



























2024 PROSPECT DEVELOPMENT









	BLUE = GENERAL SESSION (See below for breakout key)	GREEN = EXHIBIT/SPONSOR	YELLOW = NETWORKING	ORANGE = ADD-ON PROGRAMMING	GRAY = REGISTRATION	
ALL TIMES IN PT Monday, August 19, 2024						
3:00 PM - 5:00 PM	Registration Desk Open 6ABC Lobby					
ALL TIMES IN PT DAY 1 - Tuesday, August 20, 2024						
7:30 AM - 6:00 PM	Registration Desk Open 6ABC Lobby					
8:00 AM - 8:30 AM	Breakfast for Apra Fundamentals and Data Science Now AF 603 Lobby DSN 608 Lobby					
8:30 AM - 4:00 PM	Data Science Now Room 608 Room 612					
8:30 AM - 4:00 PM	Apra Fundamentals: Prospect Research Room 603					
12:00 PM - 1:00 PM	Lunch Break for Apra Fundamentals (attendees on own)					
12:30 PM - 1:30 PM	Lunch Break for Data Science Now (attendees on own)					
12:30 PM - 4:30 PM	Executive Leadership Cohort Room 607					
1:00 PM - 4:00 PM	Room 616 *3 hours	Room 619 *3 hours	Room 615 *3 hours	Room 620 *3 hours		
	87164 Unleashing the Power of AI: Revolutionizing Prospect Development with BoodleAI's Predictive Guidons Presenter: Natalia Pierson, Norfolk State University Level I	76087 Cultivating Gratitude: Building a Grateful Patient Program from the Ground Up Presenter: Lindy Speakman, Lehigh Valley Health Network Level I	77075 Grandmother, Mother, Daughter: Mining Your Database for Meaningful Intergenerational Impact Presenter: Eric Heininger, EDEN+ Fundraising Consulting Level I, II	52633 Report Redesign: Leveraging Transparency, Authenticity, and Empathy as Change Management Tools Presenter: Jenna Ogden, The Nature Conservancy Level I		
4:30 PM - 6:30 PM	Welcome Reception in the Exhibit Hall Room 6E					






ALL TIMES IN PT							DAY 2 - Wednesday, August 21, 2024						
7:30 AM - 3:30 PM							Registration Desk Open 6ABC Lobby						
8:00 AM - 8:45 AM							Breakfast in Exhibit Hall Room 6E						
8:45 AM - 10:00 AM							Room 6ABC 						
							<p align="center">Keynote Presentation: Humanity in Fundraising: Revolutionizing Donor Engagement Lisa Greer, Philanthropist, Nonprofit Advisor, Convener, and Author</p>						
10:00 AM - 10:30 AM							Beverage Break in Exhibit Hall Room 6E						
10:30 AM - 11:30 AM							Room 613 *60-minutes 	Room 608 *60-minutes 	Room 607 *60-minutes	Room 603 *60-minutes 	Room 615 *60-minutes 	Room 620 *60-minutes	
							81362 Navigating Inclusive Philanthropy: Addressing Historical and System Biases in Prospect Development and Data Tracking and Reporting Presenters: Mandy Heath, Florida International University, Maia McGill Level I	50893 Unlocking Hidden Potential: How Indiana University Health Foundation's Mid-Level Giving Program Generated Over \$93,000 in Six Months Presenters: Derek Todd, Abby Charlebois, IU Health Foundation Level I	15861 Evaluating and Implementing AI for Prospect Identification Presenters: Samuel Warren, World Vision, Jaime Davis, Children's Hospital Foundation Level I	84090 Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights Presenters: Catherine Flaatten, BWF, Beca Daniel, Xapien Level I, II	25682 In My Teaching Era: Training and Learning in a Small Shop Presenter: Lauren Woodring, The Philadelphia Museum of Art Level I, II	47437 Revolutionizing Data Analytics and Prospect Management: Unveiling the Power of an Organization-Wide Decision Tree Presenters: Stacey Barnes, Kristina Carroll Level I, II	
11:30 AM - 12:45 PM							Lunch in Exhibit Hall Room 6E						
12:45 PM - 1:05 PM							Unveiling the Money and Connections Trail . . . Robin Dunham, Elise Lynch, Kaleidoscope Apra Theater - Room 6E						
1:10 PM - 1:30 PM							Blackbaud ResearchPoint Demo - Using Analytics and Giving History for Prospecting Marleen Lucas, Blackbaud Apra Theater - Room 6E						
1:30 PM - 1:45 PM							Transition Break						

