

# Association for Healthcare Philanthropy Madison Institute

## Annual Giving 2023

### Core Faculty:

Tim Logan, FAHP, ACFRE, CFRE, Dean  
Lupita Garza, CFRE, Associate Dean  
Alisa Smallwood, CFRE

### Class Guest Speakers:

Michael Beall  
John Drake, MLA, FAHP, CFRE  
Shannon Duval  
Sarah Fawcett-Lee, FAHP, CFRE  
Brian Hervey, CGPP, CFRE  
Mark McCampbell, CFRE  
Dr. Patton McDowell, MBA, CFRE  
Bob Nolan, FAHP, CFRE  
Sharyl Smith, APR

Sunday, July 16	Topic/Activity	Faculty
1:00 – 5:00 pm	Registration	
4:30 - 5:00 pm	Convene to Classrooms Pyle Center	
5:00 – 6:30 pm	<b>Welcome Introductions Expectations Ice Breaker</b>	Tim Logan, CFRE, ACFRE, FAHP Lupita Garza, CFRE Alisa Smallwood, CFRE
6:30 – 7:45 pm	Networking Social	

<b>Monday, July 17</b>	<b>Topic/Activity</b>	<b>Faculty</b>
7:00 – 8:00 AM	Breakfast – Great Hall, Memorial Union	
8:00 – 9:00 AM	General Session/Opening Keynote – Great Hall, Memorial Union	
<b>9:00 – 9:15</b>	<b>Setting the Stage for Annual Giving</b>	<b>Lupita Garza</b>
<b>9:15 – 10:30</b>	<b>Planning Your Annual Fund Program</b>	<b>Lupita Garza</b>
10:30 – 10:45	Refreshment Break	
<b>10:45 – 11:45</b>	<b>Psychology of Giving</b>	<b>John Drake</b>
11:45 – 12:45	Lunch	
<b>12:45 – 2:00</b>	<b>Trends in Fundraising</b>	<b>Alisa Smallwood Lupita Garza</b>
<b>2:00 – 3:15</b>	<b>Managing Up and Across Your Organization</b>	<b>Mark McCampbell</b>
3:15 – 3:30	Refreshment Break	
<b>3:30 – 4:30</b>	<b>Evaluating Your Annual Fund Program</b>	<b>Tim Logan</b>
<b>4:30 – 5:00</b>	<b>Application of today’s learnings</b>	<b>All</b>
5:00 – 6:00 PM	Networking Social	
Evening	Dinner on your own	

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

<b>Tuesday, July 18</b>	<b>Topic</b>	<b>Faculty</b>
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session - Great Hall, Memorial Union	Dr. Angelique Grant
<b>9:00 – 10:00</b>	<b>Pipeline Development</b>	<b>Tim Logan</b>
<b>10:00 – 11:00</b>	<b>Employee Campaigns</b>	<b>Lupita Garza</b>
11:00 – 11:15	Refreshment Break	
<b>11:15 – 12:15</b>	<b>Mid-Level Giving</b>	<b>Tim Logan</b>
12:15 – 1:15	Lunch (with optional small group sessions with faculty)	
<b>1:15 – 2:15</b>	<b>Monthly Giving</b>	<b>Alisa Smallwood</b>
<b>2:15 – 3:15</b>	<b>The Foundation and the Hospital—coordinating Marketing and Communications</b>	<b>Lupita Garza &amp; Alisa Smallwood Sarah Fawcett-Lee Sharyl Smith</b>
3:15 – 3:30	Refreshment Break	
<b>3:30 – 4:30</b>	<b>Direct Mail</b>	<b>Tim Logan</b>
<b>4:30 – 5:00</b>	<b>Application of today’s learnings</b>	<b>All</b>
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

<b>Wednesday, July 19</b>	<b>Topic</b>	<b>Faculty</b>
7:00 – 7:30 AM	Breakfast – Great Hall, Memorial Union	
7:30 – 8:30 AM	General Session – Great Hall, Memorial Union	HIPAA – Donna Budak PIPEDA – Lesley Heighway
<b>9:00 – 10:15</b>	<b>Stewardship</b>	<b>Alisa Smallwood</b>
10:15 – 10:30	Refreshment Break	
<b>10:30 – 12:00</b>	<b>Grateful Patient Programs and Clinician Engagement</b>	<b>Brian Hervey</b>
<b>12:00 – 1:00</b>	<b>Corporations and Foundations</b>	<b>Bob Nolan</b>
1:00	Box Lunches	
Free afternoon and evening		

<b>Thursday, July 20</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:30 AM	Breakfast – Pyle Center	
<b>8:45 – 9:45</b>	Digital Fundraising	<b>Michael Beall</b>
9:45 – 10:00	Refreshment Break	
<b>10:00 – 11:00</b>	<b>Special Events</b>	<b>Lupita Garza</b>
<b>11:00 – 12:15</b>	<b>Personal Solicitation</b>	<b>Shannon Duval</b>
12:15 – 1:15	Lunch (with optional small group sessions with faculty)	
<b>1:15 – 2:15</b>	<b>Personal Solicitation Application</b>	<b>Alisa Smallwood</b>
2:15 – 2:45	Refreshment Break	
<b>2:45 – 3:45</b>	<b>The Role of Annual Fund in Planned and Major Giving</b>	<b>Tim Logan</b>
<b>3:45 – 4:45</b>	<b>Telling Your Story</b>	<b>Alisa Smallwood</b>
<b>4:45 – 5:00</b>	<b>Application of today’s learnings</b>	<b>All</b>
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	

Friday, July 21	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:30 – 10:30	Your Career Plan	Dr. Patton McDowell
10:30 – 10:45	Refreshment Break	
10:45 – 11:30	Taking Madison Home Create Your Action Plan	All
11:30 - 12:00	Wrap up and Graduation	All