



# Build a Clinician Network to Resemble Your Donor Network:

*A Case Study in Achieving Exponential Growth in Service-Line Based Grateful Patient Giving*



# Today's speakers



**Taylor Baker, MBA, CFRE**  
SENIOR DIRECTOR OF  
DEVELOPMENT



**Lindsey Knarzer**  
SENIOR DIRECTOR OF  
DEVELOPMENT



**Erin Stitzel, FAHP, CFRE**  
PRINCIPAL CONSULTANT



**Vic Teschel**  
SENIOR DIRECTOR OF  
DEVELOPMENT



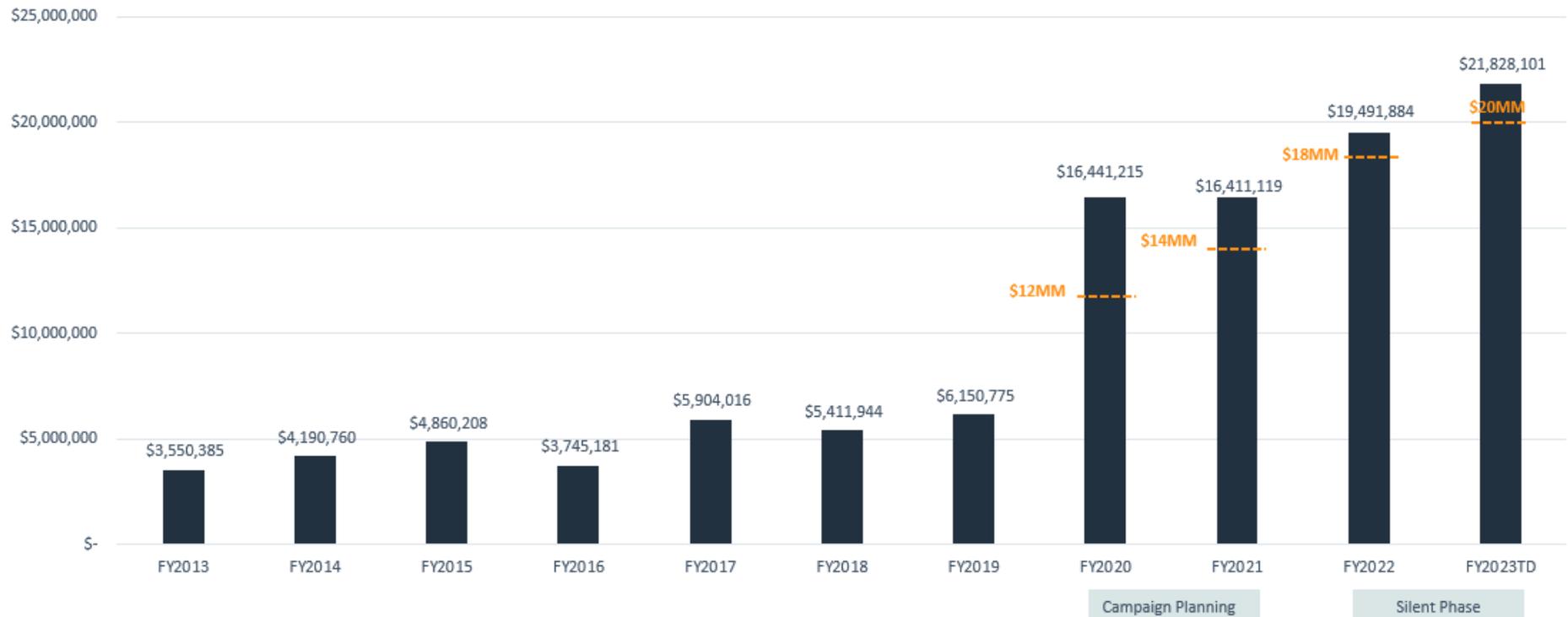
1. Life as a healthcare philanthropy officer...  
you now have 2  
portfolios!