1:45 PM - 2:30 PM	Room 6ABC 					
	<p align="center">General Session - Partner Industry Panel How is Fundraising Technology Changing, and How Will It Help Us Connect With Our Donors? Moderator: Jon Garrow, Willamette University Sam Venable, Blackbaud Chris Green, Xapien Keya Hammond, Altrata</p>					
2:30 PM - 2:45 PM	Transition Break					
2:45 PM - 3:45 PM	Room 613 *60-minutes 	Room 608 *60-minutes 	Room 607 *60-minutes	Room 603 *60-minutes 	Room 615 *60-minutes 	Room 620 *60-minutes
	95931 It's Not Just the Numbers! - Income, Psychology, and Giving Behavior Presenters: Tracey Robertson, Emory University, Amy Begg, Harvard University, Olivia Milam, Emory University Level I	13208 Partners in Fundraising: Facilitating an Effective and Collaborative Portfolio Review Meeting Presenter: Rachelle Ficke, CCS Fundraising Level I	86081 Actionable Affinity Ratings: Incorporating Donor Engagement to Prioritize Your Prospects Presenters: Amy Carrier, Advancement Resources, Harry Need, University of Alaska Foundation Level I, II	20329 It Takes a Village: Expanding the Donor Pipeline Through Strategic Partnerships Presenters: Sarah Luckey, The Ohio State University Tracey Fox, OSU Foundation Level I, II	75146 From Service Provider to Strategic Partner: The Trusted Advisor Journey Presenters: Catherine Flaatten, BWF, Ashlei Oliver, ALSAC/St. Jude Children's Research Hospital Level I, II	82872 The Dark Arts of Revenue and Fundraising Forecasting Presenters: John Carasone, Heather Forman, Williams College Level II
3:45 PM - 4:15 PM	Beverage Break in Exhibit Hall Room 6E					
3:50 PM - 4:10 PM	Maximize Your Prospect Research With Accurate and Timely News Results Dhruv Sogani, AlmaConnect Apra Theater - Room 6E					
4:15 PM - 5:15 PM	Room 613 *60-minutes 	Room 608 *60-minutes 	Room 607 *60-minutes	Room 603 *60-minutes 	Room 615 *60-minutes 	Room 620 *60-minutes
	80379 AI and PD – How All Areas Can Ensure Ethical Practices for AI (Ask the Ethicist Live) Presenters: Kate McConnell, City of Hope Level I	42752 Portfolio Health: Your Portfolio Fitness Tracker Presenters: Larissa Wilkie, Matthew Hammond, Clemson University Level I, II	52349 Beyond Documentation - Mastering Contact Reports: Guidelines for Crafting Comprehensive Contact Reports for Strategic Advancement Presenter: Prisca Zaccaria, Katalina Williams, University of South Carolina Level I, II	75840 Microdata: Your Key to the Prospects Hidden in Plain Sight Presenter: Michael Brucek, EverTrue Level I, II	25327 Bridging Eras: Integrating AI with Tried and True Screening Methods Sarah Tedesco, DonorSearch Level I, II	96022 What Moves YOU? Utilizing Your Own Personal Moves Management to Enhance Your Career and Professional Next Steps Presenters: Eric Heininger, EDEN+ Fundraising Consulting Level I

