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Ohio Prospect Research Network (OPRN)

**HIO
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2011 Spring Conference

BEST PRACTICES:
TURNING THEORY INTO \$UCCESS

Thursday and Friday,

May 5 & 6, 2011

Embassy Suites

2700 Corporate Exchange Dr.

Columbus, OH 43231

www.oprn.org

Conference Sponsored by:

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THURSDAY, MAY 5, 2011

12:30-1:00 p.m. Registration

1:00-2:30 p.m. Workshop begins

Launching Positive Revolutions in you Fundraising Office

Presented by Jay Frost

This workshop will bring your value to your 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.

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

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

Head to Arena District's Huntington Park to watch the Columbus Clippers go up against the Lehigh Valley Ironpigs. Game begins at 6:35PM.

FRIDAY, MAY 6, 2011

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

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

Frost lifts the lid on social media, 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 publicly disclosed personal information.

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

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.



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SESSION HANDOUTS

As part of our effort to make this conference as "green" as possible, we've decided not to print handouts whenever possible. Instead, presentation handouts are available online for you to download, review, and print, if you wish. To download Melissa Bank Stepno's presentation handouts, simply follow the links below:

http://www.oprn.org/member/2011_files/Stepno_RealEstate.pdf

http://www.oprn.org/member/2011_files/Stepno_DiggingDeeper.pdf

Please note that these files are located in the OPRN Member Portal. To access them, you will need to use your member log-in.

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To learn more, visit the CRFE International Web site at cfre.org.

Full participation in Ohio Prospect Research Network Spring Conference is 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.

www.oprn.org

EILEEN FITZGERALD OPRN CONFERENCE SCHOLARSHIP

CONGRATULATIONS

**to Lisa Medeiros and John Hagerty
for being awarded a 2011 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 awarded one scholarship for new researchers and one for veteran researchers. See www.oprn.org for details.

ANNE E. MAYER DISTINGUISHED SERVICE AWARD

OPRN is pleased to present the *OPRN Anne E. Mayer Distinguished Service Award* annually at our Spring Conference. This award acknowledges the work of those individuals who have provided exemplary service to the chapter and/or the field of prospect research. In 2007, the award was named after OPRN co-founder and long-time board member Anne Mayer.

Past Distinguished Service Award Recipients

Lisa Hornick	Gail Hanson	Catherine Smythe Zajc
Jackie Robbins	Bev Robertson	Anne Mayer
Eileen Fitzgerald		

Learn more and nominate your colleagues at <http://oprn.org/awards.html>.

Join us next year! Sponsorship opportunities will be available for the Spring 2012 conference. We will finalize 2012 sponsors during fall of this year 2011.

For more information, please contact OPRN at board@oprn.org.

FRIDAY, MAY 6, 2011 CONT.

11:30-12:45 Lunch provided

12:45 – 2:15 **Concurrent Session B** *(Attend one of the following:)*
Understanding the True Value of Real Estate w/ Melissa Bank Stepno

This session will review the real estate market's history, today's climate, how to use real estate information for prospecting and provide tips and tools to help best interpret and understand data.

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** *(Attend one of the following:)*

Prospect Tracking and Database Issues

Bobbie O'Malley, Baldwin-Wallace College

Productive Prospect Review Meetings

Donna Wolf, The Ohio State University

New Researcher's Discussion Group

Lisa Hornick, Wright State University

What To Do With All That Data Once You Find It

Rob Boley, Wright State University

Corporation and Foundation Research

Matt Roberts, The Ohio Health Foundation

Target Analytics Demos

Gareth Blayney, Blackbaud Inc.

Social Media

Regina Johnson, The Ohio State University

Freelancing

Kimberly Elahab, Wright State University

Prospect Research in Healthcare Organizations: Special Issues

Shaw Mumford, Cleveland Clinic

3:30 p.m. Closing Remarks/Adjournment



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 a partner in BFTConnect LLC, provider of ContactReporter. 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/>.

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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.



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 by 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.

ROB BOLEY

Rob Boley is the Associate Director of Advancement Research & Prospect Management at Wright State University. He previously served as Associate Director for Advancement at the Boonshoft School of Medicine at Wright State University. He has served as President, Web Coordinator, and Newsletter Editor for Ohio Prospect Research Network, and is currently Vice President of Conference Planning.

BRETT SCOTT

Brett Scott is the Director of Research and Prospect Management at Ohio Northern University. Brett has also served as a Data Analyst and Regional Coordinator at the Ohio Board of Regents, Residence Hall Director at Xavier University, and Academic Advisor and Assistive Technology Coordinator at the University of Denver. He serves on The OPRN Board of Trustees and is the Northwest Ohio Regional Coordinator, a member of the Council of Advancement and Support of Education, the Association of Professional Researchers for Advancement, and the Independent College Advancement Associates.

STEPHANIE JEWELL

Stephanie Jewell is Fundraising Analyst at The Ohio State University. She previously served as Development Research Analyst and Annual Giving Assistant at Ohio Wesleyan University. She serves on the OPRN Board of Trustees and has a bachelor's degree in marketing communication from Emerson College.