



MedFund 2016 – Charleston, SC – July 13-15



Wednesday, July 13, 2016		
Attendees will be arriving at Embassy Suites throughout the afternoon		
4:00pm-6:00pm	Check-in and Registration: wear school colors/logo items	Hotel Lobby
1:00pm-6:00pm	Sponsor Set-Up	Citadel North
6:00pm-7:00pm	Meet for Cocktails: Complimentary for hotel guests	Hotel Lobby Bar
7:00pm-9:00pm	Chucktown Throwdown Sponsor Presentations <ul style="list-style-type: none"> <li>iDonate and Perrone Group</li> </ul>	Carolina Ale House Bar and Patio
Thursday, July 14, 2016		
6:30am-8:30am	<b>Registration</b>	Hotel Lobby
6:30am-9:00am	<b>Breakfast:</b> Complimentary for hotel guests	Tobacco Road Restaurant
9:00am-10:30am	<b>Welcome and Opening Session</b> <ul style="list-style-type: none"> <li>Welcome by MedFund 2016 Team</li> <li>Welcome by COM Associate Dean for Development</li> <li>Opening Session</li> </ul>	Colonial Ballroom
9:00am-9:10am		
9:10am-9:20am		
9:20am-10:30am		
10:30am-10:45am	<b>Break and Visit Sponsors</b>	Ballroom Foyer/Citadel North
10:45am-11:45am	<b>Breakout 1A:</b> Reunion Giving: If They Don't Come, They Won't Give ( <i>Session Leaders Below</i> ) <ul style="list-style-type: none"> <li>Jared Longmore, University of Rochester Medical Center</li> <li>Jill Malley, Duke University School of Medicine</li> <li>Katrina Roth, University of Minnesota Foundation</li> </ul>	Colonial East
OR		
10:45am-11:45am	<b>Breakout 1B:</b> Grateful Patients: How Best to Qualify and Solicit ( <i>Session Leaders Below</i> ) <ul style="list-style-type: none"> <li>Jane Ferrone, Columbia University Medical Center</li> <li>Jessica Pursley, Fund for Johns Hopkins Medicine</li> <li>Sue Sopa, Duke Medicine</li> <li>Tom White, Penn Medicine</li> </ul>	Colonial West

Thursday, July 14, 2016 Continued		
12:00pm-1:30pm	<b>Lunch: Welcome to the Coast</b> Sponsor Presentations <ul style="list-style-type: none"> <li>• MCR, MDF Instruments and Blackbaud</li> </ul>	COAST Bar and Grill
1:30pm-2:45pm  OR	<b>Breakout 2A: It Takes Two: Collaborations for Success (Session Leaders Below)</b> <ul style="list-style-type: none"> <li>• Rhonda Banks, Augusta University/Office of Advancement</li> <li>• Jennifer Dettloff, University of Chicago, Medicine &amp; Biological Sciences</li> <li>• Allison Searson, The University of Vermont Foundation</li> </ul>	Colonial East
1:30pm-2:45pm	<b>Breakout 2B: What the Other Guys Do: Major Gifts, Planned Gifts, and Donor Relations (Session Leaders Below)</b> <ul style="list-style-type: none"> <li>• Tina Baggott, August University/Office of Advancement</li> <li>• Jason Bouck, Duke University School of Medicine</li> </ul>	Colonial West
2:45pm-3:00pm	<b>Break and Visit Sponsors</b>	Ballroom Foyer/Citadel North
3:00pm-4:00pm  OR	<b>Breakout 3A: Student Giving in a Time of Extraordinary Debt (Session Leaders Below)</b> <ul style="list-style-type: none"> <li>• Amanda Bralley Ochs, Wake Forest Baptist Medical Center</li> <li>• Candace Gillespie, MUSC COM</li> </ul>	Colonial East
3:00pm-4:00pm	<b>Breakout 3B: Employee Annual Gift Campaigns: How to Energize Yours (Session Leaders Below)</b> <ul style="list-style-type: none"> <li>• Rhonda Banks, Augusta University/Office of Advancement</li> <li>• Elsa Knysak, Medical College of Wisconsin</li> <li>• Sherri Wilmoth, OSU Wexner Medical Center</li> </ul>	Colonial West
6:00pm-7:00pm	<b>Meet for Cocktails:</b> Complimentary for hotel guests	Hotel Lobby Bar
7:00pm-9:00pm	<b>Welcome to the South Dinner</b> Sponsor Presentations <ul style="list-style-type: none"> <li>• Alumni Finder/Accudata and MainSpring Media Communications</li> </ul>	Upstairs at Rue de Jean

