

JULY 15 – 20  
MADISON, WI



AHP  
**MADISON**  
INSTITUTE 2018



AHP Health System Philanthropy  
**RESIDENCY**  
Program 2018

## SCHEDULE AT A GLANCE

### SUNDAY, JULY 15

Registration ..... 12:00 pm – 5:00 pm  
First class ..... 5:00 pm – 6:30 pm  
Networking Social..... 6:30 pm – 7:45 pm

### MONDAY, JULY 16

Registration ..... 7:30 am – 5:00 pm  
General Session..... 8:00 am – 8:45 am  
Class..... 9:00 am – 11:45 am  
Lunch..... 11:45 am – 1:00 pm  
Class..... 1:00 pm – 5:00 pm  
Social Hour..... 5:00 pm – 6:00 pm

### TUESDAY, JULY 17

Registration ..... 8:00 am – 5:00 pm  
Class..... 8:30 am – 12:15 pm  
Lunch..... 12:15 pm – 1:30 pm  
Class..... 1:30 pm – 5:00 pm  
Social Hour ..... 5:00 pm – 6:00 pm

### WEDNESDAY, JULY 18

Registration ..... 8:00 am – 1:00 pm  
Class..... 8:30 am – 1:00 pm  
Special Projects and  
Group Work ..... Free Afternoon

### THURSDAY, JULY 19

Registration ..... 8:00 am – 5:00 pm  
Class..... 8:30 am – 11:45 am  
Lunch..... 11:45 am – 1:00 pm  
Class..... 1:30 pm – 5:00 pm  
Closing Celebration.... 5:00 pm – 6:30 pm

### FRIDAY, JULY 20

Registration ..... 8:15 am – 10:00 am  
Class ..... 8:45 am – 11:30 am  
Adjourn..... 11:30 am



## THE MADISON EXPERIENCE

**WHEN:** JULY 15 – 20, 2018

**WHERE:** PYLE CENTER, UNIVERSITY OF WISCONSIN  
702 Langdon Street, Madison, WI 53703 United States

### Prestigious faculty members

Your classes will be taught by thought leaders in health care development. Faculty members are your resources inside and outside the classroom, available for expert advice on your most pressing issues. See page 11 for a list of faculty.

### Small class size

All class sizes are capped to ensure your learning experience is collaborative and individualized. You'll learn through presentations, case studies, role play, online communities and more. Extensive take-home resources mean you'll continue learning when you return to the office.

### Relationship building

The AHP Madison Institute offers numerous opportunities to connect with your fellow health care fundraisers and faculty members, both in class and after hours. The professional network you develop here will last your entire career.

### Certificate of Completion from the University of Wisconsin and AHP

Once you successfully complete the course work, you'll receive a certificate from the University of Wisconsin's Graduate School of Business and the Association for Healthcare Philanthropy. You also can earn up to 26 credits toward the Certified Fundraising Executive (CFRE) professional credential.

## Choose from one of seven tracks...

- 1. Fundamentals of Resource Development** for those new to health care fundraising
- 2. Annual Giving** for those who would like to increase their expertise in annual giving
- 3. Elements of Major Gifts** for those in the early stages of their major gift career
- 4. Major Gift Initiatives and the Campaign** for anyone who is contemplating the start of or is in the middle of a major fundraising initiative
- 5. Advanced Skills for Major Gift Success** for major gift officers with more than five years experience
- 6. Planned Giving** for those looking to establish or strengthen a planned giving program and expand their understanding of this important practice area
- 7. Fundraising Management** for those with more than five years experience in management

## ...or begin your residency.

The 18-month **Health System Philanthropy Residency Program** is for health system executives who work in or aspire to senior leadership positions.

*Not sure which track is right for you? Contact [education@ahp.org](mailto:education@ahp.org) for guidance.*

# FUNDAMENTALS OF RESOURCE DEVELOPMENT

## Summary

This fast-paced, highly participatory track provides an overview of skills and knowledge required within a comprehensive development program. A focus on personal gift solicitation is complemented by an overview of special event fundraising and annual, major and planned giving. Special sessions address board & physician giving and tax laws (separate sessions for U.S. and Canadian participants). Attendees also will gain an understanding of development structure, strategic planning, and how privacy laws affect fundraising.

