

**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

<b>Monday, July 13</b>	<b>Topic/Activity</b>	<b>Faculty</b>
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	<b>Introductions Expectations Ice Breaker</b>	<b>Tim Logan, FAHP, ACFRE, CFRE Lupita Garza, CFRE Alisa Smallwood, FAHP, CFRE Josué E. Hernández, CFRE</b>
10:30 – 10:45	Refreshment Break	
10:45 – 11:45	<b>Planning Your Annual Fund Program</b>	<b>Lupita Garza</b>
11:45 – 12:45	Lunch	
12:45 – 1:45	<b>Psychology of Giving</b>	<b>Alisa Smallwood</b>
1:45 – 2:45	<b>Employee Giving</b>	<b>Josué E. Hernández</b>
2:45 – 3:00	Refreshment Break	
3:00 – 4:15	<b>Pipeline Development</b>	<b>Tim Logan</b>
4:15 – 5:00	<b>Application of Today’s Learnings</b>	<b>Alisa Smallwood</b>
5:00 – 6:00	Welcome Reception	
Evening	Dinner on your own	

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

<b>Tuesday, July 14</b>	<b>Topic/Activity</b>	<b>Faculty</b>
8:00 – 9:00 AM	Breakfast Available	
9:00 – 9:15	Morning Welcome & Announcements	
9:15 – 10:15	<b>Direct Mail</b>	<b>Josué E. Hernández Tim Logan</b>
10:15 – 10:30	Transition to Auditorium	
10:30 – 11:30	<b>Evaluating Your Annual Fund**</b>	<b>Tim Logan</b>
11:30 – 12:30	<b>HIPAA and Compliance</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 15</b>	<b>Topic/Activity</b>	<b>Faculty</b>
8:00 – 8:45 AM	Breakfast & Optional Roundtables	
8:45 – 9:00	Morning Welcome & Announcement	
9:00 – 10:00	<b>Mid-Level Donors</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 Alisa Smallwood Sarah Fawcett-Lee, FAHP, CFRE Sharyl Smith</b>
11:30 – 12:30	<b>Trends in Fundraising</b>	<b>Alisa, Lupita, and Tim</b>
12:30 – 1:15	Lunch	
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 16</b>	<b>Topic</b>	<b>Faculty</b>
8:00 – 9:00 AM	Breakfast – Pyle Center	
9:00 – 9:15	Morning Welcome & Announcements	
9:15 – 10:15	<b>Digital Fundraising</b>	<b>Michael Bell</b>
10:15 – 10:30	Refreshment Break	
10:30 – 11:30	<b>The Annual Fund in Grateful Patient Programs</b>	<b>Tim Logan</b>
11:30 – 12:30	<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>Lupita Garza</b>
3:30 – 4:00	<b>Develop Your Annual Fund Plan</b>	<b>Tim Logan</b>
4:00 – 4:30	<b>Create Your Action Plan—Taking Madison Home</b>	<b>Alisa Smallwood</b>
4:30 – 5:00	<b>Graduation and Wrap Up</b>	<b>Team</b>
5:00 – 6:00 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	