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May 2 & 3, 2013

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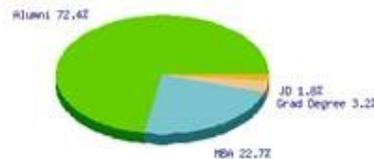
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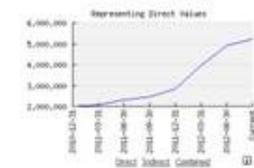
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THURSDAY MAY 2

- 12:30 REGISTRATION
- 1:00 - 2:30 **ANALYTICS: FROM A TO Z— DISTRIBUTION**
ALEXANDER OFTELIE | DIRECTOR PHILANTHROPIC ADVANCEMENT, HAZELDEN
This half-day workshop will present a comprehensive review of the most prominent analytics concepts in fundraising. The session will cover everything from performance metrics, campaign forecasting, engagement scores, predictive modeling, as well as fundamental concepts to take an analytical perspective to your program. A background in statistics is not necessary to enjoy and find relevant techniques in this workshop: a curious mind is all that is required.
- 2:30 - 2:45 BREAK
- 2:45 - 4:00 ANALYTICS: FROM A TO Z-DISTRIBUTION CONT.
- 4:00 - 4:30 TARGET ANALYTICS / BLACKBAUD VENDOR DEMO
- 4:30 - 6:30 HAPPY HOUR AT THE BOULEVARD BAR
Relax outside on the gated patio or inside the Tuscany Room.

FRIDAY MAY 3

- 8:00 REGISTRATION & BREAKFAST
- 8:15 - 9:00 BREAKFAST ROUNDTABLES (CHOOSE ONE)
CREATING A PROSPECTING PLAN | LISA HORNICK, WRIGHT STATE UNIVERSITY
EXCEL TIPS & TRICKS | ROB BOLEY, WRIGHT STATE UNIVERSITY
KEYS TO CORPORATE RESEARCH | JIM MCINTYRE, THE OHIO STATE UNIVERSITY
CONNECTIONS OUTSIDE THE FOUNDATION OFFICE | REGINA JOHNSON, THE OHIO STATE UNIVERSITY
SOCIAL MEDIA & PROSPECT RESEARCH | DAN BARTHOLOW, THE OHIO STATE UNIVERSITY
SUMMER SCHOOL FOR PLANNED GIVING | LAWRENCE HENZE, TARGET ANALYTICS
- 9:00 - 11:30 BRINGING ON THE FUTURE
JEN FILLA | ASPIRE RESEARCH GROUP & HELEN BROWN | HELEN BROWN GROUP
This year's keynote address will focus on the future of prospect research. Exciting advances in tools and techniques are changing the way we practice prospect research, and they can be incorporated in every size shop. Join Jen Filla and Helen Brown for a discussion about keeping up with new trends and applying them in your office, whether you work in a research department of many or are a solo professional. Learn why Jen and Helen wrote the book, *Prospect Research for Fundraisers*, and how you can use prospect research to make an impact and demonstrate leadership in your daily work.
- 11:30 - 1:00 LUNCH
- 1:00 - 1:15 BREAK



FRIDAY MAY 3 CONT.

1:15 - 2:15 EDUCATIONAL SESSIONS A (CHOOSE ONE)

DONOR RELATIONSHIP MANAGEMENT FOR THE SOLO RESEARCHER

JEN FILLA | ASPIRE RESEARCH GROUP

As a solo researcher, you need to be especially adept at scaling the principles of relationship management to fit your organization's size, culture and goals. It means knowing the details - ratings, fields, reports, meetings - the reasons behind them, and how to persuade others. This highly interactive session covers what goes into a relationship management system, a method for crafting and tweaking your own system, and tips on communicating to keep your system running smoothly.

EXPLORING THE TOP OF THE GIFT PYRAMID: PRINCIPAL GIVING PROSPECT ATTRIBUTES

LAWRENCE HENZE | TARGET ANALYTICS

We know that top-of-the-pyramid prospects have access to assets and/or disposable income, but they also share other interesting characteristics. Furthermore, do not ignore planned giving prospects as principal gift donors - their characteristics are different, but their potential giving impact is significant.

