



JULY 14-19
MADISON, WI



AHP

MADISON
INSTITUTE 2019



AHP Health System Philanthropy

RESIDENCY
Program 2019

SCHEDULE AT A GLANCE

SUNDAY, JULY 14

Registration 12:00 p.m. – 5:00 p.m.
First class in session..... 5:00 p.m. – 6:30 p.m.
Opening reception 6:30 p.m. – 7:45 p.m.

Sponsored by **blackbaud**
▶ power your passion

MONDAY, JULY 15

Registration 6:30 a.m. – 5:00 p.m.
Breakfast..... 7:00 a.m. – 8:00 a.m.
General Session..... 8:00 a.m. – 9:00 a.m.
Class in session 9:00 a.m. – 5:00 p.m.
Lunch..... 11:45 a.m. – 1:15 p.m.
Networking social..... 5:00 p.m. – 6:00 p.m.

TUESDAY, JULY 16

Registration 7:30 a.m. – 5:00 p.m.
Breakfast and General
Session speaker 7:30 a.m. – 9:00 a.m.
All-day continuous
refreshments 8:00 a.m. – 5:00 p.m.
Class in session 9:00 a.m. – 5:00 p.m.
Lunch..... 11:45 a.m. – 1:15 p.m.
Networking social..... 5:00 p.m. – 6:00 p.m.



MADISON EXPERIENCE TIP:

Rent a motor boat from a local marina and cruise Lake Mendota with your classmates!

WEDNESDAY, JULY 17

Registration 7:30 a.m. – 2:00 p.m.
Breakfast and General
Session speaker 7:30 a.m. – 9:00 a.m.
All-day continuous
refreshments 8:00 a.m. – 5:00 p.m.
Class in session 9:00 a.m. – 1:00 p.m.
Lunch..... 1:00 p.m. – 2:00 p.m.
Marketing Learning
Lab (optional) 2:00 p.m. – 5:00 p.m.
Networking social..... 5:00 p.m. – 6:00 p.m.
Special Projects and
Group Work..... Free Afternoon

THURSDAY, JULY 18

Registration 7:30 a.m. – 5:00 p.m.
Breakfast..... 7:30 a.m. – 8:30 a.m.
All-day continuous
refreshments 8:00 a.m. – 5:00 p.m.
Class in session 8:30 a.m. – 5:00 p.m.
Lunch..... 11:45 a.m. – 1:15 p.m.
Closing Celebration 5:00 p.m. – 6:30 p.m.

FRIDAY, JULY 19

Registration 7:30 a.m. – 10:00 a.m.
Breakfast..... 7:30 a.m. – 8:30 a.m.
All-day continuous
refreshments 8:00 a.m. – 5:00 p.m.
Class in session 8:30 a.m. – 12:00 p.m.
Madison concludes 1:00 p.m.



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Prestigious faculty members

Your classes will be taught by thought leaders in health care development. Faculty members are your resources inside and outside the classroom, available for expert advice on your most pressing issues. See page 15 for a list of faculty.

Small class size

All class sizes are capped to ensure your learning experience is collaborative and individualized. You'll learn through presentations, case studies, role play, online communities and more. Extensive take-home resources mean you'll continue learning when you return to the office.

Relationship building

The AHP Madison Institute offers numerous opportunities to connect with your fellow health care fundraisers and faculty members, both in class and after hours. The professional network you develop here will last your entire career.

Certificate of Completion from the University of Wisconsin and AHP

Once you successfully complete the course work in one of the seven full tracks, you'll receive a certificate from the University of Wisconsin's Graduate School of Business and the Association for Healthcare Philanthropy. All tracks help you earn up to 26 credits toward the Certified Fundraising Executive (CFRE) professional credential.



THE MADISON EXPERIENCE

WHEN: JULY 14 – 19, 2019

WHERE: PYLE CENTER, UNIVERSITY OF WISCONSIN
702 Langdon Street, Madison, WI 53703 United States

Choose from one of seven tracks...

- 1. Fundamentals of Resource Development** for those new to health care fundraising
- 2. Annual Giving** for those who would like to increase their expertise in annual giving
- 3. Elements of Major Gifts** for those in the early stages of their major gift career
- 4. Major Gift Initiatives and the Campaign** for anyone who is contemplating the start of or is in the middle of a major fundraising initiative
- 5. Advanced Skills for Major Gifts** for major gift officers with more than five years experience
- 6. Planned Giving** for those looking to establish or strengthen a planned giving program and expand their understanding of this important practice area
- 7. Fundraising Management** for those with more than five years experience in management

...or one of two mini tracks...

