Advisory Board

2021 Guide to Philanthropy Presentations and Workshops

Topic descriptions and frequently asked questions

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Advisory Board presentations in brief

An opportunity to bring Advisory Board research to your organization

What should I expect from an Advisory Board presentation?

One of our distinguished subject-matter experts will present our latest research and share our key insights with you and your teams.

- Our team of experts are renowned for their deep content knowledge as well as their presentation and facilitation skills. Advisory Board members routinely evaluate presentations as the most important service included with their membership.
- This guide serves as a starting point, but we will work with you to tailor our presentation to meet your unique needs.

When should you use your presentation?

- Organizations typically use our learning experiences for a number of reasons, including to:
  - Accelerate decision-making for a key initiative
  - Create alignment among key stakeholders on strategic priorities
  - Educate and equip their teams to make progress on organization goals
- Organizations often find it valuable to include an Advisory Board presentation in the agenda of an executive-team meeting, as a component of a board retreat, or as part of a broader staff education effort.

Why should you use your presentation in 2021?

- Health care is an industry of constant change. Make sure you and your teams are up to date on the latest market trends, equipped with the tactics needed to succeed, and prepared to execute on key strategic goals.
- Our presentations will help you with all of these issues and more.

80%

Average Net Promoter Score across all 2020 virtual presentations

Make the most of our virtual experiences

Advisory Board is pleased to offer interactive presentations from the convenience of your office or home. Our team of experts has experience facilitating virtual conversations and deploying a variety of tools to deliver a uniquely engaging presentation.

FAQs for your Advisory Board presentation

How do we request a presentation, and what happens next?

This guide details our top three areas of focus in 2021. Once you have a top challenge in mind, contact our experts through the AskAdvisory portal. Our team will guide you through next steps, such as selecting a date and identifying the right expert to present to your organization. Approximately four to eight weeks before your presentation, our education coordinator will set up a planning call for you to speak directly with your presenter regarding the topic you've selected.

How much time should we allot for the presentation?

Most of our presentations are roughly 60 to 120 minutes in length. See the summaries in this document for the suggested length of each presentation.

Can we have multiple presentations in one day?

We typically caution against multiple presentations in one day due to the volume of material covered. We've found that it's difficult for audiences to absorb content from multiple presentations at once. Our members get the most value out of going in-depth on one topic. If you need a facilitator to speak to multiple groups on the same day, we will do our best to accommodate that request.

Who should attend the presentation?

Each of our presentations is tailored to a specific audience. You can find this information listed inside the guide as well as on our website.

Will we receive handouts for our presentation?

Advisory Board has migrated to an electronic format for materials distribution. We will send you the handout and presentation via email before your scheduled session. We welcome you to send copies of the handout to attendees before the presentation or to provide hard copies of the meeting materials.

What physical and/or virtual setup should we provide?

Our experts have presented in a variety of formats, from in-person podium presentations to interactive virtual board rooms and everything in between. You'll work with a designated expert and a coordinator to ensure the right setup and technology is available for your presentation.

Available presentation topics

- State of the industry for philanthropy leaders
- Data-driven grateful patient strategy
- Generational change in donor pipelines

State of the industry for philanthropy leaders

Recommended audience

- Board
- Executives
- Frontline philanthropy staff

Teaching methodology

Didactic presentation

Typical length

- 60-90 minutes
- Can be customized to meet audience and needs

GOAL

Teach the top insights about the state of health care philanthropy in the wake of the Covid-19 pandemic

OVERVIEW

Covid-19's impact on philanthropy strategy will not be limited to the duration of the public health crisis. The pandemic is accelerating inevitable long-term challenges and opportunities in health care philanthropy. Once distant ambitions, such as a rich digital engagement platform, a strong focus on community health, and a modern pipeline growth strategy, are quickly becoming requisites in the current environment.

Successful leaders will understand that their response to the challenges of the Covid-19 era is inextricably tied to their post-pandemic growth. Solving for the problems of the next 12 months should be viewed as an accelerated effort to solve for the problems of the next 10 years. In this presentation we will lay out the most critical insights for philanthropy executives, boards, and staff as they plan their post-Covid strategies.

LEARNING OBJECTIVES

After attending this session, participants will be able to:

- Identify and understand the lasting impact of Covid-19 on philanthropy and fundraising strategy
- Understand the impact of generational change, health inequity, and social determinants of health on donor behavior
- See why now is the time to innovate and adopt new metrics of success to meet the national environment

Data-driven grateful patient strategy

Recommended audience

- Frontline philanthropy staff
- Clinical executives

Teaching methodology

Didactic presentation

Typical length

- 90-120 minutes
- Can be customized to meet audience and needs

GOAL

Help development teams better understand and connect with grateful patients

OVERVIEW

We surveyed 2,000 patients and family members from around the country. Their answers revealed several surprising truths about gratitude and philanthropy. This information suggests that organizations may need to significantly rethink their strategies.

In this presentation, explore data-driven insights about why philanthropic affinity develops, who is likely to develop it, and how to reorient your grateful patient program around what matters most to patients.

