

Register before April 15 and save \$400! Class size is limited so register today!

AHP Institute for Healthcare Philanthropy

35th Annual Madison Institute



The Premier Certificate Program for Health Care Fundraisers



SCHOOL OF BUSINESS
University of Wisconsin-Madison

Sponsored by the Association for Healthcare Philanthropy in cooperation with the University of Wisconsin's Graduate School of Business

Saturday, July 9–Thursday, July 14, 2011
Madison, Wisconsin

Early Bird
registration fees
confirmed at
2010 rates.



ASSOCIATION FOR
HEALTHCARE
PHILANTHROPYSM

Connecting People • Enriching Lives

An **Insightful** Experience.

A **Thought-provoking** Conference.

An Incredible **Learning** Opportunity.

Five Days of **Intensive Education**
and Interaction **targeted** to health
care fundraisers.



Featuring:

Five-day curriculum focusing on health care development with numerous opportunities to learn, share, develop networks, and make new friends in a supportive and pleasant environment.

Prestigious faculty members who are the best and brightest in health care resource development.

Small class size to help make your learning experience a strong one.

Network with your colleagues and faculty through presentations, case studies, and role playing.

Certificate from University of Wisconsin and AHP presented to each student who successfully completes course work.

It will be time well spent for both you and your institution.



ASSOCIATION FOR
HEALTHCARE
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YOU WILL:

Explore the possibilities in a unique **educational experience** with your peers.

Participate in a five-day **intensive fundraising program**.

Examine alternative solutions to the challenges that you face in your job, and arm yourself with the tools you need to be successful.

Make connections and **develop long-lasting relationships** with people who truly understand your career as a health care fundraiser.



Register before April 15 and save \$200!
Class size is limited so register today!



Become part of a learning community that will help you achieve excellence.
The “Madison Experience” is an event not to be missed!

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Certificate Programs

Participants select the certificate program that is most relevant to their needs. There are six comprehensive programs from which to choose. Although each program is independent of the others, it is recommended that the programs be taken according to the numbered sequence.

1. Fundamentals of Resource Development

Overview: This course provides a comprehensive overview of the skills and knowledge required to successfully operate a resource development program—including operational underpinning and development technique, structure, and strategy.

Who should attend: This track is a survival kit for those who are new to fundraising, those who want to broaden their knowledge of development, and for organizations that are beginning a foundation or development program.

Overview

- Introduction to Health Care Philanthropy (U.S. and Canada)
- Development Structures
- The Case for Support in Health Care

Prospect and Donor Constituencies

- Individuals
- Corporations and Foundations
- Prospect Identification, Research, and Cultivation
- The Psychology of Giving

Keeping People and Procedures Healthy

- Fundamentals of Tax Law (U.S. and Canada)
- Roles and Responsibilities for Staff and Volunteer Leadership
- Planning and Budgeting

Fundraising Tool Kit

- Direct Mail
- Family and Tribute Giving
- Recognition and Donor Clubs
- Special Events
- Major Gifts and Personal Solicitation
- Corporate and Foundation Solicitation
- Capital Campaigns
- Planned Giving (U.S. and Canada)

2. Annual Giving

Overview: This course is a comprehensive account of annual giving strategies, tools, skills, approaches for specific constituencies, and other keys to success. Learn new skills, gather ideas, and be inspired as expert faculty and classmates share proven ideas that you can use on the job to increase your fundraising revenue and to grow a loyal donor base through a comprehensive annual giving program.

Walk away with tools you can use immediately at your organization to build your annual plan.

Who should attend: This track is for individuals who want to increase their expertise in annual giving, who have two or more years of fundraising experience, or who have completed the *Fundamentals of Resource Development* program or a comparable introductory offering.

Special Note: AHP has two annual giving tracks. Each track will be limited to 50 participants, and both tracks will have the identical curriculum. AHP reserves the right to assign you to a particular track.

Creating and Implementing a Successful Annual Giving Program

- Elements of a Comprehensive Program
- Annual Giving Critical Success Factors
- Planning, Managing, and Evaluating Annual Giving
- Annual Giving Metrics

Annual Giving Strategies and Tools

- Direct Response Solicitation
- Donor Clubs
- Support Groups and Community Organizations
- Special Events
- Commemorative Giving
- ePhilanthropy/the Internet/Social Media
- Person-to-person Solicitation

Annual Giving and Key Constituencies

- Boards and Other Leadership
- Medical Staff Solicitation
- Employee Campaigns
- Grateful Patient Programs

Annual Giving Skills

- Fundraising Copy and Graphics
- Donor Relations and Communication
- Application of Annual Giving Skills

Integrating Annual, Major, and Planned Giving Programs

- Strategies for Coordinating Annual, Major and Planned Gift Solicitation
- Culture of Philanthropy

3. Major Gifts

Overview: This course is a comprehensive journey through major gift development, from concept to the practical application of knowledge for cultivation and solicitation strategies.