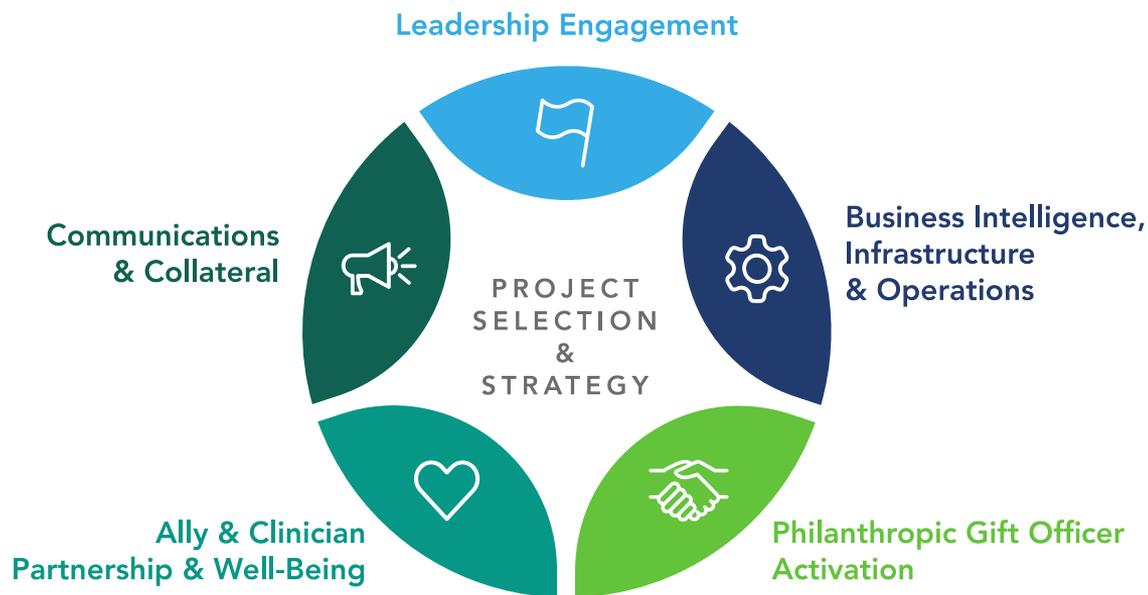


# Today's agenda

1. The tale of two portfolios
2. Getting started
3. Physician Partner selection & the importance of educating yourself
4. Advanced cultivation & stewardship of Physician Partners
5. Growth, expansion & sustainability
6. Results, success stories, lessons learned



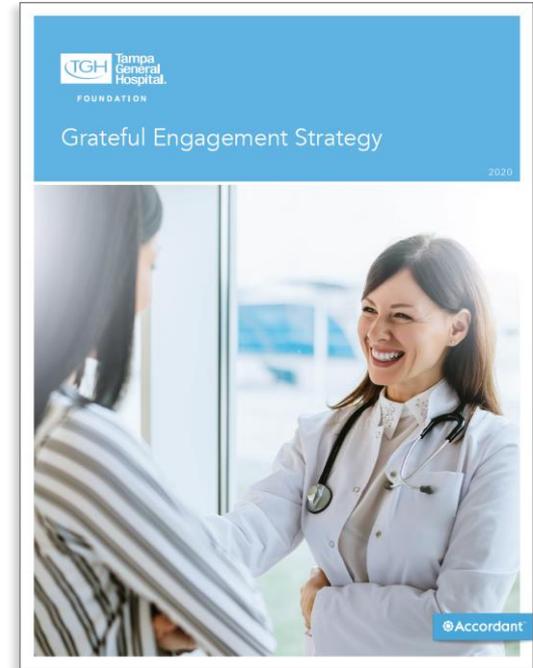
# 5 Pillars of Grateful Engagement



Accordant™

# Strategy is everything...

- Internal planning study
- Leadership buy-in
- Recruitment interviews
- Staff & physician training
- Service line selection



# Start-Up Phase / Portfolio Build

- Physician Partner selection
- Service line leaders (medical & administrative) provide names





# Physician Partner Discovery Phase

1.

Schedule 30 minutes per month to get to know the physician.

2.

Learn as much as you can about the physician's work to build trust and competence.

3.

Gain verbal approval that they are bought in.

# Advanced Cultivation

- Audit your Service Line portfolio
- Double down on those engaged





Being assertive isn't  
disrespectful.  
It's respect earning."



