

Continuing Education



Approved Provider For

c/o Rob Birk, OPRN Board Member
Nationwide Children's Hospital Foundation
700 Children's Drive
Columbus, OH 43205



2009 Spring Conference and Workshop

**Reaching Across the Aisle:
New Partners and Prospects
During Difficult Times**

**Thursday and Friday,
April 2 & 3, 2009
Embassy Suites**

2700 Corporate Exchange Dr., Columbus, OH 43231

Conference Sponsored by:

Target Analytics®
a Blackbaud Company

CFRE
NEW THIS YEAR! Full participation in
Ohio Prospect Research Network
Spring Conference is applicable for 7.75
points in Category 1.B – Education of the CFRE Interna-
tional application for initial certification and/or recertification.

Thursday, April 2, 2009

12:30-1:00 p.m.	Registration
1:00-2:30 p.m.	Workshops begin (see below - choose one)
2:30-2:45 p.m.	Break (snack provided)
2:45-4:00 p.m.	Workshops continue
4:00 p.m.	Adjourn for the day

Note: OPRN Board Members will be arranging dinners at restaurants at nearby Easton Town Center (transportation provided)

Introduction to Data Mining Workshop w/ Marianne Pelletier

This interactive workshop is designed for beginners in prospecting using statistics and will demonstrate the techniques used in donor modeling and data mining. The following concepts coupled with in-session Excel exercises will be addressed: understanding what data says and how to read it; using mean, median and mode to spot trends in prospect behavior and characteristics; key charting techniques for pattern finding among best donors; developing a correlation score (basic statistics) for modeling top prospects; and implementing a simple score plan that works.

Or

New Researchers' Workshop w/ Kimberly Elahab, Craig Kahn & Jackie Robbins

Designed for new researchers with less than one year of experience or fundraisers and other development professionals who are interested in learning about research, this workshop covers the role of research in development, ethics, essential Web-searching tools and techniques, basic research on individuals, corporations, and foundations, and tips on organizing and presenting information.

Friday, April 3, 2009

8:00-8:30 a.m.	Registration & Continental Breakfast
8:30-8:45 a.m.	Welcome/Announcements
9:00-10:30 a.m.	Elizabeth Crabtree: <i>Guiding the Way: Rating Wealth, Capacity, and Potential for Philanthropic Giving</i>

Learn proven techniques for understanding and evaluating wealth indicators to estimate an individual's potential for philanthropic giving. Discuss how affluent and charitable giving statistics and various analysis strategies based on income, real estate, stock, and other factors can be used as a basis for estimating giving capacity for annual, major, or planned giving programs. Discover how to create affinity and inclination ratings based on relationships and levels of engagement, which can be used to further prioritize prospect pools and refine solicitation ask amounts.

Friday, April 3, 2009, continued

10:30-10:45 a.m.	Break
10:45-12:15	Katherine Swank, J.D. – <i>Wealth and Philanthropy in America</i>

We know America's wealthiest people: Bill and Melinda Gates, Warren Buffett, the Walton family to name a few. Their philanthropy is legendary and nonprofits try to connect with them; very few will be successful. What options do you have to acquire major gifts if you aren't on their list? Turn your attention to cultivating prospects that are affluent versus wealthy. The affluent market has been one of the fastest growing in America for more than two decades. This presentation examines wealth and philanthropy in American society including giving patterns of the affluent and how to find them in your donor base.

12:15-1:30 p.m.	Lunch (provided)
1:30-2:30 p.m.	Elizabeth Crabtree's Keynote Address: <i>Partners in Fundraising: Creating Synergy Between Researchers and Fundraisers</i>

Learn how to increase the potential and effectiveness of your entire development program by creating a collaborative, team-oriented environment between researchers, fundraisers and program managers. From prospect identification and portfolio management to trip planning, data analysis and prospect strategy plans, examine practical techniques and proven methods for leveraging the talents of the entire frontline effort. This enlightening conversation will focus on how fostering this vital partnership can strengthen your development program and increase the impact of philanthropy for your organization.

2:30-3:30 p.m.	Panel Discussion on Creating Synergy Between Researchers and Fundraisers, featuring a diverse panel of Ohio fundraisers:
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Jan Hillman, Assistant VP for University Initiatives, Wright State University
Nancy Koerner, J.D., Director of Planned Giving, The University of Toledo
Tom Konkoly, Director of Development for Gift Planning, Baldwin-Wallace College
Midge Stulberg, Senior Director of Development, Major Gifts – Eastern States, The Ohio State University
Sean Thompson, Director of Alumni Affairs, OSU College of Education & Human Ecology
Katie Webster, Annual Giving Officer, OhioHealth Foundation

3:30	Closing Remarks/Adjournment
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Accommodations

OPRN has reserved a block of rooms at the Embassy Suites Columbus for \$129 per night. The newly renovated Embassy Suites Columbus hotel offers attractive accommodations in a thriving area, ideal for anyone traveling to Columbus on business or for pleasure. The hotel is conveniently situated amongst some of the most exciting tourist attractions in the area and offers complimentary transportation to nearby Easton Town Center.

