

Association for Healthcare Philanthropy Madison Institute

Elements of Major Gifts

July 16 – 21, 2023

Core Faculty:

Donna Budak, FAHP/CFRE, Dean
Sarah Fawcett-Lee, FAHP/CFRE, Associate Dean
Tim Self, CFRE, Faculty

Class Guest Speakers:

Shannon Duval – Storytelling & Senior MG Panel
Dr. Angelique Grant – Strat. Leader, C-Suite, and Volunteer Engagement
Tim Logan - Integrating Gift Planning into Major Gift
Ashley Nall - Senior MG Panel
Preston Walton - Storytelling

Sunday, July 16	Topic/Activity	Faculty
1:00 – 5:00 pm	Registration	
5:00 – 6:30 pm	Orientation and Making the Most of the Madison Institute Experience <ul style="list-style-type: none">• Faculty introductions• Course preview• “Getting to Know You”• Making the most of the Madison Experience	Donna Budak Sarah Fawcett-Lee Tim Self
6:30 – 7:45 pm	Networking Social	

**All sessions and breaks are in Pyle Center unless otherwise noted.*

Madison Institute 2023 - Elements of Major Gifts

Monday, July 17	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast – Great Hall, Memorial Union	
8:00 – 9:00 AM	General Session/Opening Keynote – Great Hall, Memorial Union	
9:00 – 9:45 AM	Introduction to Major Gifts <ul style="list-style-type: none"> What is a major gifts program? What is the difference between transactional and transformational giving? What does it take to be a successful major gifts officer? 	Donna Budak Sarah Fawcett-Lee Tim Self
9:45 - 10:00 AM	BREAK	
10:00 AM – 11:45 AM	Donor Motivations <ul style="list-style-type: none"> In-depth examination of gratitude What also motivates donors? Grateful patients and major gifts 	Sarah Fawcett-Lee
11:45 – 12:45 PM	LUNCH	
12:45 – 2:15 PM	Prospect Identification <ul style="list-style-type: none"> What is a prospect? How do you build a prospect pipeline? How and when to use wealth screening How to develop a network of philanthropy champions Physician and clinician engagement 	Tim Self (Leader) Donna Budak Sarah Fawcett-Lee
2:15 – 2:30 PM	BREAK	
2:30 – 4:00 PM	Setting Priorities and Portfolio Management <ul style="list-style-type: none"> What should your portfolio look like? How do you go about prioritizing your work? Pipeline management. Assign homework to categorize and organize their portfolios.	Sarah Fawcett-Lee
4:00 – 4:45 PM	Assign and Discuss Capstone Projects	All track faculty
5:00 – 6:00 PM	Networking Social	

**All sessions and breaks are in Pyle Center unless otherwise noted.*

Madison Institute 2023 - Elements of Major Gifts

Tuesday, July 18	Topic	Faculty
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session – Great Hall, Memorial Union	Dr. Angelique Grant
9:00 – 10:30 AM	Storytelling	Guest: Preston Walton & Shannon Duval
10:30 – 10:45 AM	BREAK	
10:45 AM – 12:15 PM	Qualification <ul style="list-style-type: none"> • Getting the visit. • What to do on the visit. Work on script & Role playing	Tim Self
12:15 – 12:30 PM	Parking Lot Questions	Faculty
12:30 – 1:30 PM	LUNCH	
1:30– 2:30 PM	Strategic Leader, C-Suite and Volunteer Engagement	Dr. Angelique Grant
2:30 – 2:45 PM	BREAK	
2:45 – 4:15 PM	Cultivation <ul style="list-style-type: none"> • Asking questions and active listening. • Connecting the donor's passion to opportunities for investment. • Laying the groundwork for an invitation to invest. • Role playing the soft ask 	Donna Budak
4:15 – 4:45 PM	Capstone Preparation	Break-out session for teams (faculty to monitor and assist)
5:00 - 6:00 PM	Networking Social	
Evening	Dinner on your own	

Wednesday, July 19	Topic	Faculty
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session – Great Hall, Memorial Union	HIPAA – Donna Budak PIPEDA – Lesley Heighway
9:00 – 10:15 PM	Solicitation	Tim Self
10:15 – 10:30 AM	BREAK	
10:30 AM – 12:00 PM	Stewardship	Donna Budak
Free afternoon/evening		

**All sessions and breaks are in Pyle Center unless otherwise noted.*

Madison Institute 2023 - Elements of Major Gifts

Thursday, July 20	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:30 – 10:00 AM	Ethics	Sarah Fawcett-Lee and Donna Budak
10:00 – 10:15 AM	BREAK	
10:15 – 11:45 AM	Integrating Gift Planning into Major Gifts	Tim Logan
11:45 AM – 12:45 PM	LUNCH	
12:45 – 2:15 PM	Senior MGO Panel	Shannon Duval - Facilitator Ashley Nall Add'l panelists tbd
2:15 – 2:30 PM	BREAK	
2:30 – 4:00 PM	Moves Management	Sarah Fawcett-Lee
4:00 – 5:00 PM	Parking Lot	All Track Faculty
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	

Friday, July 21	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:30 – 10:30 AM	Capstone Project Presentations	All Track Faculty
10:30 – 11:30 AM	Evaluation, Certificate Presentations	All Track Faculty
	Safe Travels Back Home	

**All sessions and breaks are in Pyle Center unless otherwise noted.*