

LEADERSHIP RETREAT 2025

AGENDA

FEBRUARY 4+5 | AMELIA ISLAND | FLORIDA

Day One FEBRUARY 4

7:30 a.m. BREAKFAST

8:30 a.m. WELCOME

8:40 a.m. **OPENING PLENARY: Navigating Trends Shaping Health Philanthropy's Next Big Moves**
Speaker: Betsy Chapin Taylor

9:35 a.m. **Keys to Deepening Connection (Part 1)** with Michael Beall

9:45 a.m. BREAK

<p>10:00 a.m. Track One: Strategy and Innovation</p> <p>Four Levers to Building Bigger, Bolder and Better Campaigns with Heather Wiley Starankovic, John Donovan and Michael Beall</p>	<p>Track Two: Advancing Philanthropy</p> <p>The Next Frontier in Harnessing Gratitude and Clinician Engagement with Erin Stitzel, Debbie Ferguson, Scott Rosenkrans, Associate VP of DonorSearch Ai, Linda Roszak Burton and Susan Attwell</p>	<p>Track Three: The CEO Corner</p> <p>Accelerating Philanthropy as a High ROI Revenue Source for Health Care with Nathan Chappell, Senior VP of DonorSearch Ai, Lori Counts and Betsy Chapin Taylor</p>
<p>12:00 p.m. SOCIAL LUNCH</p>		
<p>1:00 p.m. Track One: Strategy and Innovation</p> <p>Building a Culture of Curiosity: An Organization's Superpower in the Age of AI with Nathan Chappell, Senior VP of DonorSearch Ai</p>	<p>Track Two: Advancing Philanthropy</p> <p>Donor-Advised Funds: The Future of Philanthropy is Here with John Donovan, Cindy Reynolds and James Gold</p>	
<p>2:15 p.m. BREAK</p>		
<p>2:30 p.m. Navigating Your AI Transformation with Scott Rosenkrans, Associate VP of DonorSearch Ai</p>	<p>Activate Your Storytelling Potential: An Action Guide to Maximize Storytelling with Michael Beall</p>	
<p>3:30 p.m. ADJOURNMENT</p>		
<p>6:30 p.m. SOCIAL DRINKS</p>		
<p>7:00 p.m. DINNER</p>		

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Day Two FEBRUARY 5

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

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

8:00 a.m. BUZZ SESSIONS

- Partnership and Resilience: Navigating through Clinician Burnout with Sarah Burdi and Susan Attwell
- Find Funding to Address Health Disparities in Disadvantaged Communities with Cindy Reynolds
- Partnership and Stewardship: The Benefit of Expressing Gratitude to Your Donors with Linda Roszak Burton
- Nike & Apple / Taco Bell & Doritos / Your Organization & the Community Non-Profit with Amy Dorrill
- What You Must Do Now and Next to Ensure Your Database is HIPAA Compliant with Debbie Ferguson
- Building a Planned Giving Culture with Minimal Resources with James Gold

9:00 a.m. WELCOME

9:05 a.m. Keys to Deepening Connection (Part 2) with Michael Beall

9:15 a.m. KEYNOTE: **Overcoming the Competition for Connection**

Speaker: Nathan Chappell, Senior VP of DonorSearch Ai

10:15 a.m. BREAK

10:45 a.m. **Track One:** Strategy and Innovation

Redefining Volunteer Leadership: Unleashing Influence Beyond the Boardroom

with Betsy Chapin Taylor and Lori Counts

Track Two: Advancing Philanthropy

Philanthropy, Grants, Government Relations and Community Benefits, Oh My!

with Amy Dorrill

12:00 p.m. BREAK

12:15 p.m. POWER LUNCH: **Implementing AI for Social Good**

Speakers: Nathan Chappell, Senior VP of DonorSearch Ai and Scott Rosenkrans, Associate VP of DonorSearch Ai

1:15 p.m. CLOSING PLENARY: **Key Takeaways and Considerations**

Speaker: Pamela Ronka Maroulis

1:45 p.m. Keys to Deepening Connection (Part 3) with Michael Beall

1:55 p.m. CLOSING REMARKS

2:00 p.m. CONFERENCE ADJOURNMENT



Full participation in the 2025 Leadership Retreat is applicable for 9.5 CE points in Category 1.B-Education of the CFRE International application for initial certification and/or recertification.