



Friday, May 14, 2021	
9:30 am – 9:45 am	Pre-Conference Networking Opportunities (Conference Log-In)
9:45 am – 10:00 am	Welcome and Conference Kick-Off
10:00 am – 11:00 am	SESSION 1: Due Diligence and Prospect Vetting <i>Lori Hood Lawson, UC Innovation, Vice President of Advancement Insights</i>
	<p>Requests for due diligence can be onerous and time consuming. Prospect development professionals are tasked with mitigating risk to their nonprofit organization through a variety of tasks, one of which is due diligence, also known as “vetting” or “screening.” This session will help you formulate your own due diligence policy. Additionally, suggest some improvements to your current policy and/or your current due diligence process. While providing best practices for prospect vetting research.</p>
11:00 am – 11:15 am	Break
11:15 am – 12:15 pm	SESSION 2: Crazy Requests from Important People <i>Dan Zarlenga, Northwestern University, Prospect Research & Management; Amy Langenberg, Northwestern University, Prospect Research & Management</i>
	<p>Crazy requests from important people – we’ve all received them, but often don’t know the best solutions to these seemingly impossible requests. In this session, we will review several case studies that we experienced in our careers as prospect development professionals and dive into lessons learned along the way. We will end by sharing a solutions framework you can use the next time you receive a crazy request from an important person to help guide you toward the path to mutual success.</p>
12:15 pm -12:45 pm	(Sponsorship Sessions)



12:45 pm – 1:00 pm	Break
1:00 pm – 2:00 pm	SESSION 3: Data-Inspired Strategy <i>Jessica Laborde, UC Davis, Advancement Services</i>
	<p>We hear a lot about data-driven decisions, but what exactly are we asking of our data? Join Jessica LaBorde, Assistant Vice Chancellor for Advancement Services at UC Davis, as she explores how to ask the right questions first before allowing data to inspire the decisions. This session will consider business strategy and context as the drivers of data science.</p>
2:00 pm – 2:15 pm	Break
2:15 pm – 3:15 pm	SESSION 4: The "Tumbleweed" Approach: Continuous, Targeted Wealth Screening <i>Kelley Rowe, University of Wisconsin Foundation & Alumni Association, Advancement Services: Research & Prospect Management</i>
	<p>Attendees will learn about the Wisconsin Foundation and Alumni Association (WFAA) approach to identifying potential donors with significant giving capacity, as a fundamental component of prospect identification and prioritization. Discrete or ad hoc approaches to wealth screening donors and constituents are common. The alternative approach, of perpetually screening novel, emergent potential donor populations based on key characteristics, offers opportunities to continuously identify new high-capacity prospects hiding in plain sight in institutional data. WFAA's "Tumbleweed" approach is a proactive, revolving strategy for identifying capacity through predictable and sustainable use of wealth screening resources and staff time. We'll discuss how to strategically leverage limited resources to consistently screen key populations and will touch on options for validating the resulting data. Takeaways will include example populations to help organizations evaluate their own potential Tumbleweed processes, opportunities for further analysis, and pitfalls to avoid (volume matters – unwieldy tumbleweeds may become a roadblock!)</p>
3:15 pm – 3:30 pm	APRA Florida Updates/Closing Remarks
3:30 pm – 4:30 pm	Networking

*Schedule is subject to change