after day. This proprietary approach builds stronger relationships with donors and grows giving.

Ghiorso & Sorrenti Inc. Booth 101

Ghiorso & Sorrenti Inc. (GSI) is a full-service philanthropic consulting firm specializing in capital campaigns for the complete spectrum of healthcare organizations. Since 1989, GSI has partnered with thousands of providers with goals ranging from a million to several hundred million dollars and has assisted those clients in raising billions.

Gobel Group Booth 120, 122

Gobel Group is the leading consulting firm working exclusively in healthcare philanthropy, and the experts in helping clients build meaningful partnerships

with physicians and nurses to create a robust grateful patient program. This year, we launched Futurus Group with G2G, "Gratitude to Give," the first patent-pending algorithm to use big data and artificial intelligence to identify prospects based on gratitude. Come find out how together, we are unlocking the power of gratitude and inspiring a more generous world. Please visit www.gobelgroup.com and www.futurusgroup.com for more information or reach out to Dave Chrystal (Dave@gobelgroup.com).

Graham Pelton Booth 231

Graham-Pelton is a global fundraising and nonprofit management firm and is the trusted advisor and partner to leading impact-driven institutions across all sectors of the nonprofit world. The firm customizes services to the needs of the client and the institution's culture, providing campaign management, planning studies, board training, major gift counsel, interim staffing, and more. Graham-Pelton's mission is clear: Elevate philanthropy so nonprofits flourish.

Gravyty Booth 209

Gravyty is the nonprofit industry's leading provider of fundraiser enablement tools that fundraisers love. Gravyty is powered by artificial intelligence (AI) and machine learning that automate the most time-consuming processes for frontline fundraisers, so they can do what they love – develop relationships with prospects and donors, at scale. With Gravyty, organizations expand their fundraising workforces, and their missions, without having to make additional hires.

Grenzebach Glier & Associates Booth 214

GG+A is a global strategic management firm that works with nonprofit organizations to help them fulfill their missions. Our clients include world-class healthcare institutions, health systems and specialty hospitals. We integrate analytics with a deep

Exhibitors

understanding of philanthropic giving to help advancement teams create and enhance programs that resonate with patients, physicians, and volunteers, and achieve ambitious goals.

Health Giving Booth 126



Health Giving - A full-service, specialized healthcare philanthropy consulting firm. We are experienced in serving community-based health and healthcare non-profits ranging in size, scope and mission. We are committed to contributing to the quality and success of health philanthropy nationwide, and being a valuable, trusted resource to you and your office.

Heaton Smith Group Booth 219

Heaton Smith partners with nonprofit organizations to help them facilitate and celebrate more blended and documented estate gifts for an average gift of \$515,000. For more information please contact Dave Smith at Dave@heatonsmithgroup.com.

Hillary Lyons Associates Booth 111

HLA is dedicated to providing professional, full-service fundraising counsel to healthcare organizations. Through organizing an extensive network of community and business leaders and providing comprehensive education for staff and volunteers, a program is developed to maximize philanthropic potential and achieve long-term success. Put our expertise to work for you! www.hillarylyons.com.

Henderson Mallory Partners Booth 123

Consultants in Philanthropy. Whether increasing the effectiveness of established development programs or creating new philanthropic foundations and fundraising programs, Henderson Mallory Partners applies over 50 years of fundraising and management experience to craft custom solutions

for nonprofit clients across the country. Services include leadership development, planning, development and organizational audits, foundation and program start-up, feasibility studies and campaign support. www.hendersonmallory.com.

Honorcraft Booth 109

Honorcraft is a leading designer, manufacturer and supplier of creative, high quality recognition products and systems, serving not-for-profit and for-profit organizations. Our goal is to help our clients demonstrate their appreciation for the people, organizations, and actions that matter in their lives. Ask us about LegacyCurator and LCTracker.

iWave Booth 318

iWave is the industry's top-rated fundraising intelligence platform. Our prospect research and wealth screening solutions help you identify top prospects and determine their capacity and inclination to give to your cause. iWave gives you access to billions of wealth and philanthropic records, and fully customizable screens, scores, and profiles. Using iWave you can present the right ask to the right person at the right time, empowering you to fundraise with confidence.

