

**Association for Healthcare Philanthropy
Madison Institute**

Annual Giving

2022

Core Faculty:

Suzanne Bone, FAHP, CFRE, Dean

Lupita Garza, CFRE

Tim Logan, CFRE, ACFRE, FAHP, FCEP Associate Dean

Alisa Smallwood, CFRE

Class Guest Speakers:

John Drake, MLA, FAHP, CFRE,

Doug Dillon, CFRE

Brian Hervey, CGPP, CFRE

Jill Kyle, MBA, CFRE

Mark McCampbell, CFRE

Sunday, July 17	Topic/Activity	Faculty
1:00 – 5:00 pm	Registration Pyle Center	
5:00 – 6:30 pm	Convene to Classrooms Pyle Center Welcome Introductions Expectations Ice Breaker	Suzanne Bone, FAHP, CFRE Lupita Garza, CFRE Tim Logan, CFRE, ACFRE, FAHP Alisa Smallwood, CFRE
6:30 – 7:45 pm	Networking Social	

Madison Institute 2022—Annual Giving

Monday, July 18	Topic/Activity	Faculty
7:30 – 8:30	Breakfast and Welcome Great Hall-Memorial Hall	
8:30 – 9:00	Transfer to Pyle Center	
9:00 – 9:15	Setting the Stage for Annual Giving	Suzanne Bone
9:15 – 10:30	Planning Your Annual Fund Program	Suzanne Bone
10:30 – 10:45	Refreshment Break	
10:45 – 11:45	Psychology of Giving	John Drake
11:45 – 12:45	Lunch	
12:45 – 2:00	Trends in Fundraising	Alisa Smallwood Lupita Garza
2:00 – 3:15	Managing Up and Across Your Organization	Mark McCampbell
3:15 – 3:30	Refreshment Break	
3:30 – 4:30	Evaluating Your Annual Fund Program	Tim Logan
4:30 – 5:00	Application of today's learnings	All
5:00 – 6:00	Social Hour	Pyle
Evening	Dinner on your own	

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

Madison Institute 2022—Annual Giving

Tuesday, July 19	Topic	Faculty
7:30 – 8:30	Breakfast & General Session – Great Hall, Memorial Union	Lisa Bielamowicz, MD, President, Gist Healthcare
8:30 – 9:00	Transfer to Pyle Center	
9:00 – 10:00	Pipeline Development	Tim Logan
10:00 – 11:00	Employee Campaigns	Lupita Garza
11:00 – 11:15	Refreshment Break	
11:15 – 12:15	Monthly Giving	Alisa Smallwood
12:15 – 1:15	Lunch (with optional small group sessions with faculty)	
1:15 – 2:15	The Foundation and the Hospital— coordinating Marketing and Communications	Panel—Lupita Garza, Moderator, Suzanne Bone, & Alisa Smallwood
2:15 – 3:15	Mid-Level Donors	Suzanne Bone
3:15 – 3:30	Refreshment Break	
3:30 – 4:30	Direct Mail	Tim Logan
4:30 – 5:00	Application of today’s learnings	All
5:00 – 6:00	Social Hour	Pyle
Evening	Dinner on your own	

Madison Institute 2022—Annual Giving

Wednesday, July 20	Topic	Faculty
7:30 – 8:45	Breakfast & General Session – HIPAA Great Hall, Memorial Union	
8:45 – 9:00	Transfer to Pyle Center	
9:00 – 10:15	Stewardship	Alisa Smallwood
10:15 – 10:30	Refreshment Break	
10:30 – 11:45	Clinician Engagement	Jill Kyle
11:45 – 1:00	Grateful Patient Programs	Brian Hervey Tim Logan
1:00	Box Lunches	
Free afternoon and evening		

Madison Institute 2022—Annual Giving

Thursday, July 21	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Great Hall, Memorial Union	
8:30 – 8:45	Transfer to Pyle Center	
8:45 – 10:00	Personal Solicitation	Doug Dillon
10:00 – 10:15	Refreshment Break	
10:15 – 11:45	The Complete Session on Digital Fundraising Online, email, social, peer to peer, web, text	Suzanne Bone Tim Logan
11:45 – 12:45	Lunch (with optional small group sessions with faculty)	
12:45 – 2:15	Special Events	Lupita Garza
2:15 – 3:15	Personal Solicitation Application	Alisa Smallwood
3:15 – 3:30	Refreshment Break	
3:30 – 4:30	The Role of Annual Fund in Planned and Major Giving	Tim Logan
4:30 – 5:00	Application of today's learnings	All
5:00 – 6:00	Social Hour	Pyle
Evening	Dinner on your own	

Madison Institute 2022—Annual Giving

Friday, July 22	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Great Hall, Memorial Union	
8:30 – 8:45	Transfer to Pyle Center	
8:45 – 9:45	Create Your Action Plan	Lupita Garza
9:45 – 10:30	Your Career	Suzanne Bone
10:30 – 10:45	Refreshment Break	
10:45 – 11:30	Managing Competing Priorities	All
11:30 - 12:30	Wrap up and Graduation	All