

GADP and SCHSHFD Presents SAILING TO SUCCESS



Sonesta Resort
Hilton Head Island, SC
July 20-22, 2022



SCHEDULE AT A GLANCE:

Wednesday, July 20

9:00 am Registration

9:30am- 10:30am Fire Up Your Board for Fundraising: Turn Their Passion into Action
Gail Perry, Associates Philanthropy Consultants

Join board expert coach Gail Perry to learn how to awaken your board members' passion and engage their help in fundraising. It IS possible to have them opening doors for you everywhere they go. When you work with trustees to change their attitudes and you tell them they don't have to solicit, then they often happy to help open doors to new prospects.

Gail will show you proven ways to educate your board about fundraising – ways that will shift attitudes, bring fundraising alive and create excitement and buy-in. You'll learn some high-impact exercises that will help motivate and inspire your board members. You'll learn practical ways to tap their fundraising potential and activate their enthusiasm for all aspects of fundraising - finding friends, donors and spreading the good word about their vision for a better community. Join us to discover new strategies for getting much, much more out of your board members and their contacts.

10:45am-11:45am Big Data and Artificial Intelligence Profoundly Benefit Philanthropy
Clint Hauger, Gobel Group

If you could leverage the latest technologies to model every single patient that came through your doors with minimal effort to find the top 3% percent likely to make a gift, would you? How about if you could spend less time "in" the data and more time connecting and building relationships with those patients that are most likely to give, would you? The good news is that you can as rapid progress has been made in clinical analytics over the years. With techniques using big data and artificial intelligence, the philanthropy landscape has radically changed for the better.

During this session you will learn about the latest modeling trends advancing healthcare philanthropy. Gratitude to Give (G2G) puts the patient experience first and utilizes patient data, patient satisfaction scores, fundraising data, wealth data, and other activity data to predict and segment patient populations. The results are presented back in a user-friendly modern-day business intelligence platform, so you can easily identify your best major, leadership annual, and annual giving prospects.

See how big data and AI have profoundly benefited fundraising efforts and how you too can benefit. The session will be led by Jenny Kleintop of Gobel. She will discuss how this powerful tool can be leveraged to increase gift officer effectiveness, elevate annual giving programs, measure the impact of prioritizing names by gratitude scores, and drive revenue and efficiency. At the conclusion of this session, participants will be able to:

1. Understand the evolution of using big data and artificial intelligence in philanthropy efforts.
2. Leverage technology and existing data to identify your best philanthropic prospects.
3. Discover how you can view all your patients at a moment's notice and know if they are likely to make a gift.

11:45am-1:30pm Lunch: Updates from SCHA and GADP

Thorton Kirby, President and CEO of the South Carolina Hospital Association
Keri Conely, GHA General Counsel and Sr. VP of Healthcare Policy

1:45pm- 2:45 pm The Roadmap for a Highly Profitable Major Gift Program

Gail Perry, Associates Philanthropy Consultants

Major gift fundraising is changing. Whether you are just starting a major gift program or want to enhance your current program, this session will help you develop an organized plan based on both the art and science of fundraising. You'll learn how to interpret data information (screening, gift history, contact reports, etc.) to find the high-value donor prospects in your database. You'll discover how to:

- Quantify and manage your major gift prospect portfolio,
- Create effective, actionable cultivation strategies that result in major gifts.
- Incorporate structure, metrics and accountability into the often-fuzzy major gift process.

You'll learn the five principles for discovering and qualifying a major gift donor today. From developing donor journey maps, to building donor profiles, you'll learn practical and relevant information you can immediately use to help max out your giving potential.

3:00pm- 4:00 pm Socially Relevant: Don't Become a Digital Castaway

Linda Mosely, Co-Founder and CEO of 365 Total Marketing

This session will teach you how to build an effective digital content strategy for success by asking all the correct questions.

4:15pm-5:15 pm Perspectives on a Career in Health Care Philanthropy

Bill Littlejohn, SVP and CEO of SHARP Healthcare Foundation

With a career of more than 35 years, Bill Littlejohn will provide perspectives on several important elements that go into a career in health care philanthropy:

- The value of tenure
- Collegial relationships and best practice sharing
- Strategic institutional alignment and philanthropy as investment vs need
- The dynamics of physician engagement and grateful patient philanthropy
- "Platforming Philanthropy" over time to elevate the production and sophistication of the fundraising program
- Professional development of team members
- Philanthropy in a New Era – E-Philanthropy, virtual work and engagement

5:30pm- 6:30 pm Cocktail Reception

Thursday, July 21

8:00am-9:00am Networking Breakfast with the vendors

9:00am-10:00am How to Connect with Donors and Motivate Gifts

Barry Spencer, Donor Motivation

Planned Giving messages are often complex and confusing for the donor, which can push away even some of the most qualified donors. Development professionals must be in front of more potentially qualified and interested donors, and they must engage donors so that donors want to have a conversation about planned giving. This session provides the simple and effective planned giving language and message that connects with donors, and the cost-effective marketing that reaches a wider group of donors, providing the donor-centric message keys, and how to deliver them so donors understand and take interest and action.

10:15am-11:15am Selling Success by Building Trust through Ethics and Transparency.

Teresa Abell and Michael Hardin, Synovus

Trust in the nonprofit organization is essential to relationships with the public and donors, and ethics is the foundation for building that trust. We would speak on how an ethical foundation impacts all aspects of the nonprofit organization, including earning public trust, advancing the mission, attracting donors, board members, and new talent, encouraging giving, and remaining compliant with governmental regulations.

