

# Association for Healthcare Philanthropy Madison Institute

## Annual Giving --2024

### Core Faculty:

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

### Class Guest Speakers:

Michael Beall  
Sarah Fawcett-Lee, FAHP, CFRE  
Dr. Patton McDowell, MBA, CFRE  
Sharyl Smith, APR

Sunday, July 21	Topic/Activity	Faculty
9:00 am – 1:00 pm	Registration	
1:00 pm	Convene to Classroom	
1:00 – 2:30 pm	Welcome Introductions Expectations Ice Breaker	Tim Logan, CFRE, ACFRE, FAHP Lupita Garza, CFRE Alisa Smallwood, CFRE
2:30 – 2:45 pm	Setting the Stage for Annual Giving	Lupita Garza
2:45 – 4:00 pm	Planning Your Annual Fund Program	Lupita Garza
4:00 – 4:15 pm	Refreshment Break	
4:15 -5:30 pm	Your Career Plan	Dr. Patton McDowell
5:30 – 6:00 pm	Application of Today’s Learnings	Alisa Smallwood
6:30 – 7:45 pm	Networking Social	

<b>Monday, July 22</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/Keynote – Great Hall, Memorial Union	
9:00 – 9:15 am	Morning Welcome/ Announcements	Tim Logan
<b>9:15 – 10:30 am</b>	<b>Pipeline Development</b>	<b>Tim Logan</b>
10:30 – 10:45 am	Refreshment Break	
<b>10:45 – 12:00 pm</b>	<b>Employee Campaigns</b>	<b>Lupita Garza</b>
12:00 – 1:00 pm	Lunch	
<b>1:00 – 2:00 pm</b>	<b>Psychology of Giving</b>	<b>Alisa Smallwood</b>
<b>2:00 – 3:15 pm</b>	<b>Trends in Giving</b>	<b>Allisa Smallwood</b>
3:15 – 3:30 pm	Refreshment Break	
<b>3:30 – 4:30 pm</b>	<b>Working within the Development Department</b>	<b>TBD</b>
<b>4:30 – 5:00 pm</b>	<b>Application of Today’s Learnings</b>	<b>Alisa Smallwood</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 23</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:45 am	Breakfast & Roundtables – Pyle Center	
<b>8:45 – 9:00 am</b>	<b>Morning Welcome/ Announcements</b>	<b>Tim Logan</b>
<b>9:00 – 10:00 am</b>	<b>Direct Marketing</b>	<b>Tim Logan</b>
<b>10:00-11:00 am</b>	<b>Monthly Giving</b>	<b>Alisa Smallwood</b>
11:00 – 11:15 am	Refreshment Break	
<b>11:15 – 12:15 pm</b>	<b>Special Events</b>	<b>Lupita Garza</b>
12:15 – 1:00 pm	Lunch	
<b>1:00 – 2:00 pm</b>	<b>Annual Fund in Grateful Patients</b>	<b>Tim Logan</b>
2:00 – 2:15 pm	Refreshment Break	
<b>2:15 – 4:00 pm</b>	<b>Leveraging AI in Philanthropic Programs **</b>	<b>Josh LaBorde</b>
4:00 – 4:15 pm	Transition to classroom	
<b>4:15 – 5:00 pm</b>	<b>Application of Today’s Learnings Parking Lot Discussion</b>	<b>Alisa, Lupita, and Tim</b>
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on Own	

\*\* Joint Session with AHP Madison Operations Track

<b>Wednesday, July 24</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
<b>9:00 – 9:15 am</b>	<b>Morning Welcome/ Announcements</b>	<b>Tim Logan</b>
<b>9:15 – 10:30 am</b>	<b>Stewardship</b>	<b>Alisa Smallwood</b>
10:30 – 10:45 am	Refreshment Break	
<b>10:45 – 11:45 am</b>	<b>The Foundation and the Hospital— coordinating Marketing and Communications</b>	<b>Lupita Garza &amp; Alisa Smallwood Sarah Fawcett-Lee Sharyl Smith</b>
<b>11:45 – 12:45 pm</b>	<b>Mid-Level Donors</b>	Tim Logan
12:45 – 1:00 pm	<b>Application of Today’s Learnings</b>	<b>Alisa Smallwood</b>
Free afternoon and evening		

<b>Thursday, July 25</b>	<b>Topic</b>	<b>Faculty</b>
7:30 – 8:30 am	Breakfast – Pyle Center	
8:30 – 9:00 am	<b>Morning Welcome/ Announcements</b>	<b>Tim Logan</b>
<b>9:00 – 10:15 am</b>	<b>Digital</b>	<b>Mike Beall</b>
10:15 – 10:30 am	Convene to Auditorium	
<b>10:30 – 11:30 am</b>	<b>Evaluating Your Development Fund Program **</b>	<b>Tim Logan</b>
11:30 – 11:45 am	Refreshment Break	
<b>11:45 – 12:45 pm</b>	<b>Major Donors</b>	<b>Panel—Alisa, Lupita, and Tim</b>
12:45 – 1:45 pm	Lunch	
<b>1:45 – 2:45 pm</b>	<b>Telling Your Story</b>	Alisa Smallwood
<b>2:45 – 3:45 pm</b>	<b>Develop Your Annual Fund Plan</b>	<b>Team</b>
<b>3:45 – 4:15 pm</b>	<b>Create Your Action Plan— Taking Madison Home</b>	<b>Alisa and Lupita</b>
<b>4:15 – 4:45 pm</b>	<b>Graduation and Wrap Up</b>	<b>Team</b>
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	

\*\* Joint Session with AHP Madison **Development Operations** Track