

Association for Healthcare Philanthropy Madison Institute

Elements of Major Gifts

2022

Core Faculty:

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

Sunday, July 17	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	

Class Guest Speakers:

Doug Dillon
Ashley Nall – Senior MGO Panel
Shannon Duval – Facilitate MGO Panel
John Drake -
Tim Logan

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

Madison Institute 2022—Elements of Major Gifts

Monday, July 18	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 transformative 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	Strategic Leader, C-Suite and Volunteer Engagement	Guest Faculty – John Drake?
4:00 – 4:45 PM	Assign and Discuss Capstone Projects	All track faculty
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	

Madison Institute 2022—Elements of Major Gifts²

Tuesday, July 19	Topic	Faculty
7:30 – 9:00 AM	Breakfast & General Session – Great Hall, Memorial Union	
9:00 – 10:30 AM	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
10:30 – 10:45 AM	BREAK	
10:45 AM – 12:15 PM	Qualification <ul style="list-style-type: none"> • Getting the visit <ul style="list-style-type: none"> ○ Work on script ○ Role playing • What do to on a qualification visit <ul style="list-style-type: none"> ○ Work on script ○ Role playing 	Tim Self ?
12:15 – 1:15PM	LUNCH	
1:15 – 2:45 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
2:45 – 3:00 PM	BREAK	
3:00 – 4:15 PM	Storytelling	Doug Dillon
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	

Madison Institute 2022—Elements of Major Gifts⁴

Wednesday, July 20	Topic	Faculty
7:30 – 9:00 AM	Breakfast & General Session – Great Hall, Memorial Union	
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 and evening		

Madison Institute 2022—Elements of Major Gifts⁵

Thursday, July 21	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Great Hall, Memorial Union	
8:30 – 10:00 AM	Ethics	Sarah Fawcett-Lee and Donna Budak
10:00 – 10:15 AM	BREAK	
10:15 – 11:45 AM	Senior MGO Panel	Shannon Duval - Facilitator
11:45 AM – 12:45 PM	LUNCH	
12:45 – 2:15 PM	Integrating Gift Planning into Major Gifts	Tim Logan
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 22	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Great Hall, Memorial Union	
8:30 – 10:30 AM	Capstone Project Presentations	All Track Faculty
10:30 – 11:30 AM	Evaluation, Certificate Presentations	All Track Faculty