

**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**

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**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**

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**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