Who should attend: Track participants will benefit most if they have at least five years of experience in fundraising or have completed the *Fundamentals of Resource Development* and/or *Annual Giving* programs.

Special Note: AHP has two major gift tracks. Each track will be limited to 50 participants, and both tracks will have the identical curriculum. AHP reserves the right to assign you to a particular track.

Overview

- What is a Major Gift?
- Create a Long-term Vision for Your Major Gift Program
- Setting Revenue Goals and Evaluating Your Program

Create Your Case

- Importance and Elements of the Case Statement
- The Impact of Branding and Positioning

Effective Leadership

- Role of the Chief Development Officer
- Role of the Institution's CEO
- Volunteer Leadership Roles and Responsibilities

Donor Cultivation System/Moves Management

- Research Your Potential
- Prospect Qualification
- Managing Prospects

Solicitation Techniques/Training

- Getting the Appointment
- Making the Ask
- Closing the Gift

Stewardship

- Donor Recognition
- Renewal and Upgrading
- Personalized Stewardship

4. Capital Campaigns

Overview: When your organization commits to a capital campaign, the goal is public, the volunteers are community leaders, and the need is urgent and compelling. This course is designed and presented by seasoned professionals who will guide you in understanding and implementing all aspects of a capital campaign.

Who should attend: Whether you hold a staff/administrative position, are a board member or key volunteer with an organization that is either in or contemplating a capital campaign, this track is for you.

Overview

The objective of this course on capital campaigns is to create an atmosphere that facilitates experiential learning. The course approaches campaign elements in a chronological order. From determining your readiness, establishing timelines and procedures, discovering what motivates donors, how to make the ‘ask’, and engaging volunteers and staff to reach your greatest potential possible. This is accomplished through:

- a series of workshops;
- group interaction;
- personal assessment; and
- team exercises.

Participants will work through all strategic components of a campaign with emphasis on evaluating your own situation. It begins from the inception of the “big idea” to the celebration that marks the achievement of the campaign goal, and the effective stewardship of those who participate in your success.

Key Pillars

The course curriculum is based on the four key pillars of a campaign:

- Case
- Leadership
- Probable Donors
- Plan

You also will discover how a campaign can enhance your current fundraising program and advance your future potential. Further, we will explore and address “mid-course correction” action needed to reenergize stalled campaign programs.



5. Planned Giving

Overview: This course provides an overview of the components of a successful planned giving program, offering an in-depth explanation of planned giving products and the marketing of planned gifts, with some emphasis on small development offices and programs currently without a planned gift component. The centerpiece of this track is an evolving case study that will allow students to apply what they learn to facts that involve planned giving donors.

Who should attend: This track is for individuals who have completed the *Fundamentals of Resource Development* program or a comparable introductory program; those with several years of fundraising experience; and those wanting to initiate a planned giving program or improve an existing one.

Understanding Planned Giving Tools

- Wills and Bequests
- Charitable Estate Planning
- Tax Aspects of Charitable Giving in the United States and Canada
- Charitable Trusts
- Pooled Income Funds
- Charitable Gift Annuities
- Gifts of Real Estate

Marketing Planned Gifts

- Elements of Marketing
- Marketing Through Newsletters, Advertisements, Discovery, Mailings and Telemarketing
- Estate Planning Seminars
- Profiles in Successful Financial Advisor Groups
- Planned Giving Through the Internet

Planned Giving Practice

- Making the Call
- Using Planned Giving to Solve Donor Estate Challenges
- Cultivating the Prospective Planned Giving Donor

6. Fundraising Management

Overview: Excellent fundraising skills are crucial for professional advancement, but each stage of a development officer's career demands more and better management skills. This comprehensive, interactive program focuses on contemporary management strategies to prepare participants for the challenges of executive leadership. The faculty includes experienced development professionals and University of Wisconsin Business School instructors.

Who Should Attend: The completion of the *Fundamentals of Resource Development* program or a similar educational program, and at least 5 years of management experience in fundraising are required.