2:30 - 3:30 EDUCATIONAL SESSIONS B (CHOOSE ONE)

MEASURING UP: HOW AUDITING AND METRICS WILL HELP YOU SUCCEED

HELEN BROWN | HELEN BROWN GROUP

Whether you're working in a one-person or 12-person research shop, prospect research has a profound impact on your organization's fundraising totals. Proving that to your supervisor and to others is becoming increasingly important and expected. How can you be ready for their questions? What should you be measuring? Would an audit help your department be more effective? In this session, Helen will lead a discussion on audits and key metrics to use to help you measure up.

STOCK –WHAT IT MEANS ONCE THE RESEARCHER DISCOVERS IT

NANCY KOERNER | THE OHIO STATE UNIVERSITY FOUNDATION

ROBERT HAYS | MERRILL LYNCH

For a prospect researcher, stock holdings frequently emerge as an indication of affluence. This session will discuss the various types of stocks, gift potential, and strategies for researching and for using to benefit your organization.

3:45 ADJOURN

ABOUT OPRN

Ohio Prospect Research Network (OPRN) 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 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 is a training and networking organization serving prospect researchers and other fundraising professionals in non-profit organizations throughout Ohio. OPRN is the Ohio chapter of the international organization Association of Professional Researchers for Advancement (APRA).

OPRN was founded in 1987 to:

- Facilitate education in the field of advancement research,
- Act as a central source of information about advancement research,
- Encourage professional development among its members,
- Promote networking and advancement of cooperative relationships,
- Establish common benchmarking statistics,
- Advance the profession of advancement research within the field of fundraising.



MEET THE SPEAKERS

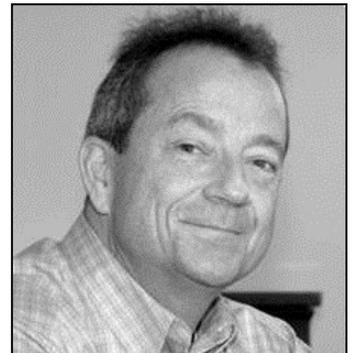


Helen is the president of **The Helen Brown Group LLC**, the largest global prospect research consulting firm. She is also the president of ShareTraining, which offers web-based and in-person training to fundraising professionals. Helen is the co-author (with Jennifer Filla) of *Prospect Research for Fundraisers*; the essential handbook (Wiley, 2013). She is a past board member of the Association of Professional Researchers for Advancement (APRA) and is currently the chair of its Chapter Relations Committee. She is a past president of the New England Development Research Association (NEDRA). Helen is a board member of Factory, a prospect research consulting company in Bristol, England, and is Special Advisor on Fundraising to the board of the North American Foundation for the University of Manchester. Helen received the NEDRA Ann Castle Award for service to the prospect research community in 2006. The Helen Brown Group is based in Watertown, MA.



Jennifer Filla [pronounced “FILL-uh”] is president and founder of **Aspire Research Group**. She combines her research and front-line fundraising experience to assist organizations across the country that are concerned about finding the right prospects, worried about what size gift to ask for, or struggling to meet major gift goals. Jen is co-author of *Prospect Researcher for Fundraisers: The Essential Handbook*. She received a B.S. from Neumann University and is a member of the Association for Professional Researchers for Advancement (APRA) and the Association for Fundraising Professionals (AFP). She is a former trustee of Habitat for Humanity of Delaware County and The Center Foundation.

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.



Alex Oftelie is the **Director of Philanthropic Advancement at Hazelden**. Alex specializes in predictive modeling, analytics training, campaign forecasting, prospect management strategy, and analytics implementation. Prior to joining Hazelden, Alex worked as an analytics consultant at Bentz Whaley Flessner, and as an economist for the State of Minnesota. He holds a Bachelor of Arts from St. Olaf College and a Masters of Public Affairs from the University of Minnesota.