## Who should attend

This track is ideal for those who are new to fundraising—or for those who want to broaden their understanding of health care development. The Fundamentals of Resource Development track is a great foundational course that will help prepare participants for any of the other AHP Madison offerings in subsequent years.

## Curriculum

### Overview

- Psychology of Giving
- Case for Support
- Strategic Planning
- Development Structures
- Privacy Laws
- Fundamentals of Tax Law (U.S. and Canada)
- Prospect Research, Cultivation and Identification
- Planning and Budgeting

### Prospect and Donor Constituencies

- Board Members
- Employees
- Physicians
- Individuals
- Corporations and Foundations

### Fundraising Tool Kit

- Direct Mail
- Tribute Giving
- Recognition and Donor Clubs
- Special Events
- Capital Campaigns
- Major Gift Solicitation
- Estate and Planned Giving



*“No one wants to make their own mistakes the first time. To be able to learn from people who have already been there was just invaluable for me.*

*I have called my faculty member, my dean, since we left Madison and have been able to get feedback and advice from him, which has been fantastic.*

*I hope to get to go back year after year.”*

**Alicen Swift**  
Development Director  
OakBend Medical Center  
Richmond, TX

## ANNUAL GIVING

### Summary

Now featuring expanded and updated content in social media, metrics, grateful patient programs and tools for building a donor pipeline. This course is a comprehensive account of annual giving strategies, tools, skills and approaches for specific constituencies and other keys to success. Learn new skills, gather ideas and be inspired. Expert faculty and classmates share proven approaches you can use on the job to increase your fundraising revenue and to build a pipeline of donors for major, planned and campaign gifts. Walk away with tools you can use immediately at your organization to build or update your annual plan.

### Who should attend

This track is for individuals who want to increase their expertise in annual giving, who have two or more years of fundraising experience or who have completed the Fundamentals of Resource Development track or a comparable introductory offering.

### Curriculum

#### Creating and Implementing a Successful Annual Giving Program

- The Psychology of Giving
- Elements of a Comprehensive Program
- Annual Giving Critical Success Factors
- Planning, Managing, and Evaluating Annual Giving
- Privacy and Compliance (U.S. and Canada)

#### Annual Giving Strategies and Tools

- Direct Marketing
- Monthly Giving
- Grateful Patient Programs
- The Role of Digital
- Support Groups and Community Organizations
- Family Giving
- Special Events
- Commemorative Giving
- Mid-level Donor Programs
- Personal Solicitation

#### Annual Giving Skills

- Working with Volunteers
- Leadership
- Donor Stewardship and Engagement
- Integrating Annual, Major and Planned Gifts

*“There’s a lot of people that will come back after they’ve gone to year one, they want to come back for year two and year three, that’s a testament to the value they get out of it as well.”*

**David Gillig, FAHP**  
Dean, Fundraising Management track  
Senior Consultant & Principal  
Marts & Lundy, Inc.  
San Diego, CA



# ELEMENTS OF MAJOR GIFTS

## Summary

This course is a comprehensive journey through the world of major gifts, from concept to the practical application of knowledge for cultivation and solicitation strategies. Students will have the opportunity for one-on-one consulting time with faculty and will leave with individual action plans to implement immediately. All students will work on a capstone project to be presented on the final day of class.

## Who should attend

This track is designed for anyone beginning their career in health care philanthropy, or just venturing into major gifts after having worked in other fundraising capacities or careers. In addition, anyone who has been in the major gifts arena for a year or two and wishes to gain more confidence, this class is designed for you.