ALL TIMES IN PT		DAY 3 - Thursday, August 22, 2024				
7:15 AM - 8:00 AM	Apra Walks Arch Convention Center Lobby					
7:30 AM - 1:00 PM	Registration Desk Open 6ABC Lobby					
8:00 AM - 9:00 AM	Breakfast in Exhibit Hall Room 6E					
8:45 AM - 9:00 AM	Passport to Prizes Drawing in Exhibit Hall Room 6E					
9:00 AM - 10:30 AM	Room 6ABC 					
	<p>Apra Talks: We're All Data Scientists Moderator: Rodger Devine, Pomona College Rachael Dietrich Walker, Cornell University Barron Cato, University of Washington Anne Pollock, University of New Mexico Foundation</p>					
10:30 AM - 10:45 AM	Beverage Break 6ABC Lobby 6E Lobby					
10:45 AM - 11:45 AM	Room 613 *60-minutes 	Room 608 *60-minutes 	Room 607 *60-minutes	Room 603 *60-minutes 	Room 615 *60-minutes 	Room 620 *60-minutes
	22910 Identifying the Next Generation of Principal Gift Prospects Presenters: Z.B. Haislip, Diane Hummelbrunner, Keiler Pulling, Jenny Peterson, The University of North Carolina at Chapel Hill Level I	11934 How to Turn Your Database Into an Asset Presenters: Jessica Roberts, Nicholas Huron, CCS Fundraising, Reggie Reyes, University of Alabama Level II	40412 Using Tableau to Create Heat Maps by County Presenter: Amanda Struer, Laura Johnson, Santa Clara University, Level I, II	15109 Prospect Management as the Keystone for Radical Change in Portfolio Management and Fundraiser Performance Management Presenter: Stephen Deutsch, Seton Hall University Level II	70584 Using Analytics to Drive Dynamic Major and Principal Giving Pipeline Development Presenter: Carol Belair, Blackbaud Level I	33108 Pathfinding Leadership: An Informed Tactic to Development Stewardship Presenter: Quinton Jefferson, Cincinnati Symphony Orchestra Level I
11:45 AM - 1:30 PM	Lunch Break (attendees on own)					

1:30 PM - 2:45 PM	Room 613 *75-minutes 	Room 608 *75-minutes 	Room 607 *75-minutes	Room 603 *75-minutes 	Room 615 *75-minutes 	Room 620 *75-minutes
	75159 The ABCs and 123s of DAFs Presenters: Melissa Bank Stepno, Helen Brown, The Helen Brown Group LLC Level I	19385 You CAN Have It All: Building a Proactive Lead Program That Works for Everyone Presenters: Christopher Hubert, Alison Freeman, Ryan Collins, University of Virginia Level II	29345 Advice from the field: Prospect Development Best Practices for Small Shops Presenters: Liz Mills, Oglethorpe University, Tracey Robertson, Emory University Level I	51717 A KPI Journey - Creating Metrics and Changing Culture with Institutional Fundraisers Presenters: Amy Pawin, Megan Horton, UNICEF USA Level I	34737 Building a Career Pathway Program: A Roadmap to Growing Opportunities for our Teams Presenters: Caroline Oblack, Caitlin Cairncross, Oregon Health & Science University Level I, II	67672 Beyond VLookup: How You – Yes, You – Can Use Basic Coding to Increase Efficiency and Close Gaps in Your Prospect Development Reporting Presenters: Jack Pitfield, University of Chicago Level I
2:45 PM - 3:00 PM	Beverage Break 6ABC Lobby 6E Lobby					
3:00 PM - 4:15 PM	Room 613 *75-minutes 	Room 608 *75-minutes 	Room 607 *75-minutes	Room 603 *75-minutes 	Room 615 *75-minutes 	Room 620 *75-minutes
	79343 Sailing Through Stock Research Presenter: Michie Adams, Santa Clara University Level I	68716 Building a Prospect Management System as a Team of One Presenter: Don Irwin, Lutheran Social Service of Minnesota Level I, II	39341 The Strong, Silent Type - Introverted Leadership Presenter: Stephanie Hughes, BWF Level I, II	87562 What to Expect When You're Expecting (a Salesforce CRM)! Presenters: Killian Roach, John Hopkins University, Amanda Boushey, University of San Francisco, Hallie Brignall, Sierra Club Level I	66550 Revolutionize Your Database: Fix Messy Data and Build a Strong Foundation Presenter: Stephanie Brouwer, Creative Fundraising Advisors Level I, II	87838 PRIMED for Success! Data and Information for Impact and Influence Presenter: Pamela Lewis, George Mason University Level I, II

