

Schedule-at-a-Glance

ENVISIONING THE FUTURE
LEADING THE CHANGE

Pre-Conference Workshops

WEDNESDAY, AUGUST 20								
Track	Advanced Research		Data Mining/ Prospect Identification	Healthcare	Campaigns	Member and Cause-Related Organizations	Trends	Prospect Management
9:00am – 12:00pm	101	102	103	104	105	106	107	108
	Initial Private Offerings: The New Public Market for Private Companies <i>David Lawson</i>	Creating Customized Prospect Ratings to Maximize Fundraising Potential <i>Lisa Howley</i>	An Introduction to Data Mining <i>Marianne M. Pelletier</i>	Fundraising Post-HIPAA <i>Nancy G. Bowers</i>	Prospect Research in a Campaign <i>David Lamb</i>	City Researcher Country Researcher — Large Shop Skills Transferred to a Small Shop <i>Liz McHugh</i>	Surviving and Thriving in the Flat Philanthropic World <i>Jon Duschinsky</i>	Creating and Implementing a Prospect Management System <i>Josh Birkholz</i> <i>Chris Cannon</i>
9:00am – 5:00pm	Management and Leadership Seminar <i>Elizabeth Crabtree</i> <i>Henry Givray</i> <i>Shelby Kloures Radcliffe</i> <i>Barbara Tannenbaum</i>							
Track	Advanced Research		Data Mining/ Prospect Identification	Healthcare	Campaigns	Member and Cause-Related Organizations	Trends	Prospect Management
1:30pm – 4:30pm	111	112	113	114	115	116	117	118
	Planning and Implementing a Successful Prospect Screening <i>Amanda Jarman</i> <i>Peter Zeimet</i>	Balancing Your Research Portfolio – Setting Prospect Identification Goals <i>Christina Pulawski</i>	Using Data Mining to Drive Fundraising <i>Lawrence Henze</i> <i>Jennifer Key</i>	Effective Prospect Research in the Hospital and Healthcare Sectors <i>David Eberly</i> <i>Barbara Fanning</i>	Campaign Reporting <i>Rob Scott</i>	Redeeming Time: Strategic Planning for the Research Operation <i>Mark DeFillippis</i> <i>Jon Thorsen</i>	Philanthropic Giving – Emerging Trends and Recent Studies <i>Eva Aldrich</i>	Major, Leadership and Transformational Gifts – How to Get Key Players in the Same Sandbox <i>Deborah L. Mueller</i> <i>Jennifer L. Soderholm</i>
4:45pm – 5:45pm	Conference Orientation for Newcomers							
6:00pm – 7:30pm	Exhibit Hall Grand Opening and Welcome Reception							

