

PRE-CONFERENCE WORKSHOP SCHEDULE

Wednesday, July 27, 2016

	Prospect Research	Data Analytics	Partnerships, Leadership and Change Management		Relationship Management	Campaigns
9:00am-12:00pm	101 LI	105 LI	103 LII	104 LII	102 LII	106 LI
	Anatomy of a Profile <i>Jennifer Filla, Prospect Research Institute</i> Cheekwood ABC	Your First Steps in Data Analytics: Getting From Here to There <i>Carrick Davis, Wisconsin Foundation & Alumni Association</i> Hermitage D	Strategically Partnering with HR on Staffing, Structure, & Metrics <i>Janna Holm, Johns Hopkins Institutions</i> Hermitage AB	A Culture of Outreach: Moving from Reactive Work to Proactive Partnership <i>Angela Georgallis, Duke University; Natalie Spring, Duke University</i> Hermitage C	How to Find the Golden Prospect Pool <i>Missy Garner, Clemson University</i> Cheekwood GH	DIY Feasibility Study <i>Liz Clark, Creighton University; Deb Hoiem, Creighton University; Alyssa Norman, Creighton University; Amy Turbes, Creighton University</i> Tennessee A
	Prospect Research		Partnerships, Leadership and Change Management		Relationship Management	Campaigns
1:30pm-4:30pm	111 LI, LII	112 LI, LII	114 LI, LII	115 LI, LII	113 LI, LII	116 LI, LII
	Let's Talk About Writing! Skills for Effective Prospect Research <i>Sarah Bernstein, Philanthrodata; Preeti Gill, St. Paul's Foundation</i> Cheekwood ABC	Advanced Web Searching <i>Helen Brown, Helen Brown Group; Angie Stapleton, Helen Brown Group</i> Tennessee A	Adapting "Big Idea" Best Practices to Small Shops <i>Clara Lutz, Cedarville University</i> Hermitage C	Making the Body of Knowledge Work for You: Advocacy and Professional Development <i>Milagro Lobato, University of Colorado</i> Hermitage D	The 5-Step Prospect Management System <i>Ali Jacobs, The Hill School; Emily Mimms, The Hill School</i> Hermitage AB	The Research Recipe for Campaign Success <i>Estee Pierce, New York University</i> Magnolia Ballroom

Level: Level II: LI = Level 1 | Level II = Level 2

BOK Domains

- Prospect Research ●
- Relationship Management ●
- Data Analytics ●
- Campaigns ●