11:30am- 12:30pm A Comprehensive Approach to Physician Engagement and Grateful Patient

Philanthropy

Bill Littlejohn, SVP and CEO of SHARP Healthcare Foundation

For two decades, the Foundations of Sharp HealthCare in San Diego have implemented a strategic approach to physician engagement and grateful patient philanthropy. The result has been hundreds of physicians actively engaged in philanthropy; 60,000 Guardian Angel recognitions of caregivers; and some \$400 million in philanthropy revenues; much of it as a result of ally relationships and the gratitude of patients and families. The session will the mechanics of a comprehensive approach to physician engagement and grateful patient philanthropy -- caregiver recognition; identification, screening and research; grateful patient referrals; and MOVES management, stewardship, and the managing the roles of physicians in the philanthropy program.

12:30pm-1:30pm Roundtable Lunch Discussion

2:00pm-3:00 pm How a Capital Campaign Transformed a Mid-Sized Hospital

Jessica Browning, Winkler Group

A case study that explores how a capital campaign is transforming a mid-sized Texas hospital system, through new facilities, new patient service lines, improved patient satisfaction, and more long-term financial support while cementing the legacy of the hospital's new CEO.

3:00pm Family Time

Friday, July 22

8:00-9:00 Networking Breakfast with the vendors Breakfast/Business Meeting

9:05-10:00 Simple Sustainability

Steve Winesett, BrookGlobal

Steven Dasher, Piedmont Athens Regional Foundation

Step outside the whirlwind of the day and consider the habits, rhythms, and cadence of sustaining both your professional life and your institution's philanthropic revenue stream. Strong, resilient philanthropy professionals are more productive for their organizations and persevere more gracefully through today's constant challenges.

Don't be fooled, this is not a melodramatic, mushy-feely session; it is a practical approach toward sustaining your personal wellbeing and growing philanthropic investment.

Two seasoned professionals will lead a discussion utilizing simple questionnaires to unearth personal adjustments you can make in your daily habits and routines to strengthen yourself and your institution's philanthropy.

10:15-11:00 When Fate Knocks You Down, Faith and Friends can pick You Up

Billy, Kelsey and Annie Nichols, Annie Banannie Foundation
Dr. Ramin Eskandari, Pediatric Neurosurgery, MUSC Charleston

“The Annie Banannie Foundation was created by Kelsey and Billy Nichols alongside the MUSC Foundation. The Annie Banannie Foundation started this event to raise money for Traumatic Brain Injury Research in Pediatrics at MUSC Children’s Hospital. On July 1st, 2017, Annie Nichols suffered a Traumatic Brain Injury and was airlifted to MUSC. The team in place was able to save her life because of the education and research that was placed before them prior to her accident. We owe everything to the incredible Doctors at MUSC. By helping fund research for brain injuries in children, our doctors will be better equipped to save other children’s lives.”

11:10-12:00 Leveraging data to create actionable insights - the power of Salesforce to ignite your fundraising!

Sterrin Bird, Senior Director, Nonprofit Industry Advisor, Salesforce
Nicole Adair, Principal Solution Engineer

Come join us to learn about how to use one of your greatest assets, your data, to make the most of your fundraising efforts and help your team work smarter. We’ll share:

- how you can make the most of your prospect lists and grateful patient campaigns by focusing on the right donors
- how you can harness the power of artificial intelligence and automation
- how to use and visualize data so you can make real-time decisions about your fundraising strategies.

Let technology do some of the heavy lifting for your team to ignite your fundraising and boost your bottom line!

12:15-12:30 Closing Comments

****All speakers and topics are subject to change.***

6.16.22

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Hotel Information:

Sonesta Resort 130 Shipyard Dr. Hilton Head Island, SC 29928

For hotel reservations, please contact the Sonesta Resort directly at (843) 842-2400, or 1800-766-3782 or use the online reservation link below. Reference the conference name: South Carolina Hospital Association 2022 Fund Developers Meeting **071922SCHA** in order to receive the discounted room rates. Deadline to reserve hotel rooms is June 28, 2022. If you need assistance with registration or have a question about hotel reservations, please contact Kim Wooten at (803) 796-3080 or kwooten@scha.org Room rate is \$249 ++ a night. these rates are available 2 days prior to & 2 days after the meeting. Check in time is 4 pm on day of arrival, check out time is before noon on day of departure.

<https://be.synxis.com/?adult=1&arrive=2022-07-19&chain=5157&child=0¤cy=USD&depart=2022-07-23&group=071922SCHA&hotel=56762&level=hotel&locale=en-US&rooms=>

Registration & Fees:

To register for this or other meetings, visit the [SCHA web calendar of events](#). Select this event, to view the schedule at a glance. Online registration will be available soon. If you need an invoice before registration opens, please email Kim Wooten at kwooten@scha.org.

Registration fee (\$200 members; \$300 non-members) includes admission to program events, session materials and scheduled meal functions. To receive the early bird discount, registration must be received by SCHA prior to June 24, 2022. After this date, fees increase by \$50 per person. All attendees and guests must be registered for this meeting. Guest Fees are \$75 (children 12 and under are free).

SUBSTITUTION/REFUND/CANCELLATION

Any registrant who cannot attend may send a substitute from the same organization by emailing Kim Wooten at kwooten@scha.org. The registration fee (less \$25 processing fee) is refundable if SCHA is notified of the cancellation no less than 14 days prior to the conference. No refunds will be issued past this time. No refunds will be issued for no-shows.

SPECIAL DIETARY NEEDS

If you have any special dietary needs, please contact Kim Wooten at 803-744-3527 or kwooten@scha.org.