

Association for Healthcare Philanthropy

Madison Institute

Philanthropy Operations Track

2025

Core Faculty:

Carrie Boardwick, CFRE, Dean
Josh LaBorde, CFRE, Associate Dean
Wayne Combs, MBA, Ed.D.
Becky Frantz, Ph.D., CFRE

Class Guest Speakers:

Tim Logan, ACFRE, FAHP, FCEP
Alisa Smallwood, FAHP, CFRE

Madison Institute 2025—Philanthropy Operations²

Monday, July 21	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast Available	
8:00 AM	Welcome and Introductions	All
9:00-10:00 AM	The Role of the Operations Leader in Healthcare Philanthropy	Operations Faculty
10-10:15 AM	Break	
10:15-11:15 AM	Benchmarking: What's it all About?	Operations Faculty
11:15-12:15 PM	Prospect Development Overview and the Case for Relationship Management	Operations Faculty
12:15-1:15 PM	Lunch	
1:15-2:30 PM	Digital Philanthropy	Operations Faculty
2:30-3:15 PM	Project Management	Operations Faculty
3:15-3:30 PM	Break	
3:30-4:15 PM	Recap Discussion	
5:00 – 6:00 PM	Welcome Reception	
Evening	Dinner on your own	

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

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Tuesday, July 22	Topic	Faculty
8:00 – 8:45 AM	Breakfast Available	
8:45 – 9:30 AM	General Session & Keynote Speaker	
10:00-11:15 AM	Evaluating Your Annual Fund	Tim Logan
11:15-12:30 PM	HIPAA, Privacy, and DEI	Operations/Annual Giving Faculty
12:30-1:30 PM	Lunch	
1:30-2:30 PM	Stewardship	Alisa Smallwood
2:30-2:45 PM	Break	
2:45-4:00 PM	Leveraging AI	Operations/Annual Giving Faculty
3:45-4:30 PM	Tracks Separate for Debrief	
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

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Wednesday, July 23	Topic	Faculty
8:00 – 9:00 AM	Breakfast & Optional Roundtables	
9:15-10:15 AM	Ethics in Philanthropy- Our Role as Transparent and Accountable Stewardship of Donors	Operations Faculty
10:15- 11:15 AM	Merging Operations: When Organizations Come Together	Operations Faculty
11:15-12:15 PM	Lunch	
12:15-1:15 PM	Grateful Patient Programming and Operations	Operations Faculty
1:15-2:30 PM	Data Governance and Technology	Operations Faculty
2:30 PM	Free afternoon begins	

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Thursday, July 24	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:45- 9:45 AM	Strategic Alignment Session	Operations Faculty
9:45-10:45 AM	Talent Management	Operations Faculty
10:45-11 AM	Break	
11-12:15 PM	Data Reporting, Business Intelligence, and Analytics	Operations Faculty
12:15-1:15 PM	Lunch	
1:15-2:30 PM	Finance, Accounting, & Budgeting	Operations Faculty
2:30-4:00 PM	Recap and Discussion	
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	