ALL TIMES IN PT							DAY 4 - Friday, August 23, 2024							
7:15 AM - 8:00 AM	Apra Breathes Room 309													
8:00 AM - 8:30 AM	Breakfast 6ABC Lobby 6E Lobby													
8:30 AM - 9:30 AM	Room 613 *60-minutes 		Room 608 *60-minutes 		Room 607 *60-minutes		Room 603 *60-minutes 		Room 615 *60-minutes 		Room 620 *60-minutes			
	68304 Moving from the Cubicle to the Kitchen Table: Pivoting to Remote Work Presenters: Ryan Gallagher, Eli Mendelson, City of Hope Level I		44662 The Wheels on the Bus: Using Data & Process to Drive a Public-Phase Campaign Prospect Pipeline Presenters: Nicole Szydlo, Wendy Saam, Elaine Hooker, Chautauqua Institution Level II		26821 LOVE in Practice: Identification Beyond Financial Metrics Presenter: Melissa Yale, Oregon Food Bank Prospect Development Team Level II		86751 Unlocking Fundraising Success: Powering Discovery and Referrals with Goal Motivation Presenter: Kim Sargent, University of Central Florida Foundation Level I, II		12874 Finding Your (Donor's) Roots: Practical Applications for Genealogy in Development Presenter: Sarah Daly, Southern Methodist University Level I		48818 Donor Advised Funds Presenter: Ryan Glaser, TNC Level I			
9:30 AM - 9:45 AM	Beverage Break 6ABC Lobby 6E Lobby													
9:45 AM - 10:45 AM	Room 613 *60-minutes 		Room 608 *60-minutes 		Room 607 *60-minutes		Room 603 *60-minutes 		Room 615 *60-minutes 		Room 620 *60-minutes			
	45706 Designing Your Own Crystal Ball: From Revenue Forecasting to a Long-Term Growth Model Presenter: Lindsey Nadeau, UNICEF USA Level I, II		77247 Small and Mighty-- -- Leveraging the Unique Strengths and Challenges of Smaller Shops Presenter: Susan Quinn, Lenoir-Rhyne University, Jon Kingzette, Campbell & Company Level I, II		66637 Managing Portfolios and Pipelines Through Staffing Changes Presenter: Hannah Avdoulos, Georgetown University Level I		49116 What's your red flag? Reputational Risk and Philanthropic Due Diligence Best Practices Presenters: Gareth Griffin, Charles Latham, Duke University Level I, II		86391 Lighting Your Own Way -- Using Vision to Find Professional Growth Opportunities in Challenging Times Presenter: Killian Roach, John Hopkins University Level I		38106 Hand over the Heavy Lifting: Use AI in Your Prospecting Presenters: Beth Inman, Shriners Hospital for Children, Scott Rosenkrans, DonorSearch Level II			
10:45 AM - 11:00 AM	Transition Break													

11:00 AM - 12:00 PM	Room 613 *60-minutes 	Room 608 *60-minutes 	Room 607 *60-minutes	Room 603 *60-minutes 	Room 615 *60-minutes 	Room 620 *60-minutes
	<p>80394 Oh the Places You'll Go: Using Data and Reporting to Inform A Holistic Travel Strategy Presenters: Peter Kotowski, Nathan Zick-Smith, University of Denver Level I</p>	<p>22800 In My Wellness Era: How a Wellness Skeptic Became a Convert Presenter: Megan Tedeschi, UNICEF USA Level I</p>	<p>25573 Shifting Tides from Reactive to Proactive - Transforming Prospect Research for Dynamic Pipeline Support → How to Flip the 80/20 Ratio by Building and Implementing an Impactful Proactive Research Program Presenter: Prisca Zaccaria, University of South Carolina Level I, II</p>	<p>70157 The (Hidden) Wealth of Nations: Perils, Pitfalls and Opportunities in Using Data to Estimate Gift Capacity Presenter: Ben Rymer, UNICEF PFP Global Philanthropy (Geneva) Level I</p>	<p>39166 Optimizing Fundraising Success: A Deep Dive into Performance Metrics Presenters: Emma Hinke, BWF, Maggie Miller, South Dakota State University Level II</p>	<p>34817 Parent Pipeline Under Pressure Presenters: Carol Spurlin, Tracey Robertson, David Joannides, Emory University Level I</p>
				BODY OF KNOWLEDGE TRACKS:		
	 Indicates the session will be recorded.			<i>Leadership and Professional Development</i>		
				<i>Data Science</i>		
				<i>Prospect Research</i>		
				<i>Relationship Management</i>		
				<i>Collaborative Sharing</i>		
				Updated on 8/13/2024		