Insightful Booth 312

Know More. Raise More. insightful alerts gift officers and prospect researchers when donors or topics they care about are in the news. insightful seamlessly connects to your CRM and is powered by NewsBank, an information company that has served academic, public and government libraries for nearly 50 years.

Jerold Panas, Linzy & Partners Booth 119

We bring to our client's uncommon creativity, flexibility, and accountability. You can count on results that are time-phased and objective-focused. We are the outside voice that produces and ensures successful fundraising programs. Jerold Panas, Linzy & Partners is made up of experts in the

field of fundraising from a variety of sectors. Our energetic team works with organizations to help them make a difference in reaching their goals."

Johnson, Grossnickle and Associates Booth 132

Johnson, Grossnickle and Associates takes an authentic approach to providing strategic and philanthropic consulting services to healthcare organizations. Our 25 years of experience is where our authentic approach first becomes apparent. Whatever scenario you're facing, its likely we've faced it too. Discover for yourself and let our learnings become your strengths.

Kidzpace Booth 133

Kidzpace is perfect for donations and fundraising efforts. We entertain visitors of all ages with a variety of cabinets, carts and kiosks complete with video game systems and touch computer screen games. Our Touch2Play systems offer on-screen donor recognition opportunities. Super popular in lobbies, family lounges, waiting areas, play rooms and patient rooms.

LIFT Leadership Booth 301

LIFT Leadership's powerful engagement model focuses on implementing proven solutions and real world tools that achieve optimal performance, such as our Donor Engagement Assessment. This comprehensive evaluation informs Foundation Teams and their Leaders of their unique style of donor interaction and identifies areas of improvement, helping to create affinity for your organization, build benefactor relationships, and increase contributions faster and more effectively.

Lois L. Lindauer Searches, LLC Booth 202

Lindauer specializes in recruiting nonprofit leaders and their teams across the healthcare, education, science, arts and culture, advocacy and mission-driven sectors. Visit lindauerglobal.com to learn more.

MarkeTeam Booth 138

For over 30 years, MarkeTeam has partnered with results-driven nonprofits to exceed their fundraising goals. Whether you're looking for assistance in grateful patient, monthly sustainer, Mid-Level, or planned giving, our skill set helps identify and cultivate sustainers, high value donors, and long-term supporters. Learn more at <https://www.mkteam.com/thinking>.

Marketing Communication Resource, Inc. Booth 323, 321

MCR is a leading provider of print and mail solutions for health care organizations—with more than 100 clients nationwide. A true partner in the development process—from ideation through execution—we're here to be an extension of your team and improve your ROI.

Marts & Lundy Booth 243

At Marts & Lundy we have senior consultants who specialize in health sciences precisely because of the complex nature of the work. They possess unparalleled breadth of experience from their work as advancement professionals and breadth of perspective from work with clients across North America, United Kingdom and Australia. martsandlundy.com.

MD Designs Booth 143

Since 1961 MD Designs Inc. has created spectacular donor walls, signage and awards. It is our goal to provide our clients with a custom creative donor wall or recognition award that inspires philanthropy, aesthetically fits their facility, accommodates their donor programs and is manufactured with the highest quality lasting products.

MedStar Health Booth 307, 313

Visit our Gratitude Booth and members of the MedStar Philanthropy Group to explore their innovative approach to philanthropy "powered by gratitude."

From facilitating meaningful relationships to positively impacting patient experience and reducing clinician burnout, the proven success of this philanthropy model has industry-revolutionizing capabilities for revenue growth and more.

Otto Trading, LLC Booth 308

We deliver full logistic solutions for our clients and customers. Our diverse range of logistics services includes transportation across all 50 States, organizing and booking containers in all major ports, freight forwarding and providing our clients with all necessary paperwork. Our logistics solutions are very flexible that address all the unique needs of our customers.