Friday, July 15, 2016		
6:30am-8:30am	<b>Breakfast:</b> Complimentary for hotel guests	Tobacco Road Restaurant
8:30am-9:45am	<b>Group Session:</b> How to Love Them Back and Truly Show Appreciation to Donors <i>(Session Leaders Below)</i> <ul style="list-style-type: none"> <li>• Lori Apicella, University of Florida Health</li> <li>• Ashley King Snyder, Washington University in St. Louis</li> <li>• Kelly Messmer, UC Irvine</li> </ul>	Colonial Ballroom
9:45am-10:00am	<b>Break and Visit with Sponsors</b>	Ballroom Foyer/Citadel North
10:00am-11:15am  OR	<b>Breakout 4A:</b> Leveraging New Strategies <i>(Session Leaders Below)</i> <ul style="list-style-type: none"> <li>• Jennifer Dettloff, University of Chicago, Medicine &amp; Biological Sciences</li> <li>• Colleen Raminski, University of Chicago, Medicine &amp; Biological Sciences</li> </ul>	Colonial East
10:00am-11:15am	<b>Breakout 4B:</b> Open Forum Topics <i>(Session Leaders Below)</i> <ul style="list-style-type: none"> <li>• Becky Dornisch, MUSC Annual Giving</li> <li>• Candace Gillespie, MUSC COM</li> </ul>	Colonial West
11:15am-11:30am	<b>Break</b> (no refreshments)	
11:30am-12:30pm	<b>Lunch and Wrap Up/MedFund 2017</b> Sponsor Presentations <ul style="list-style-type: none"> <li>• Ruffalo Noel Levitz and Target Analytics</li> </ul>	Colonial Ballroom



*This conference would not be possible without the **generous** support of our wonderful sponsors!  
Please thank them when you meet them.*





## 2015 MedFund Conference Agenda

July 8 – 10, 2015

Durham, NC

<b>Wednesday, July 8, 2015</b>	
Attendees will be arriving at Durham Marriott throughout the afternoon	
4:00pm – 6:00pm	Check-In and Pick Up Your MedFund Conference Tote Bag (Hotel Lobby) Sponsor Booth Set-Up at Trent Semans Center
5:45pm	Meet in Hotel Lobby to walk to Tobacco Road
6:00pm – 9:00pm	<b>Group Dinner</b> at Tobacco Road   Sponsored by: <small>instruments</small>
Recommended Attire	Sport a school shirt, so we will know the school you represent
<b>Thursday, July 9, 2015</b>	
Recommended Attire for Conference	Business casual attire is recommended
7:45am	Bus arrives at Marriott (Meet in Hotel Lobby to Ride Bus)
8:00am	Bus departs from Durham Marriott to Trent Semans Center Driving Tour of Duke's East, West, and Medical Campus along the way
8:30am	Bus arrives at Trent Semans Center
8:30am – 8:50am	<b>Guided Tour</b> of Trent Semans Center
8:50am – 9:30am	<b>Breakfast and Opening Remarks</b> in the Great Hall of the Trent Semans Center   Sponsored by: <ul style="list-style-type: none"><li>• Welcome and Remarks from Duke Medicine Leadership <ul style="list-style-type: none"><li>○ <b>Sarah Nicholson</b>, Executive Director, Duke University School of Medicine Development and Alumni Affairs</li><li>○ <b>Ellen Medearis</b>, Vice President, Duke Medicine Development and Alumni Affairs</li><li>○ <b>Nancy C. Andrews, M.D., Ph.D.</b>, Dean, Duke University School of Medicine</li></ul></li></ul>

