



2016 Spring Conference
Crowne Plaza Downtown Columbus
May 5—May 6, 2016

presents



the **POWER** of
philanthropy

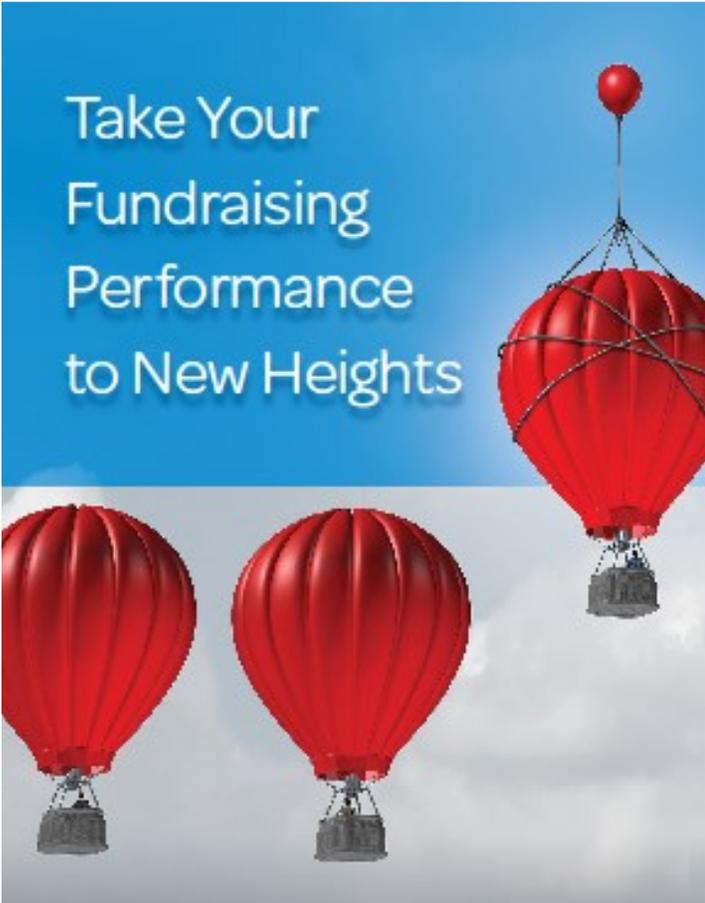
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ABOUT OPRN

Ohio Prospect Research Network (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

In 2007, the award was named after OPRN co-founder and long-time board member, Anne Mayer. This award acknowledges the work of those individuals who have provided exemplary service to the chapter and/or the field of prospect research.

Congratulations to our 2016 Awardee!

DEBORAH FREELS
Cincinnati Children's Hospital

EILEEN FITZGERALD CONFERENCE

SCHOLARSHIP

In 2008, the OPRN Conference Scholarship was named in honor of long-time board member, Eileen Fitzgerald. OPRN will award up to two scholarships each year for the annual OPRN conference or an APRA conference.

**Congratulations to our 2016
New Researcher Scholarship Awardees!**

SARAH RICHARDS
Dynamic Catholic

JESSICA QUITTENTON
John Carroll University



THURSDAY MAY 5

12:30 REGISTRATION

1:00–2:15 CONCURRENT EDUCATIONAL SESSIONS (CHOOSE ONE)

NEW RESEARCHER’S WORKSHOP & PANEL DISCUSSION

MODERATOR: JULIE DAVIS | DAYTON CHILDREN’S

PANELISTS: CRAIG KAHN | UNIVERSITY OF CINCINNATI

PATTY KELLER | UNIVERSITY OF TOLEDO

ROB BIRK | NATIONWIDE CHILDREN’S HOSPITAL

New to prospect research? In this session you will learn from our panel of veterans in the field of prospect development for help navigating the waters of profiles, ratings, analyzing assets and more.

PROSPECT RESEARCH CONSULTING

MODERATOR: KELLI LYNN CLAWSON | DENISON UNIVERSITY

PANELISTS: MARGE KING | INFO RICH GROUP, INC

NICK SOLLOG | THE SOLLOG GROUP

PATRICK O’TOOLE | PROSPIRA CONSULTING, LLC

Have you ever wanted to venture out on your own? Maybe just do a little moonlighting? If the answer is yes, come hear from our panel of consultants and learn the pros and cons of being your own boss.