## Curriculum

### Introduction to Major Gifts

- Defining the term “major gifts”
- Exploring the difference between transactional and transformative giving
- What it takes to be a successful major gifts officer

### Donor Motivations and Clinician Engagement

- Understanding the role gratitude plays as a motivating factor
- How to build a prospect pipeline
- How to build a network of philanthropy champions
- Physician and clinician engagement

### C-Suite and Volunteer Engagement

- Working successfully with executive and volunteer leaders
- Volunteer leadership roles and responsibilities

### Setting Priorities and Portfolio Management

- Classroom activities will include reviewing prospect lists, pipelines and metrics

### Putting Theory into Practice

- Identifying and qualifying major gift prospects
- Getting the appointment and bringing prospects to the table
- Aligning prospects to compelling investment opportunities
- Making the case for support
- Inviting prospects to make a philanthropic investment (i.e. making the ask)
- Negotiation and closing the gift

### Stewardship

- Donor Recognition
- Personalized Stewardship

### Integrating Major Gifts with Campaigns

### Integrating Major Gifts with Planned Giving



*“I always go back to Madison as the experience that has made the most significant difference in my career, in my profession and will continue to do that.”*

**Doug Dillon, CFRE**  
 Dean, Major Gift Initiatives & The Campaign  
 Senior Managing Partner  
 Jerold Panas, Linzy & Partners  
 Chicago, IL

## MAJOR GIFT INITIATIVES AND THE CAMPAIGN

### Summary

Your organization must decide on the best approach in enhancing your major gift program. This may include a capital campaign, but may necessitate a modified and target approach included in a mini-campaign or special (major) gift initiative. This track is designed and presented by seasoned professionals who will guide you in determining what strategy is best for your situation and implementing the exact structure and plan for the greatest level of success. You will work through all strategic components of a major fundraising campaign—from the inception of the “big idea” to the celebration that marks the achievement of the goal and the effective stewardship of those who participate in your success. The track emphasizes the evaluation of each participant’s own situation—and facilitates experiential learning through a series of workshops, group interaction, personal assessment and team exercises.

### Who should attend

This track is designed for anyone at a health care organization who is either in the middle of, or contemplating the start of, a major fundraising initiative, including staff and administrative personnel, board members and key volunteers.

### Curriculum

The course curriculum explores in depth each of the following:

**STEP 1:** A New Way of Planning in the Changing Philanthropic Landscape

**STEP 2:** Understanding the Essential Elements of a Winning Campaign

**STEP 3:** Understanding the Necessary Mechanics

**STEP 4:** The Importance of a Case Statement

**STEP 5:** The Feasibility Study

**STEP 6:** Identifying and Recruiting Leadership

**STEP 7:** The Role of Staff, Board, and Volunteers in the Campaign

**STEP 8:** Stewardship Isn’t Important. It’s Everything

**STEP 9:** Securing the Donor Visit and the Art of the Ask

*“The Madison Institute is unlike any other experience that I’ve had the privilege of being a part of. You can go back [to your classmates] at any juncture and get advice and support. It isn’t just about the time that we’re together, but it creates a career-long fraternity.”*

**Shannon Duval**

Dean, Elements of Major Gifts  
President and Chief Development Officer  
Catholic Health Initiatives National Foundation  
Englewood, CO



## ADVANCED SKILLS FOR MAJOR GIFTS

### Summary

This track will focus on successful leadership and problem solving skills to better motivate and engage health care CEOs, volunteers and ultimately the investor-type donor in your organization's major gifts program. Participants are required to bring actual solicitation experiences and challenges for group case work discussions and solutions.

### Who should attend

Experienced health care major gifts officers (minimum of five years in a major gifts capacity) will explore the skills and processes required to expand and maximize their major gift program potential and their career path in today's changing health care environment. While not a prerequisite, it is recommended that participants have completed the Major Gifts and Capital Campaign Tracks offered at the Madison Institute or similar course work.

### Curriculum

#### Leadership

- Successful Engagement Strategies at All Levels (Volunteers, Staff, Executive Suite)
- Problem Solving Challenges with Roles and Responsibilities
- Creating an Enduring Culture of Integrated Major Gifts
- The Changing Health Care Organization: Adapting Your Case and Plan
- Performance Measures and Metrics for an Overall Major Gifts Program for Staff and Volunteers

#### Advanced Techniques and Skills

- In-house Training
- Problem Solving Strategies from Securing an Appointment to Advisor Disagreements and More

### Case Work

The Advanced Major Gifts class is highly interactive. Time will be dedicated to sharing best practices. Each participant must bring a case to work on throughout the week as a significant benefit of the experience is incorporating the shared learning into your individual situation and plan.



