

# **Association for Healthcare Philanthropy Madison Institute**

## **Annual Giving**

**2025**

### **Core Faculty:**

Tim Logan, FAHP, ACFRE, CFRE, Dean

Lupita Garza, CFRE, Associate Dean

Alisa Smallwood, FAHP, CFRE

### **Class Guest Speakers:**

Michael Beall

Becky Frantz, Ph.D., CFRE

Josh LaBorde, CFRE

Sarah Fawcett-Lee, FAHP, CFRE

Sharyl Smith, APR

<b>Monday, July 21</b>	<b>Topic/Activity</b>	<b>Faculty</b>
7:00 – 8:00 AM	Breakfast Available	
8:00 AM	Morning Welcome and Announcements	
8:15 – 9:30	<b>Introductions Expectations Ice Breaker</b>	<b>Tim Logan, FAHP, ACFRE, CFRE Lupita Garza, CFRE Alisa Smallwood, FAHP, CFRE</b>
9:30 – 10:30	<b>Planning Your Annual Fund Program</b>	<b>Lupita Garza</b>
10:30 – 10:45	Refreshment Break	
10:45 – 11:45	<b>Psychology of Giving</b>	<b>Alisa Smallwood</b>
11:45 – 12:45 PM	Lunch	
12:45 – 2:00	<b>Trends in Giving</b>	<b>Alisa Smallwood Lupita Garza</b>
2:00 – 3:00	<b>Employee Giving</b>	<b>Lupita Garza</b>
3:00 – 3:15	Refreshment Break	
3:15 – 4:30	<b>Pipeline Development</b>	<b>Tim Logan</b>
4:30 – 5:00	<b>Application of Today's Learnings</b>	<b>Alisa Smallwood</b>
5:00 – 6:00 PM	Welcome Reception	
Evening	Dinner on your own	

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

<b>Tuesday, July 22</b>	<b>Topic</b>	<b>Faculty</b>
8:00 – 8:45 AM	Breakfast Available	
8:45 – 9:30 AM	<b>General Session &amp; Keynote Speaker</b>	
9:30 – 9:45	Transition to classroom	
9:45 – 10:00	Morning Welcome and Announcements	
10:00 – 11:15	<b>Evaluating Your Annual Fund**</b>	<b>Tim Logan</b>
11:15 – 12:30 PM	<b>HIPAA, Privacy, and DEI</b>	<b>Josh Laborde Becky Frantz</b>
12:30 – 1:30	Lunch	
1:30 – 2:30	<b>Stewardship**</b>	<b>Alisa Smallwood</b>
2:30 – 2:45	Refreshment Break	
2:45 – 4:00	<b>Leveraging AI in Philanthropic Programs**</b>	<b>Josh LaBorde</b>
4:00 – 4:15	Transition to Classroom	
4:15 – 5:00	<b>Application of Today's Learnings Parking Lot Discussion Faculty "Office Hours"</b>	<b>Alisa, Lupita, and Tim</b>
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

**\*\*Joint Session with AHP Madison Operations Track  
Held in the Pyle Center Auditorium**

<b>Wednesday, July 23</b>	<b>Topic</b>	<b>Faculty</b>
8:00 – 9:00 AM	Breakfast & Optional Roundtables	
8:45 – 9:00	Morning Welcome & Announcements	
9:00 – 10:00	<b>Mid-Level Donor Programs</b>	<b>Tim Logan</b>
10:00 – 10:15	Refreshment Break	
10:15 – 11:30	<b>The Foundation and the Hospital—Coordinating Marketing and Communications</b>	<b>Lupita Garza</b> <b>Alisa Smallwood</b> <b>Sarah Fawcett-Lee, FAHP, CFRE</b> <b>Sharyl Smith</b>
11:30 – 12:15 PM	Lunch	
12:15 – 1:15	<b>Direct Mail</b>	<b>Tim Logan</b>
1:15 – 2:15	<b>Telling Your Story</b>	<b>Alisa Smallwood</b>
2:15 – 2:30	<b>Application of Today's Learnings</b>	<b>Alisa Smallwood</b>
2:30 PM	Free afternoon begins	

<b>Thursday, July 24</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:30 – 8:45	Morning Welcome & Announcements	
8:45 – 10:00	<b>Digital Fundraising</b>	<b>Mike Beall</b>
10:00 – 10:15	Refreshment Break	
10:15 – 11:30	<b>The Annual Fund in Grateful Patient Programs</b>	<b>Tim Logan</b>
11:30 – 12:30 PM	<b>Special Events</b>	<b>Lupita Garza</b>
12:30 – 1:30	Lunch	
1:30 – 2:30	<b>Monthly Giving</b>	<b>Alisa Smallwood</b>
2:30 – 3:30	<b>Strengths of Annual Giving</b>	<b>Panel— Led by Lupita with Alisa and Tim</b>
3:30 – 4:00	<b>Develop Your Annual Fund Plan</b>	<b>Lupita</b>
4:00 – 4:30	<b>Create Your Action Plan— Taking Madison Home</b>	<b>Alisa</b>
4:30 – 5:00	<b>Graduation and Wrap Up</b>	<b>Team</b>
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	