CONFERENCE SESSIONS

Thursday, July 28, 2016

	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management	Campaigns	
10:30am-12:00pm	201 LI, LII 20/20: Strategic Vision for Today's Philanthropic Realities <i>Rachel Dakarian, Helen Brown Group; Elizabeth Roma, Helen Brown Group</i> Cheekwood ABC	202 LI Industry Corner II: Firm Funding Lifecycle Role of Venture Capital and Private Equity <i>Amelia Aldred, University of Chicago; John McBride, University of Chicago</i> Cheekwood GH	203 LI, LII Swipe Right: The Ethics of Social Media <i>Gareth Griffin, University of California, Berkeley; Lori Hood Lawson, WorkingPhilanthropy.com</i> Hermitage AB	204 LI, LII prspct.py - Python Programming for Prospect Researchers <i>John Connelly, Northwestern University</i> Hermitage C	205 LI, LII More Than a Data Scrub: Crafting an Ongoing Portfolio Consultation Service <i>Chris Brakenbury, The Ohio State University; Becky Fullmer, The Ohio State University</i> Hermitage D	206 LI, LII Partners in Fundraising: Front-Line Researcher, Back-Line Fundraiser <i>David Schein, New York University; Nina Smith, New York University</i> Hermitage E	207 LI, LII So You Think You Want to Be A Director: Creating a Career Ladder in Prospect Development <i>Briana Cons, Arizona State University Foundation; Mandy Heath, St. Joseph's & Barrow Neurological Foundations</i> Magnolia Ballroom	208 LII DIY Campaign Planning <i>Krista Gallagher Colt, Luther Seminary</i> Tennessee A
1:15pm-1:55pm	211 LI One [Wo]man Army: Conquering Prospect Development in a Small Shop <i>Marissa Todd, University of Central Missouri</i> Cheekwood ABC	212 LI Industry Corner: Prime Your Pipeline with Prospects: Moving Members to Major Gifts <i>Robert Lyon, World Wildlife Fund; Matthew Perrin, Natural Resources Defense Council</i> Cheekwood GH	213 LI Unpack Your Ethics: APRA's New Ethics Toolkit <i>Lauren Dixon, Drake University; Gareth F. Griffin, University of California, Berkeley; Lori Hood Lawson, WorkingPhilanthropy.com; Lynn Lazzar, William Paterson University; Liz Rejman, Pathways to Education Canada</i> Hermitage AB	214 LI, LII The Power of Data Visualization, Prospect Management & Fundraisers <i>Trish McPeck, Oklahoma State University Foundation; Christina Prerreaux, Oklahoma State University Foundation</i> Hermitage C	215 LII Setting Them Up for Success: Performance Management to Improve Fundraiser Retention and Optimize Results <i>Kathleen Casanova, University of Colorado; Milagro Lobato, University of Colorado</i> Hermitage D	216 LI, LII Wealth Screening: A Consultative Approach to Analysis <i>Nick Sollog, The Sollog Group</i> Hermitage E	217 LI Forging Cultural Change: Transforming Your Organization into a Data-Driven Machine <i>Nathan Fay, Prospect Research Consulting Group</i> Tennessee A	218 LII Responsive Reporting in a Campaign <i>Jessica Balsam, University of Washington</i> Magnolia Ballroom
2:05pm-2:45pm		222 LII Industry Corner: Understanding Your Donor: The Intracacies of Doctors <i>Emily Davis, Indiana University Foundation</i> Cheekwood GH		224 LI Does Your Documentation Need Documentation? <i>Rachel Weingarten, The Wharton School, University of Pennsylvania</i> Hermitage C			227 LI, LII Prospect Managers as Part of the Fundraising Team <i>Cheryl Younger, Indiana University Foundation</i> Tennessee A	228 LII Leveraging Campaign Volunteers to Maximize Outcomes <i>Katie Nowak, Northwestern University</i> Magnolia Ballroom
Vendor Sessions								
3:00pm-3:45pm	VS 1 BWF Insight: A Total Pipeline Solution <i>Josh Birkholz, Bond T. Lamme, Emma L. Hinke, Bentz Whaley Flessner</i> Magnolia Ballroom	VS 2 Assessing Net Worth and Liquidity – A Roundtable Discussion <i>Jennifer Filla, Prospect Research Institute</i> Cheekwood ABC	VS 3 Why We Banned the Word Wealth Screening & Created PROScreen <i>Gerry Lawless, iWave Information Systems Inc.</i> Hermitage AB	VS 4 Starting from Scratch: How to Identify New Prospects (Beginner) <i>Ginger Cole, LexisNexis</i> Cheekwood GH	VS 5 Back to the Future: The next evolution for prospect research and constituent management <i>John Wilburn, Target Analytics</i> Hermitage C	VS 6 On Demand Modeling: Learn How to Gain Actionable Insights in Seconds <i>Claire B. Logue, WealthEngine</i> Hermitage E		
4:15pm-5:00pm	VS 1 BWF Insight: A Total Pipeline Solution <i>Josh Birkholz, Bond T. Lamme, Emma L. Hinke, Bentz Whaley Flessner</i> Magnolia Ballroom	VS 2 Assessing Net Worth and Liquidity – A Roundtable Discussion <i>Jennifer Filla, Prospect Research Institute</i> Cheekwood ABC	VS 3 Why We Banned the Word Wealth Screening & Created PROScreen (Advanced) <i>Gerry Lawless, iWave Information Systems Inc.</i> Hermitage AB	VS 4 Rethinking Tactics: How to target millennial and GEN X Donors <i>Andrew Albers, LexisNexis</i> Cheekwood GH	VS 5 Back to the Future: The next evolution for prospect research and constituent management <i>John Wilburn, Target Analytics</i> Hermitage C	VS 6 On Demand Modeling: Learn How to Gain Actionable Insights in Seconds <i>Claire B. Logue, WealthEngine</i> Hermitage E		

Level: Level I: LI = Level 1 | Level II = Level 2

BOK Domains

- Prospect Research ●
- Relationship Management ●
- Data Analytics ●
- Campaigns ●