Strategic Management of the Fundraising Process

- Strategic Thinking
- The Strategic Development Plan
- Leading Strategic Change
- Application of the Strategic Fundraising Process

Operational Effectiveness

- Financial Analysis and Control
- High Performance Systems for Trustees and Staff

Leadership Skills for the Development Officer

- Leading Organizational Transformation
- The Politics of Fundraising for the Chief Development Officer
- Negotiating and Building Agreement
- Team Building for Fundraising Success

Practical Applications

- Making the Case for Health Care Philanthropy
- Resource Development Clinic



Pearl Veenema, FAHP

*Chair, AHP University-based Programs
and Director of the Institute for
Healthcare Philanthropy*
President & CEO
Hamilton Health Sciences Foundation
Hamilton, ON

**DEANS AND
ASSOCIATE DEANS OF
CERTIFICATE PROGRAMS**

Dorothy A. Allen, FAHP

*Associate Dean, Fundamentals
of Resource Development*
Vice President for Philanthropy
Florida Institute of Technology
Melbourne, FL

James DeLauro, Ph.D.

Associate Dean, Fundraising Management
Principal
DeLauro & Associates Consulting
San Diego, CA

Douglas A. Dillon, CFRE

Associate Dean, Capital Campaigns
Senior Partner
Jerold Panas, Linzy & Partners
Marblehead, MA

David B. Gillig, FAHP

Dean, Fundraising Management
Senior Vice President & Executive Director
Rady Children's Hospital Foundation
San Diego, CA

Richard P. Green, FAHP

Dean, Planned Giving
Vice President & Chief Development
Officer
Queen of the Valley Medical Center
Napa, CA

Mary Love “Bitsy” Henderson, FAHP

*Dean, Fundamentals of
Resource Development*
President
Henderson Mallory Partners
Austin, TX

Julie Jones Manning, CFRE

Associate Dean, Annual Giving
Vice President Development and
Community Relations
Samaritan Health Services
Corvallis, OR

Debbie McGarry, CFRE

Dean, Capital Campaigns
Director, Strategy and Operations
University of Ontario Institute
Advancement of Technology
Sunderland, ON

J. Gregory Pope, FAHP, CFRE

Associate Dean, Major Gifts
Vice President of Philanthropy
Saint Thomas Health Services Foundation
Nashville, TN

Laura Rehrmann, FAHP

Dean, Major Gifts
President
Group Health Foundation
Seattle, WA

Ann Thompson-Haas, FAHP

Dean, Annual Giving
Principal and Senior Consultant
Larkwood Consulting, LLC
Oakland, CA

FACULTY

Ian Fraser, FAHP, CHE

Vice President & Senior Counsel
The Fundraising Network
Kingston, ON

Lorraine Del Prado

Senior Director of Development, Trust
Services and Legacy Planning
Seattle Children's Hospital Foundation
Seattle, WA

Chad Gobel

Associate Vice President for Medical
Center Advancement
University of Rochester Medical Center
Rochester, NY

Maurice Henderson, FAHP

National CEO
Henderson Partners Fundraising
Consultants
Wayville, Australia

Jerry Linzy

Senior Managing Partner
Jerold Panas, Linzy & Partners
Chicago, IL

Sidney Mallory, FAHP

Dean Emeritus
Principal
Henderson Mallory Partners
Austin, TX

Arthur M. “Rusty” Brink, FAHP, CFP

Vice President/Chief Philanthropic Officer
Martin Memorial Foundation
Stuart, FL

Jory Pritchard-Kerr, FAHP

Executive Director
Collingwood General & Marine Hospital
Foundation
Collingwood, ON

Robert Shaver, MBA

Faculty Associate, Management Institute-
School of Business
University of Wisconsin-Madison
Madison, WI

SCHEDULE

Saturday, July 9

	4:00–5:00 PM	Registration
	5:00–8:30 PM	First Class and Dinner

Sunday, July 10

	8:00–8:45 AM	Special Speaker
	9:00–11:45 AM	Class
	1:00–5:00 PM	Class

Monday, July 11

	8:30 AM–12:15 PM	Class
	1:30–5:00 PM	Class

Tuesday, July 12

	8:30 AM–12:45 PM*	Class
		*Afternoon for special projects and group work

Wednesday, July 13

	8:30–11:45 AM	Class
	1:00–5:00 PM	Class

Thursday, July 14*

	8:45 AM–12:00 PM	Class Group Presentation and Presentation of Certificate of Completion
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* IT IS A REQUIREMENT THAT ATTENDEES ARE PRESENT FOR THE ENTIRE CONFERENCE INCLUDING GROUP PRESENTATIONS ON THURSDAY, JULY 14.

