



**2017 Spring Conference**  
**Crowne Plaza Downtown Columbus**  
**April 27-28, 2017**

# #oprn30

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## ABOUT OPRN

**Ohio Prospect Research Network (OPRN)** is the Ohio chapter of the international organization, Apra (formerly Association of Professional Researchers for Advancement). 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 members,
- Promote networking and cooperative relationships,
- Establish common benchmarking statistics,
- Advance the profession of advancement research within the field of fundraising.

## OPRN AWARD & SCHOLARSHIPS

### 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 2017 Awardee!

**ERIN DEARDORFF**  
The Ohio State University

### 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 2017 Scholarship Awardees!

**JAMES FERGUSON**  
Malone University  
(New Researcher Scholarship)

**LISA MEDEIROS**  
Miami University Regional Campuses  
(Veteran Researcher Scholarship)



# THURSDAY APRIL 27

12:00	Registration
12:30	<p><b>Welcome</b> <i>Regina Alhassan, OPRN President</i></p> <p><b>OPRN at 30: A Retrospective</b> <i>Anne Mayer, OPRN Founding Board Member</i></p> <p>Workshops (pick one):</p> <p><b>Relationship Management: Building the Car while Driving It</b> <i>Bond Lammey, Bentz Whaley Flessner</i></p> <p>As prospect development professionals, we are often tasked with developing and implementing complex systems and processes to make our fundraising programs operate efficiently. Unfortunately, the expectation is generally that we develop and implement these systems simultaneously. What does this mean for establishing a successful relationship management program? In this workshop, Bond will discuss:</p> <ul style="list-style-type: none"> <li>•The fundamental elements of a strong relationship management program</li> <li>•Tactical steps to enact solid processes based on the tools you have at your organization</li> <li>•Strategies to gain buy-in from senior leadership and development officers</li> </ul> <p><b>Trends and Innovations in the Ever Changing Field of Prospect Research</b> <i>Nick Sollog, The Sollog Group</i></p> <p>In the ever changing field of Prospect Research professionals, now more than ever, need to stay abreast of current trends and innovations. Knowing when to change up your processes and/or resources are key to staying relevant and will enable you better serve your organization. The results of a recent survey of prospect development professionals will be shared. In addition, we will take a deep dive into some of the questions and in doing so allow for attendees to walk away with an action plan for keeping up with trends and innovations as well as some new resources.</p>
2:30 - 2:45	Break
2:45 - 4:00	Workshops continue
4:00	Target Analytics / Blackbaud Vendor Demo
4:30	Happy Hour at the Boulevard Bar
6:30	Optional Group Dinner & Entertainment If you get separated and would like to join us, please call Jessica E. Channell-Iler's cell: (205) 329-3749



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*OPRN belongs to you. Make the most of your membership!*

- Be a mentor or mentee
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- Present your own case study
- Host a webinar at your shop
- Organize a lunch & learn
- Gather colleagues for a networking happy hour
- Share your ideas

COMPLETE THE CONFERENCE EVALUATION SURVEY ONLINE:

<https://www.surveymonkey.com/r/OPRN30>

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



**FRIDAY APRIL 28**

REMINDER: CASUAL FRIDAY ATTIRE — JEANS WELCOME!