*“Anyone who comes to Madison will leave with unbelievable knowledge, they’ll leave with new friendships, they’ll leave with renewed friendships and they’ll also know where to turn when they need any answer to any question.”*

**Sharon A. Jones, FAHP, CFRE**  
 Chair, AHP University-based Programs and Director of the Institute for Healthcare Philanthropy  
 Vice President Development  
 Chapters Health System  
 Temple Terrace, FL

## PLANNED GIVING

### Summary

This course explores the components of a successful planned giving program, offering an in-depth explanation of planned gift instruments (in both the United States and Canada) and their uses in funding major gifts. This year, understanding the impact of the Tax Cuts and Jobs Act of 2017 on planned giving will be an important benefit derived from attending this course.

Emphasis also will be placed on 'small shop' program design and implementation, and the marketing of gift planning from the donor's perspective. Walk away with practical tips and tools you can use immediately at your organization to build an effective planned giving program that will help attract, inspire and retain your most loyal donors.

### Who should attend

This track is for individuals who have completed the Fundamentals of Resource Development program or a comparable introductory program; those with several years of fundraising experience; and those wanting to initiate a planned giving program or improve an existing one.

### Curriculum

#### Understanding and Managing the Planned Gift Instruments

- Tax Aspects of Charitable Gifts, Including Recent Updates (U.S. and Canada)
- Current Gift Options
- Deferred Gift Options
- Bequest Administration Practices
- Ethical Issues in Gift Planning

#### Marketing Planned Gifts

- Donor-Centered Marketing – The Essentials
- Factors Motivating Planned Gifts
- Communicating Planned Gift Opportunities
- Identifying Bequest Prospects
- Cultivating Prospective Planned Giving Donors
- Asking for the Gift
- Building Endowment with Planned Gifts
- Working with Professional Advisors
- Planned Giving and the Internet

#### Gift Planning Program Opportunities

- Common Myths about Planned Giving
- Preparing Your Annual Activity Plan
- Program Integration Opportunities
- Performance Goals - Tracking, Managing and Reporting Planned Gifts
- Principles of Charitable Estate Planning
- Using Planned Giving to Solve Donor Estate Challenges
- Recognition and Stewardship of Planned Gift Donors





## FUNDRAISING MANAGEMENT

### Summary

Excellent fundraising skills are crucial for professional advancement, but each stage of a development officer's career demands more and better leadership and management skills. This comprehensive, interactive program focuses on contemporary leadership and management strategies to prepare participants for the challenges of a health care development executive.

### Who should attend

You should attend if you have completed the Fundamentals of Resource Development program or a similar educational program, and have at least five years of management experience in fundraising.

### Curriculum

#### Strategic Management of the Fundraising Process

- Strategic Thinking
- The Strategic Development Plan
- Leading Strategic Change
- Application of the Strategic Fundraising Process

#### Operational Effectiveness

- Financial Analysis and Control
- High Performance Systems for Trustees and Staff

#### Leadership Skills for the Development Officer

- Leading Organizational Transformation
- The Politics of Fundraising for the Chief Development Officer
- Negotiating and Building Agreement
- Team Building for Fundraising Success
- Leading During a Crisis

#### Practical Applications

- Making the Case for Health Care Philanthropy
- Resource Development Clinic

*“I find the faculty to be outstanding. They are well-regarded within our industry, they are great teachers, they are great mentors.”*

**Mark Larkin, CFRE**  
 President  
 Boca Raton Regional Hospital  
 Foundation  
 Boca Raton, FL



# AHP Health System Philanthropy RESIDENCY Program 2018

The AHP Health System Philanthropy Residency Program is an 18-month, comprehensive examination and engagement in the concepts and practices of strategic and advanced philanthropy development for health care systems, grounded in experience and frameworks that can inform practice; and sharing of the competencies and knowledge required for successful senior development officers.

