

Association for Healthcare Philanthropy Madison Institute

Annual Giving --2024

Core Faculty:

Tim Logan, FAHP, ACFRE, CFRE, Dean
Lupita Garza, CFRE, Associate Dean
Alisa Smallwood, CFRE

Class Guest Speakers:

Michael Beall
Wayne Combs
Sarah Fawcett-Lee, FAHP, CFRE
Josh LaBorde, CFRE
Dr. Patton McDowell, MBA, CFRE
Sharyl Smith, APR

Sunday, July 21	Topic/Activity	Faculty
9:00 am – 1:00 pm	Registration	
1:00 pm	Convene to Classroom	
1:00 – 2:30 pm	Welcome Introductions Expectations Ice Breaker	Tim Logan, CFRE, ACFRE, FAHP Lupita Garza, CFRE Alisa Smallwood, CFRE
2:30 – 2:45 pm	Setting the Stage for Annual Giving	Lupita Garza
2:45 – 4:00 pm	Planning Your Annual Fund Program	Lupita Garza
4:00 – 4:15 pm	Refreshment Break	
4:15 -5:30 pm	Your Career Plan	Dr. Patton McDowell
5:30 – 6:00 pm	Application of Today’s Learnings	Alisa Smallwood
6:30 – 7:45 pm	Networking Social	

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	
9:00 – 9:15 am	Morning Welcome/ Announcements	Tim Logan
9:15 – 9:30am	Transition to Auditorium	
9:30 – 10:30 am	HIPAA, Privacy, and DEI**	Josh Laborde Wayne Combs
10:30 – 10:45 am	Refreshment Break	
10:45 – 12:00 pm	Employee Campaigns	Lupita Garza
12:00 – 1:00 pm	Lunch	
1:00 – 2:00 pm	Psychology of Giving	Alisa Smallwood
2:00 – 3:15 pm	Trends in Giving	Allisa Smallwood Lupita Garza
3:15 – 3:30 pm	Refreshment Break	
3:30 – 4:30 pm	Pipeline Development	Tim Logan
4:30 – 5:00 pm	Application of Today’s Learnings	Alisa Smallwood
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

** Joint Session with AHP Madison Operations Track

Tuesday, July 23	Topic	Faculty
7:30 – 8:45 am	Breakfast & Roundtables – Pyle Center	
8:45 – 9:00 am	Morning Welcome/ Announcements	Tim Logan
9:00 – 10:00 am	Direct Marketing	Tim Logan
10:00-11:00 am	Monthly Giving	Alisa Smallwood
11:00 – 11:15 am	Refreshment Break	
11:15 – 12:15 pm	Special Events	Lupita Garza
12:15 – 1:00 pm	Lunch	
1:00 – 2:00 pm	Stewardship**	Alisa Smallwood
2:00 – 2:15 pm	Refreshment Break	
2:15 – 4:00 pm	Leveraging AI in Philanthropic Programs **	Josh LaBorde
4:00 – 4:15 pm	Transition to classroom	
4:15 – 5:00 pm	Application of Today’s Learnings Parking Lot Discussion	Alisa, Lupita, and Tim
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on Own	

** Joint Session with AHP Madison Operations Track

Wednesday, July 24	Topic	Faculty
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 9:15 am	Morning Welcome/ Announcements	Tim Logan
9:15 – 10:30 am	Annual Fund in Grateful Patients	Tim Logan
10:30 – 10:45 am	Refreshment Break	
10:45 – 11:45 am	The Foundation and the Hospital— coordinating Marketing and Communications	Lupita Garza & Alisa Smallwood Sarah Fawcett-Lee Sharyl Smith
11:45 – 12:45 pm	Digital Fundraising	Mike Beall
12:45 – 1:00 pm	Application of Today’s Learnings	Alisa Smallwood
Free afternoon and evening		

Thursday, July 25	Topic	Faculty
7:30 – 8:30 am	Breakfast – Pyle Center	
8:30 – 9:00 am	Morning Welcome/ Announcements	Tim Logan
9:00 – 10:15 am	Mid-Level Donors	Tim Logan
10:15 – 10:30 am	Convene to Auditorium	
10:30 – 11:30 am	Evaluating Your Annual Fund Development Program **	Tim Logan
11:30 – 11:45 am	Refreshment Break	
11:45 – 12:45 pm	Major Donors	Panel—Alisa, Lupita, and Tim
12:45 – 1:45 pm	Lunch	
1:45 – 2:45 pm	Telling Your Story	Alisa Smallwood
2:45 – 3:45 pm	Develop Your Annual Fund Plan	Team
3:45 – 4:15 pm	Create Your Action Plan— Taking Madison Home	Alisa and Lupita
4:15 – 4:45 pm	Graduation and Wrap Up	Team
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	

** Joint Session with AHP Madison **Development Operations** Track