Friday, July 29, 2016

	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management	Campaigns	
10:30am-12:00pm	301 LI International Fundraising: Cultural Intelligence <i>Jon Garrow, Albert Einstein College of Medicine</i> Cheekwood ABC	302 LI Streamlining Materials with the Audience in Mind <i>Natalie Spring, Duke University; Patricia Brunson, Duke University; Elise Speck, Duke University</i> Cheekwood GH	303 LI Innovation Lab - Applying Design Thinking Principles to Your Shop <i>Iberia Zafra, University of California, Berkeley</i> Hermitage AB	304 LII Predictive Modeling - Or How We Learned to Stop Worrying and Love the Database <i>Vicki Leigh O'Brien, University of South Carolina; Abigail Mann, University of South Carolina</i> Hermitage C	305 LI Case Study: Transforming into a Pipeline Management System <i>Frank Choi, McDaniel College; Joanna Schofield, Johns Hopkins Institutions</i> Hermitage D	306 LI, LII Optimize Prime: Prospect Management for Portfolio Reviews <i>Bond Lammey, Bentz Whaley Flessner; Emily Walsh, University of Arizona Foundation</i> Hermitage E	307 LI, LII Go Organic! A Sustainable Approach to Change Management <i>Alison Sommers-Sayre, Princeton University</i> Tennessee A	308 LI, LII The Analytics Journey Throughout Your Campaign <i>Marianne Pelletier, Staupell Analytics</i> Magnolia Ballroom
	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management	Campaigns	
1:15pm-1:55pm	311 LI Impact Giving: Where the Return is Good <i>Lori Hood Lawson, MLSc, WorkingPhilanthropy.com; David M. Lawson, NewSci, LLC</i> Cheekwood ABC	312 LI The New Family Foundation: Donor Advised Funds (and What You Should Know) <i>Lindsey Nadeau, George Washington University</i> Cheekwood GH	313 LI, LII Industry Corner: Opportunities in Arts and Culture <i>Elizabeth Collinge, Frick Collection</i> Hermitage AB	314 LI, LII Engagement Through Events: Success or Failure <i>Tanya Ford, Taylor University</i> Hermitage C	315 LI, LII Gift Officer Turnover and Other Disasters: How to Effectively Manage a Prospect Pipeline During Periods of Disruptive Change <i>Tricia Pekarna, Hazelden Betty Ford Foundation; Renee Francis, Hazelden Betty Ford Foundation</i> Hermitage D	316 LII Leading the Implementation of a New Development Officer Metrics System <i>Jenny Gallagher, Iowa State University Foundation</i> Hermitage E	317 LII Transitioning into a Leader: My Evolution from Prospect Research to Development Leader <i>Jamie Malcolm, Baylor Health System Foundation</i> Tennessee A	318 LII Make Sure You See the Forest AND the Trees When Preparing for Campaign <i>Tracey Church, Tracey Church & Associates; Izabela Piasecak-Latour, The Arthritis Society</i> Magnolia Ballroom
2:05pm-2:45pm			323 LI, LII Industry Corner: Finding Community Builders: Unique Challenges of Community Foundations <i>Jo Theodosopoulos, Minneapolis Foundation</i> Hermitage AB	324 LI Your Model Is Finished, Now What? <i>Brent Laskowski, Pennsylvania State University; Phillip Manning, Pennsylvania State University</i> Tennessee A	325 LI, LII Getting the Band Back Together: Creating Harmony in Prospect Strategy Meetings <i>Lara Beth Lehman, Vanderbilt University; Julie Martin, Vanderbilt University</i> Hermitage D	326 LI Onboarding for Success: Improving Your Fundraiser Training <i>Sandy Jeter, University of Washington; Krista Seabrook, University of Washington</i> Hermitage E	327 LI Wanted: Librarians and Bankers - Recruiting & Hiring for Prospect Development <i>Kari Stokosa, Wisconsin Foundation & Alumni Association</i> Hermitage C	
	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management	Campaigns	
3:00pm-4:30pm	331 LI Reap Rewards from Geneology Research! <i>Barbara Huff, Claremont McKenna College</i> Cheekwood ABC	332 LI Prospect Development Round Robin <i>Elizabeth McHugh, EMcHugh Consulting; Emily Walsh, University of Arizona Foundation; Jennifer A. McCormack, University of Washington; Michael Quevili, Target Analytics</i> Tennessee A	333 LI, LII Quantifying Accountability & ROI in Proactive Research Development <i>Debra Ann Thomas, University of Louisville; Terri Whitehouse, University of Louisville</i> Cheekwood GH	334 LII Fully Engaged: Quantifying Engagement for Recognition and Strategy <i>James Eichinger, University of Rochester</i> Hermitage C	335 LI, LII Fundraiser Performance Evaluation: Management and Operations Perspectives <i>Serena Amerson, Eastern Virginia Medical School; Rebecca Norman, Eastern Virginia Medical School</i> Hermitage D	336 LI, LII Partners in Fundraising: Getting to the Table - Your Team as Strategic Partners <i>Karen Prater, University of Oregon; Maureen Procopio, University of Oregon</i> Hermitage E	337 LII Using Disruptive Change to Drive Organizational Excellence <i>Lorrie Robertson, Stanford University; Bond Lammey, Bentz Whaley Flessner</i> Hermitage AB	338 LI Got Interest? Improving the Utilization of Donor Interest Codes <i>Abbey Myszka, University of California at Berkeley; Mallory Laas, University of California at Berkeley</i> Magnolia Ballroom