- 1. Hospice Development** for those looking for education tailored specifically to the hospice environment
- 2. Philanthropy Operations** for those who provide operations support to their organization and aspire to be in a leadership role

...or begin your residency.

The 18-month **Health System Philanthropy Residency Program** is for health system executives who work in or aspire to senior leadership positions.

Not sure which track is right for you? Contact education@ahp.org for guidance.

FUNDAMENTALS OF RESOURCE DEVELOPMENT

Summary

This fast-paced, highly participatory track provides an overview of skills and knowledge required within a comprehensive development program. A focus on personal gift solicitation is complemented by an overview of special event fundraising and annual, major and planned giving. Special sessions address board & physician giving and tax laws (separate sessions for U.S. and Canadian participants). Attendees also will gain an understanding of development structure, strategic planning and how privacy laws affect fundraising.

Who should attend

This track is ideal for those who are new to fundraising—or for those who want to broaden their understanding of health care development. The Fundamentals of Resource Development track is a great foundational course that will help prepare participants for any of the other AHP Madison offerings in subsequent years.

Curriculum

Overview

- Psychology of Giving
- Case for Support
- Strategic Planning
- Development Structures
- Privacy Laws
- Fundamentals of Tax Law (U.S. and Canada)
- Prospect Research, Cultivation and Identification
- Planning and Budgeting

Prospect and Donor Constituencies

- Board Members
- Employees
- Physicians
- Individuals
- Corporations and Foundations

Fundraising Tool Kit

- Direct Mail
- Tribute Giving
- Recognition and Donor Clubs
- Special Events
- Capital Campaigns
- Major Gift Solicitation
- Estate and Planned Giving

“No one wants to make their own mistakes the first time. To be able to learn from people who have already been there was just invaluable for me.

I have called my faculty member, my dean, since we left Madison and have been able to get feedback and advice from him, which has been fantastic.

I hope to get to go back year after year.”

Alicen Swift
Development Director
OakBend Medical Center
Richmond, TX



MADISON EXPERIENCE TIP:

Arrive early on Sunday, July 14 to enjoy the Art Fair on the Square in downtown Madison.



ANNUAL GIVING

Summary

Now featuring expanded and updated content in social media, metrics, grateful patient programs and tools for building a donor pipeline. This course is a comprehensive account of annual giving strategies, tools, skills and approaches for specific constituencies and other keys to success. Learn new skills, gather ideas and be inspired. Expert faculty and classmates share proven approaches you can use on the job to increase your fundraising revenue and to build a pipeline of donors for major, planned and campaign gifts. Walk away with tools you can use immediately at your organization to build or update your annual plan.

Who should attend

This track is for individuals who want to increase their expertise in annual giving, who have two or more years of fundraising experience or who have completed the Fundamentals of Resource Development track or a comparable introductory offering.

Curriculum

Creating and Implementing a Successful Annual Giving Program

- The Psychology of Giving
- Elements of a Comprehensive Program
- Annual Giving Critical Success Factors
- Planning, Managing and Evaluating Annual Giving
- Privacy and Compliance (U.S. and Canada)

Annual Giving Strategies and Tools

- Direct Marketing
- Monthly Giving
- Grateful Patient Programs
- The Role of Digital
- Support Groups and Community Organizations
- Family Giving
- Special Events
- Commemorative Giving
- Mid-level Donor Programs
- Personal Solicitation

Annual Giving Skills

- Working with Volunteers
- Leadership
- Donor Stewardship and Engagement
- Integrating Annual, Major and Planned Gifts

“I came away from Madison feeling empowered, knowledgeable and confident in the belief that I was returning to my organization as THE resident expert in health care philanthropy.”

Jennifer C. Maust
Executive Director
Meritus Healthcare Foundation
Hagerstown, MD



ELEMENTS OF MAJOR GIFTS

Summary

This course is a comprehensive journey through the world of major gifts, from concept to the practical application of knowledge for cultivation and solicitation strategies. Students will have the opportunity for one-on-one consulting time with faculty and will leave with individual action plans to implement immediately. All students will work on a capstone project to be presented on the final day of class.

