




# 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	<b>Breakfast, Registration, and Sign-In</b>
8:45 am – 9:00 am	<b>Welcome and Conference Kick-Off</b>
9:00 am – 10:00am	<div data-bbox="451 594 652 793">  </div> <div data-bbox="673 583 1356 756"> <p><b>SESSION 1: Diamond Sponsor Presentation</b>  <b>Navigating Your AI Transformation</b>  <i>Cecelia Poplin, Senior Vice of Client Success and Strategic Partnerships</i>  <i>DonorSearch</i></p> </div> <div data-bbox="646 772 912 856">  </div> <p>In this session, we'll review the state of AI in our sector, the goal of Responsible AI, and discuss ways to begin using AI and Analytics for enhanced prospect research.</p>
10:00 am – 10:10 am	<b>Break</b>
10:15am – 11:15 am	<div data-bbox="443 1024 613 1224">  </div> <div data-bbox="652 1003 1458 1144"> <p><b>SESSION 2: Sprint Your Way to Sanity: Adapting Agile &amp; Scrum for Prospect Development</b>  <i>Lindsey Nadeau, Vice President, Data, Insight and Campaigns</i>  <i>UNICEF USA</i></p> </div> <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>

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<p>11:30 pm – 12:45 pm</p>	<p><b>Lunch and Learn: Platinum Sponsor Kaleidoscope</b></p>  <p><b>PRM Ziplining with AI?</b>  <i>Elise Lynch, Partner and Chief Marketing Officer                  KALEIDOSCOPE</i></p> 
<p>1:00 pm – 2:00 pm</p>	 <p><b>SESSION 3: Industry Practice Review: Prospect Profiles</b>  <i>Jennifer Filla, CEO                  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>2:00 pm – 2:10 pm</p>	<p><b>Break</b></p>
<p>2:10 pm – 3:10 pm</p>	 <p><b>SESSION 4: Designing Your Own Crystal Ball: From Revenue Forecasting to a Long-Term Growth Model</b>  <i>Lindsey Nadeau, Vice President, Data, Insight and Campaigns                  UNICEF USA</i></p> <p>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.</p>

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	<p>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!</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> <li>• The value of a robust pipeline data set and how prospect development can drive long-term planning</li> <li>• How to use your pipeline to project your fundraising results at both an introductory and advanced level</li> </ul>
<p>3:10 pm – 3:40 pm</p>	<div style="display: flex; align-items: center;">  <div> <p><b>SESSION 5: Gold Sponsor Presentation: Insightful Philanthropy</b>  <b>Insightful- What's New and What's Next</b>  <i>Sara Landman, Executive Vice President</i>  <i>Insightful Philanthropy</i></p>  </div> </div>
<p>3:40 pm- 3:50pm</p>	<p><b>Apra FL Updates</b></p>
<p>4:00 pm – 5:30 pm</p>	<p><b>Reception, Networking, Visit with Vendors</b></p>
<p>5:30pm</p>	<p><b>Independent Dinner</b></p>

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## Friday, February 21, 2025

8:00 am – 8:45 am	<b>Breakfast</b>
8:45 am – 9:15 am	 <p><b>SESSION 1: Gold Sponsor Presentation: LexisNexis Nexis for Development Professionals -Search by Criteria and New Features</b>  <i>Ginger Cole, Relationship and Consortia Manager                  LexisNexis</i></p> 
9:15 am – 10:15 am	 <p><b>SESSION 2: Advice from the Field: Prospect Development Best Practices for Small Shops</b>  <i>Tracey Robertson, Assistant Director                  Emory University</i></p>  <p><i>Liz Mills, Director of Prospect Research and Portfolio Management                  Roanoke College</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>
10:15 am – 10:45 am	<b>Apra Florida Activity</b>
10:45 am – 12:00pm	 <p><b>SESSION 3: Red Flags: Identifying and Assessing Potential Risks Ethical Considerations in Due Diligence</b>  <i>Charles Latham, Senior Research Analyst Principal Gifts                  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.
12:00 pm -1:15 pm	<p><b>Lunch: Roundtable Discussions</b>  <b>Table Hosts: Apra FL Sponsor</b></p> <p><b>Table 1: Insightful Philanthropy – Sarah Latham – “The great wealth transfer and engaging the Next Generation of major donors”</b></p> <p><b>Table 2: DonorSearch – Cecelia Poplin – “Differences between Predictive and Generative AI and the benefits each could bring to Prospect Research”</b></p> <p><b>Table 3: LexisNexis – Ginger Cole - Due Diligence</b></p> <p><b>Table 4: Kaleidoscope – Elise Lynch – “Goals for 2025: Your Expectations for AI to improve Prospect Research in Your Organization”</b></p>
1:15 pm	<b>APRA Florida Updates/Closing Remarks</b>

\*Schedule is subject to change