



# 2025 Annual Conference

Unveil the Magic of Prospect Development

Thursday, February 20 - Friday, February 21, 2025  
 Shades of Green at Walt Disney World Resort

## Thursday, February 20, 2025

8:00 am – 8:45 am	Breakfast, Registration, and Sign-In
8:45 am – 9:00 am	Welcome and Conference Kick-Off
9:00 am – 10:00am	 <p><b>SESSION 1: Diamond Sponsor Presentation - DonorSearch</b></p>
10:00 am – 10:10 am	Break
10:15am – 11:15 am	 <p><b>SESSION 2:                  Sprint Your Way to Sanity: Adapting Agile &amp; Scrum for Prospect Development</b>  <i>Lindsey Nadeau</i>                  Vice President, Data, Insight and Campaigns                  UNICEF USA</p> <p>Do you ever feel like you are drowning in projects? Do you often struggle to say "no" to taking on more? This is the path to burnout and unmet expectations. But don't fret! You can manage the volume and become a savvy negotiator while centering employee wellness. In three years, UNICEF USA honed a scrum-based agile project management approach to manage increasing workloads. With origins in software development, we tailored what worked for us: we created an integrated project management board in Trello, organized two-week "sprints", and customized "rituals" allowing us to purposefully plan and track our project work. In our third year, we set a data-driven KPI and dashboarded our expected vs. actual workload. This incentivizes individual accountability to not take too much on. When urgent projects emerge, we can assess bandwidth and are empowered with tools to deprioritize other projects. This approach provides greater visibility and collaboration opportunities across research, relationship management, data science, and campaign planning teams and integrates mindfulness techniques critical to our team culture. Let us help you maintain your sanity by learning about how to make project management more manageable.</p>
11:30 pm – 12:45 pm	Lunch and Learn: Platinum Sponsor TBD

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<p><b>1:00 pm – 2:00 pm</b></p>	 <p><b>SESSION 3:</b>  <b>Industry Practice Review: Prospect Profiles</b>  <i>Jennifer Filla, CEO</i>  <i>Aspire Research Group LLC</i></p> <p>Profiles are like denim: they never go out of style, are long-lasting, and yet they trend like fashion! Whether you are new to the profession or decades in, profiles are worth your attention. Jen Filla shares how her firm handles different profile levels, leading you through two roundtable discussions along the way. You get to connect with peers, ask questions, and share success stories.</p> <p>After this session, participants will be able to:</p> <ol style="list-style-type: none"> <li>1. Recognize how profile levels support different types of information needs for fundraising officers</li> <li>2. Learn new approaches to researching and storing information depending upon the profile level</li> </ol>
<p><b>2:00 pm – 2:10 pm</b></p>	<p><b>Break</b></p>
<p><b>2:10 pm – 3:10 pm</b></p>	 <p><b>SESSION 4:</b>  <b>Advice from the Field: Prospect Development Best Practices for Small Shops</b>  <i>Tracey Robertson</i>  <i>Assistant Director</i>  <i>Emory University</i></p> <p>This session led by a 20- year veteran prospect researcher. Will discuss how the field has changed over the past few years and how younger prospect researchers have the potential to revolutionize the industry. Tracey will share advice on creating a successful prospect research “shop” and growing in the profession. This will be a collaborative discussion to share knowledge and best practices with other shops. From leveraging limited resources effectively to building sustainable donor pipelines, this session will equip you with the tools needed to achieve success.</p>
<p><b>3:10 pm – 3:40 pm</b></p>	 <p><b>Session 5: Gold Sponsor Presentation – Insightful Philanthropy</b></p>
<p><b>3:40 pm- 3:50pm</b></p>	<p><b>Apra FL Updates</b></p>
<p><b>4:00 pm – 5:30 pm</b></p>	<p><b>Reception, Networking, Visit with Vendors</b></p>

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5:30pm	Independent Dinner
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## Friday, February 21, 2025

8:00 am – 8:45 am	Breakfast
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8:45 am – 9:15 am	Gold Sponsor Presentation:
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9:15 am – 10:15 am	 <p><b>SESSION 1:</b>  <b>Designing Your Own Crystal Ball: From Revenue Forecasting to a Long-Term Growth Model</b>  <i>Lindsey Nadeau</i>  <i>Vice President, Data, Insight and Campaigns</i>  <i>UNICEF USA</i></p>
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How many times is prospect development asked "where we are going to land at the end of the year? Will we make goal? What should next year's fundraising goal be? What long-term growth rate is sustainable?" The answers to many of leadership's most important questions are rooted in our solicitation pipeline data.

Unfortunately, there's no standard issue crystal ball for prospect development professionals. UNICEF USA spent four years building a robust pipeline data set, documenting people-centric business rules, and shifting our pipeline culture. From there we centralized and automated revenue forecasting and then developed a four-year growth model to drive the organization's strategic plan. Come learn from our case study - complete with rudimentary Excel formulas to an advanced projections dashboard - and how we have iterated and refined our approach over time. You too can become your own financial meteorologist!

Learning Objectives:

- The value of a robust pipeline data set and how prospect development can drive long-term planning
- How to use your pipeline to project your fundraising results at both an introductory and advanced level

10:15 am – 10:45 am	Gold Sponsor Presentation
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10:45 am – 12:00pm	 <p><b>SESSION 2:</b>  <b>Red Flags: Identifying and Assessing Potential Risks Ethical Considerations in Due Diligence</b>  <i>Charles Latham, Senior Research Analyst Principal Gifts</i>  <i>Duke University</i></p>
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	This session will focus on recognizing warning signs during the vetting process. We'll cover common financial, legal, and reputational red flags and discuss how to evaluate their significance for your organization.
<b>12:00 pm -1:15 pm</b>	<b>Lunch: Roundtable Discussions</b> <b>Table Hosts: Apra FI Sponsor</b> <b>Insightful Philanthropy – “TBD”</b> <b>DonorSearch – TBD – “TBD”</b> <b>Altrata – TBD</b> <b>Kaleidoscope – TBD – “TBD”</b>
<b>1:15 pm</b>	<b>APRA Florida Updates/Closing Remarks</b>

\*Schedule is subject to change