Schedule Subject to Change

Conference Sessions

THURSDAY, AUGUST 21

7:15am – 8:00am	Continental Breakfast								
7:15am – 8:15am	Roundtable Discussion Groups in the Exhibit Hall								
7:15am – 5:00pm	Exhibit Hall Open								
Track	Research Fundamentals	Advanced Research	Data Mining/ Prospect Identification	Prospect Management	Member and Cause-Related Organizations	Healthcare	Campaigns	Management and Professional Development	Trends
8:30am – 10:00am	201	202	203	204	205	206	207	208	209
	Look, Ma! No Hands: Lessons Learned From Our First Year <i>Joni Warner</i>	Organizing with Intent: Managing Data with the Mission in Mind <i>Jon Thorsen</i>	Data Mining for Dynamic Donors <i>David Robertson</i>	Prospect Management and Metrics <i>Leslie Gonnella</i>	A Road Map to Screening — Start Your Engines <i>Ilana Lester Moreno</i> <i>Miriam Wazeter</i>	A Prescription for Success — Making Philanthropy a Priority at Your Healthcare Institution <i>Diane Crane</i>	Hitting for the Cycle: The Top 10 Ways to Ensure Campaign Success <i>Deborah Reinhardt</i> <i>Youmans</i>	Changing the Landscape — Transforming Your Shop From Reactive to Proactive <i>Michelle Franke</i>	Whistle Stop Tour of European Philanthropy <i>Jon Duschinsky</i>
8:30am – 10:00am	Vendor Seminar								
10:30am – 12:00pm	211	212	213	214	215	216	217	218	219
	The Basics of Estimating: Asset-Based Giving Capacity <i>Jeff Watson</i>	Building and Utilizing a Researcher and Fundraiser Partnership <i>Elizabeth Dollhopf-Brown</i>	Identifying Loyal Donors <i>Jamie Nelson</i>	Communicating and Marketing Prospect Management and Research Policies <i>Karen T. Isble</i>	Prospecting Without an Alumni Base <i>Sara Edwards-Asuncion</i>	Prospecting the Patient List — A Panel Discussion of Best Practices <i>Linda Hahn</i> <i>Ceci Riecker</i> <i>Anne Scheurer</i> <i>Suzanne Szalay</i>	Prospect Research and Management During Each Stage of a Campaign <i>Shelby Kloures Radcliffe</i>	Reporting Accomplishments Like a Researcher <i>Janice Cuning</i> <i>Shannon Rafferty</i>	The Evolution of Document Imaging <i>Kristin Harold</i> <i>Sarah Fernandez</i> <i>Rob Scott</i>
10:30am – 12:00pm	Vendor Seminar								
12:00pm – 2:00pm	APRA Annual Meeting and Awards Presentation Luncheon								
Track	Research Fundamentals	Advanced Research	Data Mining/ Prospect Identification	Prospect Management	Member and Cause-Related Organizations	Healthcare	Campaigns	Management and Professional Development	Trends
2:30pm – 4:00pm	221	222	223	224	225	226	227	228	229
	Absolutely Must Have Resources <i>Ofelia Alayeto</i>	Finding the Silver Spoon; Researching Inherited Wealth <i>Inez Bergquist</i>	Making Hedge Funds “HIP” <i>Amber Countis</i> <i>Samantha Harris</i>	Prioritize and Segment Your Prospect Pool to Focus on Your Best Prospects <i>David Manuel</i> <i>Caroline Oblack</i>	Strategic Prospect Management in Cause-Related Organizations <i>Hodan Hassan</i> <i>Phoebe Slanetz</i>	Physician-Faculty and Fundraising – Partnering to Enhance the Health of Your Development Program <i>Jennifer L. Soderholm</i>	Leveraging the Prospect Researcher/Fundraiser Relationship for Campaign Success <i>Armando Zumaya</i>	How to Position Yourself as a Standout When You’re Not the Leader <i>Michelle Robertson</i>	American Philanthropy: What Was, What Is and What’s Next <i>Craig C. Wruck</i>
2:30pm – 4:00pm	Vendor Seminar								
4:30pm – 5:30pm	Affinity and User Group Sessions								
6:00pm – 10:00pm	Optional Outings: Board dinners, networking and casual gatherings								

