

**Association for Healthcare Philanthropy  
Madison Institute**

**Charitable Gift Planning**

2024

**Core Faculty:**

Dave Smith, CAP, Dean

Nicola Lawrence, CAP

Nelson Wittenmyer, J.D.

Mandy Steyer, J.D.

<b>Sunday, July 21</b>	<b>Topic/Activity</b>	<b>Faculty</b>
9:00 am – 1:00 pm	Registration	
1:00 – 1:45 PM	Introductions/Ice Breaker	All Faculty
	<b>PRELUDE</b>	
1:45 – 2:30 PM	The Case for Charitable Gift Planning	Dave Smith, CAP®
2:30 – 2:45 PM	Break	
2:45 – 3:45 PM	Income, Estate Tax, and Estate Planning Primer	Nicola Lawrence, CAP®
3:45 – 5:15 PM	Gift Planning Instruments	Mandy Steyer, J.D.
5:15 PM – 6:00 PM	Charitable Gift Planning Assets	Nicola Lawrence, CAP®
6:30 – 7:45 pm	Networking Social	

## Madison Institute 2024 – Charitable Gift Planning<sup>2</sup> Track

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	
	<b>IDENTIFICATION</b>	
9:00 – 10:30 AM	Gift Planning Prospects Identification Gratefulness, Interest, Affluence, Influence	Mandy Steyer, J.D.
10:30 – 10:45 AM	Break	
10:45 – 12:00 PM	Gift Planning Marketing: Tools and Strategy	Nicola Lawrence, CAP®
12:00 – 1:00 PM	Luncheon	
	<b>QUALIFICATION</b>	
1:00 – 2:00 PM	Tools to Determine Donor Affinity, Financial Capacity, and Philanthropic Motivations	Mandy Steyer, J.D.
2:00 – 3:00 PM	Gift Planning Prospect Segmentation	Dave Smith CAP®
3:15 – 3:30 PM	Break	
3:30 – 4:15 PM	Gift Planning in a Campaign	Nicola Lawrence, CAP®, Mandy Steyer, J.D.
4:15 – 5:00 PM	How to Construct a Gift Planning Program Workplan: A Primer	Nicola Lawrence, CAP®
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	

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

## Madison Institute 2024 – Charitable Gift Planning<sup>3</sup> Track

<b>Tuesday, July 23</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 9:00 AM	Breakfast & Roundtables – Pyle Center	
	<b>CULTIVATION</b>	
9:00 – 10:00 AM	A Leading Practice: Building a Collaborative Team	Nelson Wittenmyer, J.D.
10:30 – 10:45 AM	Break	
10:45 AM – 12:00 PM	Building Donor Relationships: A Suite of Strategies	Mandy Steyer, J.D.
12:00 – 1:00 PM	Luncheon	
1:00 – 2:00 PM	Blended Gift Strategies	Nicola Lawrence, CAP®
2:00 – 2:45 PM	Building a Donor Fact Pattern: Leading Practice Questions	Dave Smith, CAP®
2:45 – 3:00 PM	Break	
3:00 – 4:00 PM	The Gift Planning Conversation	Nelson Wittenmyer, J.D.
4:00 – 5:00 PM	Before the Ask: Determine the Best Gift Vehicles(s) for Donor	Nelson Wittenmyer, J.D.
5:00 – 6:00 pm	Networking Social	
Evening		

## Madison Institute 2024 – Charitable Gift Planning<sup>4</sup> Track

Wednesday, July 24	Topic	Faculty
7:30 – 9:00 AM	Breakfast & Roundtables – Pyle Center	
	<b>SOLICITATION</b>	
9:00 – 10:30 AM	Gift Planning Case Studies: Donor Scenarios and Recommendations	All Faculty
10:30 – 10:45 AM	Break	
10:45 – 11:45 AM	Working With Professional Advisors	Nicola Lawrence, CAP®
11:45 AM – 12:15 PM	Ethics in Fundraising/Gift Planning	Dave Smith, CAP®
12:15 – 12:30 PM	What We've Learned So Far	All Faculty
Free afternoon and evening		

## Madison Institute 2024 – Charitable Gift Planning<sup>5</sup> Track

Thursday, July 25	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
	<b>STEWARDSHIP</b>	
8:30 – 9:30 AM	Stewardship and Recognition Strategies	Nicola Lawrence, CAP®
10:00 – 10:15 AM	Break	
10:15 – 11:15 AM	Impact Reports: A Framework	Dave Smith, CAP®
11:15 AM – 12:00 PM	Counting Versus Accounting	Nelson Wittenmyer, J.D.
12:00 – 1:00 PM	Luncheon	
	<b>PUTTING KNOWLEDGE INTO PRACTICE</b>	
1:00 – 1:45 PM	Gift Administration	Nelson Wittenmyer, J.D.
1:45 – 2:15 PM	Interviewing a Gift Planning Prospect	Nelson Wittenmyer, J.D. Class Participant
2:15 – 2:45 PM	Gift Design	Class Project
2:45 – 3:-00 PM	Break	
3:00 – 3:30 PM	Interviewing a Gift Planning Prospect	Nelson Wittenmyer, J.D. Class Participant
3:30 – 4:45 PM	Finalize Work Plan	Class Project
4:45 – 5:00 PM	What You Learned	Class
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	