



Conference Sponsored by:

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Ohio Prospect Research Network presents 2011 Spring Conference

BEST PRACTICES: TURNING THEORY INTO *SUCCESS*

Thursday May 5 and Friday May 6, 2011

Embassy Suites ~ 2700 Corporate Exchange Drive ~ Columbus, OH 43231

www.oprn.org

THURSDAY, MAY 5, 2011

12:30-1:00 p.m.	Registration
1:00-2:30 p.m.	Workshop begins (description below)
2:30-2:45 p.m.	Break (snack provided)
2:45-4:00 p.m.	Workshop continues
4:00 p.m.	Adjourn for the day

Launching Positive Revolutions in you Fundraising Office

Presented by Jay Frost

Do you ever feel disconnected from the work of the development office or the mission of institution? This workshop will bring your value to the institution into sharp relief and help make a case for increasing resources, gaining greater influence over strategy and setting and managing the efforts of the development team. We will go through exercises converting research quotas (number of prospects or profiles) into fund-raising parlance (feasibility, major gift goals), discuss written action plans with dollar targets and work together to convert research tools into resource investments. Join us for an aggressive and tough-minded exploration of how research is truly fund raising.

Thursday Night Excursion – We’re going to the ballpark!

On Thursday evening, members and their guests will be able to head to Huntington Park located in Columbus’ Arena District to watch the Columbus Clippers go up against the Lehigh Valley Ironpigs. OPRN will accept payments to reserve a block of seats (adults, \$10; youth [12 yrs old and younger] or seniors [60 yrs old and over], \$7). Please be sure to submit payment for tickets along with registration form by **Wednesday April 13, 2011** to ensure guaranteed seating in the OPRN block.

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FRIDAY, MAY 6, 2011

8:00-8:30 a.m. Registration & Continental Breakfast

8:30-8:45 a.m. Welcome/Announcements

8:45-9:45 a.m. **Jay Frost's Keynote Address**

9:45-10:00 a.m. Break

10:00-11:30 a.m. **Concurrent Session A** *(Attend one of the following:)*

The Horse's Mouth: Social Media as a Window on the Prospects of the Future w/ Jay Frost

Social media can seem so trivial. Until we realize that the majority of our current and future supporters are on these platforms, defining themselves, their interests and their communities every day. Fundraising and research veteran Jay Frost lifts the lid on social media in this session, exploring how we can use these networks to better identify, understand and engage prospects and donors. We will learn how to get started, to work efficiently, effectively and ethically, and how to avoid getting stuck in this new world of publically disclosed personal information.

Digging Deeper: Uncovering the Wealth Hidden in your Electronic Screening Results w/ Melissa Bank Stepno

After completing an electronic database screening, many organizations feel overwhelmed by the amount of data they receive. Prospecting by skimming off the top – or focusing on those with high scores and/or capacity - may be a great place to start. But, if that's all you do, you are likely leaving a lot of valuable data behind. This session will focus on tips to systematically mine the data included in your electronic screening to help you uncover potential that is often hidden below the surface. With a little bit of extra sleuthing, you can take your screening to a deeper level and find the diamonds in the rough.

11:30-12:45 Lunch (provided)

12:45 – 2:15 **Concurrent Session B** *(Attend one of the following:)*

The Application of Donor and Database Surveys in Prospect Research w/ Lawrence Henze

With all of the techniques we have for rating and identifying giving prospects we often ignore the opportunity to ask our prospects about their interests and attitudes. Learn how to make surveys an important part of your research efforts, as well as some design techniques that will permit you to use the results in quantitative analysis as well.

Meet Excel, Your New Best Friend: Excel Tips and Tricks

A Panel Discussion led by OPRN Board Members Rob Boley, Stephanie Jewell, and Brett Scott

2:15-2:30 p.m. Break

2:30-3:30 p.m. **Roundtable discussions**

(Speakers & topics TBA) If you have a topic idea or are interested in leading a roundtable, please contact one of the conference co-chairs.

3:30 p.m. Closing Remarks/Adjournment

QUESTIONS? Contact the conference co-chairs.

