

Association for Healthcare Philanthropy
Madison Institute
Elements of Major Gifts
2024

Core Faculty:

Donna Budak, MA, FAHP/CFRE, Dean
Sarah Fawcett-Lee, FAHP/CFRE, Associate Dean
Tim Self, MS, CFRE, Faculty

Track Guest Speakers:

Janet DeWolfe, FAHP/CFRE – Strategic Leader, C-Suite, and Volunteer Engagement
Jill Kyle, MBA, CFRE – Senior MGO Panel
Ashley Nall, MS, CFRE – Facilitator Senior MGO Panel
Dave Smith, CAP – Integrating Gift Planning in Major Gifts
Preston Walton, MA – Storytelling
Robert Wahlers, MS, CFRE - Senior MGO Panel

Madison Institute 2024—Elements of Major Gifts

Sunday, July 21	Topic/Activity	Faculty
9:00 am – 1:00 pm	Registration	
1:00 – 2:30 pm	Orientation and Making the Most of the Madison Experience <ul style="list-style-type: none"> • Faculty introductions • Course preview • “Getting to know you” • Making the most of the Madison Experience 	Donna Budak Sarah Fawcett-Lee Tim Self
2:30 – 3:15 pm	Introduction to Major Gifts <ul style="list-style-type: none"> • What is a major gifts program? • What is the difference between transactional and transformational giving? • What does it take to be a successful major gifts officer? 	Donna Budak Sarah Fawcett-Lee Tim Self
3:15 – 3:30 pm	Break	
3:30 – 5:15 pm	Donor Motivations	Sarah Fawcett-Lee
5:15 – 5:30 pm	Break	
5:30 – 6:30 pm	Assign and Discuss Capstone Projects	All track faculty
6:30 – 7:45 pm	Networking Social	

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

Madison Institute 2024—Elements of Major Gifts

Monday, July 22	Topic/Activity	Faculty
7:00 – 8:00 am	Breakfast – Great Hall, Memorial Union	
8:00 – 9:00 am	General Session/Keynote – Great Hall, Memorial Union	
9:15 – 10:45 am	<p>Prospect Identification</p> <ul style="list-style-type: none"> • What is a prospect? • How do you build a prospect pipeline? • How and when to use wealth screening • How to develop a network of philanthropy champions • Physician and clinician engagement 	Tim Self
10:45 – 11:30 am	Strategic Leader, C-Suite and Volunteer Engagement	Janet DeWolfe
11:30 – 12:30 pm	Lunch	
12:30 – 2:00 pm	Setting Priorities and Portfolio Management	Sarah Fawcett-Lee
2:00 – 2:45 pm	Storytelling	Preston Walton
2:45 – 3:00 pm	Break	
3:00 – 4:30 pm	Qualification	Tim Self
4:30 – 5:00 pm	Capstone Project	Faculty
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

Madison Institute 2024—Elements of Major Gifts

Tuesday, July 23	Topic	Faculty
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 10:30 am	<p>Cultivation</p> <ul style="list-style-type: none"> • Asking questions and active listening • Connecting the donor’s passion to opportunities for investment • Laying the groundwork for an invitation to invest • Role playing the soft ask 	Donna Budak
10:30 – 10:45 am	Break	
10:45 am – 12:15 pm	Solicitation	Tim Self
12:15 – 1:15 pm	Lunch	
1:15 – 2:45 pm	Stewardship	Donna Budak
2:45 – 3:00 pm	Break	
3:00 – 4:30 pm	Moves Management	Sarah Fawcett-Lee
4:30 – 5:00 pm	Capstone Project	
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

Madison Institute 2024—Elements of Major Gifts

Wednesday, July 24	Topic	Faculty
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 10:30 am	Integrating Gift Planning into Major Gifts	Dave Smith
10:30 – 10:45 am	Break	
10:45 am – 11:15 am	HIPAA	Donna Budak
11:15 AM – Noon	Capstone Project	All Track Faculty
Free afternoon and evening		

Thursday, July 25	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
8:45 – 10:15 am	Senior Major Gift Panel	Ashley Nall
10:15 – 10:30 am	Break	
10:30 am – 12:00 pm	Ethics	Sarah Fawcett-Lee & Donna Budak
12:00 – 1:00 pm	Lunch	
1:00 – 3:45 pm	Capstone Project Presentations	All Track Faculty
3:45 – 4:45 pm	Evaluation, Certificate Presentations	All Track Faculty
5:00 – 6:30 pm	Closing Celebration Social Hour	
Evening	Dinner on your own	