8:00	Registration
8:30	Breakfast & Networking
9:30 - 10:45	<p>Session A (pick one):</p> <p><b>Secrets of Data Driven Nonprofits</b>  <i>Steve MacLaughlin   Blackbaud</i></p> <p>Why is everyone talking about Big Data, but few nonprofits are leveraging it? How do nonprofits find the real hidden treasure in their data? What does a data driven nonprofit look like, act like, and create real results? Join Steve MacLaughlin, nonprofit industry expert and author of the bestselling book <i>Data Driven Nonprofits</i>, for this informative and actionable session. This session will also give you first-hand examples of nonprofit organizations that have become more data driven. What are the secrets of these data driven nonprofits and what can you learn from their success.</p> <p><b>“POPT” Year Zero- Launching a New Approach to Prospect Discovery &amp; Qualification</b>  <i>Chris Brakenbury, Sarah Luckey &amp; Stephanie Jewell Vaver   The Ohio State University</i></p> <p>After a year-long planning effort, Ohio State is launching a new approach to prospect discovery and qualification: Portfolio Optimization (more affectionately known as "POPT"). This project includes the systematic implementation, and for the first time at Ohio State, integration of multiple components on an epic scale: wealth screening, predictive modeling, a brand new unit assignment score, portfolio consultations, and a new process for distributing prospects to development officers for qualification. Join us as we dive into an overview of the project, how it came about, how it will be implemented, anticipated outcomes, and more!</p>
10:45 - 11:00	Break
11:00 - 12:15	<p>Session B (pick one):</p> <p><b>Working Through Difficult Conversations</b>  <i>Ann Metzler &amp; Stephanie Mizer   The Ohio State University, Advancement Human Resources</i></p> <p>Do you sometimes avoid difficult or challenging conversations? Is it hard to decide where to start? Do you have the same conversation more than once with the same person? Working Through Difficult Conversations provides tools and practice to help you increase your skill and comfort in engaging in difficult conversations. Learn how to prepare in advance, start the conversation effectively, and maintain a productive environment. We will also cover how to handle conversations that become difficult in the moment and how to anticipate and respond to other's reactions.</p> <p><b>Trends in Corporate and Foundation Giving &amp; Prospects</b>  <i>Matt Roberts   Ohio University Advancement</i></p> <p>What trends are we seeing in Ohio and nationally related to corporate and foundation prospects? In this presentation, Matt Roberts discusses regional trends related to corporate and foundation funders and discusses tips for prospect researchers when working on these unique types of profiles.</p>
12:15 - 1:15	Awards Luncheon
1:30 - 3:30	<p>Keynote:</p> <p><b>Prospect Development and its Transformational Influence on Fundraising</b>  <i>Josh Birkholz   Bentz Whaley Flessner</i></p> <p>Since our humble Midwest origins in the 1970s, prospect development has been a continuous force of change and progress for development programs around the world. From basement archival research to complex data science, our profession has pushed how we think, organize our time, and perform to the potential worthy of our donors. Join Josh Birkholz as he presents the past, present, and future of the greatest profession in the world; yours.</p>
3:30	Conference Adjourns

**EXPLORE C-BUS!** Check out these sites for details about favorite local attractions.

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## MEET THE SPEAKERS



Our keynote speaker, **JOSHUA M. BIRKHOLZ** is a principal at the international fundraising consulting firm Bentz Whaley Flessner, where he consults leading nonprofits in higher education, healthcare, and human services in comprehensive campaigning, organizational structure, data-driven strategies, and productive business processes. Josh also oversees a team of consultants with specialties in the data sciences and prospect development. He is widely regarded as a leading innovator in 21st-century development strategies.

His contributions to the fundraising industry include founding the BWF analytics division, BWF Insight, guiding several institutions through billion dollar campaigns, advocating for the integration of data science, and establishing more than 50 in-house analytics programs throughout North America, Europe, and the Pacific Rim. In addition to his numerous articles and videos, Josh is the author of the sought-after book, *Fundraising Analytics: Using Data to Guide Strategy*, and contributor to the books *A Kaleidoscope of Prospect Development* and *Return on Character*. Josh is the Chair of the Advisory Council on

Methodology for Giving USA. He is an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership. And he is the recipient of the prestigious Apra Visionary award for his contributions to prospect development.

**CHRIS BRAKENBURY** is the Director of Prospect Development at The Ohio State University. After starting the first organized prospect management program at OSU, he has focused on the integration of identification, research, and prospect management activities throughout the university. Chris continues to be an advocate for the field of prospect development by being an active member of APRA and presenting at regional and national conferences.



**BOND T. LAMMEY** is a managing 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. 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.

Bond received her BA in Sociology and her Master of Management in Nonprofit Administration, both from North Park University in Chicago, Illinois. She is on the board of Apra International and has presented in the United States, Canada, Australia, and Asia at CASE, ADRP, AASP, and Apra conferences.

**SARAH LUCKEY** is a Prospect Consultant at The Ohio State University. She has been with Ohio State for 4 ½ years, during which she has served on both the prospect research and prospect management sides of her team. As a prospect consultant, Sarah advises frontline fundraisers on moves management, prospect strategy, and portfolio management. In this role, she supports the colleges of Business, Dentistry, Medicine, Nursing, Optometry, Pharmacy, Public Health, and Veterinary Medicine. Sarah holds a Master's degree in Public Administration from The Ohio State University and a Bachelor's degree from the University of Mount Union. She resides in Dublin, Ohio with her husband and twin daughters.



**STEVE MACLAUGHLIN** is the Vice President of Data & Analytics at Blackbaud and best-selling author of *Data Driven Nonprofits*. MacLaughlin has been featured as a fundraising and nonprofit expert in *The New York Times*, *The Washington Post*, *USA Today*, *The Chronicle of Philanthropy*, and on National Public Radio. MacLaughlin serves on the board of the Nonprofit Technology Network (NTEN) and is a frequent speaker at conferences and events. Steve earned both his undergraduate degree and a Master of Science degree in Interactive Media from Indiana University.