Who should attend

This track is designed for anyone beginning their career in health care philanthropy, or just venturing into major gifts after having worked in other fundraising capacities or careers. In addition, anyone who has been in the major gifts arena for a year or two and wishes to gain more confidence—this class is designed for you.

Curriculum

Introduction to Major Gifts

- Defining the term “major gifts”
- Exploring the difference between transactional and transformative giving
- What it takes to be a successful major gifts officer

Donor Motivations and Clinician Engagement

- Understanding the role gratitude plays as a motivating factor
- How to build a prospect pipeline
- How to build a network of philanthropy champions
- Physician and clinician engagement

C-Suite and Volunteer Engagement

- Working successfully with executive and volunteer leaders
- Volunteer leadership roles and responsibilities

Setting Priorities and Portfolio Management

- Classroom activities will include reviewing prospect lists, pipelines and metrics

Putting Theory into Practice

- Identifying and qualifying major gift prospects
- Getting the appointment and bringing prospects to the table
- Aligning prospects to compelling investment opportunities
- Making the case for support
- Inviting prospects to make a philanthropic investment (i.e. Making the Ask)
- Negotiation and closing the gift

Stewardship

- Donor Recognition
- Personalized Stewardship

Integrating Major Gifts with Campaigns

Integrating Major Gifts with Planned Giving



“I always go back to Madison as the experience that has made the most significant difference in my career, in my profession and will continue to do that.”

Doug Dillon, CFRE
 Dean, Major Gift Initiatives & The Campaign
 Chief Executive Officer
 Jerold Panas, Linzy & Partners
 Chicago, IL

MAJOR GIFT INITIATIVES AND THE CAMPAIGN

Summary

Your organization must decide on the best approach in enhancing your major gift program. This may include a capital campaign, but may necessitate a modified and targeted approach included in a mini campaign or special (major) gift initiative. This track is designed and presented by seasoned professionals who will guide you in determining what strategy is best for your situation and implementing the exact structure and plan for the greatest level of success. You will work through all strategic components of a major fundraising campaign—from the inception of the “big idea” to the celebration that marks the achievement of the goal and the effective stewardship of those who participate in your success. The track emphasizes the evaluation of each participant’s own situation, and facilitates experiential learning through a series of workshops, group interaction and personal assessment and team exercises.

Who should attend

This track is designed for anyone at a health care organization who is either in the middle of, or contemplating the start of, a major fundraising initiative, including staff and administrative personnel, board members and key volunteers.

Curriculum

The course curriculum explores in depth each of the following:

STEP 1: A New Way of Planning in the Changing Philanthropic Landscape

STEP 2: Understanding the Essential Elements of a Winning Campaign

STEP 3: Understanding the Necessary Mechanics

STEP 4: The Importance of a Case Statement

STEP 5: The Feasibility Study

STEP 6: Identifying and Recruiting Leadership

STEP 7: The Role of Staff, Board and Volunteers in the Campaign

STEP 8: Stewardship Isn’t Important. It’s Everything

STEP 9: Securing the Donor Visit and the Art of the Ask

“The Madison Institute is unlike any other experience that I’ve had the privilege of being a part of. You can go back [to your classmates] at any juncture and get advice and support. It isn’t just about the time that we’re together, but it creates a career-long fraternity.”

Shannon Duval

Dean, Elements of Major Gifts
Senior Vice President of Philanthropy
CommonSpirit Health
Englewood, CO



MADISON EXPERIENCE

TIP:

You can’t leave Wisconsin without trying Babcock ice cream at the UW Memorial Union!

ADVANCED SKILLS FOR MAJOR GIFTS

Summary

This track will focus on successful leadership and problem solving skills to better motivate and engage health care CEOs, volunteers and ultimately the investor-type donor in your organization's major gifts program. Participants are required to bring actual solicitation experiences and challenges for group case work discussions and solutions.

Who should attend

Experienced health care major gifts officers (minimum of five years in a major gifts capacity) will explore the skills and processes required to expand and maximize their major gift program potential and their career path in today's changing health care environment. While not a prerequisite, it is recommended that participants have completed the Major Gifts and Capital Campaign Tracks offered at the Madison Institute or similar course work.