Attendees are responsible for their own reservations. Please refer to Ohio Prospect Research Network when making your reservations. **Individuals are requested to call (614) 890-8600 by March 2, 2009 to reserve suites.** Reservations received after this date will be honored on a space available basis at the prevailing corporate rate.

Check-in time is after 3:00 PM. If your schedule requires an early check-in time, please advise the hotel in advance. Payment for guest suite is due upon check-in, either by cash or credit card. Checkout is 12:00 Noon. Arrangements can be made for luggage storage beyond 12:00 noon.

NOTE: Please dress in layers. Heating and cooling may fluctuate in a room setting of this size.

Conference Registration

\$90 for 1 day & **\$125** for 2 days for OPRN members
\$125 for 1 day & **\$160** for new members (membership included)
\$105 for 1 day & **\$140** for 2 days for non-members

BRING A COLLEAGUE! Invite one of your colleagues to attend Friday's lunch and stay for the keynote and panel discussion (worth 2 points of Category 1.B CFRE Credit) . Only \$25 per guest.

Registration must be postmarked by Wednesday, March 25, 2009, or a late fee of \$25 will apply. No shows will be billed for meals. **We encourage you to register for BOTH days to benefit from the reduced registration fees for two days of learning from these dynamic speakers!**

Please return registration form and check (made payable to Ohio Prospect Research Network) to: Rob Birk, OPRN Board Member, c/o Nationwide Children's Hospital Foundation, 700 Children's Drive, Columbus, OH 43205.

Questions? Call Rob Boley, OPRN Vice President of Conference Planning, at (937) 775-3826 or robert.boleym@wright.edu.

CFRE Credits

Full participation in the OPRN Spring Conference is applicable for 7.75 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. For those wishing to receive CFRE credit, Continuing Education Points Trackers will be made available at the conference registration table. This credential is the only internationally recognized baseline professional credential for philanthropic fundraising executives. To learn more, visit the CRFE International Web site at cfre.org.

Conference Directions

Embassy Suites Hotel

2700 Corporate Exchange Drive, Columbus, OH 43231
Phone: (614) 890-8600 - FAX: (614) 890-6768

Located at I-270 and Cleveland Ave-on the north end of Columbus.
Parking is free.

From the North: Enter I-270 eastbound to the Cleveland Ave. Exit (Exit 27).

From the South: Follow I-71 to I-270, and enter I-270 east-bound to the Cleveland Ave. Exit (Exit 27).

From East or West: Follow I-70 to I-270, and enter I-270 Northbound toward Cleveland. Take the Cleveland Ave. Exit (Exit 27).

After exiting I-270: After exiting onto Cleveland Ave., immediately get into the far left hand lane. Turn left at the first traffic light onto Community Park Drive. Proceed one block to the first stop sign and turn left onto Corporate Exchange Drive. The hotel is one block ahead on the left side of the street.

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. Scholarships will be announced a few weeks before the annual OPRN spring conference. For full details, please visit www.oprn.org today! **Please note that scholarship applications are due by Friday, February 27, 2009.**

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.

Speaker Biographies

KEYNOTE SPEAKER:

Elizabeth Crabtree is the Director of Prospect Development at Brown University where she manages a team of professionals that provide advice, counsel and analytical support to several areas critical to Brown's fundraising effort, including: campaign planning and management, prospect identification and research, data mining, modeling and market research, relationship management and volunteer engagement. Elizabeth is the President of the Association of Professional Researchers for Advancement (APRA), the international professional society of fundraising research and relationship management professionals. She is also a member of the Association of Fundraising Professionals (AFP), the Council for the Advancement and Support of Education (CASE), and the New England Development Researchers Association (NEDRA). In 2007, Elizabeth was the recipient of the prestigious Ann Castle Award in recognition of her outstanding achievements and contributions to the fundraising research profession. She is a frequent, nationally recognized speaker, industry expert and advocate. Elizabeth is a graduate of Berklee College of Music and is currently an Executive M.A. candidate in the in Philanthropic Studies program at Indiana University.

Kimberly Elahab is a professionally trained journalist who received a master's degree from Columbia University in New York and a bachelor's degree from the University of Cincinnati. She has years of experience working in the nonprofit sector in fundraising and administrative capacities. She currently works at Wright State University in the Development department as a prospect research specialist. Kimberly provides leadership to the grants profession as a local American Association of Grant Professionals board member in Dayton, Ohio. She is a member of the Ohio Prospect Research Network, the Association of Independent Information Professionals, the Association of Professional Researchers for Advancement and Generation Dayton.

