

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 and Compliance	Josh Laborde Becky Frantz
12:30 – 1:30	Lunch	
1:30 – 2:30	Stewardship**	Alisa Smallwood
2:30 – 2:45	Refreshment Break	
2:45 – 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 Bell
10:15 – 10:30	Refreshment Break	
10:30 – 11:30	The Annual Fund in Grateful Patient Programs	Tim Logan
11:30 – 12:30	Special Events	Lupita Garza
12:30 – 1:30	Lunch	
1:30 – 2:30	Monthly Giving	Alisa Smallwood
2:30 – 3:30	Strengths of Annual Giving	Lupita Garza
3:30 – 4:00	Develop Your Annual Fund Plan	Tim Logan
4:00 – 4:30	Create Your Action Plan—Taking Madison Home	Alisa Smallwood
4:30 – 5:00	Graduation and Wrap Up	Team
5:00 – 6:00 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	