Curriculum

Leadership

- Successful Engagement Strategies at All Levels (Volunteers, Staff, Executive Suite)
- Problem Solving Challenges with Roles and Responsibilities
- Creating an Enduring Culture of Integrated Major Gifts
- The Changing Health Care Organization: Adapting Your Case and Plan
- Performance Measures and Metrics for an Overall Major Gifts Program for Staff and Volunteers

Advanced Techniques and Skills

- In-house Training
- Problem Solving Strategies from Securing an Appointment to Advisor Disagreements and More

Case Work

The Advanced Major Gifts class is highly interactive. Time will be dedicated to sharing best practices. Each participant must bring a case to work on throughout the week as a significant benefit of the experience is incorporating the shared learning into your individual situation and plan.



“Anyone who comes to Madison will leave with unbelievable knowledge, they’ll leave with new friendships, they’ll leave with renewed friendships and they’ll also know where to turn when they need any answer to any question.”

Sharon A. Jones, FAHP, CFRE
 Chair, AHP University-based Programs and Director of the Institute for Healthcare Philanthropy
 Vice President, Development
 Haven Hospice
 Gainesville, FL

PLANNED GIVING

Summary

This course explores the components of a successful planned giving program, offering an in-depth explanation of planned gift instruments (in both the United States and Canada) and their uses in funding major gifts. This year, understanding the impact of the Tax Cuts and Jobs Act of 2017 on planned giving will be an important benefit derived from attending this course.

Emphasis will also be placed on 'small shop' program design and implementation, and the marketing of gift planning from the donor's perspective. Walk away with practical tips and tools you can use immediately at your organization to build an effective planned giving program that will help attract, inspire and retain your most loyal donors.

Who should attend

This track is for individuals who have completed the Fundamentals of Resource Development program or a comparable introductory program; those with several years of fundraising experience; and those wanting to initiate a planned giving program or improve an existing one.

Curriculum

Understanding and Managing the Planned Gift Instruments

- Tax Aspects of Charitable Gifts, Including Recent Updates (U.S. and Canada)
- Current Gift Options
- Deferred Gift Options
- Bequest Administration Practices
- Ethical Issues in Gift Planning

Marketing Planned Gifts

- Donor-Centered Marketing – The Essentials
- Factors Motivating Planned Gifts
- Communicating Planned Gift Opportunities
- Identifying Bequest Prospects
- Cultivating Prospective Planned Giving Donors
- Asking for the Gift
- Building Endowment with Planned Gifts
- Working with Professional Advisors
- Planned Giving and the Internet

Gift Planning Program Opportunities

- Common Myths about Planned Giving
- Preparing Your Annual Activity Plan
- Program Integration Opportunities
- Performance Goals – Tracking, Managing and Reporting Planned Gifts
- Principles of Charitable Estate Planning
- Using Planned Giving to Solve Donor Estate Challenges
- Recognition and Stewardship of Planned Gift Donors



FUNDRAISING MANAGEMENT

Summary

Excellent fundraising skills are crucial for professional advancement, but each stage of a development officer's career demands more and better leadership and management skills. This comprehensive, interactive program focuses on contemporary leadership and management strategies to prepare participants for the challenges faced by health care development executives.

Who should attend

You should attend if you have completed the Fundamentals of Resource Development program or a similar educational program, and have at least five years of management experience in fundraising.

Curriculum

Strategic Management of the Fundraising Process

- Strategic Thinking
- The Strategic Development Plan
- Leading Strategic Change
- Application of the Strategic Fundraising Process

Operational Effectiveness

- Financial Analysis and Control
- High Performance Systems for Trustees and Staff

Leadership Skills for the Development Officer

- Leading Organizational Transformation
- The Politics of Fundraising for the Chief Development Officer
- Negotiating and Building Agreement
- Team Building for Fundraising Success
- Leading During a Crisis

Practical Applications

- Making the Case for Health Care Philanthropy
- Resource Development Clinic

“I find the faculty to be outstanding. They are well-regarded within our industry, they are great teachers, they are great mentors.”

Mark Larkin, CFRE
 President
 Boca Raton Regional Hospital
 Foundation
 Boca Raton, FL



HOSPICE DEVELOPMENT

NOTE: This three-day track ends at noon on Tuesday, July 16.

