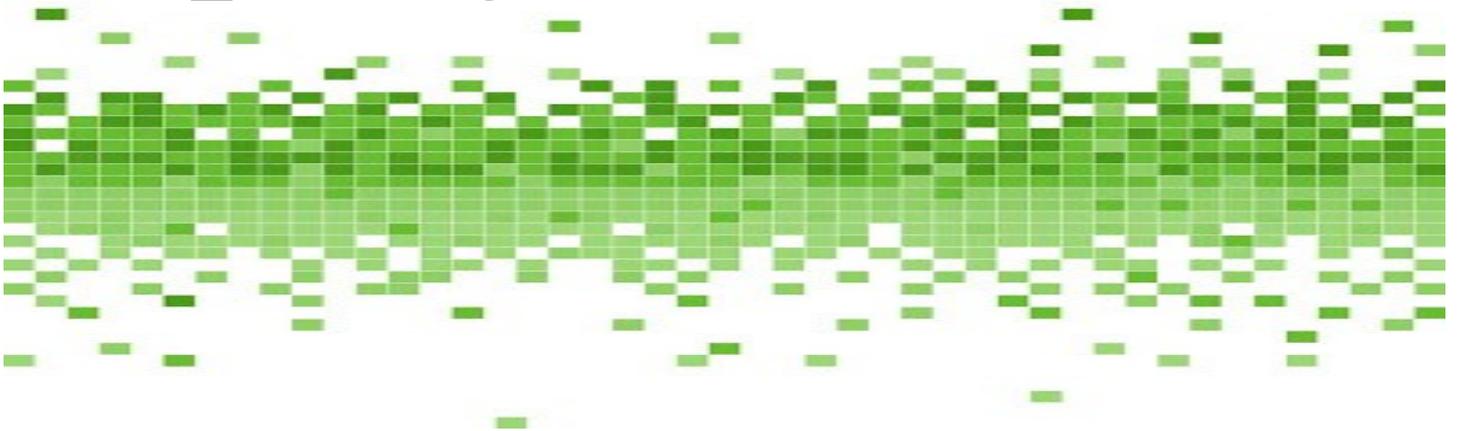




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THURSDAY MAY 1

12:30 REGISTRATION

1:00 - 2:30 **RAISING THE PROFILE OF THE RESEARCH OFFICE**
BOND LAMMEY | BENTZ WHALEY FLESSNER

If you're in prospect development, you've probably attended a decent amount of conference sessions that discuss how to best partner with frontline gift officers to do your work effectively and efficiently. But what about your relationship with your senior leadership team? Can you position the work you do with frontline gift officers to influence change within your organization? Are you able to synthesize your experiences working with staff to articulate patterns and develop recommendations, and are your recommendations heard? This workshop will focus on best practices in building a relationship with a senior management team, and will provide recommendations for making the most of the unique positioning of prospect development teams within organizations to improve fundraising efficacy at a micro and macro scale. We will provide some real-life examples of how this has worked for us, as well as a group exercise that will help you focus on delivering outcomes first and process second.

2:30 - 2:45 BREAK

2:45 - 4:00 **RAISING THE PROFILE OF THE RESEARCH OFFICE 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.

Group dinner & entertainment options will be available in the evening.

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arenadistrict.com

The Arena District is the premier entertainment district in downtown Columbus.

experiencecolumbus.com

Guide to the city that includes hotels, shopping, restaurants, and the arts.

FRIDAY MAY 2

8:00 REGISTRATION & BREAKFAST

8:15 - 9:15 BREAKFAST ROUNDTABLES (CHOOSE ONE)

Join one of the discussions over coffee and breakfast. The roundtables are the perfect time to share best practices, network and learn from your colleagues.

9:30 - 11:30 **TO BOLDLY GO...**

KAREN ISBLE | APRA PRESIDENT; UNIVERSITY OF MICHIGAN

Prospect research has changed. Prospect *researchers* have changed, as traditional research skills now share space with skills in relationship management and analytics. What does this mean for the field? How do we continue to refine and re-define our roles to have the greatest impact on our organizations? Come prepared to share your thoughts and ideas!



FRIDAY MAY 2 CONT.

11:30 - 1:00 AWARDS LUNCHEON

1:00 - 1:15 BREAK

1:15 - 2:30 EDUCATIONAL SESSIONS A (CHOOSE ONE)

PROSPECT MANAGEMENT

CHRIS BRAKENBURY | THE OHIO STATE UNIVERSITY

In early 2013, The Ohio State University embarked on a journey to completely rethink our prospect management program, turning it from a loosely-applied set of standards focused on tracking to a solid framework providing management guidance and a focus on increased fundraising and collaboration. This session will review the rebuilding process, outcomes, and the future of prospect development at Ohio State.