MEET THE SPEAKERS

Not pictured:

Nancy Koerner joined the **Office of Gift Planning at The Ohio State University in January 2012**. She supports the frontline development staff assigned to the Wexner Medical Center and the seven Health Science colleges. Her role is to provide gift planning expertise and implication of various gift vehicles, to assist in successful solicitation and strategies for prospects, to advise development staff of state and federal legislation that affects charitable gifts, and to collaborate with marketing colleagues on gift planning communication and outreach.

Nancy has focused her career in the nonprofit sector for more than 12 years. Previously she served as the director of planned giving at the University of Toledo and University of Toledo Medical Center and as associate director of planned giving at The Columbus Foundation. Prior to that, she was in private practice.

Nancy is a graduate of Capital University Law School and holds a BS from Ball State University. She worked for more than six years as a social worker prior to attending law school. Nancy is a member of the Ohio State Bar Association and Partnership for Philanthropic Planning. She serves on the planning committee for the Wealth Transfer Conference, and has been active in the Worthington Estate Planning Council, Central Ohio Planned Giving Council, Toledo Area Partnership for Phil-

Robert “Bob” Hays is a dedicated financial service professional with over 20 years of experience assisting clients with their investment, retirement and trust and estate planning needs. In addition to focusing on the needs of high net worth individuals, Bob works with family businesses and small to medium sized non-profit organizations providing both investment management and banking solutions.

Bob joined Merrill Lynch in 2010 as a Senior Financial Advisor and works as part of a three person team with his business partner Todd Altenbach and Senior Client Associate, Katrina Cunningham. Previously, Bob was a Wealth Advisor at Morgan Stanley and a Trust Officer with Fifth Third Bank working with individuals and foundations and endowments. Bob graduated from the Moritz College of Law and completed his undergraduate degree in Political Science and Marketing from The Ohio State University.

Bob is active in the community. He serves on The Planned Giving Committee of The Ohio State University Foundation. Previously, he served as President, Treasurer and as a Board Member of The Central Ohio Planned Giving Council. He is currently a member of The Worthington Estate Planning Council and Upper Arlington Rotary Club. Bob resides in Bexley with Jessica and their son, Grant.

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Kelli Lynn Clawson - OPRN President

Kelli recently accepted the role of Fundraising Analyst for The Wexner Medical Center at The Ohio State University in Columbus, OH. Kelli leads the data analysis, prospect identification, and research for the Medical Center's Grateful Patient Program. Prior to joining her team at OSU, Ms. Clawson was a research analyst at Ohio University in Athens, OH where she collaborated with various Development Officers, identifying and researching prospects while also strategizing the best possible cultivation plan. Before Ohio University, she spent five years with the OhioHealth Foundation in Columbus, OH, gaining experience in various positions—primarily as the Gift Planning and Research Coordinator. Ms. Clawson joined the board of OPRN in the fall of 2007 and has served in multiple roles, accepting the responsibility as acting OPRN President in January 2012. Ms. Clawson has a bachelor's degree in Theater Arts from the University of Pittsburgh at Johnstown, PA. She resides in Gahanna, OH with her husband, Craig, and two boys, Aidan and Liam.



Regina K. Johnson - OPRN Vice President, Conference Planning

Regina is a Prospect Research Analyst for The Ohio State University Colleges of Nursing, Pharmacy, Optometry, Public Health, Dentistry and Veterinary Medicine. Her 15 years of experience in institutional advancement has been honed at The Ohio State University, Ohio Historical Society, National Urban League (Columbus OH affiliate) and as an independent campaign consultant. Regina's passion for service leadership led her to co-found The CHANGE Agency and serve as Trustee for organizations such as Create Columbus Commission, Columbus Metropolitan Library Friends of the Library, Urban Cultural Arts Foundation, International Artists & Merchants and OSU Ray Miller Institute for Change & Leadership Alumni Association. In these capacities, Regina launched many landmark initiatives and events throughout central Ohio. Regina is a graduate of The Ohio State University and resides with her family and their beloved rescue beagle in Columbus.