# Stewardship

- Communicate more than monthly
- Keep accurate notes
- Check your emotions at the door



# Performance Grid

CLOSED	Donor	Gift Amount	Grateful Patient Physician	Designation	Development Officer	
	Ricardo	\$100,000	Dr. Shepard	Vascular Center of Excellence	Taylor	1
	Mertz	\$500,000	Dr. Grey	Heart Failure Center of Excellence	Taylor/Lindsey	1
	Hope Foundation	\$75,000	Dr. Yang	Interventional Center of Excellence	Taylor/Corporate	1
					<b>Average Gift Size:</b>	<b>\$225,000</b>
					<b>Gift Count:</b>	<b>3</b>
	<b>Total Closed:</b>	<b>\$675,000</b>				
PENDING	Donor	Potential Gift Amount	Grateful Patient Physician	Potential Designation	Development Officer	
	ABC Corporation	\$1,000,000	Dr. Kirev	General Cardiac Fund	Taylor/Corporate	
	Smith Family	\$250,000	Dr. Stevens	Cardiac Family Assistance Fund	Taylor/Vic	
	<b>Total Pending:</b>	<b>\$1,925,000</b>				

# Expansion & Growth

- Addition of service lines & team members
- Continuous evaluation of service line partners
- Road blocks & pivoting



# Affinity Councils



**HEART & VASCULAR INSTITUTE AFFINITY COUNCIL NEWSLETTER**  
JULY 2023



The Heart and Vascular Institute (HVI) Affinity Council unites physician champions, community leaders, grateful patients and families who are passionate about helping the Institute achieve its aspirations and goals through philanthropy. It is physician-led and supported by the Tampa General Hospital Foundation and University of South Florida Foundation. Members aid in connecting the Foundations with physician and clinician partners and key community influencers.

### Recent Heart & Vascular Institute Gifts

<b>\$50,000</b> in honor of Dr. Oliveira	<b>\$10,000</b> to support HVI Grand Rounds, an educational lecture series for physician/clinician training and continuing education	<b>\$10,000</b> to support the HVI's area of greatest need
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#### HVI AFFINITY COUNCIL KICK OFF



On May 31, TGH HVI launched its inaugural Affinity Council with a kick-off meeting held at Mise en Place. Attendees shared stories of gratitude and motivation for support of the HVI. Attendees also had the opportunity to virtually meet Mr. Henry Greer, who previously served as the leader of the Affinity Council at UMSC where Dr. Lozonschi previously worked. The next meeting is planned for August 30.

#### WHITE COAT



Tina James, Florida Blue Senior Manager of Corporate Social Responsibility, spent the day observing Dr. Hiram Bezerra in the cath lab, meeting patients post procedure and even helped celebrate a physician's 50th birthday at a surprise team lunch. White Coat is an exclusive experience for donors and stakeholders to be a doctor for a day. The White Coat experience is open to all members of the HVI Affinity Council and we invite you to take advantage of this opportunity to learn first hand how TGH is making a difference in the lives of patients everyday.

#### SCOTT CHANEY HVI MEMORIAL NURSING SCHOLARSHIP

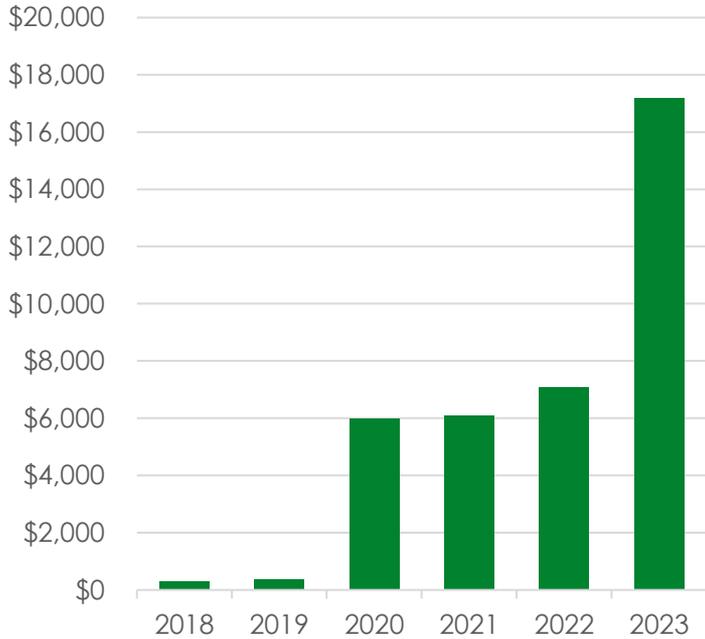


The Scott Chaney HVI Memorial Nursing Scholarship was awarded to Mackenzie Elliot, who is a TGH nurse in the Cardiac Critical Care Unit and is currently pursuing her Doctorate of Nursing Practice at the University of South Florida. This scholarship is graciously awarded by the Schlossnagle and Chaney families and their friends to honor the legacy of Mr. Scott Chaney. This scholarship will provide awardees the opportunity to advance their nursing education while continuing to work at TGH.