2:15–2:30 BREAK

2:30–3:45 SPEAK UP! ADVOCATING FOR RESEARCH ACROSS ADVANCEMENT

REGINA ALHASSAN | THE OHIO STATE UNIVERSITY

BARBARA WAITKUS BILLINGS | BALDWIN-WALLACE UNIVERSITY

Many researchers agree that our fundraising colleagues do not understand what we do. As research professionals, it is up to us to change this and to advocate for our profession. But how?

How can we inform our colleagues of our work and shape their perception of our value as fellow fund raisers? What does advocacy look like in Prospect Development? What are others doing to be their own best advocate? How can we advocate for the profession as a whole? In this workshop, we’ll discuss common misconceptions about prospect research. And, we’ll explore practical tools you can use to demystify your work and clarify your value to the overall fundraising team.

3:45–4:00 BREAK

4:00–4:30 TARGET ANALYTICS / BLACKBAUD VENDOR DEMO

4:30 HAPPY HOUR AT THE BOULEVARD BAR

Unwind with colleagues outside on the patio.

****Optional: Group dinner & entertainment options will be available later in the evening.**

If you get separated and would like to join us, please reach out to one of the following:

Kelli Clawson’s cell: (614) 284-4181 | Stephanie Jewell Vaver’s cell: (614) 440-6563

explore!

Check out these sites for details about favorite local attractions.

- ⇒ experiencecolumbus.com
- ⇒ arenadistrict.com
- ⇒ northmarket.com
- ⇒ sciotomile.com
- ⇒ shortnorth.org

HELP US GROW

OPRN is a member-driven organization. *This means YOU!*
Please volunteer and share your ideas.

- How?**
- Post, tweet, or blog
 - Be a mentor or mentee
 - Present a webinar or workshop
 - Host a webinar at your shop
 - Organize a lunch & learn
 - Gather colleagues for happy hour
 - Chat with a board member



MEET OUR KEYNOTE SPEAKER



ASHUTOSH NANDESHWAR

The author of Tableau Data Visualization Cookbook and an award winning speaker, Ashutosh R. Nandeshwar is one of the few analytics professionals in the higher education industry who has developed analytical solutions for all stages of the student life cycle (from recruitment to giving). He enjoys speaking about the power of data, as well as ranting about data professionals who chase after "interesting" things. He received his PhD/MS from West Virginia University and his BEng from Nagpur University, all in industrial engineering. Currently, he is leading the data science and prospect development teams as the Assistant Vice President at the University of Southern California. You can follow him on Twitter @n_ashutosh and find his website at: <http://www.nandeshwar.info>.

FRIDAY MAY 6

REMINDER: CASUAL FRIDAY ATTIRE — JEANS WELCOME!

- 8:15 **REGISTRATION & BREAKFAST**
- 8:30–9:30 **BREAKFAST ROUNDTABLES**
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.
- 9:45–11:30 **KEYNOTE FROM ASHUTOSH NANDESHWAR**
Imagine your life hanging by just a couple of spoken words. Our speaker was transformed by such a few words. In this talk, you will learn about these experiences that shaped him and brought him here and how you too can benefit from these principles and make yourself successful.
- 11:30–1:00 **AWARDS LUNCHEON**
- 1:15–2:00 **WHY DO OUR CHARTS SUCK AND WHAT TO DO ABOUT THEM**
ASHUTOSH NANDESHWAR
- 2:00–2:15 **BREAK**
- 2:15–3:00 **WHY DO OUR CHARTS SUCK AND WHAT TO DO ABOUT THEM, CONTINUED**
- 3:15 **ADJOURN**

COMPLETE THE CONFERENCE EVALUATION SURVEY ONLINE:

<https://www.surveymonkey.com/r/LLNNMBL>

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





MEET THE SPEAKERS



MARGARET (MARGE) KING has extensive experience in the nonprofit sector and has been part of the executive management team for two internationally recognized nonprofit institutions. In addition to raising millions of dollars for her clients, she has broad experience raising capital support as well as developing and organizing nonprofit boards and advisory councils. She is a highly-skilled fundraiser and researcher. She founded InfoRich Group, Inc. in 2000 and she used research to help her clients obtain large gifts/grants, including a \$7,500,000 government grant.