Stephanie Jewell – OPRN Vice President, Board Development

Since 2009, Stephanie has served as the Fundraising Analyst at The Ohio State University, providing analytics, data mining, screening support, and random data, database, and Microsoft Office insight in support of fundraising and advancement efforts. She previously served as Development Research Analyst and Annual Giving Assistant at Ohio Wesleyan University. Stephanie earned a Bachelor of Science in Speech in Marketing Communications from Emerson College.



Donna Wolf - OPRN Secretary

Donna is currently the Associate Director of Prospect Research & Reporting at The Ohio State University Foundation. In this position she coordinates a team of 10 research analysts focusing on research, strategy and identification of prospects for the university's current \$2.5 billion campaign. Previously she held the position of Prospect Research Analyst at Ohio State from 1998- 2009. Donna earned a Bachelor of Arts degree in History at Lynchburg College and received a Master of Arts from The Ohio State University in 1997. She joined the board of OPRN in 2007 and has served as Secretary since 2009. At home she and her husband spend time renovating their Victorian house and enjoying the company of several beagles either adopted or fostered from a local rescue group.



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Jodi Pinney - OPRN Treasurer

Jodi is an Assistant Director of Prospect Research & Reporting at The Ohio State University. In this role, she oversees the prospect research functions for the James Cancer Hospital, Wexner Medical Center, and the Colleges of Medicine and Health Sciences. She has worked in the field of Advancement at Ohio State since 1998. Previous roles have included prospect management and briefing coordination for the Foundation. Jodi holds a BA in Psychology from The Ohio State University.



Rob Boley – OPRN Conference Sponsorship Coordinator

Rob is the Associate Director of Advancement Research & Prospect Management at Wright State University, providing research, reports, intelligence and pretty data to aid the University's fundraising efforts. He previously served as Associate Director for Advancement at the University's Boonshoft School of Medicine, where he worked in annual giving, event planning, and alumni relations. He has also worked as a freelance journalist for Wild Earth magazine and Dayton, Ohio's The City Paper. He has previously served on the boards of Beaver Creek Wetlands Association and Highlands Nature Sanctuary. He also writes fiction and poetry. His short fiction has been published in A cappella Zoo, Pseudopod, and Necrotic Tissue, and is forthcoming in Clackamas Literary Review. For more information, visit his website at www.robboley.com.



Brett Scott – OPRN NW Ohio Regional Conference Coordinator

Brett is the Director of Research and Prospect Management at Ohio Northern University. Previously, Brett has 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. Brett holds a Bachelor of Arts in Psychology from the Ohio State University, a Master of Arts in University Administration and Student Development from the University of Denver, and is currently pursuing a Doctorate in Higher Education Administration at Bowling Green State University. He volunteers as a Chapter Advisor, Alumni Board Member, and Housing Corporation Member for the Sigma Alpha Epsilon fraternity.

Brett resides in Ada, OH with his wife and daughter.

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<http://www.surveymonkey.com/s/ZNWKPNQ>

Please help us improve the annual spring conference by completing our online evaluation survey.





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Randy Burkett – OPRN Marketing and Recruitment Coordinator

Randy served as the Director of Research and Prospect Management for the Children’s Medical Center for 5 years. In this role, he oversaw all aspects of prospect research, moves management, benchmarking, performance tracking, data analytics and the Raiser’s Edge donor database. He also played instrumental roles in campaign management as well as systems integration and fundraising operations. He serves on The OPRN Board of Trustees as the Marketing and Recruitment coordinator, and is a member of the Association of Professional Researchers for Advancement. Randy has worked in a number of research and intelligence positions for over 20 years and enjoys utilizing his research and organizational skills for philanthropic efforts. He was the 2013 recipient of the APRA Scholarship awarded at the Conference in Minneapolis, MN. Randy has a Bachelors from the University of Dayton and a Masters from Miami University – Oxford.

Rob Birk

Since 2007, Rob Birk has been the Associate Director of Prospect Research and Management at Nationwide Children’s Hospital. Prior to that, Rob worked in various capacities at several public libraries in Central and Eastern Ohio.

