

APRA Symposium

# Management and Leadership Summit for Senior Professionals

APRA  
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APRA



October 25-26, 2007

Hotel Marlowe | Cambridge, Massachusetts

## Faculty Bios



**Mark J. Marshall,**  
Senior Associate,  
Bentz Whaley Flessner

Mark Marshall is a senior associate in Bentz Whaley Flessner's Minneapolis office. With 17 years of institutional advancement experience, he brings a strong background in major and planned gifts, alumni relations, and campaign strategy to clients. Prior to joining the Bentz Whaley Flessner Mark served as vice president for development and alumni relations at William Mitchell College of Law in St. Paul, Minnesota. Previously he served as director of development for special programs at the University of Minnesota's Medical Foundation. Mark holds a bachelor of arts degree from St. Olaf College in Northfield, Minnesota, and has completed his MBA. He has been a presenter and has served in volunteer capacities for CASE and the Minnesota Planned Giving Council.



**David Eberly,**  
Director of Prospect Research and  
Management,  
Children's Hospital Trust, Boston

David Eberly is Director of Prospect Research and Management at Children's Hospital Trust, Boston. During his twenty-five plus years in the fundraising field, David has divided his time between higher education and health care. David served as Director of Research at Tufts University; Director of Development Services at the Harvard Medical School; and Director of Resource Development at Harvard's Kennedy School of Government, before returning to the research field in 2003 at Children's Hospital. In addition to his staff time, David has consulted for institutions in higher education, health care, and other member organizations.

David currently sits on the HIPAA Steering Committee of Children's Hospital. He is a past president of the New England Development Research Association and the recipient of its Ann Castle Award.



**Dr. Cynthia Ingols,**  
Associate Professor of Management,  
Simmons School of Management,

Dr. Cynthia Ingols is an experienced professor, consultant and researcher who specializes in the ways individuals lead and organizations negotiate their environments. At the Simmons School of Management, Cynthia teaches *Leading Organizational Change* and *Career Strategies* in the MBA program and *Strategic Leadership for Women* in the Executive Education program. As a consultant, Cynthia has focused on developing interactive executive education programs; coaching professionals to enhance their leadership potential; and conducting diagnostic work to promote change in organizations. Recently, she worked with Harvard University in a five-part practicum on how to successfully lead change across the university.

## APRA Symposium

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### Day One – Thursday, October 25

(Note: Actual session times and order are subject to change at the discretion of faculty.)

<b>7:30am – 8:30am</b>	<b>Registration and Breakfast</b>
<b>8:30am – 9:00am</b>	<b>Welcome and Introductions</b>
<b>9:00am – 10:45am</b>	<b>Speak Like a Leader: Developing an Effective Communications Style</b> (Barbara Tannenbaum, Senior Lecturer, Brown University)  An interactive program for managers and team leaders on developing a public speaking and communications style that will engage, inspire and motivate others
<b>10:45am – 11:00am</b>	<b>Break</b>
<b>11:00am – 12:30pm</b>	<b>Business Intelligence</b> (Jon Thorsen, Director of Advancement Services, The Nature Conservancy)  A discussion of goal setting, benchmarking and performance management techniques for fundraising and associated trends, tools and advancements in technology solutions that support data analytics
<b>12:30pm – 2:00pm</b>	<b>Lunch on Your Own</b>
<b>2:00pm – 3:30pm</b>	<b>Developing Your Leadership Potential</b> (Cynthia Ingols, Associate Professor, Simmons School of Management)  An interactive program on leading teams to excellence, leading change and change management
<b>3:30pm – 3:45pm</b>	<b>Break</b>
<b>3:45pm – 5:00pm</b>	<b>Strategic Positioning of Development Research, Data Analysis and Information Management</b> (Elizabeth Crabtree, David Eberly and Jon Thorsen)  A panel discussion with senior leaders and dialogue between attendees about the growing and complex roles and responsibilities of research and relationship management professionals
<b>5:00pm – 6:30pm</b>	<b>Complimentary Reception</b>

*Immediately following Day One, APRA is hosting a complimentary reception with cocktails and light hors d'oeuvres. This reception is an opportunity for networking and information sharing with your colleagues.*

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 Hotel Marlowe  
 25 Edwin H. Land Blvd.  
 Cambridge, MA 02141

For hotel reservations, please call the Hotel Marlowe before **October 5, 2007** at (800) 825-7140 and mention the APRA room block or visit <http://www.hotelmarlowe.com> and enter rate code "APA" to receive the discounted rate when booking online.

Room Rate: \$249 single/double (not including taxes).

## Day Two – Friday, October 26

(Note: Actual session times and order are subject to change at the discretion of faculty.)