Level: Level II: LI = Level 1 | Level II = Level 2

BOK Domains

- Prospect Research ●
- Relationship Management ●
- Data Analytics ●
- Campaigns ●

Saturday, July 30, 2016

	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management		Campaigns
8:30am-9:10am	401 LI, LII Data or the Profile, Which Comes First? <i>Ryan Frank, City of Hope; Elana Mendelson, City of Hope</i> Tennessee A	402 LI, LII The Wonderful Wizards of Odds & Ends - The Person(s) Behind the Curtain: The Unseen World of the Small Research Shop <i>Bill Powers, Hospital for Special Surgery; Qaya Thompson, Yale - New Haven Hospital- Office Development</i> Cheekwood ABC	403 LI, LII Industry Corner: Dialoging with Users: Building the Best Reports Possible <i>Lauren Rose Mairella, The Wharton School/University of Pennsylvania; Rebecca Weingarten, The Wharton School/University of Pennsylvania</i> Cheekwood GH	404 LI Learning SQL for Beginners, Part I & Part II <i>Ben Adams, The Wharton School, University of Pennsylvania</i> Hermitage C	405 LI, LII LINK Your Way to Collaborative Portfolio Evaluations <i>Sharon Das, Lehigh University</i> Hermitage D	406 LI Partnering with Annual Giving: A Rich (and Often Overlooked) Opportunity <i>Sarah Clough, Marts & Lundy; Kathy Howrigan, Marts & Lundy</i> Hermitage E	407 LI, LII Creating Integrated Prospect Development (Regardless of Size or Org) <i>Brett Berger, University of New Hampshire, Harvard Business School; Leigh Petersen, Harvard Business School</i> Hermitage AB	408 LII More than Just News: How a Newsletter Can Help Your Team, Measure Impact, Maximize Partnerships, and Inspire Collaboration <i>Amelia Aldred, University of Chicago; Marcus Smith, University of Chicago; Lindsey Royer, University of Chicago</i> Magnolia Ballroom
9:20am-10:00am			413 LI, LII Industry Corner: Consultants Beyond Price: Evaluating Information Products <i>Margaret King, InfoRich Group, Inc.</i> Cheekwood GH			416 LI, LII Feed the Lead - Giving Organizational Memory a Boost <i>Glenda Garcia, McGill University</i> Hermitage E		
	Prospect Research			Data Analytics	Relationship Management	Partnerships, Leadership and Change Management		Campaigns
10:15am-11:45am	421 LI The Basics of Building a Prospect Research Program for a Small Shop <i>Kristen Ann Cooper, HealthEast Foundation</i> Cheekwood ABC	422 LI, LII A New Gilded Age - Philanthropy and Wealth in the 21st Century <i>David Sterling, Western New England University</i> Cheekwood GH	423 LI Turn Gender Research into Fundraising Intelligence <i>Jennifer Filla, Prospect Research Institute; Andrea Pactor, Indiana University Lilly Family School of Philanthropy</i> Hermitage AB	424 LI, LII "Excel"-ing at Data Viz Design <i>Rachel Collins, American University; Jennifer Knutzen, The Pew Charitable Trusts</i> Hermitage C	425 LI, LII Contact Reports That Work For You (Not Against You) <i>Thomas Turner, International Justice Mission; Paige Hrubik, International Justice Mission</i> Hermitage D	426 LI Rocket Ships and Relationships: When Simple Isn't Always Easy <i>Jared D. Schulman, University of Texas; Andrew Watkins, Michigan State University</i> Tennessee A	427 LII Prospect Research is a Cause <i>Armando Zumaya, Armando Zumaya Consulting</i> Hermitage E	428 LI, LII Scaffolding Around the Campaign Pyramid <i>Brett Lantz, University of Michigan</i> Magnolia Ballroom

Level: Level II: LI = Level 1 | Level II = Level 2

BOK Domains

- Prospect Research ●
- Relationship Management ●
- Data Analytics ●
- Campaigns ●