## MEET THE SPEAKERS



**ANN METZLER**'s experience has included time in the non-profit sector for the Center of Science and Industry (COSI), the corporate sector for *Jo-Ann Fabric and Craft Stores* Human Resources Team and currently in academia for *The Ohio State University* as the Training Manager for the Advancement Human Resources Team. While at *The Ohio State University* Ms. Metzler has created and implemented a comprehensive onboarding program called "Advancement Buckeye Boot Camp" that engages all areas of Advancement. Additionally, she implemented and enhanced a robust internship program that has 53 alumni, 8 of whom have been hired in various full-time roles across Advancement. She is Advisory Board Member for the Christian Coalition Outreach (CCO) organization. Ms. Metzler holds a BA in Communications from Geneva College and a MA in

Workforce Development and Education from *The Ohio State University*. She is passionate about increasing the organization's effectiveness to further Ohio State's mission.

As recruitment manager for *The Ohio State University's* Office of Advancement, **STEPHANIE MIZER** creates and delivers a comprehensive talent acquisition function for hiring managers who lead the university's advancement activities. This includes development, alumni relations and marketing both centrally and in the colleges and units across campus as well as the Wexner Medical Center and James Cancer Hospital. Prior to joining the world of higher education, Stephanie spent 17 years in the zoo industry. In her last "wild" position, she directed all human resources policies, strategies, legal compliance and programs for the \$50M Columbus Zoo and Aquarium organization including a non-profit zoo, for-profit water park, 18-hole public golf course and conservation/science center. Stephanie is a founding advisor of Ohio State's Association of Fundraising Professionals (AFP) Collegiate Chapter and is currently serving on AFP's board as chair of the Collegiate Chapter Committee. She received her BA in psychology from Otterbein University and possesses the Professional Human Resources Certification (PHR, SHRM-CP). Additionally, she volunteers as a member of Franklin University's resume review team.



**MATTHEW ROBERTS** is the Senior Director of Development for Organizational Giving at Ohio University Advancement. His primary role is to administer giving relationships with both corporations and foundations on behalf of Ohio University, its regional campuses, and various external programs. Since taking the position in 2015, he has led a variety of projects related to corporate proposal development, organizational stewardship, and prospect development at the Ohio University Foundation. He is a current CASE faculty member specializing in persuasive development writing for corporations and foundations. Prior to working for Ohio University, Matt spent time as a resource officer and senior staffer for community-based non-profits in central Ohio. From 2006 through 2014, he served as a Senior Project Manager and Development Director at the OhioHealth Foundation, which supported a 46 county health system in central and southeastern Ohio. Matt holds a Master of Arts degree in Public Administration from Ohio University. He is also a 1998 Grantsmanship Center gradu-

**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 current 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.



**STEPHANIE VAVER** is a Fundraising Analyst with *The Ohio State University*. In this position, she provides analytics, data mining, business intelligence, and screenings in support of fundraising and advancement efforts. Since starting with Ohio State in 2009, key projects have included creating the Major Giving Likelihood score, university-wide Engagement Score, the Development Dashboard, and now our new unit assignment/engagement score. She previously served as Development Research Analyst and Annual Giving Assistant at Ohio Wesleyan University. She received her Bachelor of Science in Speech in Marketing Communications from Emerson College. Stephanie is a board member of the Ohio Prospect Research Network (OPRN), currently serving as Past President and Website Coordinator, and has presented at prior OPRN conferences.



## OHIO PROSPECT RESEARCH NETWORK BOARD OF TRUSTEES



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**Donna Wolf**  
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**Not pictured: Craig Kahn, University of Kentucky**

### **"ON WHOSE SHOULDERS WE STAND"**

**ANNE MAYER** was a founding board member of OPRN - a chapter of APRA. She served several terms and held the office of Secretary and President. She attended the first national APRA conference in 1988 and served on the Association of Professional Researchers for Advancement Membership Survey Committee from 1995-1999. Anne served her alma mater Wittenberg University for nearly 3 decades as director of advancement information resources. She established the first formal prospect research office in the late 1970s, providing research and information resources support to Wittenberg through 3 major capital projects. Following graduation from Wittenberg, Anne attended the University of Delaware where she earned an MA in American history and was named a Fellow in the Historic Agency Administration program of the Eleutherian Mills Hagley Foundation. Anne holds a masters degree in library science from Kent State University. Her masters paper "Advancement Information Resources Management: An Information Understanding Profession in Support of Philanthropy" documented the development of advancement research.

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