

**Association for Healthcare Philanthropy**  
**Madison Institute**  
**Elements of Major Gifts**  
2024

**Core Faculty:**

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

**Track Guest Speakers:**

Janet DeWolfe, FAHP/CFRE – Strategic Leader, C-Suite, and Volunteer Engagement  
Ashley Nall, MS, CFRE – Facilitator Senior MGO Panel  
Jill Kyle, MBA, CFRE – Senior MGO Panel  
Dave Smith, CAP – Integrating Gift Planning in Major Gifts  
Preston Walton – Storytelling  
Robert Wahlers, MS, CFRE-Senior MGO Panel

## Madison Institute 2024—Elements of Major Gifts

Sunday, July 21	Topic/Activity	Faculty
9:00 am – 1:00 pm	Registration	
1:00 – 2:30 pm	<b>Orientation and Making the Most of the Madison Experience</b> <ul style="list-style-type: none"> <li>• Faculty introductions</li> <li>• Course preview</li> <li>• “Getting to know you”</li> <li>• Making the most of the Madison Experience</li> </ul>	Donna Budak Sarah Fawcett-Lee Tim Self
2:30 – 3:15 pm	<b>Introduction to Major Gifts</b> <ul style="list-style-type: none"> <li>• What is a major gifts program?</li> <li>• What is the difference between transactional and transformational giving?</li> <li>• What does it take to be a successful major gifts officer?</li> </ul>	Donna Budak Sarah Fawcett-Lee Tim Self
3:15 – 3:30 pm	<b>Break</b>	
3:30 – 5:15 pm	<b>Donor Motivations</b>	Sarah Fawcett-Lee
5:15 – 5:30 pm	<b>Break</b>	
5:30 – 6:30 pm	<b>Assign and Discuss Capstone Projects</b>	All track faculty
6:30 – 7:45 pm	<b>Networking Social</b>	

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

## Madison Institute 2024—Elements of Major Gifts

Monday, July 22	Topic/Activity	Faculty
7:00 – 8:00 am	Breakfast – Great Hall, Memorial Union	
8:00 – 9:00 am	General Session/Keynote – Great Hall, Memorial Union	
9:15 – 10:45 am	<p><b>Prospect Identification</b></p> <ul style="list-style-type: none"> <li>• What is a prospect?</li> <li>• How do you build a prospect pipeline?</li> <li>• How and when to use wealth screening</li> <li>• How to develop a network of philanthropy champions</li> <li>• Physician and clinician engagement</li> </ul>	<p>Tim Self (Leader) Donna Budak Sarah Fawcett-Lee</p>
10:45 – 11:15 am	Strategic Leader, C-Suite and Volunteer Engagement	Janet DeWolfe
11:15 – 12:15 am	Storytelling	Preston Walton
12:15 – 1:15 pm	Lunch	
1:15 – 2:45 pm	Setting Priorities and Portfolio Management	Sarah Fawcett-Lee
2:45 – 3:00 pm	Break	
3:00 – 4:30 pm	Qualification	Tim Self
4:30 – 5:00 pm	Capstone Project	Faculty
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

## Madison Institute 2024—Elements of Major Gifts

<b>Tuesday, July 23</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 10:30 am	<p><b>Cultivation</b></p> <ul style="list-style-type: none"> <li>• Asking questions and active listening</li> <li>• Connecting the donor’s passion to opportunities for investment</li> <li>• Laying the groundwork for an invitation to invest</li> <li>• Role playing the soft ask</li> </ul>	Donna Budak
10:30 – 10:45 am	Break	
10:45 am – 12:15 pm	Solicitation	Tim Self
12:15 – 1:15 pm	Lunch	
1:15 – 2:45 pm	Stewardship	Donna Budak
2:45 – 3:00 pm	Break	
3:00 – 4:30 pm	Moves Management	Sarah Fawcett-Lee
4:30 – 5:00 pm	Capstone Project	
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

## Madison Institute 2024—Elements of Major Gifts

<b>Wednesday, July 24</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 10:30 am	Integrating Gift Planning into Major Gifts	Dave Smith
10:30 – 10:45 am	Break	
10:45 am – 11:15 am	HIPAA	Donna Budak
11:15 AM – Noon	Capstone Project	All Track Faculty
Free afternoon and evening		

<b>Thursday, July 25</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:45 – 10:15 am	Senior Major Gift Panel	Ashley Nall
10:15 – 10:30 am	Break	
10:30 am – 12:00 pm	Ethics	Sarah Fawcett-Lee & Donna Budak
12:00 – 1:00 pm	Lunch	
1:00 – 3:45 pm	Capstone Project Presentations	All Track Faculty
3:45 – 4:45 pm	Evaluation, Certificate Presentations	All Track Faculty
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	