PROSPECTING FOR HIDDEN TREASURE: FINDING GOLD IN YOUR PLANNED GIFT PROSPECT POOL

KATHERINE SWANK | TARGET ANALYTICS, A BLACKBAUD COMPANY

Surveys say that the average planned gift is 200 times larger than a person's average annual gift and statistics indicate that most major-sized gifts are made through end-of-life instruments rather than through current-giving methods. Yet, the majority of planned gift donors are often overlooked by development offices simply because they are masquerading as annual fund donors. However, based on their gift potential, a well-structured proactive investigation for planned gift prospects should be part of your prospecting strategy. This session begins with a detailed discussion on understanding the most common planned giving donor profiles and then continues with step-by-step actions to help you identify the best prospects at your organization. Join us for this enlightening journey into the world of the hidden major donor!

2:30 - 2:45 BREAK

2:45 - 4:00 EDUCATIONAL SESSIONS B (CHOOSE ONE)

IMPLEMENTING ANALYTICS FROM A RESEARCH PROSPECTIVE

BOND LAMMEY | BENTZ WHALEY FLESSNER

Regardless of whether your shop develops analytics in-house or outsources, research teams are the primary consumers of this data. We are often asked to overlay predictive modeling scores with wealth screening data and develop thoughtful strategies around verification of results and assignment of prospects into the appropriate portfolios. How do you make sense of all of this data? The workshop will focus on strategies and best practices for implementing a predictive modeling project through thoughtful and comprehensive segmentation. Participants will leave the workshop with a clear understanding of key components of an acquisition project including how to define the project, preparing for success, obtaining buy-in from front-line staff and leadership, and establishing accountability.

NEW RESEARCHERS PANEL

**PANELISTS: ROB BIRK | NATIONWIDE CHILDREN'S HOSPITAL; CRAIG KAHN | UNIVERSITY OF CINCINNATI;
BRETT SCOTT | OHIO NORTHERN UNIVERSITY; SARAH SIGLER | KENT STATE UNIVERSITY**

MODERATOR: REGINA K. JOHNSON | THE OHIO STATE UNIVERSITY

New researchers are encouraged to participate in this panel discussion focused on four key topics: Do's and Don'ts of a Research Profile, General Financial Evaluation, General Prospecting, and Partnering with Frontline Fundraisers.

4:00 ADJOURN

MEET THE SPEAKERS



KAREN ISBLE | SENIOR EXECUTIVE DIRECTOR, CAMPAIGN, DEVELOPMENT SERVICES & STRATEGIC SOLUTIONS AT UNIVERSITY OF MICHIGAN

Karen Isble oversees the prospect development and analytics, reporting, gifts and records administration, data management and web/application developer teams for the University of Michigan's 500-member development community. She serves on the VP for Development's senior management team, the campaign leadership team, and has served in multiple roles over the past five years on the implementation of the University's enterprise fundraising software. During her 20-year career with nonprofits, Karen's roles have included seven years as Administrative Director of the Chamber Music Society of Detroit and four years with the Chicago Symphony Orchestra. Karen currently serves as president of APRA International, having served on the board since 2010. She has presented at conferences for APRA, CASE V, APRA Illinois and AFP-West Michigan. Karen holds a master's degree from the University of Michigan and a bachelor's degree from Harvard University.



BOND T. LAMMEY | SENIOR ASSOCIATE, BENTZ WHALEY FLESSNER

Bond is a senior associate at Bentz Whaley Flessner specializing in prospect development. Bond's experience ranges from higher education to academic medicine, large and small social service agencies, and national and local member/cause organizations. She is accomplished in principal gift prospecting, working with non-natural constituencies, daily wealth screenings, and comprehensive prospect development strategies.

Prior to joining BWF, Bond led prospect research efforts at the University of Chicago, where she oversaw the central prospect research team and developed integrated strategies with prospect management, analytics, corporate and foundation relations research, and non-central research teams at the medical center and Booth School of Business. While Bond was at the University of Chicago, the prospect research team launched several ambitious initiatives, including a proactive prospect identification process, a single-source rating system, and

expanding international prospecting efforts. Bond received her BA in Sociology and her Masters of Management in Nonprofit Administration, both from North Park University in Chicago, Illinois. She is a former treasurer of APRA Illinois and was volunteer co-chair for the 26th Annual APRA International Conference; she has presented at CASE, SunGard, and APRA International conferences. Bond is on the board of Chicago Dance Crash and was previously vice president of the AIDS Foundation of Chicago Junior Board. She has been a charity runner on behalf of AIDS Foundation of Chicago in the Chicago Marathon (2009 and 2012) and the Marine Corps Marathon (2012).