Rob holds a Bachelor of Arts in History from Capital University, a Master of Arts in History from Youngstown State University and a Master of Library and Information Science from Kent State University. He lives in Blacklick, OH with his wife and two canine “Daughters.”



Patty Keller

Patty has been Director of Prospect Research at the University of Toledo since 2010. She began her development career at the University of Toledo while completing her master’s thesis on donor stewardship and recognition practices for UT. Following graduation, she worked as a prospect research analyst in Georgia for a few years, and returned to her alma mater.

Patty is married to Tim, who also has his Master’s in Education from UT. The couple has four “children”: two lovely daughters who have both completed college and two cats that are totally spoiled. Patty enjoys participating in her local book club and is active in music ministry at her church.



Not pictured:

Anne Soulé — OPRN Membership Coordinator

Anne Soulé has spent more than 13 years supporting nonprofit organizations with prospect research and prospect management. Her experience includes support for a \$350 million campaign at a large private university, the establishment of a brand new research office at a small liberal arts college, and leading a new research team at a world class performing arts organization. Building on several years of consulting work for a variety of nonprofits nationally, Anne recently took the leap and launched a full-time consulting practice. She has a BA in literature and music from Case Western Reserve University and has served as a board member of OPRN since 2005.

Craig Kahn — OPRN Newsletter Editor



OPRN AWARD & SCHOLARSHIP

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 Recipients:

2006 – Bev Robertson

2007 – Anne Mayer

2008 – Eileen Fitzgerald

2009 – Amy Dragga, Summa Health Foundation

2010 – David Smittle, Ohio Northern University

2011 – Tasha Thomas, Philanthropic Research Resources LLC

2012—Bobbi O'Malley, Baldwin Wallace University and OPRN Past President



Left to right: Kelli Clawson with 2012 Service Award Recipient Bobbi O'Malley.

EILEEN FITZGERALD OPRN CONFERENCE SCHOLARSHIP

OPRN will award up to two scholarships each year, each for up to \$200, reimbursing, in this order, membership/conference registration, transportation, and lodging expenses.

- New Researcher Scholarship (*less than 5 years research experience*)
- Veteran Researcher Scholarship (*current OPRN members only with 5+ years research experience*)

About the Conference Scholarship

In 2008, the OPRN Conference Scholarship was named in honor of Eileen Fitzgerald, a long-time board member of OPRN who served as the organization's president, conference chair, and membership chair, as well as many other roles. Eileen is an exemplary member of our profession.

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 skills within the Ohio region 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 base.

CONGRATULATIONS TO OUR 2013 RECIPIENTS:

NEW RESEARCHER: SHELLY SCHNEIDER | CLEVELAND FOODBANK

VETERAN RESEARCHER: BARBARA BILLINGS | BALDWIN WALLACE UNIVERSITY

Past Recipients

- 2008 – Randy Burkett, The Children's Medical Center of Dayton; Patricia Keller, University of Toledo
- 2009 – Dayna Garret, Samaritan Health Foundation; Sarah Metzger, Owens Community College Foundation; Deborah Phillips, The City Mission
- 2010 – Margaret Donohue, Miami University; Jessica Hagerty, Playhouse Square; Matt Morneault, Miami University
- 2011 – John Hagerty, The Free Clinic of Greater Cleveland; Lisa Medeiros, Miami Valley Hospital Foundation
- 2012—Joe Hecht, Case Western Reserve University



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Jen Filla

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The Ohio State University Wexner Medical Center

University of Toledo

Wright State University

SPECIAL THANKS TO OUR CONFERENCE PLANNING TEAM

Regina K. Johnson, OPRN Vice President for Conference Planning

Rob Boley, OPRN Conference Sponsorship Coordinator

Kelli Clawson, OPRN President

Jodi Pinney, OPRN Treasurer

Patty Keller, OPRN Conference Planning Team member

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— Kimberly Ordunio,
Director of Prospect Research, University Relations,
Loyola Marymount University

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