### Who should attend

This customized executive training and knowledge-sharing program is specifically designed for health system executives who work in or aspire to senior leadership positions. Ideal candidates will have at least five years of health care development experience, including significant experience managing a major development function, and will currently have supervisory responsibility.

### Application Process

For 2018-19, the cohort is capped at 15 members on a first-come, first-serve basis. There is no application process, although registrants will need to submit a letter of recommendation from their immediate supervisor.

### Format

- All sessions will be conducted in seminar format, with participants sharing issues and completing assignments for discussion with the group.
- The program will begin with two on-site days at the Madison Institute in July 2018 and will be followed by four in-person meetings (conducted over 1-2 days), and regular virtual meetings (two hours in duration) during the program period. The residency program will conclude at the AHP Annual International Conference in October 2019.

### Curriculum

- Health System Development Architecture
- Healthcare Finance
- Performance Metrics & Standards
- Managing Major Gifts in a Health System Development Program
- Creating a Culture of Gratitude
- Program Assessment and Strategic Plan Development
- Fundamentals of Self-Management
- HIPAA
- Systemization's Effect on Philanthropy
- Governance & Finance
- Systems vs. Regional Programs
- Human Resources Management
- Leadership & Management Dynamics

A unique element of the fellowship program will be the opportunity for participants to identify topics for focus and learning, as well as identify a term project which they will work on individually or in small groups and then present before the end of the program. During the final session (held in conjunction with the 2019 AHP International Conference), residents will make individual presentations, giving a summary of their learning during the program and specific elements related to their institution and their role as a senior officer for philanthropy.



# DEANS & FACULTY MEMBERS

## **Sharon A. Jones, FAHP, CFRE**

Chair, AHP University-based Programs and  
Director of the Institute for Healthcare  
Philanthropy  
Vice President Development  
Chapters Health System  
Temple Terrace, FL

## **Deans & Associate Deans**

### **Suzanne Bone, FAHP, CFRE**

**Dean, Annual Giving**  
CEO  
The Foundation of Guelph General  
Hospital  
Guelph, ON

### **Douglas A. Dillon, CFRE**

**Dean, Major Gift Initiatives & The Campaign**  
Senior Managing Partner  
Jerold Panas, Linzy & Partners  
Chicago, IL

### **John P. Drake, CFRE**

**Dean, Fundamentals of Resource  
Development**  
President  
Irving Healthcare Foundation  
Irving, TX

### **Shannon Duval**

**Dean, Elements of Major Gifts**  
President and Chief Development Officer  
Catholic Health Initiatives National  
Foundation  
Englewood, CO

### **Ian M. Fraser, MBA, FAHP, FCEP**

**Dean, Planned Giving**  
Legacy Advisor & Estate Planner  
PhilanthroPlan  
Kingston, ON

### **David B. Gillig, FAHP**

**Dean, Fundraising Management**  
Senior Consultant  
Marts & Lundy, Inc.  
San Diego, CA

### **James DeLauro, Ph.D.**

**Associate Dean, Fundraising Management**  
Principal  
DeLauro & Associates Consulting  
San Diego, CA



### **Janet DeWolfe, FAHP, CFRE**

**Dean, Advanced Major Gifts**  
Regional Chief Development Officer  
Intermountain Foundation  
Salt Lake City, UT

### **Sarah Fawcett-Lee, CFRE**

**Associate Dean, Elements of Major Gifts**  
Regional VP Philanthropy MedStar Health  
MedStar Union Memorial Hospital  
Baltimore, MD

### **Ashley C. Nall, CFRE**

**Associate Dean, Major Gift Initiatives and  
the Campaign**  
Assistant Director, Annual Giving  
All Children's Hospital Foundation  
Saint Petersburg, FL

## **Faculty**

### **Donna Budak, FAHP, CFRE**

**Annual Giving**  
Executive Director, Seton Healthcare  
Family  
The Seton Fund and Seton Williamson  
Foundation  
Austin, TX