Summary

The Hospice Philanthropy track provides an in-depth overview of the key elements of a comprehensive development program for hospice. Discussion will include proven strategies in annual giving, major and planned giving as well as stewardship techniques designed specifically for grateful hospice patient families.

This three-day track will include content specifically tailored to the hospice environment, including:

1. Ideas on how a development professional can establish an annual giving plan including timelines and budget. Participants will learn unique and creative ways to help grateful families memorialize a loved one.
2. Strategies for creating donor giving circles/levels leading to the development and implementation of strategies to cultivate and solicit major gift prospects from those grateful families.
3. Necessary steps for transforming an annual or major gift donor to a significant planned giving donor.

Who should attend

This track is ideal for development professionals assigned or seeking hospice fundraising responsibilities, whether it is one of many service lines assigned to you or your singular focus.

Curriculum

This track will teach the steps necessary to build a successful pipeline program and transform an annual giving donor to a major/planned giving donor. Curriculum will include the key elements of a successful hospice capital campaign and ways to engage hospice staff in the philanthropic process.

“I always leave Madison with a greater and renewed sense of confidence for the work we do as health care philanthropy professionals. I have a better understanding of the huge impact my work has on the community my hospital serves.”

Tim Self, CFRE, CNP, FCEP
Executive Director
AnMed Health Foundation
Anderson, SC



PHILANTHROPY OPERATIONS

NOTE: This three-day track ends at noon on Tuesday, July 16.

Summary

The Philanthropy Operations track provides an overview of the many roles and responsibilities typically fulfilled by philanthropy operations managers and the competencies and skills needed to supervise and lead a team of professionals focused on the operations of your organization. Attendees will be encouraged to share their organizations' operational structures and collaborate on overcoming challenges.

Who should attend

This track is ideal for those who provide operations support to their organization and aspire to be in a leadership role or are currently in a leadership role and want to learn how to maximize their scope.

Curriculum

This course will spotlight a wide variety of subjects, including:

- Governance
- Board/fiduciary management
- Compliance/legal
- Strategic planning
- Budgeting
- Contracting/vendor management
- Purchasing/accounts payable
- Treasury (cash and investment management)
- Human resources/payroll
- Donor database/prospect information management
- Managing unrestricted and restricted funds
- Programmatic support
- ...and more!



MADISON EXPERIENCE TIP:

Show off your karaoke skills after class with faculty and other students at the Karaoke Kid, a Madison favorite.

“As a relative newcomer to the fundraising industry, I found the Madison Institute to be an incredible learning experience. It is truly the ‘gold standard’ for anyone new to the industry and would certainly benefit any fundraising professional looking to strengthen his or her knowledge.”

Amy Massimo
Director, Donor Relations & Stewardship
Hackensack University Medical Center Foundation
Lodi, NJ

DEANS & FACULTY MEMBERS

Sharon A. Jones, FAHP, CFRE

Chair, AHP University-based Programs
and Director of the Institute for
Healthcare Philanthropy
Vice President, Development
Haven Hospice
Gainesville, FL

Deans & Associate Deans

Donna Budak, MA, FAHP, CFRE

Associate Dean, Annual Giving
Vice President, Service Line & Strategy
AMITA Health Foundation
Lisle, IL

Rhonda Cunningham, FAHP, CFRE

Associate Dean, Fundamentals of
Resource Development
Executive Director
Northumberland Hills Hospital Foundation
Cobourg, ON

Lorraine Del Prado, CSPG, CFRE, FCEP

Associate Dean, Planned Giving
Vice President
Thompson & Associates
Mercer Island, WA

James DeLauro, Ph.D.

Dean, Fundraising Management/Health
Systems Residency Program
Principal
DeLauro & Associates Consulting
Chula Vista, CA

Janet DeWolfe, FAHP, CFRE

Dean, Advanced Major Gifts
Regional Chief Development Officer
Intermountain Foundation
Salt Lake City, UT

Douglas A. Dillon, CFRE

Dean, Major Gift Initiatives and
the Campaign
Chief Executive Officer
Jerold Panas, Linzy & Partners
Chicago, IL

John P. Drake, CFRE

Dean, Fundamentals of
Resource Development
President
Irving Healthcare Foundation
Irving, TX

Shannon Duval

Dean, Elements of Major Gifts
Senior Vice President of Philanthropy
CommonSpirit Health
Englewood, CO

