



# PROGRAM AGENDA

Day 1 - Tuesday, June 2, 2026 | 11:00 a.m. - 4:30 p.m.

Time	Session	Description
11:00 AM - 11:15 AM ET	Welcome & Introductions	Join us for a welcome from Apra Volunteers and Apra President, followed by a brief logistics overview before the start of our first session at 101:00 AM ET.
11:15 AM - 12:45 PM ET	Ask the Experts: Defining and Diagnosing the Prospect Development Pipeline	<p>“Pipeline” is one of the most widely used—and inconsistently defined—concepts in prospect development. Is it a linear process, or a dynamic system shaped by priorities, timelines, and team structure? This panel brings together advancement professionals to examine how pipeline strategy functions in practice. Panelists will explore differences across sectors such as higher education and healthcare, and how pipelines evolve as funding priorities and proposal timelines shift. The conversation will also address how corporate and foundation relations pipelines differ from traditional prospect development workflows, including how each tracks portfolio movement and measures success. Additional focus will be given to donor progression—particularly moving annual donors into major gift portfolios—and the role of collaboration between prospect development and annual fund teams. The session will also highlight how research intelligence informs pipeline strategy, from identification through long-term cultivation. Expect a candid, practical discussion grounded in real-world application.</p> <p><i>Faculty: Kate Sutterfield, Director of Research on the Prospect Development Decision Support team at the University of Chicago</i>  <i>Kevin Vaughn, Research Analyst in the Department of Development at the University of Notre Dame</i>  <i>Emily Shipman, Pipeline Development &amp; Analytics Lead at Corewell Health</i>  <i>Ryan Gallagher, Associate Director of Pipeline Development and Analytics at City of Hope</i></p>
12:45 PM - 1:45 PM ET	Lunch	
1:45 PM - 2:30 PM ET	Healthy Pipelines, Healthy Results: A Metrics-Based Approach	<p>This session explores the characteristics of strong, successful prospect pipelines and the metrics that help us assess their health with clarity and purpose. Grounded in the philosophy that smaller, active pipelines perform better, we’ll reposition pipeline review as a supportive check-in, not a performance judgement. Participants will walk through the Pipeline Health Check tool as developed and used by the University of Calgary’s PRPM team end to end—from generating the report and interpreting insights, to having meaningful conversations with the fundraiser to turn diagnosis into action. We’ll unpack the core metrics that matter, show how they connect to real decision-making, and briefly go behind the scenes to explain how the report was created (report in Power BI, with data from the donor database BB-CRM, and the data warehouse). Attendees will leave with a practical, people-centered approach to keeping pipelines focused, energized, and fully plugged in.</p> <p><i>Faculty: Dawn Cattoor, Manager, Pipeline Development at the University of Calgary</i></p>

2:30 PM ET - 2:45 PM ET	Break	
2:45 PM - 3:30 PM ET	<b>Building a Sustainable Pipeline Management System for Campaign Growth</b>	<p>During a period of immense growth and opportunity at the University of St. Thomas, we were faced with the challenge of scaling our prospect management system to support a new cohort of gift officers during our campaign. Join us as we share how we used scoring, prioritization, and automation to create an efficient system for managing the prospect pipelines across colleges and units. We will share the basic concept of our new system, how it has worked in practice after more than a year since we started, what we have learned, and where we are going next.</p> <p><b>Faculty:</b>  <i>Grace De Jong, Assistant Director of Prospect Management at the University of St. Thomas (Minneapolis, MN)</i>  <i>Emily Maple, Director of Prospect Management and Research at the University of St. Thomas (Minneapolis, MN)</i></p>

3:30 PM - 3:45 PM ET

3:45 PM - 4:30 PM ET	<b>Operationalizing AI in Fundraising: A Data-Driven Donor Strategy in Action</b>	<p>What does it actually take to embed AI and predictive analytics into everyday fundraising work? This case study explores how one healthcare organization is reimagining its approach to data and technology to better support frontline fundraisers. Learn how predictive models and enhanced data are being used to identify high-potential prospects, prioritize outreach, and inform engagement strategies across the donor journey. The session will highlight practical considerations, early outcomes, and lessons for teams at any stage of data maturity.</p> <p><b>Faculty:</b>  <i>Emily Hinke, Senior Director at BWF</i>  <i>Mike Lair, Sr. Director of Data Strategy &amp; Analytics at Phoenix Children's Foundation</i></p>
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**Day 2 - Wednesday, June 3, 2026 | 11 a.m. - 3:45 p.m.**

Time	Session	Description
11:00 AM - 11:15 AM ET	Welcome & Introductions	Join us for a brief logistics overview for Day 2 before the start of our first session at 11:00 AM ET.
11:15 AM - 12:00 PM ET	<b>Quantifying Pipeline Confidence: A Weighted Scoring Model for Goal Attainment Prediction</b>	<p>Pipeline coverage ratios can oversimplify the probability of achieving a goal. This session presents a multi-factor confidence model that we implemented in Salesforce CRM Analytics, utilizing artificial intelligence, which has already enhanced our forecasting accuracy. The model integrates five weighted components: revenue progress, pipeline coverage, historical reliability, velocity, and leading indicators into a single probability score. Attendees will gain actionable insights for improving pipeline prediction by exploring the model architecture, including the weighting of individual opportunities. The session will conclude with a discussion on how we validated our model to identify any assumption failures.</p> <p><b>Faculty:</b> <i>David Hall, Director of Pipeline Development at USA for UNHCR</i></p>
12:00 PM - 12:15 PM ET	Break	
12:15 PM - 1:00 PM ET	<b>Students at the Start: From Campus to Constituent</b>	<p>As traditional funding sources became increasingly constrained at the University of Michigan, we were faced with the challenge of building a stronger, wider donor pipeline - without a class gift program. Join us as we share how we used education, engagement, and data-driven decision-making to begin focusing on students as the first stage in the donor pipeline while they are on campus. In this session, we will share the concepts that have informed our approach, our comprehensive plan for engaging students philanthropically through the year, how we collect and analyze student engagement data, and how that data helps us to strengthen our programming.</p> <p><b>Faculty:</b> <i>Craig Alcalá, Associate Director of Annual Giving and Telefund at the University of Michigan</i></p>
1:00 PM ET - 2:00 PM ET	Lunch Break	