<b>8:00am – 8:30am</b>	<b>Breakfast</b>
<b>8:30am – 10:30am</b>	<p><b><i>The Five Dysfunctions of a Team Management Workshop</i></b>          (Bill McGoldrick, Principal, Washburn and McGoldrick)</p>  <p>Based on the best-selling book by Patrick Lencione, this workshop will examine the hard truths about critical business procedures and group dynamics that prevent effective teamwork. This program will help managers identify areas for improvement and establish a framework for developing and motivating a highly functioning and collaborative team</p> <p>Note: Before the symposium attendees should separately purchase and read the book: <i>The Five Dysfunctions of a Team: A Leadership Fable</i>, by <b>Patrick M. Lencioni</b>, published by Jossey-Bass 2002; available at Amazon.com and national bookstores</p>
<b>10:30am – 10:45am</b>	<b>Break</b>
<b>10:45am – 12:00pm</b>	<p><b>Human Resource Management — Part 1</b>          (Mark J. Marshall, Senior Associate, Bentz Whaley Flessner)</p> <p>An examination of best practices for recruiting, hiring and motivating staff, including a discussion on coaching techniques to improve dysfunction and performance</p>
<b>12:00pm – 1:30pm</b>	<b>Lunch on Your Own</b>
<b>1:30pm – 2:45pm</b>	<p><b>Human Resource Management — Part 2</b>          (Mark J. Marshall, Senior Associate, Bentz Whaley Flessner)</p> <p>A review of the legal responsibilities of managing employees and dealing with conflict resolution including group interactive case studies</p>
<b>2:30pm – 2:45pm</b>	<b>Break</b>
<b>2:45pm – 3:45pm</b>	<p><b>Donor Privacy: Navigating Emerging Laws and Managing Data Security Concerns in a Data-Driven Electronic Age</b>          (David Eberly, Director of Prospect Research and Management, Children's Hospital Trust, Boston)</p> <p>An advanced discussion of privacy laws and challenges for managing donor information and security including policy development and technology issues</p>
<b>3:45pm – 5:00pm</b>	<p><b>Measuring Return on Investment in Fundraising</b>          (David Eberly, Bill McGoldrick and Jon Thorsen)</p> <p>An enlightening panel discussion from various perspectives on the expectations of management and trends for measuring the return on investment in the development enterprise and how to prove out both short- and long-term goals and results</p>
<b>5:00pm</b>	<b>Adjourn</b>

## Faculty Bios



**Bill McGoldrick,**  
**Principal,**  
**Washburn & McGoldrick**

During his 35 year career in educational advancement, Bill McGoldrick has built a reputation as a successful professional, an outstanding teacher, an entertaining speaker and valuable consultant. Bill has consulted at many of the finest universities in the United States, United Kingdom, Canada and Australia, providing board, volunteer and staff training; campaign planning and counsel; campaign readiness studies; advancement program planning and assessment; retreat facilitation; and alumni relations and communications program reviews. His skills, experience and passion for education led him to join Sue Washburn in establishing Washburn & McGoldrick, Inc. in 1995.

Bill served Rensselaer Polytechnic Institute as Director of Development for five years and as Vice President for eleven years leading the alumni relations, communications and development programs as well as two campaigns that secured more than \$260 million.



**Barbara Tannenbaum,**  
**Senior Lecturer,**  
**Brown University**

Dr. Barbara Tannenbaum is President of Dynamic Communication and Senior Lecturer in the Department of Theatre, Speech and Dance at Brown University. During more than 20 years of consulting, she has advised development professionals, salespeople, judges, lawyers, politicians, financial professionals, doctors, and countless others on how to communicate with power to maximize effectiveness. Barbara has earned many professional and academic honors, including Providence Business and Professional Women's Woman of the Year and numerous outstanding professor of the year awards.



**Jon Thorsen,**  
**Director of Advancement Services,**  
**The Nature Conservancy**

Jon Thorsen is Director of Advancement Services at The Nature Conservancy. Prior to joining the Nature Conservancy, Jon led development resources groups for organizations including Princeton University and the American Red Cross. Jon is a regular presenter with Association of Professional Researchers for Advancement (APRA), Council for Advancement and Support of Education (CASE) and the Association of Fundraising Professionals (AFP). In addition to his speaking engagements, Jon has authored numerous published articles on the fundraising profession.

Jon is a former president of APRA and received the coveted APRA Distinguished Service Award in 1999.

Save the Date!...

### **APRA LIVE! Virtual Seminar**

Approaches for Estimating Gift Capacity  
and Developing Rating Systems  
October 5, 2007

### **Virtual Seminar Replay**

Approaches for Estimating Gift Capacity  
and Developing Rating Systems  
November 2 – December 6, 2007

### **APRA LIVE! Virtual Seminar**

*Habits of Highly Effective Researchers*  
December 7, 2007

### **Annual Conference**

*21st Annual International Conference*  
August 20–23, 2008  
Hyatt Regency Denver  
at Colorado Convention Center  
Denver, Colorado

**Note:** This high-level course requires advanced reading to ensure all attendees prepare for sophisticated course concepts. Before the symposium attendees should separately purchase and read the book: *The Five Dysfunctions of a Team: A Leadership Fable*, by Patrick M. Lencioni, published by Jossey-Bass 2002; available at Amazon.com and national bookstores

# APRA Symposium Management and Leadership Summit for Senior Professionals

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The APRA Management and Leadership Summit for Senior Professionals is an exciting new program that brings together distinguished university scholars, leading development consultants and practitioners to help attendees achieve their greatest potential through effective leadership development, team management and strategic, big-picture thinking. This intensive two-day seminar will focus exclusively on proven executive management practices, business intelligence models and topics, and relevant industry issues and challenges facing senior development research, data analysis and information management practitioners. As an advanced professional development program, this seminar is designed for directors and managers desiring not only to learn but also to interact and participate fully in course readings, panel discussions and a group case study analysis.

This program teaches high-level concepts to individuals with significant responsibilities for managing high-functioning teams and units or individuals stepping into new roles requiring proactive leadership, strategic planning and implementation, and solid critical thinking and management expertise.

## **Who Should Attend**

- Vice presidents and/or senior directors of advancement services, research and/or data and information technology systems and services
- Associate Directors and managers of research, prospect management and reporting, development services and/or data and information technology systems and services
- Directors and managers of human resources and strategic planning within a development operation
- Campaign managers and fundraising department heads
- Fundraising and development services consultants



### **Association of Professional Researchers for Advancement**

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