



Fall 2017 Conference Schedule
October 5-6, 2017
University of North Carolina Wilmington

This conference has been approved for 5 pts of CFRE credit

Thursday, October 5:

4:30 – 5:30: Tour of [Anatomage Table](#) at [Trask Coliseum](#)

6:00 – 8:00: Networking Dinner at [JohnnyLuke's Kitchenbar](#); 5500 Market St, Ste 130, Wilmington, NC

Friday, October 6: (8:30 – 3:10) - [Madeline Suite](#)

8:30 – 9:25: Registration, Breakfast, and Networking

9:25 – 9:30: Welcome by Tim Rogers, Assistant Vice Chancellor for Major Gifts at UNC Wilmington

9:30 – 9:35: Welcome from Beth Inman, President of Apra Carolinas

9:35 – 10:10: **SESSION 1** – Alexei Safronov and Andy Suther: “Hiding in Plain Sight: The Top Six Markers that Predict Philanthropy”

10:15 – 11:00: **SESSION 2** – Lisa Ukuku: “What It Means to Be True Blue”

11:05 – 12:05: **SESSION 3** – Gregory Duke: “Three ways to revolutionize prospect research and prospect management with Microsoft Excel”

12:05 – 12:15: Break and lunch set-up

12:15 – 1:00 Lunch and Networking

1:00 – 1:15 Chapter Announcements & Awards

1:15 – 2:00: **SESSION 4** - Dawn Wyatt: “The Struggle is Real”

2:05 – 2:50: **SESSION 5** - C.J. Davis & Carrie Naumann: “Managing Prospect Development through Conversion”

2:50 – 3:05: Scholarship recipients present, conference wrap-up and closing remarks

Special Thanks to Apra Carolinas' Sponsors



Presentation Descriptions and Presenters

'Hiding in Plain Sight: The Top Six Markers that Predict Philanthropy'

Based on a study conducted by DonorSearch looking at the philanthropic and wealth factors that best predict future philanthropy. They analyzed \$5 billion in giving from two million donors to 400 organizations to determine the six factors that most closely correlate with philanthropy. (Surprisingly, the most commonly used marker of wealth was only the fifth best predictor of future philanthropy.)



Andy Suther

Direct Sales & Relationship Manager for DonorSearch

Andy, a graduate of James Madison University, has been with DonorSearch since 2014. Previously, he served as a Title Examiner for P and W Title Examination Services for six years. He has also served as a Board Member for Apra Maryland since 2015.

Email: andy@donorsearch.net



Alexei Safronov

Director of New Sales for DonorSearch

Alexei has been with DonorSearch since 2010 serving in their Sales department. He has been in his current role since March 2016.

Email: alexei@donorsearch.net

'True Blue'

This presentation summarizes the True Blue project which was a strategy developed as a result of a planned giving wealth screening. True Blue is the name given to our efforts and strategies to develop a more dynamic planned giving (legacy) program at The Citadel Foundation. The purpose of the strategy was to introduce and educate constituents on simple ways to make an impact by:

1. Naming TCF a beneficiary through a charitable bequest or life insurance policy
2. Naming TCF the beneficiary of a retirement-plan account



Lisa Ukuku

Director of Prospect Research for The Citadel Foundation

Lisa, a graduate of Voorhees College and Webster University, has served as the Director of Prospect Research for The Citadel Foundation since 2011. She provides leadership and strategic direction in support of the Foundation's fundraising goals through proactive and creative identification and evaluation of individual and organizational prospects. She has been a member of Apra Carolinas since 2014.

Email: lisa.ukuku@citadel.edu

'Three ways to revolutionize prospect research and prospect management with Microsoft Excel'

If you have Microsoft Excel, you have access to extremely powerful analytics tools which can revolutionize your prospect research and prospect management operations. Microsoft Excel makes it easy to take your existing data and derive useful information from it. The presentation will show you how to:

1. Estimate total donations for the year using the Monte Carlo method
2. Identify top prospects right out of your database using simple regression
3. Clean up your prospect screening results by building an algorithm



Greg Duke

Associate, Coding and Database Management for Staupell Analytics

Greg, a graduate of the University of Oxford, has nearly 20 years of experience working in fundraising organizations in the U.S. and U.K., primarily focusing on database management and prospect research. He helps optimize Raiser's Edge clients through clean-up techniques and creating reporting structures.