Paschal Murray Booth 114

Paschal Murray is your specialized executive search firm for professional fundraising positions. We are committed to finding the talent that matches the culture and the needs of our non-profit client organization. Our entire focus is to recruit for positions in philanthropy, foundation leadership and alumni affairs.

Performance Advantage, a Marketing Partners, Inc. Company Booth 137

The top 25 percent of AHP benchmarking organizations raise five to six times the median production of all others. Top performers have learned major gifts are essential to high performance. Learn 10 ways you can build your major gift program by combining the science of Lean Six Sigma, the donor-centric rigor of the Core Process and the art of front-line development.

Presentation Design Group Booth 207, 211

We design, manufacture and install architectural and interactive donor recognition displays, history exhibits and environmental graphics. Our experience helped us create Giftmap, a map-based tool that will help you plan, document and manage funding opportunities and recognition

inventories. Giftmap has become the central planning and communication platform for some of the most respected fundraising shops across North America.

Pursuant Group Booth 330

Pursuant solves nonprofits' toughest fundraising challenges. A platform of best-in-class technology, tools and services focused on empowering nonprofits to change the world, we are passionate about data-driven outcomes that deepen donor loyalty. From data-driven strategy, fundraising intelligence, award-winning storytelling, experienced leadership and proven results, we can solve the comprehensive fundraising needs of nonprofits today. Reach out and learn more at pursuant.com.

Snively Associates, LTD Booth 131

Snively Associates develops fundraising campaign brands and marketing communications for education, healthcare, and the arts. Our cloud-based digital platform, Overture, is revolutionizing major donor and prospect communications and stewardship by powering the creation of highly tailored and personalized cultivation websites and impact reports.

Sinclair, Townes & Company Booth 142

Sinclair, Townes & Company is an Atlanta fund raising consulting firm that provides comprehensive counsel for capital campaigns, endowment campaigns, planned giving programs, major giving programs, annual funds, and more. Capital and endowment campaigns for healthcare systems have ranged in size from \$1 million to more than \$2 billion. nonprofitfundraisingconsulting.com.

ThankView Booth 124

ThankView is the marriage of technology and whimsy, delivering personalized video messages with ease. ThankView focuses on bringing sincerity and efficiency to their email

Exhibitors

outreach for over 500 organizations. Regardless of whether your organization has a production staff or just a smartphone, teams of one or hundreds can create thousands of videos in minutes. See how ThankView can work for you at thankview.com/ demo.

The Angeletti Group Booth 140

The Angeletti Group offers philanthropic counsel to the most passionate in healthcare, education and community building. Customizable, strategic and deliberately personal by design, we offer a wide variety of organizational advancement services, including metrics-driven major gift programs, campaign management, prospect research and wealth screening, board development, executive search and more.

The Giving Collaborative Booth 319

The TGC mission is to deliver personalized management and philanthropy counsel to nonprofit organizations. TGC is committed to providing services that maximize results by focusing on the unique needs of each of our partners. From campaign readiness to grant writing, our goal is to build a lasting relationship based on trust and success.

The Phonathon Booth 107

Engaging patients and donors through customized and integrated telephone and mail programs. Make this year the year you: Increase your major gifts pipeline, generate new \$1,000+ donors, acquire new donors, increase your average gift and top your annual giving goal or the community phase of your capital campaign!

Thompson & Associates Booth 224, 222

Thompson & Associates partners with development teams to serve as a catalyst for actively creating planned gifts by bridging heart felt conversations surrounding a person's values with technical conversations surrounding their valuables. Our process creates a greater sense of clarity and purpose to carry out an individual's present and future philanthropic intent. Additionally, our services provide organizations new opportunities for engaging individuals, solidifying relationships and securing large gifts. Through strategic implementation, the individuals and organizations fulfill their objectives and reach their financial goals.

