

Association for Healthcare Philanthropy
Madison Institute
Elements of Major Gifts
2025

Core Faculty:

Donna Budak, MA, FAHP/CFRE, Dean
David Garamella, MPA, Faculty
Tim Self, MS, CFRE, Faculty

Track Guest Speakers:

Shannon Duval - Strategic Leader, C-Suite and Volunteer Engagement
Josh LaBorde, CFRE – Artificial Intelligence, Working with AI in Major gifts
Dave Smith – Integrating Gift Planning in Major Gifts
Preston Walton - Storytelling

Madison Institute 2025—Elements of Major Gifts

Monday, July 21	Topic/Activity	Faculty
7:00 am – 12:00 pm	Registration	
8:00 – 9:00 am	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 David Garamella Tim Self
9:00 – 10:00 am	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 teak to be a successful major gifts officer? • Donor Motivation 	Donna Budak David Garamella Tim Self
10:00- 10:15 am	Break	
10:15 am – 12:00 pm	Grateful Patients	David Garamella
12:00 – 1:00 pm	Lunch	
1:00 - 2:30 pm	Prospect Identification / Qualification	Donna Budak
2:30 – 2:45 pm	Break	
2:45 -4:15 pm	Story Telling	Preston Walton
4:30 – 5:00 pm	Capstone - Parking Lot	Donna Budak David Garamella Tim Self
5:00 -6:00pm	Welcome Reception	

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Tuesday, 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 – 10:15 am	Cultivation	Donna Budak
10:15 – 11:00 am	Strategic Leader, C-Suite and Volunteer Engagement	Shannon Duval (tentative) David Garamella
11:00 – 11:15 am	Break	
11:15 – 12:15 am	Setting Priorities and Portfolio Management	David Garamella Tim Self
12:15 – 1:15 pm	Lunch	
1:15 – 2:45 pm	“Artificial Intelligence” Working with AI in Major Gifts	Josh LaBorde
2:45 – 3:00 pm	Break	
3:00 – 4:30 pm	Solicitation	Tim Self David Garamella
4:30 – 5:00 pm	Capstone Project Prep	All Track Faculty
5:00 – 6:00 pm	Networking Social	
Evening	Dinner on your own	

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Wednesday, July 23	Topic	Faculty
7:30 – 9:00 am	Breakfast & Roundtables – Pyle Center	
9:00 – 10:00 am	Stewardship	Donna Budak David Garamella
10:00 – 10:15 am	Break	
10:15 am – 12:15pm	Ethics	Donna Budak
11:30 – 12:30 pm	Lunch	
12:45 – 2:30 pm	Planned Giving & Blended Gifts	Dave Smith Planned Giving Track Faculty
Afternoon / Evening	Dinner on your own	

Thursday, July 25	Topic	Faculty
7:30 – 8:30 AM	Breakfast – Pyle Center	
9:00 – 11:00 am	Panel Discussion Philanthropy Champions / Partners Trustee / Physician / Executive	All Track Faculty
10:45 -11:00 am	Break	
11:00 – 11:30 am	Capstone Prep	All Track Faculty
11:30 – 12:30 pm	Lunch	
12:45 – 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	