Email: greg@staupell.com

'The Struggle is Real: DoD Contact Report Entry'

After discovering that 78% of the contact report entries made by directors of development into the CRM had errors, an online form was created through which development could submit their reports to trained staff who would then enter the contact report for them. This process ensures accuracy with contact entries, decreases the time it takes development to enter their efforts, and increases the accuracy of data in reports sent to leadership. This presentation covers the issue of having so many errors and the process of implementing the use of the form.



Dawn Wyatt

Associate Director of Prospect Management at University of South Carolina Dawn, a graduate of Ferris State University, has been with USC since 2012, currently serving as their Associate Director of Prospect Management since 2016. Previously, she served as a Gift Planning Coordinator and Research Associate, as well as a Prospect Management Coordinator. She has been a member of Apra Carolinas since 2014. Email: dwyatt@mailbox.sc.edu

'Managing Prospect Development through Conversion'

Learn how to manage prospect development through a database conversion and the inherent challenges through a discussion of how the prospect development team at Virginia Commonwealth University migrated to a new CRM database during the university's largest comprehensive campaign. C.J. and Carrie will discuss the challenges of converting with limited resources, outcomes and opportunities post-conversion. Additionally, they will provide industry best practices on how to prepare for a database conversion or systems change in your own prospect development shop.



C.J. Davis

Associate Director of Prospect Development at Virginia Commonwealth University C.J., a graduate of Virginia State University and Virginia Commonwealth University, has been with VCU since 2012. Her responsibilities include advanced prospect research and wealth analysis, prospect identification, management of wealth screening projects, corporate and foundation research, and assisting in the development and implementation of strategic goals for development research and prospect management. She has been a member of Apra Virginia since 2011. Email: daviscj2@vcu.edu



Carrie Naumann

Assistant Director of Prospect Development at Virginia Commonwealth University Carrie, a graduate of George Mason University and Virginia Commonwealth University, has been with VCU since 2012. She provides primary prospect research, management and strategy support to various schools and units within VCU and is helping to support the growth of data analytics within the prospect development office. She is the webmaster for APRA Virginia. Email: naumanncp@vcu.edu

Apra Carolinas 2017 Scholarship Recipients

Apra Carolinas Professional Development Scholarship

The Professional Development Scholarship recipient receives up to \$1,500 which can be used for any professional development opportunities offered by Apra Carolinas or Apra International. This scholarship is available to all Apra Carolinas members and is awarded annually. Apply online on the [Apra Carolinas](#) website. Deadline for application is Friday, November 3rd.



Amy Jackson

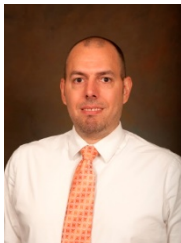
Director of Research for Propect Development at Wingate University

Amy, a graduate of Wingate University, has been with Wingate University since 2016 when she became their Director of Research for Prospect Development. Amy was the 2017 recipient of the Apra Carolinas Professional Development Scholarship and chose to attend the Apra Regional Conference (ARC) in Atlanta, GA.

Email: a.jackson@wingate.edu

Apra Carolinas Road Trip Scholarship

The Road Trip Scholarship covers travel expenses for an Apra Carolinas member to spend a day or two with someone at another organization within the Carolinas to learn about how they run their shop. The scholarship covers travel expenses up to \$300 and is awarded annually. Apply online on the [Apra Carolinas](#) website. Deadline for application is Friday, November 3rd.



Rick Loveday

Prospect Research Analyst at Clemson University

Rick, a graduate of Winthrop University and Clemson University, has been with Clemson since 2016 and works as an Analyst for Prospect Research. Rick was the 2017 recipient of the Apra Carolinas Road Trip Scholarship and chose to spend two days in the Triangle visiting UNC Chapel Hill and Duke University.

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