Vision Philanthropy Booth 305



Vision Philanthropy Group, Inc. is a full-service philanthropic consulting firm specializing in health care and biomedical research. We are architects of transformative philanthropy. We work with clients to guide successful outcomes in grateful patient fundraising, training and coaching for boards, campaigns, and impactful collaterals. VPG's Bold Asking training program is designed to give board members, CEOs, physicians and staff the tools they need to be effective, comfortable partners in creating transformational giving. Today's increasingly complex health care landscape requires innovative thinking and solutions. VPG consultants provide proven results. For more information, contact Susan Holt at susan@visionphilanthropy.com.

WealthQuotient Booth 238

WealthQuotient helps organizations accelerate access and trust with the right ultra-wealthy prospects. We believe referrals are the most efficient path to accessing and obtaining a new ultra-wealthy/principal gift donor. Most organizations recognize referrals are the most efficient path to growth but their fundraising strategies don't reflect this. We provide relational mapping and coach fundraisers on our 5-step referral-based methodology. The combination of the two helps scale and systematize referrals across an entire organization leading to 10x the results in 1/10 the time.

W & E Baum Booth 201

W & E Baum, designers and manufacturers of Donor Recognition and Memorial Walls, Giving Trees, Cast Plaques, Awards, Lettering and Signage. We offer complete solutions to fulfill your recognition and memorial needs with both traditional and contemporary designs.

Windfall Data Booth 141

Windfall is an emerging, fast-growing data company that helps nonprofits identify, understand, and engage with affluent donors. Our rich dataset on over 12.6 million U.S. households helps 400+ nonprofits with their fundraising efforts.

Sponsors

We'd like to thank the sponsors for making this year's conference possible.



