

CARA Seminar Day

Date: Friday, November 13, 2020

Time: 9:00 AM – 2:30 PM

Location: Zoom Conference

Schedule:

9:00 AM- 9:15 AM

Opening Remarks

9:15 AM – 10:30 AM

Track A- Analytics: Session 1:

Nathan Chappell, President, Futurus Group & **Jared Sheehan**, CEO of Pwrd>By

The State of Artificial Intelligence in the Nonprofit Sector

Artificial Intelligence (AI) is a hot topic in the world right now, but there has been limited research on the State of AI in the nonprofit industry. AI is nascent but quickly growing in the nonprofit industry. Nathan Chappell and Jared Sheehan are providing a review of the first ever *State of Artificial Intelligence in the Nonprofit Sector Report*. The talk will focus on findings from the research, which include a diffusion of innovation user perception study, a meta-analysis of the nonprofit sector, as well as a review of investment trends.

Track B- Prospect Development & Management: Session 1:

Julie Craig, Sr. Director of Prospect Analytics and Research, Kansas State University and **Sara Prince**, Senior Director of Strategic Solicitations, Kansas State University, **Georgina Clemens**, Development Officer, Kansas State University, and **Quinlan Stein**, Development Officer, Kansas State University

Digital Fundraising for Pipeline Propulsion

Kansas State University set forth on a mission two years ago to enhance how they identify and drive leads to major gift officers. Hear how this team connects with people, and then refers the best prospects to K-State's major gifts teams. With each associate responsible for hundreds of attempted connections a week, KSU can reach more high-potential prospects than ever before, while delivering a personal touch with every engagement. This leads to stronger connection with alums and new five, six, and seven-figure gifts for Kansas State. Learn how they got started, what the program looks like, and how to take this digital-first approach back to your campus.

10:30 AM - 10:45 AM

Break

10:45 AM – 12:00 PM

Track A- Analytics: Session 2:
Meenakshi Das, Campbell & Company

Donor and Volunteer Survey during COVID

The session will help participants design donor and volunteer surveys during COVID times, keeping in mind DEIA and forming strategies to analyze effectively. Participants will learn best practices of designing multi-constituent engagement surveys, sample questions for donor and volunteer surveys, to-do steps between design and analysis of the surveys, best practices of analyzing key questions strategically, and segmentation techniques after the survey analysis.

Track B- Prospect Development & Management: Session 2:
Mary Pomerantz, Vice President of Philanthropic Partnerships for Parker Group

Building an Advancement Function from Scratch

This presentation will talk about how to establish a development department within a complex organization. It will highlight a specific case study to tell the story.

12:00 PM – 1:00 PM

Lunch – Hear from our Sponsor, Windfall and Network

1:00 PM - 1:30 PM

Keynote Speaker

James Rygg, Director, Prospect Research and Strategy at California State University, Fullerton

James Rygg has been in the prospect development field for 28 years. He considers those 28 years a journey. It is full of lessons learned, opportunities for growth, triumphs, failures and more. His story is about the things he's learned not only about prospect development, but about organizational culture, leadership and engaging with an ever growing network of colleagues and friends.

1:30 PM – 2:30 PM

Track A- Analytics: Session 3:
Alex Oftelie, Senior Vice President of Decision Science BWF

**Everything you need to create or improve your predictive modeling:
From A to Z-scores**

This session will provide a 360 review of key topics to ensure successful predictive modeling and development for your organization. Whether you are beginning your predictive modeling journey, or an established analyst or data scientist, there will be relevant information for you. This session will touch on techniques (including uncommon but exciting methods most don't employ) but really move beyond method, to include project framing, refresh alignment, and implementation, and some impactful perspectives on the drudgery tasks of data manipulation.

Track B- Prospect Development & Management: Session 3:

Tim Gale, Regional Director, Grateful Patients Program, Providence Foundations of Southern California, **Matt Valenzuela**, Prospect Manager, Providence Foundations of Southern California, **Priya Jethwa**, Associate Development Officer, Providence Little Co. of Mary Foundation

Driving Grateful Patient Program Pipeline Development at Scale

In this session we will discuss how multiple health systems have begun replacing siloed data analytics strategies with an emerging best practice: A best of breed approach that seamlessly integrates multiple applications into a single powerful technology ecosystem. Similar to the way a smart phone integrates multiple apps in the palm of your hand, Providence is utilizing a technology ecosystem of integrated analytics, machine learning and CTI calling to enable grateful patient fundraising at scale.

2:30 PM

Closing Remarks