Sarah Fawcett-Lee, CFRE

Associate Dean, Elements of Major Gifts
Senior Vice President, Foundation
Virtua Health
Marlton, NJ

Ian M. Fraser, MBA, FAHP, FCEP

Dean, Planned Giving
Legacy Advisor & Estate Planner
PhilanthroPlan
Kingston, ON

David B. Gillig, FAHP

Dean, Fundraising Management
Senior Consultant
Marts & Lundy, Inc.
San Diego, CA

Ashley C. Nall, CFRE

Associate Dean, Major Gift Initiatives
and the Campaign
Senior Gift Officer
Johns Hopkins All Children's Foundation
Saint Petersburg, FL

Faculty

Jill Kyle, MBA, CFRE

Fundamentals of Resource Development
Senior Vice President, Regional
Advancement
Jefferson Health
Abington, PA

Tim Logan, FAHP, ACFRE

Associate Vice President of Strategy
Barton Cotton
Baltimore, MD

Mark McCampbell, CFRE

Annual Giving
Senior Vice President, Strategic
Partnerships
Advancement Resources
Cedar Rapids, IA

Arthur J. Ochoa, JD

Fundraising Management
Senior Vice President and
Chief Development Officer
Cedars-Sinai Medical Center
Los Angeles, CA

Karen Piel, JD, CPA, CFRE

Planned Giving
Planned Giving Officer
Marshfield Clinic Health System
Foundation
Marshfield, WI

Charles Slamar, Jr., JD, LL.M.

Planned Giving
Vice President
Thompson & Associates
Chicago, IL

Robert Wahlers, MS, CFRE

Advanced Major Gifts
President
PEAK Philanthropic, LLC
Orlando, FL

Visiting Faculty

Carrie L. Boardwick, CFRE

Operations
Vice President, Philanthropy Operations
MedStar Health
Columbia, MD

Beth Morgante

Hospice
Vice President and
Chief Development Officer
Grossmont Hospital Foundation
San Diego, CA

Tamra von Schroeck

Operations
Senior Director of Operations & Finance,
Philanthropy
CommonSpirit Health
Phoenix, AZ

Marketing Learning Lab

Alice Ayres

President & CEO
Association for Healthcare Philanthropy
Arlington, VA

Michael J. Beall

Principal Consultant
Accordant Philanthropy
Ponte Vedra Beach, FL



HOTEL & TRAVEL INFORMATION

Hotel Reservations

Please make your own room reservations from among the hotel options listed below. This gives you the opportunity to stay in the hotel that best accommodates your needs. Please contact the hotel directly to make your room reservation. When calling, be sure to identify yourself as an Association for Healthcare Philanthropy (AHP) attendee. If making your reservations online, please visit www.ahp.org/Madison. Remember there are limited rooms available at AHP's negotiated room rates. Make your reservation early to secure your first choice, as AHP's room block sells out quickly.

Hotel options under AHP's room block are listed below, with rates exclusive of applicable taxes.

The Lowell Center

610 Langdon St., Madison, WI 53703

Phone: 608-256-2621 *(If reserving by phone, use reference code **APHIL.**)*

Room Rate: \$124 per night for Deluxe | \$105 per night for Standard (single occupancy) | \$12 for each additional person per night

**These rates are subject to change*

DoubleTree by Hilton Downtown Madison

525 West Johnson St.
Madison, WI 53703

Phone: 608-251-5511
*(If reserving by phone, use reference code **AHP.**)*

Room Rate: \$169 per night

Fluno Center

601 University Ave.
Madison, WI 53715

Phone: 1-877-773-5866
*(If reserving by phone or email, mention the **AHP** room block.)*

Reserve via email:
reservation@fluno.com

Room Rate: \$159 per night

Hotel Cut-off Date: Friday, June 14, 2019

The hotel cut-off date for all hotels in AHP's room block is June 14, 2019. Make your reservation early to secure your preferred hotel. AHP cannot guarantee that rooms will be available until the cut-off date. After the hotel cut-off date, all hotel room rates revert to the hotels' prevailing rates.

Institute Start and End Times

Sunday, 7/14/2018 – Friday, 7/19/2018

Location of Classes and Meals

All classes are held at the Pyle Center, 702 Langdon Street. The Pyle Center is within walking distance of Lowell Center. All breakfasts are served at the Lowell Center. The remaining meals are served at the Pyle Center. All off-campus hotel options are less than a 10-minute walk from the Pyle and Lowell Centers.