Opening Session Sponsor and
Tote Bag Sponsor



George A. Brakeley Jr.
AHP Healthcare Philanthropy
Journal Award



Conference Program Sponsor
and 40 Under 40 Sponsor



Si Seymour Plaque Sponsor



Opening Reception Sponsor



Diamond Sponsor



Gold Education Sponsor
and
Si Seymour Award Dinner Sponsor



Mobile App Sponsor



Lanyard Sponsor



Portfolio Sponsor



40 Under 40 Sponsor



40 Under 40 Sponsor



Conference Badges Sponsor

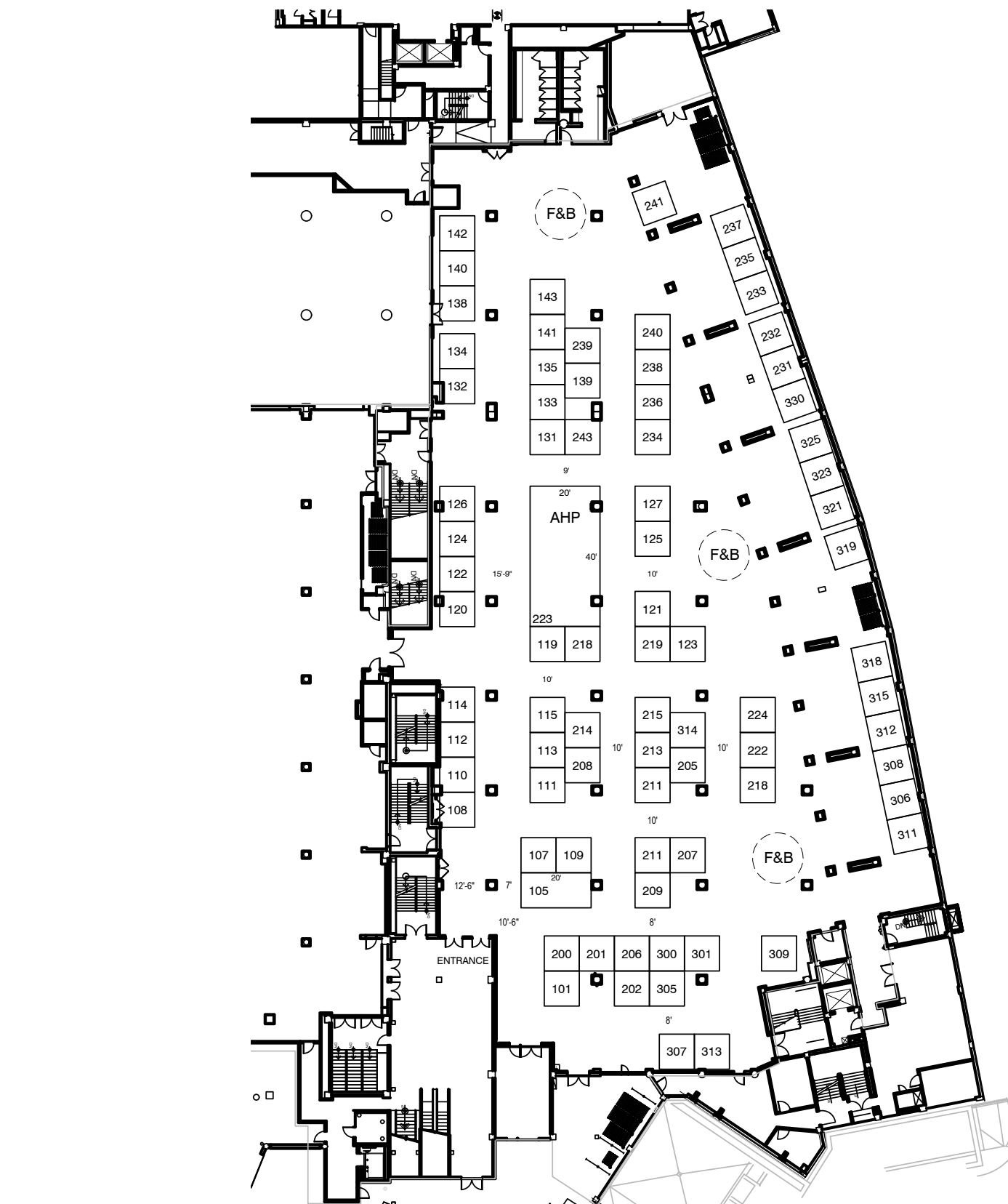


