Grateful Patient Fundraising Workshop for Development Staff and Privacy Officers  
Grand Hyatt, Dallas-Fort Worth Int’l Airport (DFW)  
December 12, 2012 · Dallas, TX

8:15-9:00 am  Breakfast

9-9:10  Introductions and Workshop Goals

9:10-9:30  National Overview of Grateful Patient Fundraising  
GG+A’s Bob Alsobrook has worked with a number of AAMC member institutions to develop and refine grateful patient programs. The AAMC Annual Development Survey, analyzed in part by GG+A, has begun to collect some data on programs and measures. Bob will provide an overview of grateful patient initiatives and detail some of the consistent practices.

Speaker:  
G. Robert Alsobrook  
Senior Executive Vice President and Managing Director  
Grenzebach Glier and Associates (GG+A)

9:30- 11:15  Privacy Officers and Development Staff Partnering for Success—Three Case Studies  
You may have heard the saying, “If you’ve seen one academic medical center, you’ve seen one academic medical center”. The same could possibly be said of grateful patient fundraising programs. But, successful programs have at least one commonality—the development office and the privacy office have partnered and collaborated on the program’s development, operations, and refinements.

In these three case studies, you will hear how each institution has succeeded in developing relationships and systems that meet a core requirement—alignment of the goals and desires of the patient, development office and the privacy office.

Case Study #1—Vanderbilt University Medical Center (9:30-10 )

Speakers:  
Eric Rhinehardt  
Executive Director of Giving Programs  
Vanderbilt University Medical Center

Gaye Smith  
Chief Patient Experience and Service Officer  
Vanderbilt University Medical Center
10:00-10:15  **Break**

**Case Study #2—Robert W. Woodruff Health Sciences Center, Emory University** (10:15-10:45)

**Speakers:**
Anne Adams  
Chief Compliance Officer, Emory Health Care/Emory Medical Center  
Compliance Officer, Office of the Executive Vice President  
Robert W. Woodruff Health Sciences Center  
Emory University

B. Alexander Brown  
Senior Director of Development  
Robert W. Woodruff Health Sciences Center  
Emory University

Margery R. McKay  
Vice President for Development  
Robert W. Woodruff Health Sciences Center  
Emory University

**Case Study #3—UCLA Medical Center** (10:45-11:15)

**Speakers:**
Marti Arvin  
Chief Compliance Officer  
UCLA Healthcare

Steve Jennings  
Assistant Vice Chancellor for Development  
University of California, Los Angeles David Geffen School of Medicine

Marcia Shackelford  
Executive Director for Health Sciences Development  
UCLA Hospital System

11:15-Noon  **Table Discussions – privacy and development officers**  
Our speakers will be available to facilitate discussions at each table. Come prepared to talk about the current status of your grateful patient initiatives and what issues may be holding you back from building a more robust program.

Noon-1 pm  **Lunch Discussions**  
During our lunch break, we will ask everyone to take a seat at a different table so you have a chance to exchange ideas, best practices and lingering concerns.
1:30 pm Recap of Morning and Lunch Discussions—Panel Q&A

Discussion Leader:
Robert G. Alsobrook
Senior Executive Vice President and Managing Director
Grenzebach Glier and Associates (GG+A)

1:30-2:30 Concurrent Sessions
Session A—Privacy Officers: An informal, candid discussion about Privacy Breaches

Discussion Leader:
Iris Mauriello
Corporate Compliance Integrity/Privacy Officer
University of Connecticut Health Center

Session B—Development Officers

Discussion Leaders:
B. Alexander Brown
Senior Director of Development
Robert W. Woodruff Health Sciences Center
Emory University

Margery R. McKay
Vice President for Development
Robert W. Woodruff Health Sciences Center
Emory University

Getting Institutional Buy-in for the Grateful Patient Program and Keeping It
Enlisting physicians and ensuring proper training
Keeping everyone informed

Operations
Identifying Prospective Grateful Patients/Wealth Screening
Patient Facilitated Services/Special Access Programs
Direct Mail Programs

2:30-2:45 Break

2:45-3:30 Concurrent Sessions
Session A—Privacy Officers
OCR Audits: How to Prepare and Lessons Learned from Living under an OCR Resolution Plan

Michael (Mac) H. McMillan
Chief Executive Officer
CynergisTek, Inc.

Marti Arvin
Chief Compliance Officer
UCLA Healthcare

**Session B—Development Officers**

**Staffing**
Fundraising with Non-faculty Physicians
Pitfalls and How to Avoid Them—Case Studies Lessons Learned
Measuring Results—How will we know if we are succeeding? What are the metrics that should be used?

**Discussion Leaders:**
Steve Jennings
Assistant Vice Chancellor for Development
University of California, Los Angeles David Geffen School of Medicine

Eric Rhinehardt
Executive Director of Giving Programs
Vanderbilt University Medical Center

Marcia Shackelford
Executive Director for Health Sciences Development
UCLA Hospital System

3:30 pm  **Adjourn**