Airport Information

The closest airport is the Dane County Airport, which is 20 minutes from the hotels. The taxi fare is approximately \$20 one way.

Attire

The attire at the AHP Madison Institute is casual. We strongly recommend bringing a jacket or light sweater because temperatures can fluctuate in the air-conditioned meeting rooms.

Weather

Average day temperature in July is 80° F.
Average evening temperature is 66° F.

MAKE YOUR
RESERVATIONS ONLINE
AT
www.ahp.org/Madison

REGISTRATION INFORMATION

Thank you for your interest in attending the 2019 AHP Madison Institute. Information about the registration process is below. If you have any questions, contact AHP at 703-532-6243 or email meetings@ahp.org. The most up-to-date information is online at www.ahp.org/Madison.

Registration Desk


The registration desk opens at 12 p.m. Sunday, July 14 in the lobby of the Pyle Center. Please check in and pick up your course materials when you arrive.

Registration Fees

Your registration fee for the 2019 AHP Madison Institute covers the cost of the certificate program and binder containing resources and handouts for your specific learning track, meals and refreshment breaks. Classes do sell out, so early registration is recommended. Reservations are accepted on a first-paid basis.

Meals Information

Your registration fee includes the following meals: reception on Sunday, breakfast and lunch Monday through Thursday and breakfast on Friday.



“I gained so much professionally. What I learned at Madison I was able to put in to practice and in addition to the actual learning was the opportunity to have a whole cohort of folks who became really good friends, and I continue to engage with them to this day.”

Madison has provided me great experience, mentors and colleagues in the field and I’m delighted to be able to do that for others who are coming along in the field.

I came away from my experience as a student with so many things that I could put into practice right in my shops right away... it’s the reason why I went three times myself.”

Donna Budak, FAHP, CFRE

Associate Dean, Annual Giving Track
Vice President, Service Line & Strategy
AMITA Health Foundation
Lisle, IL

Certificate Programs

The AHP Madison Institute offers a choice of nine certificate programs. Please indicate on the registration form which track you would like to attend. Although each track is independent of the others, we recommend that you enroll in them according to their numbered sequence.

Hurry and register – some tracks fill quickly. Participants enroll in one track and attend classes with that cohort all week.

The AHP Health System Philanthropy Residency program and the two new mini tracks are limited in capacity. Register now to reserve your spot.

NEW! Learning Lab: Strategies to Maximize Marketing Effectiveness

Storytelling, creative, planning, digital trends, budgeting... where do you turn when trying to engage prospects, donor and internal constituencies? This interactive communication workshop is designed to uncover simple truths about what works and what doesn’t. Walk away with a clear list of priorities, key elements to your customized strategic communications plan and actionable steps to ensure momentum. Get more out of your Madison experience with this FREE add-on! Reserve your spot when you register; space is limited. This Learning Lab takes place Wednesday, July 17, from 2:00–5:00 p.m.

Not an AHP Member?

Learn more about AHP member benefits and how you can save money on the Madison Institute and all other AHP events. In fact, the Madison Institute savings alone are greater than your first year’s membership dues. Email membership@ahp.org for more information.

Cancellation

All cancellation requests must be submitted to meetings@ahp.org by June 1, 2019. If registration is canceled in writing by June 1, 2019, the registration fee will be refunded less a \$125 cancellation fee. After June 1, 2019, no refunds will be made.

Confirmation Information

You will receive a confirmation letter and other helpful information after we receive your registration payment. You will also receive an email one week before the Madison Institute begins with reminder information and a detailed schedule for the certificate program for which you’ve registered.

JULY 14–19, 2019
WISCONSIN SCHOOL OF BUSINESS
MADISON, WI



REGISTRATION

REGISTER TODAY!

www.ahp.org/madison

Application must be filled out in its entirety to be accepted, and be received by June 28, 2019.

Mail to:
Association for Healthcare Philanthropy
2511 Jefferson Davis Hwy, Suite 810
Arlington, VA 22202

Fax: 703-532-7170
E-mail: meetings@ahp.org

ATTENDEE INFORMATION

Name

Name on badge

Title

Organization

Address

City State/Province Postal Code

Phone

Mobile Phone

Email*

*Email addresses are required for registration, but not published or distributed.

