



Leap Into Discovery: Innovations in Prospect Development Schedule-At-A-Glance




Thursday, February 29, 2024	
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 – 10:15 am	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  </div> <div style="flex: 2; background-color: #00a0e3; color: white; padding: 10px;"> <p>SESSION 1: Diamond Sponsor Presentation - Hand over the Heavy Lifting: Use Ai in Your Prospecting <i>Kate Verret, DSAi Solutions Architect, DonorSearch</i> <i>Beth Inman, Sr. Director of Prospect Research, Shriners' Children Hospital</i> <i>Sam Day, Data Analyst, Prospect Research & Management, Shriners' Children Hospital</i></p> </div> </div> <p>In an era where data and technology hold immense potential for making a difference, nonprofits face the exciting challenge of harnessing AI's power to drive fundraising success. AI models are now readily available to identify those who are most likely to make a gift in the near future based on their changing level of connection and engagement with your organization. During this session, learn how DonorSearch AI partnered with Shriners Children's to build custom AI models specific to their organization and unique needs, and how Shriners is leveraging these predictive scores to more seamlessly segment, sort, and filter through almost 6 million constituents. Whether you're just beginning your AI journey or looking to enhance your organization's existing capabilities, this presentation provides valuable insights and actionable strategies to elevate your nonprofit's fundraising game. Don't miss out on the chance to unlock the potential of AI for your cause.</p>
10:15 am – 10:30 am	Break
10:30am – 11:45 am	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  </div> <div style="flex: 2; background-color: #00a0e3; color: white; padding: 10px;"> <p>SESSION 2: Spheres of Influence: Leveraging Volunteer Networks to Enhance Your Fundraising <i>Mark DeFilippis, Director of Prospect Development, The Nature Conservancy</i></p> </div> </div> <p>A Sphere of Influence (SOI) analysis is one of the most powerful tools for engaging your organization's volunteers and building a pipeline. The Nature Conservancy uses the SOI extensively in its principal giving efforts. In this session, we'll discuss proven strategies for developing and utilizing this tool to boost your fundraising</p>

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	efforts. Whether you are prospecting, expanding into new markets, or developing a bench of engaged volunteers, the SOI can provide a roadmap for success.
11:45 pm – 1:00 pm	 LexisNexis® Lunch and Learn: Sponsor LexisNexis – Due Diligence
1:00 pm – 2:00 pm	<div style="display: flex; align-items: flex-start;">  <div style="background-color: #00a0e3; color: white; padding: 5px;"> <p>SESSION 3: Alternatives to Tracking the Gift Cycles at the Prospect Level <i>Jim Hammond, Associate Director of Prospect Development, Temple University</i></p> </div> </div> <p>The Prospect Development team at Temple decided to ditch the model of categorizing prospects by portfolio stage and instead developed a model reflecting maturity. Three simple measures uncovered new insights about prospects, portfolios, and Temple's fundraising potential rather than the traditional solicitation cycle. The work of the Temple Prospect Development team earned one of the 2023 AASP Sapphire Aspire Awards.</p>
2:00 pm – 2:15 pm	Break
2:15 pm – 3:15 pm	<div style="display: flex; align-items: flex-start;">  <div style="background-color: #00a0e3; color: white; padding: 5px;"> <p>SESSION 4: We've Got the Guide! Now What! A Case Study on Implementing the Apra DEI Data Guide at UNICEF USA <i>Denise Harris, Deputy Director, Prospect Intelligence, UNICEF USA</i></p> </div> </div> <p>In the summer of 2021, Apra published its long-anticipated DEI Data Guide. While many in the prospect development industry were excited to receive its timely and important guidance, some of us were wondering how to implement the recommendations it outlined. In this presentation, Denise will offer a case study on how she and the Prospect Intelligence team at UNICEF USA have made use of the guide to develop a policy for managing constituent identity data and to make policy suggestions for the larger Philanthropy division it supports. Note: Familiarity with the Apra DEI Data Guide is encouraged but not required. Time will be allotted for discussion, so questions are welcome!</p>
3:15 pm – 3:30 pm	APRA Florida Updates – Conference Reception announcement
3:30 pm – 4:30 pm	Reception, Networking, Visit with Vendors
5pm	Independent Dinner

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Friday, March 1, 2024

8:00 am – 8:45 am		Breakfast
8:45 am – 9:15 am		 Sponsor Presentation: Insightful Philanthropy, Ronda Oyen
9:15 am – 10:30 am		SESSION 1: Prospects From Scratch <i>Regina Alhassan, CEO, ResearchPro</i>
	<p>Hey – we all start somewhere! No shame in that. In today’s rapidly evolving digital landscape, organizations need to harness the power of data to make informed decisions and maximize their fundraising efforts. And, there’s no time like the present to begin to build your base of support. But where do you start? How do you use data to boost giving? How do you find donors in the first place?</p> <p>In this 70-minute presentation, “Professor Prospect” Regina Alhassan will share key data points that drive donor strategy and increase contributed revenue. Find out what information goes in a database/CRM, how to capture important data, and what to do with it to cultivate support for your organization. Discover how to find existing prospects and find brand-new supporters. Take control of your fundraising efforts like never before.</p>	
10:30 am – 10:45 am		Break
10:45 am – 12:00pm		SESSION 2: Building a Principal Gift Program <i>Julie Maspons, Senior Director, Portfolio and Relationship Optimization, The University of Miami</i>
	<p>What is a principal gift prospect/donor? How are you tracking your principal gift prospects? What are some key things to consider if you want to build a principal gift program? Julie Maspons will address these questions and more as she dives into how The University of Miami built out its principal gift program.</p>	

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<p>12:00 pm - 1:15 pm</p>	<p>Lunch: Roundtable Discussions Table Hosts: LexisNexis - Ginger Cole – “Trends in Prospect Research” Insightful Philanthropy – Ronda Oyen “How to Use News to Deepen Donor Relationships” DonorSearch – Kate Verret and Chris Meister – “Responsible Fundraising with AI” Altrata – Matt Thompsen – Informed Giving: The Critical Role of Due Diligence in Non-Profit Success Kaleidoscope – Raul Peralta – “Juicing SEC Filings”</p>	
<p>1:15 pm – 1:45 pm</p>		<p>Sponsor Presentation: Altrata</p>
<p>2:00 pm – 2:15 pm</p>	<p>Break</p>	
<p>2:15 pm – 3:30 pm</p>		<p>SESSION 3: <i>Let Me Upgrade You: Major Gift Potential in the Midlevel Segment</i> Catherine Flaatten, MPH, CFRE, Associate Vice President of Prospect Development, BWF</p> <p>While organizations are sometimes tempted to look externally for their next great prospect, the reality is that today’s midlevel donors are often tomorrow’s best major gift leads. In this session, we’ll discuss the benefits and barriers to upgrading midlevel donors, techniques for identifying major gift potential in the midlevel segment, segmentation, and management options for various midlevel donor types, and strategies to incentivize high-quality upgrade referrals.</p>
<p>3:30 pm – 4:00 pm</p>		<p>Sponsor Presentation: Kaleidoscope, Surfacing Insider Wealth/Networks with AI</p>
<p>4:00 pm</p>	<p>APRA Florida Updates/Closing Remarks</p>	

*Schedule is subject to change