Grateful Patient & Family Programs Workshop  
November 29 – 30, 2017  
UT Health San Antonio  
7703 Floyd Curl Drive  
ALTC Room 2.205

AGENDA

**DAY ONE Wednesday, November 29**

10:00am – 12:00pm  
**Morning Session**  
Grateful Patient/Family Programs’ Environmental Landscape

- Challenges and Opportunities of Effective Programs
- The UT Landscape for Grateful Patient/Family Programs
- How to Manage HIPAA Compliance and 42 CFR (Mental Health and Dependency)
- Identifying the Opportunity
- Creating a Culture of Philanthropy

12:15pm – 1:00pm  
**Buffet Lunch**

1:00pm – 4:00pm  
**Afternoon Session**  
Developing the Appropriate Program for Your Facility

- Identifying and Building Partners
- Overcoming Resistance
- Deploying Development Resources
- Understanding Your Data
- Training Physicians and Development Teams
- Investing Strategically

5:00pm – 6:30pm  
**Networking Reception (optional)**

Aldo’s Ristorante Italiano is located on the corner of Fredericksburg Road and Wurzbach Road at:

8539 Fredericksburg Road  
San Antonio, Texas 78229  
(210) 696-2536

**DAY TWO Thursday, November 30**

8:30am – 12:00pm (Light breakfast from 8:30-9:00am, session starts at 9:00am)

Managing the Logistics of Implementation

- Accessing HIPAA-Compliant Data
- Managing the Flow of Data
- Deploying Actionable Data to Fundraising
- Principal, Major, and Planned Giving
- Annual Giving
- Managing Portfolios and Prospects
- Measuring Success