

# Association for Healthcare Philanthropy Madison Institute

## Advanced Skills for Major Gifts July 16 – July 21, 2023

**2023**

### **Core Faculty:**

Janet DeWolfe, FAHP, CFRE – Dean  
Robert Wahlers, MS, CFRE – Associate Dean  
Jill Kyle, CFRE  
Crystal Miller, FAHP, CFRE

### **Guest speakers:**

John Drake, FAHP, CFRE  
Stacy Mara, Senior Consultant, Plus Delta Partners

Sunday, July 16	Topic/Activity	Faculty
1:00 – 5:00 pm	Registration	
5:00 – 6:30 pm	Class Welcome <b>Making the Most of Your Madison Experience</b> Ice Breaker Active Listening	DeWolfe, Miller, Wahlers
6:30 – 7:45 pm	Networking Social	

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<b>Monday, July 17</b>	<b>Topic/Activity</b>	<b>Faculty</b>
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 – 10:00 am	<b>Keys to Success in Major Gifts Two Minute Connection Dialogue</b>	DeWolfe, Wahlers
10:00 – 10:15 am	Refreshment Break	
10:15 – 11:45 am	<b>Major Gift Skill Set and Essential Tools</b>	DeWolfe, Miller, Wahlers
11:45 am – 12:45 pm	Lunch	
1:00 – 2:30 pm	<b>Articulating the Case</b>	Wahlers
2:30 – 3:00 pm	Refreshment Break	
3:00 – 4:30 pm	<b>Three Best Ways to Build Pipeline</b>	Wahlers
4:30 – 5:00 pm	<b>Introduction of Case Role Play</b>	DeWolfe, Miller, Wahlers
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	

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

<b>Tuesday, July 18</b>	<b>Topic</b>	<b>Faculty</b>
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	<b>Strategic Leadership Engagement (Hospital Leadership, Physicians and other Clinicians)</b>	Miller
10:30 – 10:45 am	Refreshment Break	
10:45 am – 12:15 pm	<b>Physician Advocates, Grateful Patients</b>	Kyle
12:15 – 1:15 pm	Lunch	
1:15 – 3:00 pm	<b>Major and Planned Giving Blended Gifts</b>	Wahlers
3:00 – 3:30 pm	Refreshment Break	
3:30 – 5:00 pm	<b>Closing the Gift</b>	Miller, Wahlers
5:00 – 6:00 pm	Networking Social	
Evening	On Your Own	

<b>Wednesday, July 19</b>	<b>Topic</b>	<b>Faculty</b>
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 am	<b>Stewardship</b>	Miller
10:15 – 10:30 am	Refreshment Break	
10:30 am – 12:00 pm	<b>Designing Donor Strategies</b>	Miller, Wahlers
12:00 – 12:30 pm	<b>Case Study Discussion</b>	DeWolfe, Miller, Wahlers
Free afternoon and evening		

<b>Thursday, July 20</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:15 AM	Breakfast – Pyle Center	
8:30 – 10:00 am	<b>Unsticking “Stuck” Situations: Communicating Through Challenging Prospect Scenarios</b>	Mara
10:00 – 10:15am	Refreshment Break	
10:15 – 11:45 am	<b>Unsticking “Stuck” Situations: Communicating Through Challenging Prospect Scenarios</b>	Mara
11:45 am – 12:45 pm	Lunch	
12:45 – 2:00 pm	<b>Role Play/Donor Visit</b>	All
2:00 – 2:30 pm	Refreshment Break	
2:30 – 4:30 pm	<b>Role Play/Donor Visit</b>	All
4:30 – 5:00 pm	<b>Open Discussion</b>	
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	

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<b>Friday, July 21</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:45 – 10:45 am	<b>Advancing Your Career</b>	Drake
10:45 – 11:00 am	Refreshment Break	
11:00 am – 12:00 pm	<b>Closing Remarks and Certificate Presentation</b>	DeWolfe, Miller, Wahlers