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<https://www.surveymonkey.com/s/Y59G7B5>

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



MEET THE SPEAKERS



KATHERINE SWANK | SR. CONSULTANT, TARGET ANALYTICS, A BLACKBAUD COMPANY
With more than 20 years of legal and nonprofit management experience, Katherine has raised approximately \$215 million for national healthcare and public broadcasting organizations, as well as an independent law school. Prior to joining Target Analytics in May 2007, she was the national director of gift planning at the National Multiple Sclerosis Society, where she provided fundraising consulting services to the Society's chapter leadership and development staff for six years. Katherine is an affiliate faculty member of Regis University's master of nonprofit management degree program in Denver, teaching classroom and online courses on wealth and philanthropy. She holds an independent studies degree from the University of Northern Colorado and a law degree from the Drake University School of Law in Des Moines, Iowa.



CHRIS BRAKENBURY | DIRECTOR OF PROSPECT DEVELOPMENT, THE OHIO STATE UNIVERSITY
Chris is the Director of Prospect Development at The Ohio State University. This role covers all manner of sins, but seems to mostly involve begging gift officers to enter their contact reports. An Ohio State alumnus with a degree in horticulture and crop science, Chris joined the university as an employee in the fall of 2002 while pursuing additional coursework in computer science. In 2009 he accepted a position with University Development as the Manager of Prospect Tracking, Ohio State's first position dedicated solely to prospect data. In 2013, Chris led a task force that completely re-envisioned a prospect management program for Ohio State with a focus on policy and real-world application. When not appealing to fundraisers' sense of institutional responsibility he devotes himself to all things prospect development, including managing data for thousands of prospects and acting as an intermediary and interpreter between leadership, front-line fundraisers, policy, and a massive database. Customer service, friendliness, and unabashed geekiness are his calling cards.

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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.

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

EILEEN FITZGERALD OPRN CONFERENCE SCHOLARSHIP

2014 Scholarship Awardees: Abigail Kornowski (New) and Phyllis Burkett-Caraway (Veteran)

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*)

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.

MEET YOUR OPRN BOARD OF TRUSTEES



Stephanie Jewell, OPRN President

Since 2009, Stephanie has served as the Fundraising Analyst at The Ohio State University. In this position, she provides analytics, data mining, and screenings 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.



Kelli Lynn Clawson, OPRN Vice President of Conference Planning & Past President

Kelli has been a Fundraising Analyst for The Wexner Medical Center at The Ohio State University in Columbus, OH since 2012. She 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 gaining experience in various positions – primarily as the Gift Planning and Research Coordinator. Kelli joined the board of OPRN in the fall of 2007 and has served in multiple roles, accepting the responsibility of Vice President of Conference

Planning in January 2014. Ms. Clawson has a Bachelor of Arts in Theatre 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 of Board Development

As Prospect Research Analyst for The Ohio State University, Regina identifies major gift prospects for the Colleges of Dentistry, Nursing, Optometry, Pharmacy, Public Health and Veterinary Medicine. A graduate of The Ohio State University, she has over 15 years of experience in annual and major gift fundraising with Ohio State, Ohio Historical Society, National Urban League (Columbus OH affiliate) and the Urban Cultural Arts Foundation. Regina is a lifelong learner with a passion for service leadership, noted for her impact with Create Columbus Commission, Columbus Metropolitan Library Friends of the Library, Greater Linden Development Corporation and Ohio State's Ray Miller Institute for Change & Leadership Alumni Association.



Patty Keller, OPRN Secretary

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.



Jodi Pinney, OPRN Treasurer

Jodi is 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.

MEET YOUR OPRN BOARD OF TRUSTEES



Rob Birk, OPRN Communications Coordinator

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."



Rob Boley, OPRN Website Coordinator & Vendor Relations Coordinator

By day, Rob E. Boley is the Associate Director of Advancement Research & Prospect Management at Wright State University. The rest of the time, he writes fiction and hangs out with his daughter. He's the author of THAT RISEN SNOW: A SCARY TALE OF SNOW WHITE & ZOMBIES, the first in a series of dark fantasy novels called THE SCARY TALES. His stories have won Best in Show in the Sinclair Community College Creative Writing Contest (2013) and the Dayton Daily News/Antioch Writers' Workshop Short Story Contest (2012). He also writes about his parenting adventures on his website, www.robboley.com.