Networking Lounge Sponsor

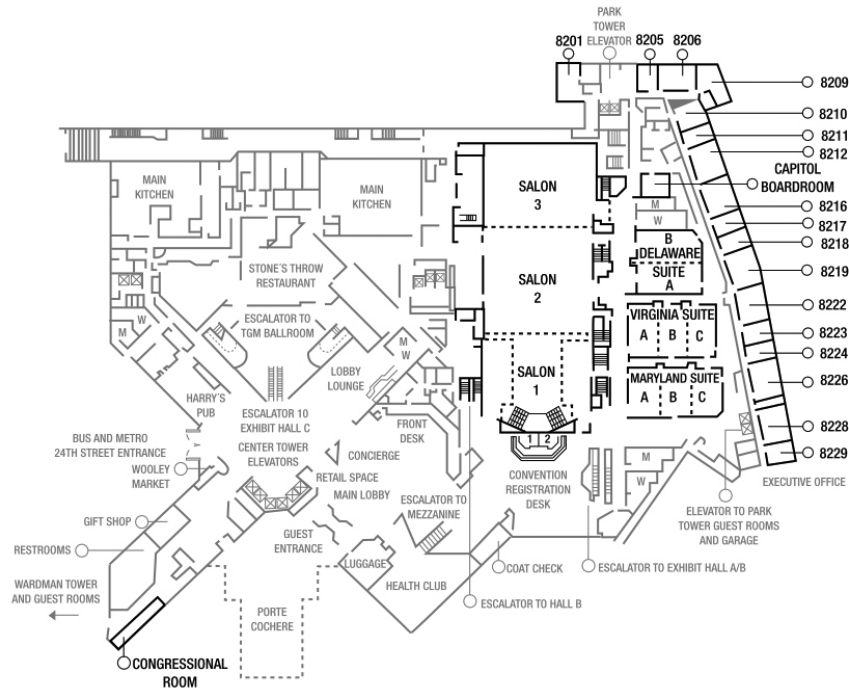


WiFi Sponsor

Exhibit Hall Map

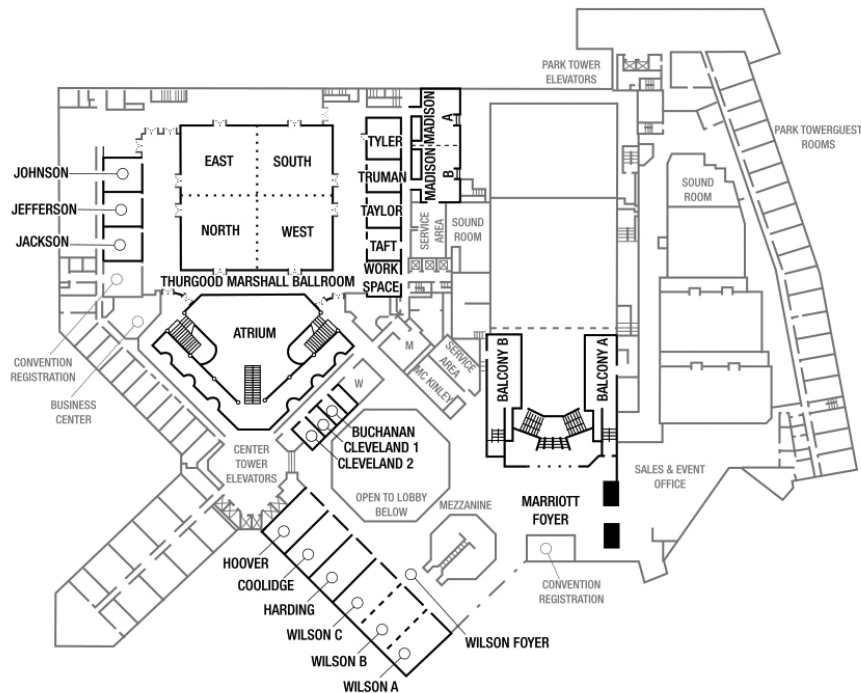
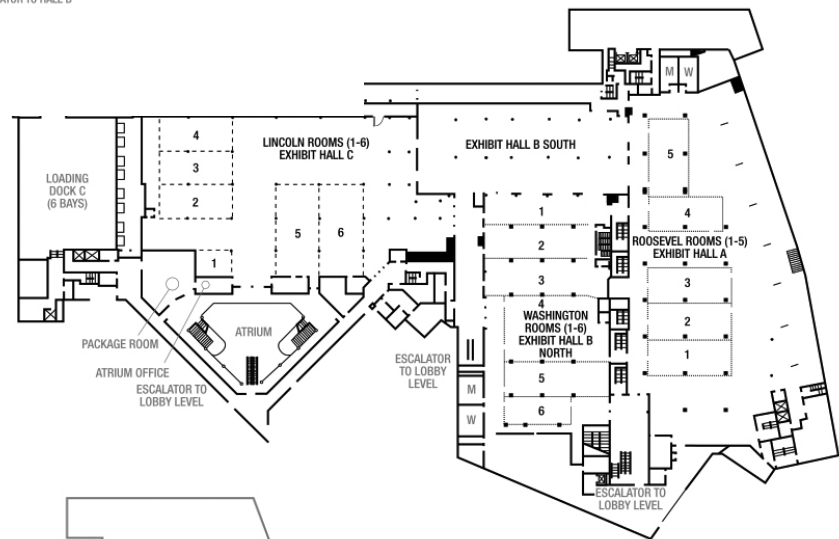


Hotel Floor Plans



◀ Lobby Level

Lower Level ▶



◀ Mezzanine Level

Index by Topic Area

Current and Prospective Donor Research

- Portfolio Values: Expanding the Art and Science of Solicitation.....22

Digital Philanthropy

- Bringing Your Foundation into the Digital Age: How to Raise Real Money Online..... 20