Registration Information

The registration fee for the Institute covers the cost of a certificate program, certificate program course manual and class handouts, and meals (Saturday dinner, breakfast and lunch from Sunday through Wednesday and Thursday breakfast.)

Registration opens at 4:00 p.m. on Saturday, July 9, in the lobby of the Pyle Center. Saturday's registration, the certificate programs, lunches, breaks, receptions, and dinners will be held in the Pyle Center. All breakfasts will be held in the Lowell Center.

Registrations will be accepted on a first-paid basis. Early registration is strongly recommended. You will receive a confirmation letter from AHP upon receipt of your registration form and fees.

A detailed schedule for the certificate program for which you've registered will be forwarded to you in June.

Membership

If you are not an AHP member and register at the nonmember rate, you will receive a one-year individual AHP membership that will be effective the date that your registration form and payment are received. Please check your membership status before registering if you are unsure.

Questions

Contact AHP at (703) 532-6243 or meetings@ahp.org if you have questions.

Choose and make your own hotel accommodations!

Attendees can choose from three hotel options and book their own room reservations. This gives you the option to stay in the hotel that best accommodates your needs.

This year's hotel options, locations, and special AHP rates are listed on page 15. Remember that reservations with each hotel will be accepted on a first-come, first-served basis and that limited space is available. Please be sure to book your room as soon as possible. You must contact the hotel directly to make reservations.

Hotel and room reservation information follows:

1. Call your hotel of choice and refer to the AHP room block.
2. There are limited rooms reserved at each hotel at the special AHP rate so make your reservation early. (All rates are as noted and are without applicable taxes. Payment for your room will be made directly to the hotel.)
3. Classes begin at 5 p.m. on Saturday, July 9, so please make your travel plans accordingly. The Institute ends at 12:00 p.m. on Thursday, July 14.
4. All classes will be held at the Pyle Center, 702 Langdon Street. The Campus Inn, Lowell Inn and Conference Center are within walking distance of the Pyle Center. The Madison Concourse Hotel is approximately an 8–10 minute walk or shuttle service is available to the campus area.
5. The deadline for hotel reservations is June 9, 2011. Reservations are made on a first-come, first-served basis with each hotel. After the June 9 deadline, reservations will be made on a space and rate-available basis. Please note that each hotel is holding limited rooms at the AHP rate that may sell out prior to the June 9 deadline. **Make your reservation early.**



Connecting People • Enriching Lives

Registration Form

35th Annual Institute for Healthcare Philanthropy

SATURDAY, JULY 9—THURSDAY, JULY 14, 2011 • UNIVERSITY OF WISCONSIN-MADISON

Please return this form by mail or fax to:

Association for Healthcare Philanthropy
313 Park Avenue, Suite 400
Falls Church, VA 22046
Phone: (703) 532-6243
Fax: (703) 532-7170
E-mail: ahp@ahp.org
Web site: www.ahp.org

REGISTRANT

Name: _____ Nickname for Badge: _____

Miss Mrs. Ms. Mr. Dr. Other _____

Title: _____ Years in Development: _____

Institution: _____

Address: _____

City: _____ State/Province: _____ Zip/Postal Code: _____

Telephone: _____ Fax: _____ E-mail: _____

(AHP does not distribute e-mail addresses. E-mails are used for official conference correspondence only.)

Photographs are taken at the Institute and may be used in AHP's future promotional material. If you do not want your image used, please contact AHP.


IMPORTANT—CERTIFICATE PROGRAM

Please indicate the ONE certificate program for which you are enrolling (You must indicate one program in order for your registration to be processed):

- Fundamentals of Resource Development
- Annual Giving
- Major Gifts
- Capital Campaigns
- Planned Giving
- Fundraising Management
- Check here if you are disabled or require special services, and e-mail meetings@ahp.org with details.
- Check here if you require a special diet, and e-mail meetings@ahp.org with details.

CANCELLATION POLICY

If notification of cancellation is received by June 3, the registration fee, less \$75, will be refunded. After June 3, no refunds will be given. Please email meetings@ahp.org

Registration form  continues on back. Please be sure to complete both sides.

