

Continuing Education



Approved Provider For

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



2010 Spring Conference and Workshop

**Diving Deeper:
Turning Your Prospect Pool
Into a Prospect Ocean**

**Thursday and Friday,
May 13 and 14, 2010
Embassy Suites
2700 Corporate Exchange Dr.
Columbus, OH 43231**

Conference Sponsored by:

Target Analytics®
a Blackbaud Company

CFRE
Full participation in Ohio Prospect Research Network Spring Conference is applicable for 7.75 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Thursday, May 13, 2010

12:30-1:00 p.m.	Registration
1:00-2:30 p.m.	Workshop begins (description below)
2:30-2:45 p.m.	Break (snack provided)
2:45-4:00 p.m.	Workshop continues
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).

Breadcrumb Navigation: Finding Prospects the Research Way w/ Cecilia Hogan

Just like the best pathfinders, agile researchers leave a trail of breadcrumbs in order to find their way to prospects. Prospects waiting to be found leave a trail of breadcrumbs, too! Join in a lively workshop focusing on how to identify, qualify, and assign prospective major gift donors.

The workshop will cover:

- Refreshing your fundamental prospecting skills with a brief review of, oh, the fundamentals
- Developing additional skills for efficient and effective prospect identification
- Cementing your reputation for reliability and trustworthiness (all the while being wrong a lot)
- Spotting the secret hiding places of prospects you've already found (or who have found your organization)
- Orienting the research office to the gift pyramid and senior management's vision
- Assigning new prospects (a group therapy session)
- Communicating new prospect assignments effectively
- Re-identifying prospects in or out of the cultivation pipeline
- Participating in strategy sessions (another group therapy session with you as the therapist)
- Nurturing a contact team that helps researchers identify the next prospects
- Creating ways to share prospect information and invigorate the team (including management)
- Building trust through annual planning and a transparent research process.

Friday, May 14, 2010

8:00-8:30 a.m.	Registration & Continental Breakfast
8:30-8:45 a.m.	Welcome/Announcements
9:00-10:30 a.m.	Concurrent Session A - choose one:

Around the World in 90 Minutes by Helen Brown
Having trouble finding sources for information on prospects living on the other side of the world? You're not alone – information can be hard to come by and tricky to decipher once you do find it. Take a tour of sources from around the world with Helen as your travel guide.

Data Mining – Your Data Gold Mine by Page Bullington
Grab that canary - your current database may be a gold mine. In the current economy, many organizations are prospecting within their own databases rather than seeking new names. This strategy makes sense, assuming those on your database have given in the past or expressed an interest in your mission. How do you determine who can increase their giving, and who simply should be maintained at their current giving level? How do you know you've captured the best data on these prospects?

10:30-10:45 a.m.	Break
10:45-12:15	Concurrent Session B - choose one:

The Missing Link: The Search for Transitional Giving Prospects by Lawrence Henze

Data analysis suggests that many organizations have difficulty in identifying transitional giving prospects: individuals emerging from the annual fund process who demonstrate potential to become mid-to-high level donor prospects in the years to come. This session will: 1) Discuss the concept of transitional giving and its critical contribution to fundraising and campaign success; 2) Describe available tools for identifying transitional giving prospects; and 3) Identify fundraising strategies that will encourage successful cultivation of transitional giving prospects

Effective Prospect Management Meetings: A Panel Discussion moderated by OPRN Board Member Stacy Wheeler
Consistently, one of the greatest challenges faced by fundraising operations is how to hold effective prospect management meetings. During this interactive session, panelists will discuss what has worked for their institutions as well as what hasn't. Specific topics will include prospect management meeting objectives, reports to support successful meetings, meeting content and structure, pitfalls to avoid, and more. Attendees will be encouraged to share their own experiences and to ask questions.

12:15-1:30 p.m.	Lunch (provided)
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Friday, May 14, 2010 continued

1:30-2:30 p.m.