Craig D. Kahn is Senior Director of Research Services for the University of Cincinnati Foundation (UCF). He joined UCF in 1994 as Assistant Director of Research and was part of their successful \$300 million campaign. He was named Associate Director of Research in 1999, Director of Research in 2005 and Senior Director in July 2008. In his current position, he manages a staff of five researchers and one data entry/file clerk and all aspects of the Research Department as it relates to the current \$1 billion University of Cincinnati capital campaign. Prior to joining UCF, Craig served as Research Associate for Miami University's successful \$100 million campaign. Craig has been a member of the Association of Professional Researchers for Advancement (APRA) and the Ohio Prospect Research Network (OPRN) since 1989. He has served on the OPRN Board of Directors since 1993. Since 2003, he has served as OPRN's newsletter editor. Craig graduated from Miami University with a BA in Political Science and also did graduate work in Political Science at Miami.

For detailed biographies on Friday afternoon's guest panel, please visit the OPRN conference website at www.oprn.org.

Speaker Biographies, continued

Marianne Pelletier, CFRE, has been in the fundraising field since 1988, when she joined the research team at Harvard's University Development Office. She has served as a researcher for Harvard, Lesley University, Carnegie Mellon University, and now Cornell University where she is Director of Advancement Research and Data Support, assisting with Cornell's \$4 billion campaign. She was also Director of Annual Giving and Development Services for Southern New Hampshire University, where she oversaw an increase in annual giving by an average of 27% for each of five years. Before joining Carnegie Mellon, Marianne worked with Datatel's clients on the Benefactor product. She has a bachelor's degree from Rockford College and an MBA degree from Southern New Hampshire University. Marianne is president of the board of APRA-UNY, APRA's Upstate New York chapter. She is also an associate with the Helen Brown Group, and serves as a key member of the Group's data mining services team.

Jackie Robbins is currently the Director of Advancement Information Services for Kenyon College, a position she's held since 2000. She has been in research-related positions at Kenyon since 1986. Prior to that, she taught history and interdisciplinary humanities courses at Kenyon. As one of OPRN's founding members, Jackie served as President in 1991, served on the board during OPRN's formative years, and received the OPRN Anne Mayer Distinguished Service Award in 2005. At the national level, Jackie served on APRA's first board of directors (and also as Secretary) from 1988 to 1990, and also served on APRA's Service Award Committee (1995 & 1996), APRA Ethics Committee (which drafted the first APRA ethics statement), and APRA member task force to redefine the APRA writing award in 1996. She has been a presenter, discussion leader, and panelist at various OPRN, ICAA, APRA and NSFRE conferences. Jackie earned a B.A. from Kenyon College and an M.A. from University of Pennsylvania. Over the course of her career, she has led Kenyon's research office through most of three capital campaigns, from the days of paper "data cards," typed profiles and a few well-worn reference books to the era of on-line/web resources and a relational database and tracking system.

Katherine Swank, J.D., an experienced consultant with Target Analytics, guides customers on using customized data modeling and wealth identification information. Through presentations and written materials, she leads nonprofit staff and leadership through the appropriate steps to craft targeted fundraising campaigns that will generate maximum returns. Katherine authors white papers on planned giving topics that provide thought-leadership to the nonprofit industry. She is currently based in Denver, Colorado. 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. She is an affiliate faculty member of Regis University's master of nonprofit management degree program in Denver. 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.

REGISTRATION FORM - Page 1 of 2
2009 OPRN Spring Conference
Embassy Suites Columbus

Name

Title

Organization

Street Address

City, State Zip

Phone

Email

I am registering as:

- OPRN Member (\$90** for 1 day & **\$125** for 2 days)
 OPRN New Member/Renewal (\$125 for 1 day & **\$160** 2 days)
\$35 membership included
 Non Member (\$105 for 1 day & **\$140** for 2 days)

I plan to attend:

Both Days **Thursday Only** **Friday Only**

If attending one of Thursday's Workshops, please indicate which:

- Introduction to Data Mining
 New Researchers Workshop

I will bring _____ guests for Friday afternoon at \$25 each (please list guests in space provided). Add \$25 for each guest to registration total.

REGISTRATION FORM - Page 2 of 2
2009 OPRN Spring Conference
Embassy Suites Columbus

Guest One (Name and Title)

Guest Two (Name and Title)

Guest Three (Name and Title)

Is this your first OPRN conference? (please circle): YES NO

Any dietary requirements: _____

Will you attend one of Thursday night's dinners? Yes No

If you'd be willing to donate a prize for Friday's raffles, please indicate above what you will bring. Rob Boley, OPRN VP of Conference Planning, will follow up with you via email.

If a new or renewing member:

Type of Membership: New Renewal

Individual: belongs to member regardless of institutional affiliation

Institutional: belongs to institution, assigned to specific employee

Are you interested in serving on the OPRN Board?

Yes No Yes, but not this year.

Are you a member of APRA? Yes No

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