

**Association for Healthcare Philanthropy**  
**Institute for Healthcare Philanthropy**

**Major Gift Initiatives and the Campaign**

**Dean: Douglas Dillon, CFRE**  
**Associate Dean: Ashley Nall, M.S., CFRE**  
**Faculty: Kathleen Patrick, CFRE**

**2022**

<b>Sunday, July 17</b>	<b>Topic/Activity</b>	<b>Faculty</b>
<b>1:00 – 5:00 pm</b>	Registration	
<b>5:00 – 6:30 pm</b>	Convene to Classrooms – Introductions  Making the Most of the Madison Experience	<b>Doug Dillon, CFRE</b>  <b>Ashley Nall, CFRE</b>  <b>Kathleen Patrick, CFRE</b>
<b>6:30 – 7:45 pm</b>	Networking Social	

## Madison Institute 2022 — Major Gift Initiatives and the Campaign

<b>Monday, July 18</b>	<b>Topic/Activity</b>	<b>Faculty</b>
<b>7:00 – 7:45 am</b>	Breakfast, Great Hall, Memorial Union	
<b>8:00 – 8:45 am</b>	<b>General Session</b> – Great Hall, Memorial Union	
<b>9:00 – 10:15 am</b>	<b>A Campaign in Uncertain Times - Part I</b>	<b>Doug Dillon, CFRE</b>
<b>10:15 – 10:30 am</b>	Refreshment Break	
<b>10:30 – 11:00 am</b>	<b>A Campaign in Unprecedented Times - Part II</b>	<b>Ashley Nall, CFRE</b>
<b>11:00 am – 12:00 pm</b>	<b>Developing your Case for Support</b>	<b>Kathleen Patrick, CFRE</b>
<b>12:00 – 1:15 pm</b>	Lunch	
<b>1:15 – 2:15 pm</b>	<b>Feasibility Study or Leadership Assessment</b>	<b>Doug Dillon, CFRE</b>
<b>2:15 – 3:15 pm</b>	<b>Group Work Case Review and Preparation</b>	All
<b>3:15 – 3:30 pm</b>	Refreshment Break	
<b>3:30 – 4:30 pm</b>	<b>Marketing the Campaign</b>	<b>Kathleen Patrick, CFRE</b>
<b>4:30 – 5:00 pm</b>	<b>Faculty &amp; Group Wrap-up</b>	ALL
<b>5:00 – 6:00 pm</b>	Social Hour	
	Dinner on your own	

## Madison Institute 2022 — Major Gift Initiatives and the Campaign

<b>Tuesday, July 19</b>	<b>Topic</b>	<b>Faculty</b>
<b>7:30 – 8:30 am</b>	Breakfast	
<b>8:30 – 9:30 am</b>	<b>The Profile of Top Leadership</b>	<b>Shannon Duval, MS, MJ</b>
<b>9:30 – 10:30 am</b>	<b>The Magic of Employees Engaged in a Campaign</b>	<b>John Drake, CFRE</b>
<b>10:30-10:45 am</b>	Refreshment Break	
<b>10:45 am – 12:15 pm</b>	<b>Building the Master Plan</b>	<b>Doug Dillon, CFRE</b>
<b>12:15 – 1:30 pm</b>	Lunch	
<b>1:30 – 2:15 pm</b>	<b>Prospect Research &amp; Donor Coordination</b>	<b>Ashley Nall, CFRE</b>
<b>2:15 – 3:15 pm</b>	<b>Grateful Patients &amp; Faculty Engagement in a Campaign</b>	<b>Kathleen Patrick, CFRE</b>
<b>3:15 – 3:30 pm</b>	Refreshment Break	
<b>3:30 – 4:30 pm</b>	<b>Mining Your Database for Campaign Gifts</b>	<b>Donna Budak, FAHP, CFRE</b>
<b>4:30 – 5:00 p.m.</b>	<b>Faculty &amp; Group Wrap-up</b>	<b>ALL</b>
<b>5:00 – 6:00 pm</b>	Social Hour	
	Dinner on your own	

## Madison Institute 2022 — Major Gift Initiatives and the Campaign

<b>Wednesday, July 20</b>	<b>Topic</b>	<b>Faculty</b>
<b>7:30 – 8:30 am</b>	Breakfast	
<b>8:30 – 10:00 am</b>	<b>Annual Giving to Enhance the Campaign</b>	<b>Jill Kyle, MBA, CFRE</b>
<b>10:00 – 10:15 am</b>	Refreshment Break	
<b>10:15 – 11:00 am</b>	<b>Individual Plan – fundamentals of a motivation, solicitation stewardship plan</b>	<b>Ashley Nall, CFRE</b>
<b>11:00 am – 12:00 pm</b>	<b>Volunteer Motivation, Management and Training (Engaging Donors on the outside)</b>	<b>Doug Dillon, CFRE</b>
<b>12:00 – 1:15 pm</b>	Lunch	
	<b>FREE AFTERNOON &amp; EVENING</b>	

## Madison Institute 2022 — Major Gift Initiatives and the Campaign

Thursday, July 21	Topic	Faculty
7:30 – 8:30 am	Breakfast	
8:30 – 10:00 am	Planned Giving in the Campaign	Tim Logan, FAHP, ACFRE
10:00 – 10:15 am	Refreshment Break	
10:15 – 11:15 am	Recognition/Stewardship in the Capital Campaign	Kathleen Patrick, CFRE
11:15 am – 12:00 pm	Keeping Score...what to count and how to count it and managing the cash flow (how do you report it out)	David Collis, CFRE
12:00 pm – 1:15 pm	Lunch	
1:15 – 2:15 pm	Securing the Visit	Doug Dillon, CFRE Ashley Nall, CFRE
2:15 – 3:15 pm	Making the call- negotiating and closing the gift	Doug Dillon, CFRE Ashley Nall, CFRE
3:15 – 3:30 pm	Refreshment Break	
3:30 – 4:00 pm	Facilitated Group Role Plays	
4:00 – 4:55 pm	Group Work Preparing for the Solicitation	All
5:00 – 6:30 pm	Closing Celebration	
	Dinner on your own	

## Madison Institute 2022 — Major Gift Initiatives and the Campaign

Friday, July 22	Topic	Faculty
7:30 – 8:30 am	Breakfast	
8:45 – 9:45 am	<b>Solicitation Workshop</b>	All
9:45 – 10:00 am	Refreshment Break	
10:00 – 10:45 am	<b>Solicitation Workshop</b>	All
10:45 – 11:30 am	<b>Certificates &amp; Wrap Up</b>	All