




























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
	<p align="center">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</p>	<p align="center">13208 Partners in Fundraising: Facilitating an Effective and Collaborative Portfolio Review Meeting Presenter: Rachelle Ficke, CCS Fundraising Level I</p>	<p align="center">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</p>	<p align="center">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</p>	<p align="center">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</p>	<p align="center">82872 The Dark Arts of Revenue and Fundraising Forecasting Presenters: John Carasone, Heather Forman, Williams College Level II</p>
3:45 PM - 4:15 PM	<p align="center">Beverage Break in Exhibit Hall Room 6E</p>					
3:50 PM - 4:10 PM	<p align="center">Maximize Your Prospect Research With Accurate and Timely News Results Dhruv Sogani, AlmaConnect Apra Theater - Room 6E</p>					
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
	<p align="center">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</p>	<p align="center">42752 Portfolio Health: Your Portfolio Fitness Tracker Presenters: Larissa Wilkie, Matthew Hammond, Clemson University Level I, II</p>	<p align="center">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</p>	<p align="center">75840 Microdata: Your Key to the Prospects Hidden in Plain Sight Presenter: Michael Brucek, EverTrue Level I, II</p>	<p align="center">25327 Bridging Eras: Integrating AI with Tried and True Screening Methods Sarah Tedesco, DonorSearch Level I, II</p>	<p align="center">96022 What Moves YOU? Utilizing Your Own Personal Moves Management to Enhance Your Career and Professional Next Steps Presenters: Eric Heininger, EDEN+ Fundraising Consulting, Kassie Cosgrove, Loyola University New Orleans Level I</p>

ALL TIMES IN PT		DAY 3 - Thursday, August 22, 2024				
7:15 AM - 8:00 AM	Apra Walks Location To Be Announced					
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 					
	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					
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, Sarah Robinson, 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 Location To Be Announced													
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 7/25/2024		