

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

10:00 a.m. **Track One:**
Strategy and Innovation
Four Levers to Building Bigger, Bolder and Better Campaigns
with Heather Wiley Starankovic, John Donovan and Michael Beall

Track Two:
Advancing Philanthropy
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

12:00 p.m. **POWER LUNCH: 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

1:30 p.m. **Track One:** Strategy and Innovation
Building a Culture of Curiosity: An Organization's Superpower in the Age of AI
with Nathan Chappell, Senior VP of DonorSearch Ai

Track Two: Advancing Philanthropy
Donor-Advised Funds: The Future of Philanthropy is Here
with John Donovan, Cindy Reynolds and James Gold

2:45 p.m. BREAK

3:00 p.m. **Navigating Your AI Transformation**
with Scott Rosenkrans, Associate VP of DonorSearch Ai

Activate Your Storytelling Potential: An Action Guide to Maximize Storytelling
with Michael Beall

4:00 p.m. ADJOURNMENT

6:30 p.m. SOCIAL DRINKS

7:00 p.m. DINNER

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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

with 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.