

Association for Healthcare Philanthropy Madison Institute

Elements of Major Gifts

2026

Core Faculty:

Shannon Duval, FAHP, CFRE, Dean
Tim Self, FAHP, CFRE, Associate Dean
Kathy Alexander, MPNL, Faculty
David Garamella, MPA, Faculty

Class Guest Speakers:

Josh LaBorde, CFRE – Artificial Intelligence, Working with AI in Major gifts
Dave Smith, CAP – Gift Planning
Nelson J. Wittenmyer, Jr., JD, LLM – Gift Planning

Madison Institute 2026—Elements of Major Gifts

Monday, July 13	Topic/Activity	Faculty
7:00 – 8:00 AM	Breakfast Available	
8:00 – 9:00 AM	General Session & Keynote Speaker	
9:00 – 9:45 AM	Welcome and Introduction to Major Gifts Setting Context: Grateful Patients	All Track Faculty <i>Moderator: Shannon Duval</i>
9:45 – 10:30 AM	Donor Motivation Setting Priorities and Portfolio Management	David Garamella
10:30 - 10:40 AM	Break	
10:40 – Lunch	Prospect Identification/Qualification	Kathy Alexander
11:45 AM – 1:15 PM	Lunch	
Lunch -2:30 PM	Cultivation	Shannon Duvall
2:30 – 2:45 PM	Break	
2:45 - 4:15 PM	Storytelling	Tim Self
4:15 – 4:25	Break	
4:25 -5:00 PM	Capstone Prep - Parking Lot	All Track Faculty
5:00 – 6:00 PM	Welcome Reception	
Evening	Dinner on your own	

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

Madison Institute 2026—Elements of Major Gifts

Tuesday, July 14	Topic	Faculty
8:00 – 9:00 AM	Breakfast Available	
9:00 – 10:15AM	Setting Priorities & Strategic Relationships	Shannon Duval
10:15 – 10:30	Break	
10:30 AM – 11:45 AM	Strategic Leader: C-Suite and Volunteer Engagement	All Track Faculty <i>Moderator: Shannon Duval</i>
11:45 AM – 1:15 PM	Lunch	
Return from Lunch – 2:30	Solicitation	Tim Self
2:30 – 2:45	Break	
2:45 PM – 4:00PM	Leveraging AI in Philanthropic Program	Josh LaBorde
4:00 PM – 4:10 PM	Break	
4:10 PM – 5:00 PM	Capstone Prep - Parking Lot	All Track Faculty
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

Madison Institute 2026—Elements of Major Gifts

Wednesday, July 15	Topic	Faculty
8:00 – 9:00 AM	Breakfast & Optional Roundtables	
9:00 – 10:15 AM	Ethics & HIPAA/PIPEDA <i>(Re: HIPAA/PIPEDA; U.S. & Canadian colleagues will breakout)</i>	All Faculty <i>Moderator: David Garamella</i>
10:15 – 10:25 AM	Break	
10:25 – LUNCH	Stewardship	Shannon Duval
11:45 AM – 1:15 PM	Lunch	
1:00 PM -2:30 PM	Planned Giving & Blended Gifts	Dave Smith, CAP Nelson Wittenmyer, JD, LLM
2:30 PM	Free afternoon begins	

Thursday, July 16	Topic	Faculty
8:00 – 9:00 AM	Breakfast – Pyle Center	
9:00 – 10:45 AM	Panel Discussion Sr. Philanthropy Leaders Champions/Partners/Trustee/ Physician/Executive)	All Track Faculty <i>Moderator: Kathy Alexander</i>
10:45 – 11:00 AM	Break	
11:00 – 11:45 AM	Capstone Prep	All Track Faculty
11:45 AM – 1:15 PM	Lunch	
1:15 PM – 3:30 PM	Capstone Project Presentations	All Track Faculty
3:30 PM - 3:45 PM	Break	
3:45 – 4:45 PM	Parking Lot, Evaluations & Certificate Presentations	All Track Faculty
5:00 – 6:00 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	