Registration Form

35th Annual Institute for Healthcare Philanthropy

REGISTRATION FEE

The registration fee includes the cost of a certificate program; certificate program course manual and class handouts; and meals and coffee breaks (Saturday dinner, breakfast and lunch Sunday through Wednesday and Thursday breakfast).

Early Bird: Before April 15		Advanced: April 16–June 17		Regular: June 17–onsite	
<input type="checkbox"/> AHP Member \$1,995 U.S.	<input type="checkbox"/> Nonmember \$2,435 U.S.*	<input type="checkbox"/> AHP Member \$2,195 U.S.	<input type="checkbox"/> Nonmember \$2,635 U.S.*	<input type="checkbox"/> AHP Member \$2,395 U.S.	<input type="checkbox"/> Nonmember \$2,835 U.S.*
* If you pay the nonmember fee, you will receive a one-year individual membership in AHP. Correspondence will be sent to you directly from AHP's membership department once your membership has been processed. If you are unsure of your member status, please contact AHP before submitting registration.					

For hotel reservation information, please see page 15. Attendees should make their own hotel reservations with the hotel of their choice. All reservations and payments should be made directly with the individual hotel. Questions should be directed to the hotel. Make your reservation early.

METHOD OF PAYMENT

TOTAL \$: _____

My check, payable to AHP for \$ _____ in U.S. dollars is enclosed.


Charge to: VISA MasterCard American Express

Account #: _____ Exp. date: _____

Security code: _____ Zip code associated with billing address: _____

Signature as it appears on card: _____

Please complete one form per person. Registrations cannot be processed without payment.

 **Registration form continues on front. Please be sure to complete both sides.**

Choose and make your hotel reservations.

The Campus Inn

Single/Double: \$145 per night
601 Langdon Street
Madison, WI 53703
Phone: (608) 257-4391
Fax: (608) 257-2832
www.thecampusinn.com/madison

The Campus Inn offers elegant guest rooms, a beautiful marble lobby accented with original art and a mahogany fireplace, access to the exclusive Chancellor's Club, and other amenities. The Campus Inn is one block from the Pyle Center where classes are held and across from the Lowell Center where breakfast is offered.

Lowell Center

Single/Double Standard Rooms: \$89/101 per night
Single/Double Deluxe Room: \$105/117 per night
Single/Double Extended Stay Room: \$129/141 per night
610 Langdon Street
Madison, WI 53703
Reservations: (866) 301-1753
Phone: (608) 256-2621
Fax: (608) 262-5445
<http://conferencing.uwex.edu/lowell.cfm>

The newly renovated Lowell Center is one of three official University of Wisconsin-Extension Conference Centers. The Lowell Center is a seven-story hotel that offers lodging just one block from the Pyle Center. The Lowell Center offers many amenities, including a swimming pool, exercise room, and sauna. For more details, visit the hotel's web site.

All conference breakfasts will be offered at the Lowell Inn as well as the Saturday evening dinner and Sunday morning general session.

The Madison Concourse Hotel

Single/Double Concourse Level: \$126/136 per night
Single/Double Governor's Club: \$179/189 per night
1 West Dayton Street
Madison, WI 53703
Phone: (608) 257-6000
www.concoursehotel.com

The Madison Concourse Hotel and Governor's Club is located in the heart of downtown Madison just steps from the state capitol. The hotel offers a pool, whirlpool, game room, and state-of-the-art fitness center. It also provides complimentary airport shuttle service, complimentary wireless Internet connection, and business services. The Concourse is an 8–10 minute walk to campus. They do offer a complimentary shuttle daily for attendees.

The deadline for hotel reservations is June 9, 2011. Reservations are made on a first-come, first-served basis with each hotel. After the June 9 deadline, reservations will be made on a space and rate-available basis. Please note that each hotel is holding limited rooms at the AHP rate that may sell out prior to the June 9 deadline. **Make your reservation early**

AHP's 35th Annual Madison Institute

A First-class Learning Experience
for Health Care Fundraisers



Saturday, July 9–Thursday, July 14, 2011
University of Wisconsin-Madison, WI

Association for Healthcare Philanthropy
313 Park Avenue, Suite 400
Falls Church, VA 22046



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**A year's worth of education in 5 days
including intensive learning and exclusive
interaction with seasoned faculty.**

Register by April 15
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PRESORTED
STANDARD
US POSTAGE
PAID
PERMIT #519
DULLES, VA