Schedule-at-a-Glance

FRIDAY, AUGUST 22

7:15am – 8:00am	Continental Breakfast								
7:15am – 8:15am	Roundtable Discussion Groups in the Exhibit Hall								
7:15am – 2:30pm	Exhibit Hall Open								
Track	Research Fundamentals	Advanced Research	Data Mining/ Prospect Identification	Prospect Management	Member and Cause-Related Organizations	Healthcare	Campaigns	Management and Professional Development	Trends
8:30am – 10:00am	301 Learn About Real Estate Research and Financial Analysis <i>Thomas Hampsey</i>	302 Performance Benchmarking <i>Karen Greene</i>	303 Understanding Driving Influence: Driving Prospect Identification Through Networks <i>Myra Norton</i>	304 Carrots and Sticks: Using Prospect Data to Measure Fundraiser Performance <i>Mark Lanum</i>	305 Leveraging Board and Volunteer Networks for Campaign Success <i>Mark DeFilippis</i>	306 Rx for More and Bigger Gifts: Dynamic Monitoring of Your Major and Planned Gift Portfolios <i>Jay Maloney</i>	307 Using Analytics and Projection for Effective Campaign Planning and Execution <i>Joshua Birkholz</i>	308 Innovative Prospect Research Training: Leveraging Relationships With Alumni Relations, Fundraisers and Researchers <i>Elizabeth Dollhopf-Brown Holly Hamilton Nicole Kurowski Stacy Mitz</i>	309 There Ought to Be a Law: Best Fundraising Practices We Probably Do Not Practice <i>Lawrence Henze</i>
8:30am – 10:00am	Vendor Seminar								
10:30am – 11:45am	Keynote Address: Why Giving Matters, <i>Arthur Brooks, PhD</i>								
Track	Research Fundamentals	Advanced Research	Data Mining/ Prospect Identification	Prospect Management	Member and Cause-Related Organizations	Healthcare	Campaigns	Management and Professional Development	Trends
2:30pm – 4:00pm	311 Putting It All Together — Developing Analysis and Strategy <i>Christina Pulawski</i>	312 Relationship Mapping: Six Degrees of Separation and Beyond <i>Randy Bunney</i>	313 The Frugal Researcher: Prospect Identification on a Limited Budget <i>David Sterling</i>	314 Prospect Management: It's All About the Reports <i>Cristian Hamilton</i>	315 “POP,” “Prospect Universes” and Other Projects to Populate Productive Prospect Pools <i>Valerie Anastasio Rachel DeMaster Heather Reisz</i>	316 Grateful Patient Prospecting in a HIPAA Environment — Doing More With Less <i>Hilla Ferguson Jason Befort</i>	317 Campaign Forecasting, Gift Pyramid: Are We Going to Make Our Goal? <i>David Robertson</i>	318 You Want What by When? Enhancing Your Project Management Skills <i>Kristin Skarie</i>	319 New Market Trends and Their Philanthropic Effects <i>Pamela Poland</i>
2:30pm – 4:00pm	Vendor Seminar								
5:00pm – 10:00pm	Optional Friday Night Hospitality Outing: Take Me Out to the Ball Game!								

SATURDAY, AUGUST 23

Track	Research Fundamentals	Advanced Research	Data Mining/ Prospect Identification	Prospect Management	Member and Cause-Related Organizations	Healthcare	Campaigns	Management and Professional Development	Trends
8:30am – 10:00am	401 The Daily Push – Showcasing Research to Development Staff <i>Robin Eidle</i>	402 A New Twist on an Old Theme: Leveraging Peer Screening Strategically <i>Suzanne Franzino Alison Sommers-Sayre</i>	403 Slicing and Dicing in the Research Kitchen: Recipes for Prospect Identification <i>Patricia Quigley Amy Westgard</i>	404 Prospect Management: From Vision to Implementation <i>Jennifer Shimp-Bowerman</i>	405 Starting a Research Shop <i>Michele Miller</i>	406 Checking the Pulse of Prospecting in Healthcare Research <i>Judith Busse</i>	407 Your Heart or Your Head: Making Decisions Based on Data <i>Steve Birnbaum Roseann Fitzgerald</i>	408 Avoid Burnout: Love Your Job <i>Sarah Cadbury</i>	409 Wealth and Philanthropy in America <i>Katherine Swank</i>
8:30am – 10:00am	Vendor Seminar								
10:30am – 12:00pm	411 The Fundamentals of International Research <i>Maria Estrada Jennifer MacCormack</i>	412 Research Beyond Major Gifts <i>Amy New</i>	413 First Year Parents: Uncovering the Wealth <i>Nicole Trickler</i>	414 Beyond Assignments: Taking Prospect Management to the Next Level <i>Amy Carrier Brock Silvey</i>	415 Teamwork Beyond the Development Office: Research and Fundraising Strategies for Everyone in Your Organization <i>Kate Fultz Hollis</i>	416 Ethical Research in Healthcare <i>Hilla Ferguson Heather Flanagan David Lamb Melissa Sandstrom Courtney Sims</i>	417 How to Hit a Home Run: Campaign Planning for Everyone <i>Patricia Ambler</i>	418 Research in Transition: Managing Change During Periods of Expansion <i>Alison Schwartz Anna Sheehan</i>	419 Using Social Networking Sites for Prospect Research: Ethical and Legal Viewpoints <i>Elizabeth Harty Susan Shebar</i>
10:30am – 12:00pm	Vendor Seminar								