### **Rhonda Cunningham, FAHP, CFRE**

**Fundamentals of Resource Development**  
Executive Director  
NHH Foundation  
Cobourg, ON

### **Lorraine del Prado, CSPG, CFRE, FCEP**

**Planned Giving**  
CEO  
Del Prado Philanthropy Training and  
Consulting  
Mercer Island, WA

### **Jill Kyle, MBA, CFRE**

**Fundamentals of Resource Development**  
Senior VP, Regional Advancement  
Jefferson Health  
Abington, PA

### **Mark McCampbell, CFRE**

**Annual Giving**  
Senior Vice President, Strategic  
Partnerships  
Advancement Resources  
Cedar Rapids, IA

### **Timothy D. Logan, FAHP, ACFRE**

Principal  
The TimLogan Group  
Reston, VA

### **Robert Wahlers, MS, CFRE Advanced Major Gifts**

VP of Development  
Meridian Health Affiliated Foundations  
Neptune, NJ

### **Karen Piel, JD, CPA, CFRE**

**Planned Giving**  
Planned Giving Officer  
Marshfield Clinic  
Marshfield, WI

### **Charles Slamar, Jr., JD, LL.M.**

**Planned Giving**  
Vice President  
Thompson & Associates  
Glenview, IL

### **Ingrid Perry**

**Fundraising Management**  
President and CEO  
Mackenzie Health Foundation  
Richmond Hill, ON



# HOTEL & TRAVEL INFORMATION

## Hotel Reservations

Please make your own room reservations from among the hotel options listed below. This gives you the opportunity to stay in the hotel that best accommodates your needs. Please contact the hotel directly to make your room reservation. When calling, be sure to identify yourself as an Association for Healthcare Philanthropy (AHP) attendee. If making your reservations online, please visit [www.ahp.org/MadisonInstitute](http://www.ahp.org/MadisonInstitute). Remember that there are limited rooms available at AHP's negotiated room rates. Make your reservation early to secure your first choice, as AHP's room block sells out quickly.

Hotel options under AHP's room block are listed below, with rates exclusive of applicable taxes.

### The Lowell Center

610 Langdon St., Madison, WI 53703

Phone: 608-256-2621

Room Rate: \$124 per night for Deluxe, \$105 for Standard (single occupancy)  
\$12 for each additional person per night

*\*These rates are subject to change*

### Graduate Hotel Madison

601 Langdon St., Madison, WI 53703

Phone: 608-257-4391

Room Rate: \$174 per night

### DoubleTree by Hilton Downtown Madison

525 West Johnson St., Madison, WI 53703

Phone: 608-251-5511

Room Rate: \$159 per night

### Fluno Center

601 University Ave, Madison, WI 53715

Phone: 877-773-5866

Room Rate: \$159 per night

## Hotel Cut-off Date: Thursday, June 14, 2018

The hotel cut-off date for all hotels in AHP's room block is June 14, 2018. Make your reservation early to secure your preferred hotel. AHP cannot guarantee that rooms will be available until the cut-off date. After the hotel cut-off date, all hotel room rates revert to the hotels' prevailing rates.

## Institute Start and End Times

Sunday, 7/15/2018 – Friday, 7/20/2018

## Location of Classes and Meals

All classes are held at the Pyle Center, 702 Langdon Street. The Pyle Center is within walking distance of the Lowell Center. All breakfasts are served at the Lowell Center. The remaining meals are served at the Pyle Center. All off-campus hotel options are less than a 10-minute walk from the Pyle and Lowell Centers.

## Airport Information

The closest airport is the Dane County Airport, which is 20 minutes from the hotels. The taxi fare is approximately \$20 one way.

## Attire

The attire at the AHP Madison Institute is casual. We strongly recommend bringing a jacket or light sweater since temperatures can fluctuate in the air-conditioned meeting rooms.

## Weather

Average day temperature in July is 80° F.  
Average evening temperature is 66° F.

