

Apra-Virginia 2017 Fall Conference
Wednesday October 11, 2017
Longwood University, Farmville, VA

Detailed Session Descriptions:

Apples, Peaches, Pumpkin π : Metrics that Matter - *Aimee Fitzgerald, Executive Director, Prospect Development and Information Strategy, The College of William & Mary*

Why should an organization track more than just dollars raised? What are the metrics that are currently used in top-performing fundraising shops? What is the impact of these metrics? We will delve into both the explicit metric and the implicit behavior these metrics are trying to influence.



Will the Mouse Take the Cheese: A Curious Experiment in Portfolio Building - *Vicki O'Brien, Associate Director of Prospect Research Analysis, University of South Carolina*

The University of South Carolina Prospect Research staff recently decided to break its traditional mold of sending prospects to Development Officers who meet that sacred trifecta we all look for—consistent giving, high capacity, and affinity—to try out something new and different to challenge ourselves. Per usual, the Prospect Research team was preparing to identify prospects to help build a newly hired Development Officer’s portfolio when we decided to segment a population to send a test email solicitation. We wanted to see if they would take the “cheese” and make a donation or accept a visit request, in turn qualifying themselves as a prime prospect for the Development Officer’s portfolio. Having no experience in mass solicitation emails or marketing designs, we partnered with the experts in that area, our Annual Giving team. We also included the Development Officer whose portfolio we were building to harness his knowledge to create a truly powerful email message that would compel a constituent to give to this particular Development Officer’s cause or accept a visit request. The aim of this session is to present a case study in how to take an artful, quasi-marketing approach to building a newly hired DoD’s portfolio that requires not only understanding your population of donors and how to segment that population but also working across teams and collaborating to send out a unique email designed to have a constituent qualify himself or herself as a prospective donor.



New Masters of Wealth: Engaging Philanthropic Advisors in Your Fundraising Efforts - *Elizabeth Roma, Assistant Director, Research, The Helen Brown Group and Angie Stapleton, Research Associate, The Helen Brown Group*

The explosion of wealth in recent decades has given rise to increasingly sophisticated tools and vehicles for managing wealth and making philanthropic gifts. As a result, more and more donors are relying on professionals to advise them on both how and where to make gifts. We will examine the formal roles these advisors play in family offices, wealth management firms, philanthropic organizations, and consulting firms, as well as individuals and organizations such as giving circles that act as more informal advisors. We will also share practical tips that nonprofits of all sizes can use to identify and engage people who are advising prospective donors on their philanthropy and discuss strategies for finding constituents who can serve as powerful connectors for your organization.