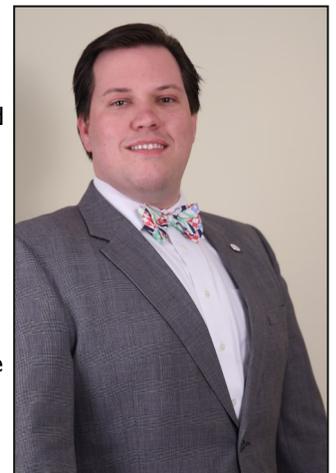
Marge is experienced in the areas of prospect research, board development, training, and fundraising. She speaks and writes about contemporary fundraising issues. She is the co-founder and co-editor of *Prospect Research Review*—the only publication that reviews and highlights the products prospect researchers use (www.prospectresearchreview.com). Her writings include: *Research: A Strategy*

For *Raising A Million Dollars*. She has served on several nonprofit boards and has evaluated and successfully written multi-million dollar grant proposals for Government Agencies, including the National Science Foundation and Centers for Medicare and Medicaid Services.

Marge is an experienced trainer and educator. A member of the adjunct faculty at Delaware County Community College and Eastern University, she teaches business and fundraising courses at graduate and undergraduate levels. She earned a BS from Cabrini College, a MBA from St. Joseph's University and completed a postgraduate certificate program at Harvard University, Kennedy School of Government. She is a member of numerous organizations including Association of Fundraising Professionals, Association of Professional Researchers for Advancement, and the Association of Independent Information Professionals. She is a member of the Association of Fundraising Professionals, Greater Philadelphia Chapter's board of directors and a past-president of the Association of Independent Information Professionals.

F. NICHOLAS SOLLOG III

Previous to joining the Episcopal Church Foundation, Nick Sollog was the Assistant Director of Annual Giving at the University of Richmond, and in 2009 Nick formed The Sollog Group to help charitable organizations meet their annual giving and prospect research needs. Prior to that, he served the University of Richmond as a Prospect Research Assistant where he worked with the Law School, Annual Giving, and Major Gifts on their research needs. He got his start in development as a phonathon caller for his alma mater Lynchburg College where he raised between \$10,000 and \$30,000 a semester for the Annual Fund. Based out of Richmond, VA Nick is involved in the local community both personally and professionally. He sits on the foundation board of the Math Science Innovation Center, is a member of Massey Cancer Center's Massey Alliance, and is an active parishioner of Grace & Holy Trinity Episcopal Church. Professionally, he is a member of APRA International, APRA-VA, and VAFRE. He currently sits on the boards of both APRA-VA and VAFRE. He is a graduate of Lynchburg College and has received certificates from the University of Richmond's Institute of Philanthropy in Grant Writing & Management, Fundraising & Development, and Nonprofit Marketing.



J. PATRICK THOMAS O'TOOLE (a.k.a. Patrick) is the principal consultant with Prospira Consulting, LLC. (In his day job, he is the Director of Prospect Research & Management with the U.S. Air Force Academy Endowment.) Patrick has been a prospect development professional since 2006. Patrick earned a master's degree in library and information studies, and specialized in library technical services. He has worked extensively with complex relational databases and information management systems since 1991. Patrick is an avid statistician, and has cultivated strong data analytic skills. He has proven himself capable of discerning subtle patterns in a sea of otherwise confusing data.

Patrick's work history is rich and diverse. He has worked with federal, state, and city governments. Patrick has worked with for-profit companies, ranging from a massive Fortune 25 firm to a small private medical partnership. He has worked with several institutions of higher education from the fourth-largest research institution in the U.S. to a small college with an enrollment of 3,500. Patrick has also volunteered with a variety of nonprofit organizations since 1987.

The breadth and depth of Patrick's professional experience enables him to draw on a variety of real-world lessons to carefully craft creative answers to the unique information management needs of his clients. He welcomes the opportunity to serve your organization. <http://prospiraconsulting.com/>



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Nationwide Children's Hospital



Julie Davis
Dayton Children's



Monique Rogers-Dogbey
Ohio University



Sarah Sigler
Kent State University



Donna Wolf
The Ohio State University

Not pictured: Craig Kahn, University of Cincinnati

PRESIDENT'S SERVICE AWARD

OPRN is led by a board of volunteers from across Ohio. Each year, we recognize the leadership and service of the immediate past president to represent and advance our profession.

Congratulations to our 2016 Awardee!

STEPHANIE JEWELL VAVER
The Ohio State University



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