Rob Boley | (937) 775-3826 | robert.bolely@wright.edu.
Regina K. Johnson | (614) 688-0861 | johnson.664@osu.edu
Stacy Wheeler | (419) 448-2888 | swheeler@heidelberg.edu

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CONFERENCE REGISTRATION

\$90 for 1 day & **\$125** for 2 days for OPRN members
\$125 for 1 day & **\$160** for new members (membership included)
\$105 for 1 day & **\$140** for 2 days for non-members

Registration must be postmarked by Wednesday, April 27, 2011, or a late fee of \$25 will apply. No shows will be billed for meals.

We encourage you to register for BOTH days to benefit from the reduced registration fees for two days of learning from these dynamic speakers!

Please return registration form and check (made payable to Ohio Prospect Research Network) to:
Regina K. Johnson, OPRN Conference Co-chair, c/o The Ohio State University, W. Lane Avenue #162, Columbus, OH 43221-3938.

ACCOMMODATIONS

OPRN has reserved a block of rooms at the Embassy Suites Columbus for \$131 per night. The newly renovated Embassy Suites Columbus hotel offers attractive accommodations in a thriving area, ideal for anyone traveling to Columbus on business or for pleasure. The hotel is conveniently situated amongst some of the most exciting tourist attractions in the area and offers complimentary transportation to nearby Easton Town Center.

Attendees are responsible for their own reservations. Please refer to *Ohio Prospect Research Network* when making your reservations. **Individuals are requested to call 1-800-EMBASSY (800-362-2779) or (614) 890-8600 by Wednesday, April 13, 2011 to reserve suites.** Reservations received after this date will be honored on a space available basis at the prevailing corporate rate.

Check-in time is after 3:00 PM. If your schedule requires an early check-in time, please advise the hotel in advance. Payment for guest suite is due upon check-in, either by cash or credit card. Checkout is 12:00 Noon. Arrangements can be made for luggage storage beyond 12:00 noon. NOTE: Please dress in layers. Heating and cooling may fluctuate in a room setting of this size.

CONFERENCE DIRECTIONS

Embassy Suites Hotel

2700 Corporate Exchange Drive, Columbus, OH43231
Phone:(614) 890-8600
FAX:(614) 890-6768

Located at I-270 and Cleveland Ave-on the north end of Columbus.

Parking is free.

From the North: Enter I-270 eastbound to the Cleveland Ave. Exit (Exit 27).

From the South: Follow I-71 to I-270, and enter I-270 east-bound to the Cleveland Ave. Exit (Exit 27).

From East or West: Follow I-70 to I-270, and enter I-270 Northbound toward Cleveland. Take the Cleveland Ave. Exit (Exit 27).

After exiting I-270: After exiting onto Cleveland Ave., immediately get into the far left hand lane. Turn left at the first traffic light onto Community Park Drive. Proceed one block to the first stop sign and turn left onto Corporate Exchange Drive. The hotel is one block ahead on the left side of the street.

CFRE CREDITS

OPRN has applied for CFRE certification so that - pending approval - full participation in the OPRN Spring Conference would be applicable for 7.75 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. This credential is the only internationally recognized baseline professional credential for philanthropic fundraising executives. To learn more, visit the CRFE International Web site at cfre.org.

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KEYNOTE SPEAKER

JAY FROST

Jay Frost is a 25 year veteran of the world of philanthropy. In addition to his work as a speaker, author and consultant through Frost on Fundraising, Jay is also partner in BFTConnect LLC, provider of ContactReport1_04384er. Over the years, Jay has played a leadership role in a number of companies serving the third sector, including serving as Vice President at FundraisingINFO.com (FRI); Chief Strategy Officer at WealthEngine; and President and CEO at Wealth ID, pioneer in the asset screening and online prospect research business in the United States, which merged with WealthEngine in 2005. In addition, Jay has also served as Director of Major Gifts at the International Rescue Committee, Editor and Co-Founder of WFC/International Philanthropy, Development Associate at Meridian International Center and as a Program Specialist at the National Endowment for the Arts. As a volunteer and educator, Jay has been a member of the CASE Industry Advisory Council, a past national board member and Metro DC Chapter President of the Association of Professional Researchers for Advancement (APRA) and a featured speaker at international, national, regional and local conferences and meetings for most of the major fundraising associations in the US, Europe and Asia. Visit him online at <http://www.frostonfundraising.com/>.