MAKE YOUR  
RESERVATIONS ONLINE  
AT [www.ahp.org/  
MadisonInstitute/Hotel](http://www.ahp.org/MadisonInstitute/Hotel)

# REGISTRATION INFORMATION

Thank you for your interest in attending the 2018 AHP Madison Institute. Information about the registration process is below. If you have any questions, contact AHP at 703-532-6243 or email [meetings@ahp.org](mailto:meetings@ahp.org). The most up-to-date information is online at [www.ahp.org/MadisonInstitute](http://www.ahp.org/MadisonInstitute).

## Registration Desk

The registration desk opens at 12 PM (noon) on Sunday, July 15 in the lobby of the Pyle Center. Please check in and pick up your course materials when you arrive.

## Registration Fees

Your registration fee for the 2018 AHP Madison Institute covers the cost of the certificate program, a flash drive and binder containing resources and handouts for your specific learning track, meals and refreshment breaks. Classes do sell out, so early registration is recommended. Reservations are accepted on a first-paid basis.

## Meals Information

Your registration fee includes the following meals: reception on Sunday, breakfast and lunch on Monday through Thursday and breakfast on Friday.

## Certificate Programs

The AHP Madison Institute offers a choice of seven certificate programs. Please indicate on the registration form which track you would like to attend. Although each track is independent of the others, we recommend that you enroll in them according to their numbered sequence.

**Register now** – some tracks fill quickly. Participants enroll in one track and attend classes with that cohort all week.

## Not an AHP Member?

Learn more about AHP member benefits and how you can save money on the Madison Institute and all other AHP events. In fact, the Madison Institute savings alone are greater than your first year's membership dues! Email [membership@ahp.org](mailto:membership@ahp.org) for more information.



## Cancellation

All cancellation requests must be submitted to [meetings@ahp.org](mailto:meetings@ahp.org) by June 1, 2018. If registration is canceled in writing by June 1, 2018, the registration fee will be refunded less a \$125 cancellation fee. After June 1, 2018, no refunds will be made.

## Confirmation Information

You will receive a confirmation letter and other helpful information after we receive your registration payment. You also will receive an email one week before the Madison Institute begins with reminder information and a detailed schedule for the certificate program for which you've registered.

*"I gained so much professionally. What I learned at Madison I was able to put in to practice and in addition to the actual learning was the opportunity to have a whole cohort of folks who became really good friends, and I continue to engage with them to this day.*

*Madison has provided me great experience, mentors and colleagues in the field and I'm delighted to be able to do that for others who are coming along in the field.*

*I came away from my experience as a student with so many things that I could put into practice right in my shops right away... it's the reason why I went three times myself."*

**Donna Budak, FAHP, CFRE**  
Faculty Member, Annual Giving track  
Executive Director, Seton Healthcare Family  
The Seton Fund and Seton Williamson Foundation  
Austin, TX

JULY 15–20, 2018  
WISCONSIN SCHOOL OF BUSINESS  
MADISON, WI



## REGISTRATION

### REGISTER TODAY!

[www.ahp.org/MadisonInstitute](http://www.ahp.org/MadisonInstitute)

**Application must be filled out in its entirety to be accepted, and be received by June 29, 2018.**

Mail to:  
Association for Healthcare Philanthropy  
2511 Jefferson Davis Hwy, Suite 810  
Arlington, VA 22202

Fax: 703-532-7170

E-mail: [meetings@ahp.org](mailto:meetings@ahp.org)

### ATTENDEE INFORMATION

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name on badge

\_\_\_\_\_  
Title

\_\_\_\_\_  
Organization

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State/Province Postal Code

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Mobile Phone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
Email\*

\*Email addresses are required for registration, but not published or distributed.

OPT OUT OF 3rd PARTY EMAILS

#### Registration Notes

Please check here if:

- You require special assistance or have special dietary needs. Please email information to [meetings@ahp.org](mailto:meetings@ahp.org).
- You are a new member of AHP.

