**APRA Carolinas**

**Spring Meeting**

**East Carolina University**

**March 19, 2015**

9:00-10:00 Registration

10:00-10:15 Welcome/Chapter announcements

10:15-11:15 **Bond Lammey**, *Conquering the High Seas of Portfolio Reviews*

11:25-11:55 Sponsor Demo: **Advizor**

12:00-1:15 Lunch

1:30-2:30 **John Taylor**, *Defining/Developing a Successful Prospect Research & Management Program*

2:30 Committee meetings

**Presentation Descriptions & Speaker Biographies**

***Conquering the High Seas of Portfolio Reviews***

What processes do you have in place to manage portfolios at your organization? Do you actively manage them, reviewing portfolio counts and development officer activities regularly? Do you assess the capacity, inclination, and engagement of currently assigned prospects and look for opportunities to assign and remove prospects proactively? Do you assess the fit of prospects that are assigned by development officer? This session will review a variety of techniques and strategies involved in portfolio reviews, rebalances, and optimizations, with particular focus on the project management implications of regular portfolio reviews.

For small organizations or those who are new to prospect management, this may mean the steps involved in regular portfolio reviews with development officers. For larger organizations or those more mature in prospect management, this means dissecting portfolio optimization into smaller, more manageable steps and communicating the strategic benefit of this process to leadership.

**Learning Objective #1:** Learning the key elements involved in portfolio rebalancing.

**Learning Objective #2:** Explaining the process to development officers who might be doing this for the first time.

**Learning Objective #3:** Creating an evolving process year-over-year that encourages and supports a culture change to developing more strategic and dynamic portfolios.

**Presenter**: Bond T. Lammey, Senior Associate, Bentz Whaley Flessner

Bond Lammey is a Senior Associate at Bentz Whaley Flessner specializing in Prospect Development. She was worked with higher education institutions, medical centers, and humanitarian and conservation organizations. Prior to joining BWF, Bond was the Director of Prospect Research at the University of Chicago. Bond received her BA in Sociology and her Masters of Management in Nonprofit Administration, both from North Park University in Chicago, Illinois. She is on the board of APRA International and is a member of six APRA chapters. She has presented in the United States, Canada, and Asia at CASE, SunGard, ADRP, and APRA conferences, and has been co-instructor for the Rice University Center for Philanthropy & Nonprofit Leadership “Fundamentals of Constituent Relationship Management” online course in 2014 and 2015.

***Defining/Developing a Successful Prospect Research & Management Program***

What are the characteristics of a top-notch researcher today? Creativity sure better be in their position description. But just as importantly, the PR/M program must dispel common myths/perceptions to be successful. In this brief session we will look as these issues, as well as how you can evaluate your existing program, and then build accountability for your program.

**Presenter**: John H. Taylor, Principal, John H. Taylor Consulting, LLC

John is Principal of John H. Taylor Consulting, LLC. For nearly 5 years John served as Associate Vice Chancellor for Advancement Services, as well as Interim Campaign Manager during his last 18 months, at North Carolina State University. He holds a BA in Mass Communications and Socio-Political Change from Vanderbilt University, and a Certificate in Nonprofit Management from Duke University. He has also served as Vice President for Research and Data Services at CASE – a position he held from its inception in late 2002. Prior to that John was the Director of Alumni & Development Records at Duke University for nearly 15 years.

John formed one of the largest, internationally acclaimed, advancement-related listservs in the world, FundSvcs, now with over 3,600 subscribers. He has spoken at hundreds of conferences across the country, receiving the CASE Crystal Apple Award for outstanding teaching. He is founder, Board member, and Former President of the Association of Advancement Services Professionals. He received the AASP Jonathan Lindsey Lifetime Achievement Award in 2012. John resides in Durham, NC, with his wife and children.