Educating the Board

- Enhance Board Impact & Create a Better Board Experience.....17
- Secure Your Hospital's Vision and Future with Philanthropy..... 18

Emerging Trends/Practices

- Bigger, Better, Smarter: Using Data-Driven Fundraising to Guide Strategy..... 20
- From Action to Value: The Future of Corporate Philanthropy..... 18
- Fundraising for Population Health..... 21
- Fundraising from Culturally Diverse Donors: How to Sensitively Cultivate New Americans and New Canadians From South Asia, China, and Africa..... 21
- Magic Happens: Campaigns, Estate Gifts, and Donor-Focused Philanthropy.....22
- Making the Most of Your Technology Investments.....22
- Reach New Fundraising Levels.....22
- The Perennial Millennial Conundrum: How to Reach this Elusive Prospect Base..... 24
- Transforming Your Donor Concierge Stewardship Program Into a Cultivation Machine..... 18
- Using Data for True Impact..... 19
- Vision 2020: Designing Impactful Campaigns in the Context of a Changing Healthcare Landscape..... 23
- What Do Millennial Millionaires Want?..... 24

- When Traditional Methods Fall Short: Creative Ways to Build the Mid-Level Major Gift Pipeline..... 24
- Work Smarter, Not Harder: Integrated Donor Pipeline Development for Optimal Results 23

Employee Engagement and Giving

- Keys to Successful Employee Giving Campaigns in an Integrative Health System 21

Grateful Patients

- From Blah to Blazing: How We Upped Our Grateful Patient Fundraising Game..... 21
- Grateful Patient Programs: The Next Generation 21

Leadership and Management

- A Lifetime of Fundraising: Lessons Learned Along the Way..... 23
- 3 CPOs: Learnings from Chief Philanthropy Officers..... 19
- Building a Community for Philanthropy Through Generative Leadership.....17
- Crisis Averted! Being Nimble and Strategic.....17
- It's Personal: Connecting the Dots Between Philanthropy, Business Development and the Patient Experience 21
- Lessons Learned from a Panel of 40 Under 40 Awardees..... 24
- The Value of a Fresh Perspective: The When and the Why of Hiring a Consultant or Your Organization 23

Managing Affiliations

- Integration of Fundraising Efforts Across a Hospital System with Multiple Partner Hospitals: Lessons Learned (and Still Learning) 21

Planned Giving

- What You Need to Know About Planned Giving: When Planned Giving Is Not All You Do®..... 24

Relationship Building

- Artificial Intelligence and Major Gift Fundraising.....17
- Breakthrough Fundraising: How Marketing and Fundraising Can Work Together to Drive Results 20
- Leveraging the Power of Private Philanthropy.....22

Small Shop

- Achieving Record-Breaking Levels of Physician Giving 20
- Riches in the Niches 18

Stewardship

- 8 Great Ideas: Raising the Bar with Innovative Donor Stewardship..... 19

Systemization

- Launching a Systemwide Comprehensive Campaign: A Case Study About Alignment and Integration 18
- To Integrate or Not: A System Approach to Philanthropy 18

Talent Management

- Building Exceptional Teams 20

Transformational Giving

- Beyond Cocktail Parties and Board Seats: Reinventing Your Principal Gifts Program.....17
- How We Built This: The Transformational Blended Legacy Gift..... 23
- Securing Transformational Gifts for Behavioral Health Fundraising22

Volunteer

- Spring Board: Elevating Your Board's Impact on Your Bottom Line..... 18

AHP > EVENTS

ONSITE SPECIAL

2020 AHP INTERNATIONAL

Meet us in Austin.

If you're reading this at 2019 International, you're eligible for a discounted pre-registration rate for next year's AHP International Conference on October 21 - 24, 2020. And who doesn't love a good discount?

Directions: In order to receive this discount, fill out this form in its entirety and submit it with your payment **no later than November 29, 2019**. You can drop off this form at the AHP Membership booth and we'll invoice you for payment. Or mail this form and a check to: Association for Healthcare Philanthropy, 2550 South Clark Street, Suite 810, Arlington, VA 22202.