#### Is this your first time attending the Madison Institute?

Yes  No

#### How did you hear about this event?

- Mail  Email  Colleague  Website
- Social networking site
- Other/Source Code \_\_\_\_\_

#### Are you familiar with AHPs Professional Pathway Program?

Yes  No

#### If yes, which Professional Pathway level best represents you?

- Baseline  Specialist  Executive
- Unsure/Need help determining Pathway level

#### I would like information about AHP Member Benefits.

#### Photography Release

By registering, I grant to AHP, its representatives and employees the right to take photographs and/or videos of me and my property to copyright, use and publish in print and/or electronically. I agree that AHP may use such photographs of me with or without my name and for any lawful purpose, including for example such purposes as publicity, illustration, advertising, email, social media, web content.

JULY 15–20, 2018  
WISCONSIN SCHOOL OF BUSINESS  
MADISON, WI



### HOTEL INFORMATION

Madison Institute participants are eligible for reduced room rates at four local hotels. Learn more at: [www.ahp.org/MadisonHotel](http://www.ahp.org/MadisonHotel)

### REGISTRATION INFORMATION

	Advanced postmarked between 2/14/18–4/20/18	Regular postmarked between 4/20/18–6/29/18
AHP member	<input type="checkbox"/> \$2,295	<input type="checkbox"/> \$2,395
Non-member	<input type="checkbox"/> \$2,895	<input type="checkbox"/> \$2,995
Residency Program		
AHP member	<input type="checkbox"/> \$7,000	Non-member <input type="checkbox"/> \$8,500

### CERTIFICATE PROGRAM

- Track 1: Fundamentals of Resource Development
- Track 2: Annual Giving
- Track 3: Elements of Major Gifts
- Track 4: Major Gift Initiatives and the Campaign
- Track 5: Advanced Skills for Major Gift Success
- Track 6: Planned Giving
- Track 7: Fundraising Management
- Health System Philanthropy Residency Program

### PAYMENT METHOD

- My check is attached, made payable to the Association for Healthcare Philanthropy. **(All checks should be made out to AHP in US dollars).**
- Please charge my:  VISA  MASTERCARD  AMEX **(All credit cards are processed in the US and will be processed in US dollars). Fax to 703.532.7170**

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### Registration Policies\*

Thank you for your interest in attending the 2018 AHP Madison Institute Certificate Program. More information about AHP's registration policies can be found online. If you have any questions about the registration process or options, please contact AHP at **703-532-6243** or via email at [meetings@ahp.org](mailto:meetings@ahp.org). The most up-to-date conference information is online at [ahp.org/MadisonInstitute](http://ahp.org/MadisonInstitute).

**HAVE QUESTIONS? EMAIL AHP'S MEETINGS DEPARTMENT WITH ALL INQUIRIES AT MEETINGS@AHP.ORG**

\* To see a full explanation of AHP's registration policies, visit [ahp.org/terms](http://ahp.org/terms).

Registration forms will not be processed without payment. All credit card payments will be processed in US funds. All cancellation requests must be submitted to [meetings@ahp.org](mailto:meetings@ahp.org) by June 1, 2018. If registration is canceled in writing by **June 1, 2018**, the registration fee less a \$125 cancellation fee will be processed. After June 1, 2018, no refunds will be made.

**Registration forms must be received by June 29, 2018.**

For your convenience, payment for conference registration, exhibitor, sponsorship payments may be made to AHP by mail, phone, fax, or through AHP's website. Please note that AHP cannot control the handling of payment information sent to AHP by way of mail or email. AHP will not be responsible for any damages or loss incurred by you if you choose to send payment information (including, without limitation, credit card information) to AHP by way of mail or email. You therefore accept sole responsibility for any damage or loss resulting from your use of such communication methods. Please review our Privacy Policy found at [ahp.org/privacy](http://ahp.org/privacy) for a summary of our practices related to the collection and use of personal information.



Association for Healthcare Philanthropy  
2511 Jefferson Davis Hwy, Suite 810  
Arlington, VA 22202  
703-532-6243  
ahp@ahp.org  
www.ahp.org/madisoninstitute

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