Craig Kahn, OPRN Newsletter Coordinator (not pictured)

Craig is Senior Director of Research Services for the University of Cincinnati Foundation (UCF). In his role he manages a staff of four and handles all prospect related issues including assignments and portfolio management. He joined UCF in 1994 and was part of the successful \$300 million Campaign for UC and the \$1 billion Proudly Cincinnati Campaign. He began his career as a Research Assistant at Miami University in 1988. He has been a member of the Association of Professional Researchers for Advancement (APRA) and the Ohio Prospect Research Network (OPRN) since 1989. In addition, he has served on the OPRN Board of Directors since 1993. He is a graduate of Miami University with a BA in Political Science.



Brett Scott, OPRN Membership Engagement Coordinator

Brett is Director of Research and Prospect Management at Ohio Northern University. Previously, he 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 BA in Psychology from the Ohio State University, a MA in University Administration and Student Development from University of Denver, and is currently pursuing a Doctorate in Leadership at Creighton University. He volunteers as 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.



Donna Wolf, OPRN Membership Services Coordinator

Donna is currently the Associate Director of Prospect Research for Advancement at The Ohio State University. 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 Ohio Prospect Research Network in 2007 and served as Secretary from 2009-2013 and now currently acts as the Membership Services Coordinator. 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.

WELCOME NEW TRUSTEES

We're thrilled to announce our new trustees. Welcome Barbara, Monique, Sarah—and Sarah!

Each of these research professionals are a fantastic addition to the board. Please take a moment to welcome and congratulate them.



Barbara Waitkus Billings, OPRN Trustee

Barbara is currently the Director of Prospect Research at Baldwin Wallace University in Berea, Ohio. She holds a Master's in Library Science from Kent State University and a Bachelor of Arts in History from Cleveland State University. Barbara has more than twenty years of experience as a professional researcher and writer within the non-profit industry. This includes research and fundraising with organizations such as the Western Reserve Historical Society, The Cleveland Foodbank, and University Hospitals of Cleveland. In addition to serving on the board for OPRN, she is an active volunteer with The Beck Center for the Arts; helping plan special events focused on community outreach and art advocacy. Barbara also serves on the Advancement Committee of Magnificat High School in Rocky River, Ohio.



Monique Rogers-Dogbey, OPRN Trustee

Monique is currently a Research Analyst in the Division of University Advancement at Ohio University (Ohio U). Previously, she worked in the Ohio U. Alumni Association's Marketing and Communications department. She had also worked in several departments including the Drain-Jordan Academic Library, English Department, Academic Affairs, and The President's Office at West Virginia State University and West Virginia State Community & Technical College.

Monique serves on the boards of the Ohio Prospect Research Network and the West Virginia State University National Alumni Association. She is a member of Association of Professional Researchers for Advancement and Council for Advancement and Support of Education. Monique holds a Master of Arts in International Affairs, Bachelor of Arts in History, Regents Bachelor of Arts, and an Associate of Arts in General Studies. She resides in Athens, Ohio with her husband and two sons.



Sarah J. Sigler, OPRN Trustee

Sarah is the Senior Advancement Research Specialist at Kent State University. She has been part of the university's Division of Institutional Advancement for over five years. Previously, she served as a prospect researcher for the Ohio Presbyterian Retirement Services Foundation. She is a member of the Association of Professional Researchers for Advancement and Kent State University's Institute for Excellence. Sarah graduated with a Bachelor of Arts degree in political science from the University of Mount Union. She resides in North Canton, Ohio, with her husband, Mike, and son, Evan.



Sarah Starr Zechman, OPRN Trustee

Sarah is the Director of Prospect Management and Research at John Carroll University in Cleveland, Ohio. Previously, she served as the Prospect Research Manager at Kent State University. She started her career in prospect management and research in 2008 as a Research Specialist at Kent State. She previously held roles with the ACLU of Ohio and the Western Reserve Historical Society Library and Archives. Sarah earned a bachelor's degree in history from John Carroll University and a master's degree in Library and Information Science from Kent State University.



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Rob Birk, OPRN Trustee
Rob Boley, OPRN Conference Sponsorship Coordinator
Stephanie Jewell, OPRN President
Regina K. Johnson, OPRN Vice President for Board Development
Jodi Pinney, OPRN Treasurer
Brett Scott, OPRN Trustee
Donna Wolf, OPRN Trustee





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