Registration Notes

Please check here if:

- You require special assistance or have special dietary needs. Please email information to meetings@ahp.org.
- You are a new member of AHP.

Is this your first time attending the Madison Institute?

- Yes No

How did you hear about this event?

- Mail Email Colleague Website
- Social networking site
- Other/Source Code _____

Are you familiar with AHP's Professional Pathway Program?

- Yes No

If yes, which Professional Pathway level best represents you?

- Baseline Specialist Executive
- Unsure/Need help determining Pathway level

I would like information about AHP Member Benefits.

Photography Release

By registering, I grant to AHP, its representatives and employees the right to take photographs and/or videos of me and my property to copyright, use and publish in print and/or electronically. I agree that AHP may use such photographs of me with or without my name and for any lawful purpose, including for example such purposes as publicity, illustration, advertising, email, social media, web content.



**JULY 14–19, 2019
WISCONSIN SCHOOL OF BUSINESS
MADISON, WI**



HOTEL INFORMATION

Madison Institute participants are eligible for reduced room rates at two local hotels. Learn more at: www.ahp.org/MadisonHotel

REGISTRATION INFORMATION

	Early postmarked before 2/8/19	Advanced postmarked between 2/9/19–4/12/19	Regular postmarked by 6/28/19
AHP member	<input type="checkbox"/> \$2,195	<input type="checkbox"/> \$2,295	<input type="checkbox"/> \$2,395
Non-member	<input type="checkbox"/> \$2,795	<input type="checkbox"/> \$2,895	<input type="checkbox"/> \$2,995
Residency Program			
AHP Member	<input type="checkbox"/> \$7,000		
Non-member	<input type="checkbox"/> \$8,500		
Hospice & Operations Mini Track			
AHP Member	<input type="checkbox"/> \$995	<input type="checkbox"/> \$1,095	<input type="checkbox"/> \$1,195
Non-member	<input type="checkbox"/> \$1,595	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$1,795

Certificate Program

- Track 1: Fundamentals of Resource Development
- Track 2: Annual Giving
- Track 3: Elements of Major Gifts
- Track 4: Major Gift Initiatives and the Campaign
- Track 5: Advanced Skills for Major Gift Success
- Track 6: Planned Giving
- Track 7: Fundraising Management
- Hospice Development Mini Track
- Philanthropy Operations Mini Track

PAYMENT METHOD

- My check is attached, made payable to the Association for Healthcare Philanthropy. **(All checks should be made out to AHP in US dollars).**
- Please charge my: VISA MASTERCARD AMEX
(All credit cards are processed in the US and will be processed in US dollars). Fax to 703.532.7170

Total amount due: \$

Name (as it appears on card)

Card number

Expiration date CVC security code

Signature

Registration Policies*

Thank you for your interest in attending the 2019 AHP Madison Institute Certificate Program. More information about AHP's registration policies can be found online. If you have any questions about the registration process or options, please contact AHP at **703-532-6243** or via email at meetings@ahp.org. The most up-to-date conference information is online at ahp.org/madison.

HAVE QUESTIONS? EMAIL AHP'S MEETINGS DEPARTMENT WITH ALL INQUIRIES AT MEETINGS@AHP.ORG

* To see a full explanation of AHP's registration policies, visit ahp.org/terms

Registration forms will not be processed without payment. All credit card payments will be processed in US funds. All cancellation requests must be submitted to meetings@ahp.org by May 31, 2019. If registration is canceled in writing by **May 31, 2019**, the registration fee less a \$125 cancellation fee will be processed. After May 31, 2019, no refunds will be made.

Registration forms must be received by June 28, 2019.

For your convenience, payment for conference registration, exhibitor, sponsorship payments may be made to AHP by mail, phone, fax, or through AHP's website. Please note that AHP cannot control the handling of payment information sent to AHP by way of mail or email. AHP will not be responsible for any damages or loss incurred by you if you choose to send payment information (including, without limitation, credit card information) to AHP by way of mail or email. You therefore accept sole responsibility for any damage or loss resulting from your use of such communication methods. Please review our Privacy Policy found at ahp.org/privacy for a summary of our practices related to the collection and use of personal information.





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JULY 14-19
MADISON, WI

WWW.AHP.ORG/MADISON

REGISTER BY
JUNE 28