**Helen Brown's Keynote Address:
*The Secret to Great Research***

Great research goes beyond the facts on the page, beyond your knowledge and skill and beyond the formats and templates that we use. What is the X factor to great research, and have you already got it? Helen shares what she's learned in her 20-year journey to discover the secret to great research.

2:30-3:30 p.m.

Roundtables on Various Topics
Speakers to be Announced

3:30

Closing Remarks/Adjournment

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

Registration must be postmarked by Wednesday, May 5, 2010, 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? Contact 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.

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 April 12, 2010 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. please dress in layers. Heating and cooling may fluctuate in a room setting of this size.

Additional **Conference Sponsorship** opportunities and **Event Program Advertisements** are still available. Please contact Regina Johnson, OPRN Sponsorships, at johnson.664@osu.edu for more information.

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: Go south onto Cleveland Avenue. 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, April 16, 2010.**

About the 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.

Speaker Biographies

KEYNOTE SPEAKER:

Helen Brown has been a development professional since 1987 and is president of The Helen Brown Group LLC (HBG), a full-service prospect research consulting firm working with clients around the world. She is also president of ShareTraining, a web-based training company specializing in prospect research and fundraising, and a partner of BFTConnect ContactReporter. Prior to founding HBG in 2002, Helen directed advancement research departments at Northeastern University and the Harvard School of Public Health.

As well, her previous experience includes The University of North Carolina at Chapel Hill, the Albert Einstein Institution, Boston College, the Harvard School of Public Health and Northeastern University. Under her eight-year leadership as director of research at the Harvard School of Public Health, Helen's innovative prospecting strategies enabled the School to reach a \$125 million goal with two years left in its capital campaign.

Helen is a board member of the Association of Professional Researchers for Advancement (APRA) and is past president of the New England Development Research Association (NEDRA). She is the 2006 recipient of the NEDRA Ann Castle Award for service to the prospect research community. Helen is Special Advisor on Fundraising to the board of the North American Foundation for the University of Manchester, and is a Fellow of the Royal Society for the Arts. She is also a non-executive director of Factory Ltd (UK).

Speaker Biographies, continued

Page Bullington, MPA, joined Target Analytics in 2007. She has more than seven years of experience working in the nonprofit industry with a focus on healthcare and political organizations. Prior to joining Blackbaud in 2007, Page was responsible for successfully securing over \$2 million in grant funding for Roper St. Francis Healthcare Foundation. As part of the Target Analytics team, Page has worked to offer professional development seminars for healthcare organizations, focusing on both major and annual gift strategies. She has developed a unique consulting offering centered on assisting healthcare organizations in using their patient data to enhance fundraising. Page works with Target Analytics clients across sectors and enjoys getting to coach clients within the K-12, higher education, and cultural areas. She is an active member of the Junior League of Charleston and is a member of the Winthrop Fund annual giving team for her alma mater. Page has a BA in English from Winthrop University and an MPA with a concentration in nonprofit management from the College of Charleston. You can contact Page at Page.Bullington@blackbaud.com.

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. 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. You can contact Lawrence at Lawrence.Henze@blackbaud.com.

Cecilia Hogan has been leading the prospect research effort at the University of Puget Sound in Tacoma, Washington for 17 years. She served on the Association of Professional Researchers for Advancement (APRA) International board of directors from 1999-2002 and is a former president of APRA-NW. She was a volunteer for Internet Prospector, an e-newsletter and Web site reviewing Internet resources, from 1995 until that project ended in 2008. Cecilia is the author of *Prospect Research: A Primer for Growing Nonprofits* (2008: Jones & Bartlett, second edition).

REGISTRATION FORM - Page 1 of 2
2010 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**

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REGISTRATION FORM - Page 2 of 2

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.

If you'd be willing to host one of Friday afternoon's roundtable sessions, please indicate your preferred topic above.

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.

OPRN Mentoring Program — this programs pairs new researchers in one-to-one relationships with OPRN members willing to share their professional knowledge and expertise. If interested, please check a box below:

___ I would like a mentor. ___ I would like to be a mentor.

Are you a member of APRA? ___ Yes ___ No

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