

**Association for Healthcare Philanthropy
Madison Institute**

Annual Giving

2026

Core Faculty:

Tim Logan, FAHP, ACFRE, CFRE, Dean
Lupita Garza, CFRE, Associate Dean
Alisa Smallwood, FAHP, CFRE
Josué E. Hernández, CFRE

Class Guest Speakers:

Michael Beall
Becky Frantz, Ph.D., CFRE
Josh LaBorde, CFRE
Sarah Fawcett-Lee, FAHP, CFRE
Sharyl Smith, APR

| Monday, July 13 | Topic/Activity | Faculty |
|------------------------|---|---|
| 7:00 – 8:00 AM | Breakfast Available | |
| 8:00 – 9:00 AM | General Session & Keynote Speaker | |
| 9:00 – 9:15 | Transition to Classroom | |
| 9:15 – 10:30 | Introductions Expectations Ice Breaker | Tim Logan, FAHP, ACFRE, CFRE Lupita Garza, CFRE Alisa Smallwood, FAHP, CFRE Josué E. Hernández, CFRE |
| 10:30 – 10:45 | Refreshment Break | |
| 10:45 – 11:45 | Planning Your Annual Fund Program | Lupita Garza |
| 11:45 – 12:45 | Lunch | |
| 12:45 – 1:45 | Psychology of Giving | Alisa Smallwood |
| 1:45 – 2:45 | Employee Giving | Josué E. Hernández |
| 2:45 – 3:00 | Refreshment Break | |
| 3:00 – 4:15 | Pipeline Development | Tim Logan |
| 4:15 – 5:00 | Application of Today’s Learnings | Alisa Smallwood |
| 5:00 – 6:00 | Welcome Reception | |
| Evening | Dinner on your own | |

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

| Tuesday, July 14 | Topic/Activity | Faculty |
|-------------------------|---|---|
| 8:00 – 9:00 AM | Breakfast Available | |
| 9:00 – 9:15 | Morning Welcome & Announcements | |
| 9:15 – 10:15 | Direct Mail | Josué E. Hernández Tim Logan |
| 10:15 – 10:30 | Transition to Auditorium | |
| 10:30 – 11:30 | Evaluating Your Annual Fund** | Tim Logan |
| 11:30 – 12:30 | HIPAA, Privacy, and DEI | Josh Laborde Becky Frantz |
| 12:30 – 1:30 | Lunch | |
| 1:30 – 2:30 | Stewardship** | Alisa Smallwood |
| 2:30 – 3:45 | Refreshment Break | |
| 3:45 – 4:00 | Leveraging AI in Philanthropic Programs ** | Josh LaBorde |
| 4:00 – 4:15 | Transition to Classroom | |
| 4:15 – 5:00 | Application of Today’s Learnings Parking Lot Discussion Faculty “Office Hours” | Alisa, Lupita, and Tim |
| 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**

| Wednesday, July 15 | Topic/Activity | Faculty |
|--------------------|---|--|
| 8:00 – 8:45 AM | Breakfast & Optional Roundtables | |
| 8:45 – 9:00 | Morning Welcome & Announcement | |
| 9:00 – 10:00 | Mid-Level Donors | Tim Logan |
| 10:00 – 10:15 | Refreshment Break | |
| 10:15 – 11:30 | The Foundation and the Hospital— Coordinating Marketing and Communications | Lupita Garza Alisa Smallwood Sarah Fawcett-Lee, FAHP, CFRE Sharyl Smith |
| 11:30 – 12:30 | Trends in Fundraising | Alisa, Lupita, and Tim |
| 12:30 – 1:15 | Lunch | |
| 1:15 – 2:15 | Telling Your Story | Alisa Smallwood |
| 2:15 – 2:30 | Application of Today’s Learnings | Alisa Smallwood |
| 2:30 PM | Free afternoon begins | |

| Thursday, July 16 | Topic | Faculty |
|-------------------|---|-------------------------|
| 8:00 – 9:00 AM | Breakfast – Pyle Center | |
| 9:00 – 9:15 | Morning Welcome & Announcements | |
| 9:15 – 10:15 | Digital Fundraising | Michael Beall |
| 10:15 – 10:30 | Refreshment Break | |
| 10:30 – 11:30 | The Annual Fund in Grateful Patient Programs | Tim Logan |
| 11:30 – 12:30 | Major Donors | Lupita and Alisa |
| 12:30 – 1:30 | Lunch | |
| 1:30 – 2:30 | Monthly Giving | Alisa Smallwood |
| 2:30 – 3:30 | Special Events | Alisa Smallwood |
| 3:30 – 4:00 | Develop Your Annual Fund Plan | Lupita |
| 4:00 – 4:30 | Create Your Action Plan—Taking Madison Home | Alisa |
| 4:30 – 5:00 | Graduation and Wrap Up | Team |
| 5:00 – 6:00 pm | Closing Celebration Social Hour | |
| Evening | Dinner on your own | |