	<p>Vice Chancellor for Academic Affairs, Duke University  Nanaline H. Duke Professor of Medicine  Professor of Pediatrics  Professor of Pharmacology and Cancer Biology</p> <ul style="list-style-type: none"> <li>Attendee Introductions</li> </ul>
9:30am – 10:45am	<p><b>Group Session – Creating a Culture of Philanthropy (Great Hall Side A)</b></p> <ul style="list-style-type: none"> <li><i>Joscelyne Brazile, Assistant Director of Development, Medical Education, UNC School of Medicine</i></li> <li><i>Sue Sopa, Executive Director, Annual Giving Strategy and Market Development, Duke Medicine Development and Alumni Affairs</i></li> </ul>
10:45am – 12:00pm	<p><b>Breakout Sessions:</b></p> <ul style="list-style-type: none"> <li>Retention, Reacquisition, and Upgrading Strategies of Grateful Patients <b>(Great Hall Side B)</b> <ul style="list-style-type: none"> <li><i>Sara Wajda, Director of the Duke Cancer Fund, Duke Cancer Institute</i></li> </ul> </li> <li>Upgrade Strategies and Reoccurring Gift Programs <b>(Great Hall Side A)</b> <ul style="list-style-type: none"> <li><i>Bari Becker, Assistant Director of Development, USF Health, University of South Florida</i></li> </ul> </li> </ul>
12:00pm	Walk to Searle Center Lecture Hall
12:05pm – 1:15pm	<p>Lunch at Searle Center Lecture Hall – Sponsored by: </p> <p><b>Roundtable Discussions:</b></p> <ul style="list-style-type: none"> <li>Grateful Patient Initiatives – Mixing Mass Outreach and Personal Approaches</li> <li>Reunion Giving Strategies</li> <li>Engaging Alumni Leaders – Working with Alumni Boards and Committees</li> </ul>
1:15pm – 1:30pm	Walk back to Trent Semans Center and visit with sponsors and collect samples of direct mail materials from other schools
1:30pm – 2:45pm	<p><b>Breakout Sessions:</b></p> <ul style="list-style-type: none"> <li>Grateful Patient Special Appeals <b>(Great Hall Side B)</b> <ul style="list-style-type: none"> <li><i>Megan Smith, Senior Director, Annual and Special Giving, University of California, San Francisco</i></li> </ul> </li> <li>Partnering with Major Gift Officers, Integrating Major Gift Donors, and Annual Giving Support <b>(Great Hall Side A)</b> <ul style="list-style-type: none"> <li><i>Jennifer Dettloff, Director, Alumni Relations and Annual Giving, University of Chicago, Medicine &amp; Biological Sciences</i></li> </ul> </li> </ul>
2:45pm – 3:00pm	<b>Break</b> – visit with sponsors and collect samples of direct mail materials from other schools
3:00pm – 4:15pm	<p><b>Breakout Sessions:</b></p> <ul style="list-style-type: none"> <li>Recent Graduate Engagement Strategies – From Medical Students to House Staff <b>(Great Hall Side A)</b> <ul style="list-style-type: none"> <li><i>Candace Gillespie, Director of Development, Medical University of South Carolina College of Medicine</i></li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>Implementing Multi-Channel Communication (<b>Great Hall Side B</b>) <ul style="list-style-type: none"> <li><i>Lori Siegel, Director of Development, Annual Giving, University of Florida Health</i></li> </ul> </li> </ul>
4:15pm	Shuttle picks up attendees to return to hotel
4:30pm – 5:45pm	Hotel Arrival and Downtime
5:45pm	Meet in the lobby to walk to dinner
6:00pm – 9:30pm	<p><b>Group Dinner</b> at The Pit</p>  <p>Sponsored by:</p>
Recommended Attire	Casual, comfortable clothing
9:30pm	Walk to Fullsteam, Motorco, Geer Street Garden, or Surf Club or walk back to the Marriott Hotel for the evening
<b>Friday, July 10, 2015</b>	
Walk next door to the Convention Center (adjacent to the Marriott) – <b>Meeting Rooms 2 &amp; 3</b>	
8:15am – 9:15am	<p><b>Breakfast, Table Discussion, and Networking</b> at the Convention Center (<b>Meeting Rooms 2 &amp; 3</b>)</p>  <p>Sponsored by: <small>MARKETING COMMUNICATION RESOURCE</small></p> <p><b>Benchmarking Discussion</b></p> <ul style="list-style-type: none"> <li><i>Jennifer Dettloff, Director, Alumni Relations and Annual Giving, University of Chicago, Medicine &amp; Biological Sciences</i></li> </ul>
9:15am – 10:30am	<p><b>Group Session: Leadership Annual Giving Societies and Meaningful Stewardship (Meeting Rooms 2 &amp; 3)</b></p> <ul style="list-style-type: none"> <li><i>Allison Searson, Director of Annual Giving, Academic Health Sciences, UVM Foundation and UVM Medical Center</i></li> <li><i>Will Arvin, Director, Annual Giving, Tulane University School of Medicine</i></li> </ul>
10:30am – 10:45am	<b>Break</b> – visit with sponsors
10:45am – 12:00pm	<p><b>Breakout Sessions:</b></p> <ul style="list-style-type: none"> <li>Building a Streamlined Pipeline and Analysis/Predictive Modeling (<b>Meeting Room 2</b>) <ul style="list-style-type: none"> <li><i>Sherri Wilmoth, Director of Annual Giving Programs, The Ohio State University Wexner Medical Center</i></li> </ul> </li> <li>Strategic Segmentation of Grateful Patient Data Outreach (<b>Meeting Room 3</b>) <ul style="list-style-type: none"> <li><i>Katie Holland, Director, Annual Giving, UCLA Health Sciences Development</i></li> </ul> </li> </ul>
12:00pm – 1:15pm	<p><b>Lunch and Roundtable Discussions:</b></p> <ul style="list-style-type: none"> <li>Annual Giving Campaigns and Integrating with Alumni Relations</li> <li>Strategic Fundraising Supported by Technology</li> <li>Renewal Initiatives and Giving/Thanking Days</li> </ul>
1:15pm – 1:45pm	<p>Wrap Up and MedFund 2016 Discussion</p> <p>Safe travels!</p>