

OPRN 2012 SPRING CONFERENCE EVENT ITINERARY
THURSDAY MAY 3

- 12:30 Registration (Westin Lobby, 1st Floor)
- 1:00-2:30 Concurrent Workshops (Choose one)
- "The Entrepreneur Economy—The Phoenix Rising Out of the Ashes of the Great Recession"**
David Lawson | WorkingPhilanthropy.com (Park Parlor, 1st Floor)
While most people have been anxiously awaiting the old economy to come back to life, entrepreneurs have been busy creating the future economy. Just like we saw in the 70's with Bill Gates and Steve Jobs, a down economy is the perfect time to reimagine what is possible. This workshop will focus on the men and women who realize that these are the best of times for those willing to combine passion, hard work, and turn risk into opportunity. We are also going to explore the world of the investors who are funding these dreamers and visionaries. If you want to take a break from the usual suspects, this workshop is for you.
- "Using Prospect Research to Boost Giving"** (Neil House Parlor, 1st Floor)
Jen Filla | Aspire Research Group
Do you need to identify more prospects? Are your frontline fundraisers getting the information they need to cultivate and solicit donor prospects effectively? In this workshop you will learn: (1) where prospect research fits into the gift cycle, (2) how to use simple data mining techniques to identify prospects and inform strategy, and (3) how to build better profiles and communicate effectively with frontline fundraisers.
- 2:30-2:45 Break (Ante Room, 1st Floor)
- 2:45-4:00 Concurrent Workshops continue
- 4:00-4:30 Target Analytics / Blackbaud Vendor Demo (Neil House Parlor, 1st Floor)
- 4:30-5:00 Roundtable Discussions (High Street Grill, 1st Floor)
"Chat it up! ANYTHING You Want To Know & Were Afraid To Ask About Research"
Bobbi O'Malley | Baldwin-Wallace College
- "Focusing on Corporate and Foundation Information"**
Matthew Roberts | OhioHealth
- "How to Do More, Get More and Be More in your Prospect Research Role"**
Tricia Ambler | WealthEngine
"Major Gift Capacity Formulas"

Michael Quevli | Target Analytics, a Blackbaud Company

“Proactive Research and Prospect Management”

Craig Kahn | University of Cincinnati Foundation

"Prospect Research - Pieces of the Puzzle"

Alex Quinn | iWave

"Using Banner Advancement for Prospect Management."

Brett Scott | Ohio Northern University

5:00-7:00 Anniversary Happy Hour at The Thurber Bar (The Thurber Bar, 1st Floor)

FRIDAY MAY 4

8:00-8:30 Registration (Westin Lobby) & Breakfast (Seneca Room, 1st Floor)

8:30-8:45 Welcome & Announcements (Seneca Room, 1st Floor)

8:45-11:15 **"Taking Charge of Change at Work and in Life"** (Seneca Room, 1st Floor)

Keynote by Kathy Cleveland Bull | N-Compass Consulting

11:30-12:45 25th Anniversary Awards Luncheon (Thurber's Conference Suite, 2nd Floor)
Featuring Michael Quevli, APRA President

12:45-1:15 iWave Vendor Demo (Neil House Parlor, 1st Floor)

1:30-2:30 Educational Session One (60 min, concurrent, choose one)

“Gleaning the Meaning of Screening” (Park Parlor, 1st Floor)

Michael Quevli | Target Analytics/Blackbaud

We have all either gone through some form of prospect screening or it is being planned in the not so distant future. This interactive session will cover all stages of going through a screening. Be prepared to ask questions and to participate in this session. We will build out the presentation based on interactive dialogue with the group. The final PowerPoint presentation will be distributed to the attendees following the conference.

“Building Effective Partnerships with Community Foundations” (Neil House Parlor, 1st Floor)

Dr. Lisa Courtice | The Columbus Foundation

This conference presentation will discuss how can we learn more about the common structure of large community foundations. Information will include

information about what information is researchable on community foundations (beyond the typical 990); what information on donor advised funds/community foundation giving is available; and what information do community foundations usually not disclose to the public. Additional information related to the accessibility of website information and how community foundations handle information requests will also be discussed.

2:45-3:45

Educational Session Two (60 min, concurrent, choose one)

“Prospect Management: Before, During and After Your Campaign” (Neil House Parlor, 1st Floor)

Tricia Ambler | WealthEngine

Today’s researcher is asked to measure not only their own successes and research related metrics but also to track gift officer metrics and also campaign related metrics. Proposals and metrics and numbers of visits and progress towards goal! We will cover some of the steps and key metrics that can be captured within your prospect management system to enable your organization to better manage processes, reporting and communication between all departments within the fundraising team. Tricia will teach the key steps to make your system more donor-focused and transparent, to better capture metrics and align goals across the development and research offices and develop buy-in across all roles.

“Getting Strategic with Prospect Research” (Park Parlor, 1st Floor)

Jen Filla | Aspire Research Group

Have you ever felt that as a prospect researcher you could add so much to your organization’s development planning, but weren’t asked? Join us for a discussion on tactics any researcher can use to become one of the people asking the important questions at your organization - the questions that prospect research can answer so well. Half the session is content and half is a facilitated discussion of your successes and challenges related to getting strategic with prospect research.

3:45 Adjourn