PRESENTERS

MELISSA BANK STEPNO

Melissa, Consultant at Target Analytics, a Blackbaud Company, has spent more than 10 years working in the non-profit industry. Since becoming a consultant in 2005, she has worked with hundreds of non-profit organizations designing strategy and implementation plans for their predictive modeling and database screening projects. Immediately prior to becoming a consultant, she served as a Senior Development Researcher at Boston University where she was responsible for managing their wealth screening of more than 100,000 records. Melissa received her BA from Brandeis University and has masters' degrees in Arts Administration and Higher Education Administration from Boston University. She sits on the boards of Brandeis University's Alumni Association, the New England Development Researchers Association (NEDRA) and the Association of Fundraising Professionals Northern New England Chapter (AFP NNE). Melissa has spoken at a number of professional conferences and webinars including those hosted the Association of Professional Researchers for Advancement (APRA), the Council for Advancement and Support of Education (CASE) and the New England Development Researchers Association (NEDRA). You can contact her at Melissa.Stepno@blackbaud.com.

LAWRENCE HENZE joined Blackbaud in 2001 as the managing director of Target Analytics when Blackbaud acquired Core Data Services, where he was the founder since 1998. Before Core Data Services, Lawrence was vice president of predictive modeling services at USA Group Noel Levitz, with responsibilities for product development, as well as marketing and sales, of predictive modeling services in the areas of higher education (student admissions and retention), fundraising (prospect identification and qualification), and commercial corporations. Prior to joining USA Group Noel Levitz, He was the president of the Philanthropic Division of Econometrics, Inc., a marketing research and analysis firm based in Chicago, Illinois. In this position, he was responsible for developing state-of-the-art donor and prospect research methodologies for use by nonprofit organizations. From his tenure with Econometrics through his current work, Lawrence has worked with more than 600 clients and has accumulated a wealth of knowledge on the financial, demographic, and attitudinal characteristics of philanthropic donors in the United States. He has spent more than 28 years in the nonprofit world, including 14 years in development and marketing positions for nonprofit organizations, primarily in higher education. Lawrence earned his BA degree from Carroll College (WI) in political science, an MA in public policy and administration, and a JD from the University of Wisconsin-Madison. While at the University of Wisconsin, he lectured in sports law and was the first director of the Institute of Sports Representation. You can contact Lawrence at Lawrence.Henze@blackbaud.com.

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EILEEN FITZGERALD OPRN CONFERENCE SCHOLARSHIP

In 2008, the OPRN Conference Scholarship was named in honor of Eileen Fitzgerald, an exemplary member of our profession and long-time board member of OPRN who served in many roles. By providing this scholarship to the OPRN annual conference, or towards the attendance of an APRA conference, we hope to:

- Encourage participation by organizations and individuals whose resources for staff development are limited.
- Promote a baseline skill set in prospect research within the Ohio nonprofit community regardless of the size or affluence of a participant's organization.
- Promote networking opportunities for new development professionals.
- Increase awareness of OPRN and build a more diverse membership.

This year, we will award one scholarship for new researchers and one for veteran researchers. See www.oprn.org for details. **Scholarship applications are due by Friday, April 1st, 2011.**

OHIO PROSPECT RESEARCH NETWORK

BOARD OF TRUSTEES

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Founded in 1987, the Ohio Prospect Research Network is a resource for individuals working in non-profit fundraising, development and advancement. OPRN is committed to furthering the profession of research in the field of Advancement.

Our pledge is to serve those individuals throughout Ohio who desire to seek and share information about prospect research by providing a forum and the organizational means to bring members together in a spirit of dialogue and partnership.

OPRN currently offers a Spring Conference and Fall Regional Gatherings. All researchers and development professionals, whether members of OPRN or not, may attend. Contact a board member for information.

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