# The Results...

Giving from Grateful Patients



# Cancer Services Progress

Gift Amount	Cancer Institute Designation	FY Closure
\$5,000,000	Colorectal Cancer Center of Excellence	FY23
\$2,000,000	<u>Sarcoma Program Fund</u>	FY23
\$1,850,000	Physician Recruitment	FY22
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\$500,000	Cancer/Global Emerging Diseases	FY22
\$486,740	Molecular Breast Imaging (Collectively)	FY22
\$300,000	Radiation Oncology	FY22
\$152,500	Patient Support Funds (Collectively)	FY21-23

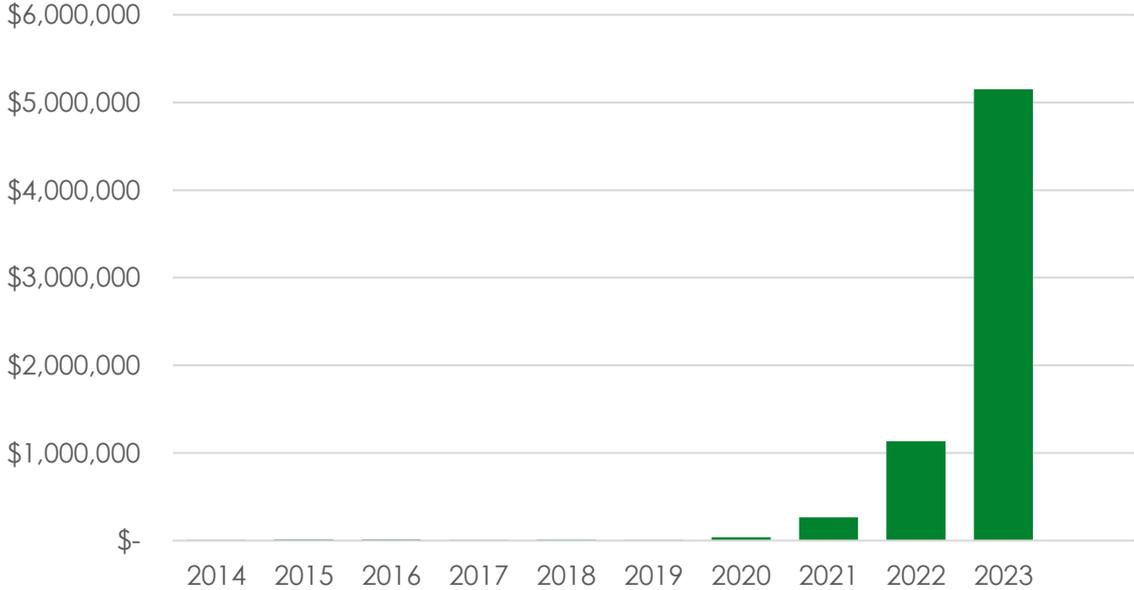
# Oncology Progress

Oncology Fundraising - Then and Now





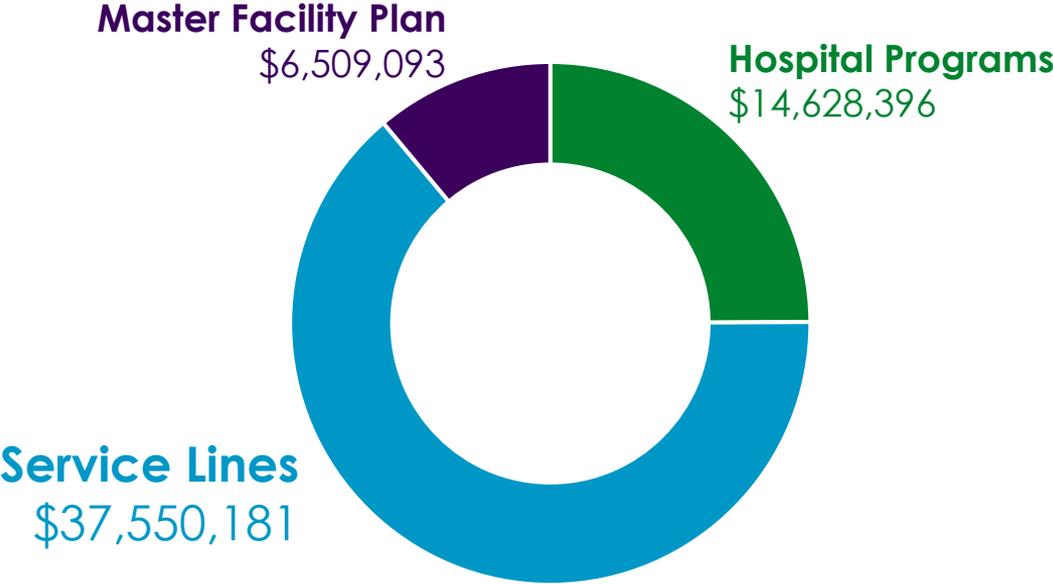
# Heart & Vascular Progress





Gift Amount	Physician Involved	HVI Designation	FY Closure
\$5,000,000	Oliveira	HVI Chief Leadership Fund	FY23
\$550,000	Bezerra	Intv. Cardiology COE	FY23
\$100,000	Lozonschi	Cardiothoracic Surgery COE Fund	FY23
\$100,000	Shames	Vascular Center of Excellence	FY22
\$100,000	N/A	Matar Research/Intv. Cardiology COE	FY22
\$100,000	Katlaps/ Lozonschi	Cardiothoracic Surgery COE Fund	FY22
\$100,000	All HVI	Nurse Scholarships/Ultrasound	FY22
\$100,000	Oliveira	HVI General Fund	FY23

# TGH Campaign Gift Designations



### Achieving Exponential Growth in Grateful Patient & Family Giving: A Case Study

**BACKGROUND**

Since 2018, the Tampa General Hospital Foundation has transformed its philanthropy by shifting from a sole focus on special events to becoming a robust, high-performing philanthropy organization raising \$19+ million a year. Under the leadership and vision of Senior Vice President of Development and Chief Philanthropy Officer Frann Leppla and Vice President of Development and Campaign Manager Michael Masem, the Tampa General Hospital Foundation is launching a \$100 million comprehensive campaign.