LEARNING OBJECTIVES

After attending this session, participants will be able to:

- Explore data-driven insights from a national survey of 2,000 patients and family members who reported on their care experiences and gratitude
- Understand why philanthropic affinity develops and who is likely to develop it
- Decide how to re-orient and upgrade grateful patient programs from prospect identification to service inflection to follow-up outreach

Generational change in donor pipelines

Recommended audience

- Frontline philanthropy staff

Teaching methodology

Interactive workshop

Typical length

- 90-120 minutes
- Can be customized to meet audience and needs

GOAL

Persuade development teams to aggressively prepare for the impact of generational change on donor pipelines

OVERVIEW

Baby boomers occupy a central place in hospital fundraising, but younger generations are bringing new opportunities and threats. An estimated $68 trillion wealth transfer, shifting care utilization patterns, and new charitable preferences will disrupt health care philanthropy across this decade.

With a heavy focus on interactive problem-solving, this session unpacks the complex giving behaviors of adult generations and identifies ways that development teams must adapt now.

LEARNING OBJECTIVES

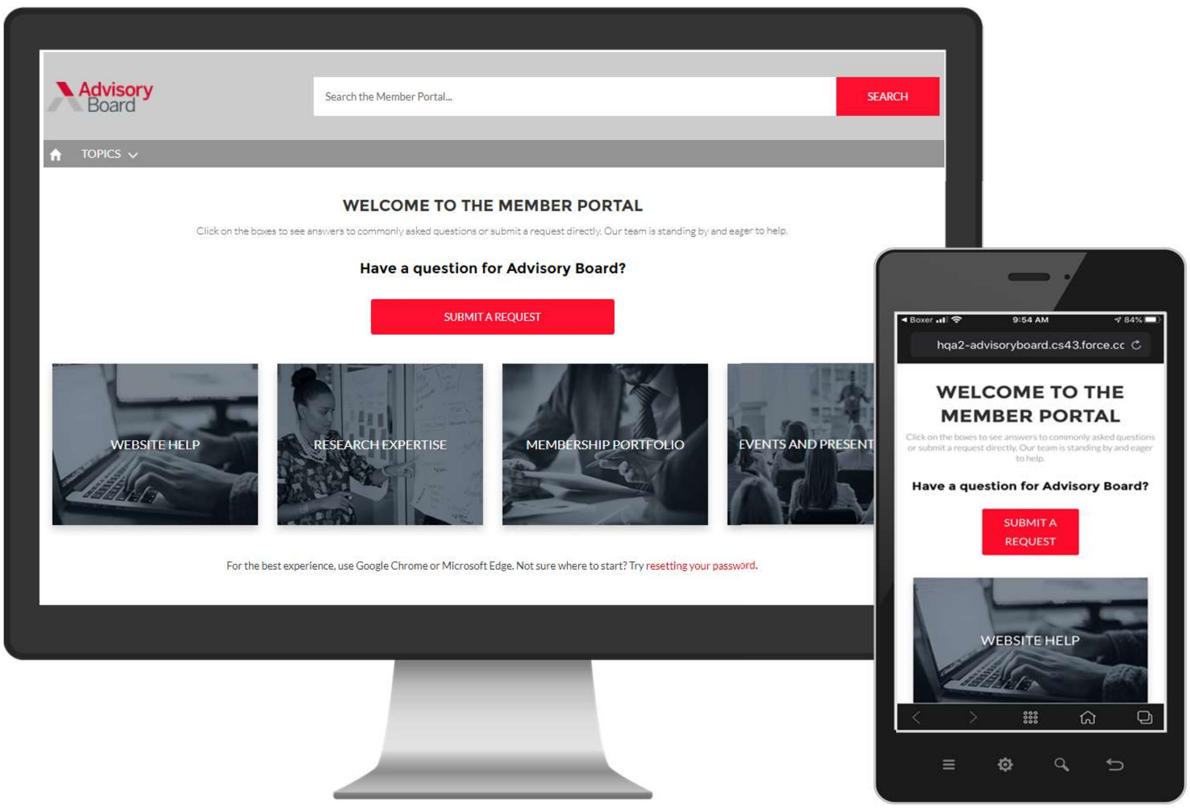
After attending this session, participants will be able to:

- Understand the urgency around adding younger generations to today's donor pipelines
- Unpack the complex giving behaviors and preferences of different generations
- Identify ways that development teams can adapt their strategies through a collaborative and interactive team activity

All the answers at your fingertips

Ask Advisory

Are you ready to host an Advisory Board presentation at your organization? Go to our member portal, **AskAdvisory**, for quick access directly to our experts.



Send your questions via email at ask@advisory.com

Helping health care leaders work smarter and faster

WHO WE SERVE

Hospitals ◦ Health systems ◦ Medical groups ◦ Post-acute care providers ◦ Life sciences firms ◦ Digital health companies ◦ Health plans ◦ Health care professional services firms

200+

EXPERTS ON OUR TEAM

40+ years

OF RESEARCH EXPERIENCE

4,500+

MEMBERS IN OUR NETWORK

Our experts harness a time-tested research process and the collective wisdom of our vast member network to develop **provocative insights**, **actionable strategies**, and **practical tools** that are at the core of our offerings.

Research

The knowledge you need to stay current, plus the strategic guidance, data, and tools you need to take action.

People development

Virtual and in-person leadership development, custom learning solutions, and online manager support

Advisory Board

655 New York Avenue NW, Washington DC 20001
202-266-5600 | **advisory.com**