ATTENDEE INFORMATION

FULL NAME

OFFICE PHONE

NICKNAME (OPTIONAL)

CELL PHONE

TITLE

EMAIL (REQUIRED)

ORGANIZATION NAME

☐ I require special assistance and/or have special dietary needs, described here:

ORGANIZATION STREET ADDRESS

CITY

STATE/PROVINCE

ZIP CODE

☐ I'd like to learn more about how to get involved with AHP

☐ I'd like to receive information about membership benefits

FORM CONTINUES ON BACK >

REGISTRATION FEE

- ☐ AHP Member: \$699
- ☐ Non-member: \$1,099

PAYMENT INFORMATION

- ☐ My check is enclosed for the amount checked above
- ☐ Please charge my credit card below for the amount checked above

NAME AS IT APPEARS ON CARD

- ☐ VISA ☐ Mastercard ☐ AMEX

CARD NUMBER

EXP. DATE CVC BILLING ZIP CODE

SIGNATURE

DATE SIGNED

Thanks for your interest in attending next year's AHP International Conference! If you have any questions, don't hesitate to reach out to our meetings department at meetings@ahp.org or call 703-532-6243. See you soon!

To see a full explanation of AHP's registration policies, visit ahp.org/terms.

Registration forms will not be processed without payment. All credit card payments will be processed in U.S. funds. All cancellation requests must be submitted to meetings@ahp.org by September 4, 2020. If the registration is cancelled in writing by this date, the registration fee less \$125 cancellation fee will be processed. After September 4, 2020 no refunds will be made for cancellations.

For your convenience, payment for conference registration, exhibitor, sponsorship payments may be made to AHP by mail, phone, fax, or through AHP's website. AHP will not be responsible for any damages or loss incurred by you if you choose to send payment information (including, without limitation, credit card information) to AHP by way of mail or email. You therefore accept sole responsibility for any damage or loss resulting from your use of such communication methods. Please review our Privacy Policy found at ahp.org/privacy for a summary of our practices related to the collection and use of personal information.

By registering, you grant AHP, its representatives, and employees the right to take photographs and/or videos of you and your property to copyright, use, and publish in print and/or electronically. You also agree that AHP may use such photographs with or without your name and for any lawful purpose, including but not limited to such purposes as publicity, illustration, advertising, email, social media, and web content. If you wish to opt-out of any photographs, please contact meetings@ahp.org.



Association for Healthcare Philanthropy
2550 South Clark Street, Suite 810
Arlington, VA 22202
(P) 703-532-6243
(F) 703-532-7170

Membership inquiries: membership@ahp.org
Conference inquiries: meetings@ahp.org
Media inquiries: communications@ahp.org

blackbaud®



Liz Smith,
Annual Giving Manager,
Cincinnati Children's
Hospital Medical Center®

ENGINEERED *for* MOUNTAIN-MOVERS

Millions of individual change agents, like Liz Smith at Cincinnati Children's Hospital Medical Center, and more than half of the philanthropic organizations supporting America's top hospitals choose Blackbaud, because we're the only company with solutions specifically engineered to transform how healthcare leaders drive impact. After all, they know that giant strides for healthcare and their organizations happen with help from the right solutions. *Join them.*

blackbaud.com/who-we-serve/healthcare-organizations



2020 Conferences and Events

Join us for one of our events in 2020!

You can reserve your spot by visiting the Membership Booth in the Exhibit Hall, or online at AHP.org. Be sure you're subscribed to our emails so you don't miss any updates!

- **Leading Forward** March 31–April 2, Chicago
- **Convene Canada** May 20–22, Toronto
- **Madison Institute** July 12–17, Madison
- **International** October 21–24, Austin

For membership questions, email:
membership@ahp.org

To register for events, email: meetings@ahp.org

 **@AHPIntl #AHP20**



Association for Healthcare Philanthropy
2550 South Clark Street
Suite 810
Arlington, VA 22202
(703) 532-6243