To prepare for campaign, the Tampa General Hospital Foundation partnered with Accordant to develop and implement a comprehensive grateful patient engagement strategy to coincide with Tampa General Hospital's focus on key, high growth service line development and the hiring of new service-line focused major gifts officers.

**ABOUT TAMPA GENERAL HOSPITAL**

Tampa General Hospital (TGH) is a private, not-for-profit, tertiary, research and academic medical center located on Davis Island in Tampa, FL. As one of the largest hospitals in Florida, TGH is licensed for 1,040 beds and employs more than 8,000 team members. Consistently recognized for world-class care, TGH is ranked as the #1 hospital in Tampa Bay by U.S. News and World Report for 2022-23 and is nationally ranked as among the top 50 hospitals in the nation in seven specialties. TGH was ranked in 2022 by Forbes Magazine as the country's #1 best employer for women.

Tampa General Hospital is affiliated with the USF Health Morsani College of Medicine and serves as the primary teaching hospital for the university. Over 300 residents/fellows are assigned to Tampa General Hospital for specialty training in areas ranging from general internal medicine to neurosurgery. In addition, USF medical students, nurses and physical therapy students receive part of their training at TGH. Faculty from the USF Health Morsani College of Medicine admit and care for patients at TGH as do private practice physicians, many of whom also serve as adjunct clinical faculty. TGH also serves as a teaching hospital to students in many disciplines from several area schools.

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# Case Study

- C-suite & leadership engagement
- Trust before referrals
- Long game wins
- Service line entrenchment key

Achieving Exponential Growth in Grateful Patient & Family Giving: A Case Study



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To download the  
case study:





Questions?