

# **Association for Healthcare Philanthropy Madison Institute**

## **Elements of Major Gifts 2025**

### **Core Faculty:**

Donna Budak, MA, FAHP/CFRE, Dean  
Tim Self, MS, CFRE, Associate Dean  
Kathy Alexander, MPNL, Faculty  
David Garamella, MPA, Faculty

### **Class Guest Speakers:**

Shannon Duval, FAHP, CFRE - Strategic Leader, C-Suite and Volunteer Engagement  
Josh LaBorde, CFRE – Artificial Intelligence, Working with AI in Major gifts  
Dave Smith – Integrating Gift Planning in Major Gifts  
Preston Walton - Storytelling

## Madison Institute 2025—Elements of Major Gifts

Monday, July 21	Topic/Activity	Faculty
7:00 – 12:00 PM	Registration	
7:00 – 8:00 AM	Breakfast Available	
8:00 – 9:00 AM	Orientation and Inro. to Major Gifts	All Track Faculty
9:00 – 10:00 AM	Donor Motivation	*David Garamella
10:00 - 10:15 AM	Break	
10:15 – 12:00 PM	Grateful Patients	*David Garamella *Kathy Alexander
12:00 – 1:00 PM	Lunch	
1:00 – 2:30 PM	Prospect Identification/Qualification	Kathy Alexander
2:30 – 2:45 PM	Break	
2:45 - 4:15 PM	Story Telling	Preston Walton
4:30 – 5:00 PM	Cap Stone – Parking Lot	All Track Faculty
5:00 - 6:00 PM	Welcome Reception	

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

## Madison Institute 2025—Elements of Major Gifts

<b>Tuesday, July 22</b>	<b>Topic</b>	<b>Faculty</b>
8:00 – 8:45 AM	Breakfast Available	
8:00 – 9:00 AM	General Session/Keynote Speaker	Alice Ayres
9:15 - 10:15 AM	Cultivation	Donna Budak
10:15 – 11:00 AM	Strategic Leader, C-Suite and Volunteer Engagement	Shannon Duval *David Garamella
11:00 - 11:15 AM	Break	
11:15 – 12:15 PM	Setting Priorities and Portfolio Management	*David Garamella
12:15 – 1:15 PM	Lunch	
1:15 – 2:45 PM	“Artificial Intelligence” Working with AI in Major Gifts	Josh LaBorde
2:45 - 3:00 PM	Break	
3:00 – 4:30 PM	Solicitation	*Tim Self
4:30 -5:00 PM	Capstone Project Prep	All Track Faculty
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	

<b>Wednesday, July 23</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 9:00 AM	Roundtables – Pyle Center	
8:00 – 9:00 AM	Breakfast Available	
9:00 – 10:00 AM	Stewardship	*Donna Budak
10:00 – 10:15 AM	Break	
10:15 – 11:30 PM	HIPPA/PIPEDA & Ethics	*David Garamella *Kathy Alexander
11:30 – 12:30 PM	Lunch	
12:45 – 2:30 PM	Planned Giving & Blended Gifts	Dave Smith Planned Giving Track Faculty
Afternoon/Evening	Dinner on your own	

## Madison Institute 2025—Elements of Major Gifts

Thursday, July 24	Topic	Faculty
7:30 – 8:30 AM	Pyle Center	
8:00 – 9:00 AM	Breakfast Available	
9:00 – 10:45 AM	Panel Discussion Philanthropy Champions/Partners/Trustee/ Physician/Executive	All Track Faculty
10:45 – 11:00 AM	Break	
11:00 – 11:30 AM	Capstone Prep	All Track Faculty
11:30 – 12:30 PM	Lunch	
12:30 – 3:45 PM	Capstone Project Presentations	All Track Faculty
3:45 – 4:45 PM	Evaluation, Certificate Presentations	All Track Faculty
5:00 – 6:00 PM	Closing Celebration Social Hour	