OHIO PROSPECT RESEARCH NETWORK.
A Chapter of APRA

2015 Spring Conference
Crowne Plaza Downtown Columbus
April 30—May 1, 2015

presents

"Big Data Down to Size"

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Your **OPRN** yearly membership provides opportunities outside of the Spring Conference —

including **mentorship** and **regional networking or educational events**.

We want to be a very member-driven organization and can only improve by **hearing from you**. We are looking for ways to provide events and programming that are interesting and useful to you and we would love your feedback!

Please visit the table located in the vendor area and speak with one of our board members!

You can…

⇒ Sign up as a mentor or mentee — or just find out more about the program

⇒ Discuss your needs and ideas for regional networking and events

⇒ Learn about volunteering with OPRN and share your interests

Not able to visit the table?
Contact **mentor@oprn.org**

THURSDAY APRIL 30

12:30 REGISTRATION

1:00 - 2:30 **PROSPECT RESEARCHER = CHIEF STRATEGY OFFICER**
KATHRYN "KAT" BANAKIS| GRENZEBACH GLIER AND ASSOCIATES
PROSPECT RESEARCHER = CHIEF STRATEGY OFFICER. Use what you know about prospects to be an indispensable chief strategist within your organization. Using case studies from large and small organizations across industries, we will examine how knowledge of prospects on both the macro and household level can inform development-wide strategy.

2:30 - 2:45 BREAK

2:45 - 4:00 **PROSPECT RESEARCHER = CHIEF STRATEGY OFFICER** 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 Boulevard Bar next to the lobby.

Group dinner & entertainment options will be available 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's cell: (614) 440-6563

check it out! *Crowne Plaza is in the heart of downtown*

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 1

REMINDER: CASUAL FRIDAY ATTIRE — JEANS WELCOME!

8:00 REGISTRATION & BREAKFAST

8:15 - 9:15 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.

9:30 - 11:30 **KEYNOTE: BIG DATA, WHAT'S THE BIG DEAL?**
ALISON SOMMERS-SAYRE | APRA PRESIDENT; PRINCETON UNIVERSITY
You hear a lot about big data but what does it really mean? Putting big data in historical context and highlighting implications and trends, Alison will explore how we got here and why it matters. She'll discuss what big data means to you, as an individual, as a member of society and as a prospect development professional.

FRIDAY MAY 1 CONT.

11:30 - 1:00 AWARDS LUNCHEON

1:00 - 1:15 BREAK

1:15 - 2:30 EDUCATIONAL SESSION A

A CASE STUDY OF TABLEAU BY THE CLEVELAND CLINIC
JEFF KULA | CLEVELAND CLINIC PHILANTHROPY INSTITUTE
MICHAEL LONDON| CLEVELAND CLINIC PHILANTHROPY INSTITUTE
Hear from Jeff Kula and Michael London from The Cleveland Clinic Philanthropy Institute on how they are utilizing the data visualization tool, Tableau. They will discuss aspects of implementing Tableau at the Clinic and the benefits and outcomes they are receiving.

2:30 - 2:45 BREAK

2:45 - 4:00 EDUCATIONAL SESSION B

SCORING PANEL DISCUSSION
PANELISTS: ROB BOLEY | WRIGHT STATE UNIVERSITY; BECKY FULLMER | THE OHIO STATE UNIVERSITY; STEPHANIE JEWELL | THE OHIO STATE UNIVERSITY; SARAH STARR ZECHMAN | JOHN CARROLL UNIVERSITY
MODERATOR: KELLI CLAWSON| WEXNER MEDICAL CENTER AT THE OHIO STATE UNIVERSITY
Learn about different scores that organizations have created — from simple to more complex — and the outcomes.

4:00 ADJOURN

COMPLETE THE CONFERENCE EVALUATION SURVEY ONLINE:

https://www.surveymonkey.com/r/9SBXZSM

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

MEET THE SPEAKERS

KAT BANAKIS | DIRECTOR, STRATEGIC IMPLEMENTATION, GG+A ANALYTICS

In her role, Kat assists clients in using analytics to enhance prospect management and research, assessing their prospect management and research divisions, and creating prospect pipelines and return on investment for communications and events. She works with organizations to create holistic implementation plans that maximize donor outreach and engagement efforts.

Kat led the re-design of the DonorScape® software to more closely reflect gift officer and researcher needs and workflows based on extensive client feedback surveys, focus groups, and assessments. She also created the DonorScape® training curriculum for a variety of user groups and launched the DonorScape® webinar series to highlight best practices of organizations of all sizes that have used data analytics to improve fundraising. Kat has trained and counseled more than 200 GG+A Analytics clients, representing many of the top universities, academic and community medical centers, museums and cultural organizations, independent schools, and social service organizations in the country. Recent key engagements include Ann & Robert H. Lurie Children's Hospital of Chicago, the University of Chicago Medical and Biological Sciences Division, Atlanta Ballet, the University of Missouri, and Carthage College.

Prior to joining the firm in 2010, Kat worked as the Director of Finance and Donor Relations at QuestBridge – a Silicon Valley-based non-profit organization dedicated to broadening access to higher education for low-income students. She holds a Masters of Divinity and a BA in Religious Studies, both from Yale University, for which she has been a class agent. Outside of GG+A, Kat sits on the board of various non-profit organizations.

During her tenure with GG+A, Kat Banakis has provided counsel to the following client institutions: American Cancer Society, Atlanta Ballet, California State Polytechnic University Pomona, Carthage College, Cheyenne Mountain Zoo, Chicago Botanic Garden, Chicago Council on Global Affairs, Sterling and Francine Clark Art Institute, Drexel University, Easter Seals Southern California, Episcopal High School of Baton Rouge, George Mason University, Holderness School, Huntington Library Art Collections and Botanical Gardens, Iowa Public Television Foundation, Kansas University Endowment, Knox College, Loomis Chaffee School, Los Angeles Philharmonic Association, Lucile Packard Foundation for Children's Health, Ann & Robert H. Lurie Children's Hospital of Chicago, Make-A-Wish Foundation of America, Midwest Palliative & Hospice Care Center, Miller Theater at Columbia University School of the Arts, Missouri Botanical Garden, New York Eye and Ear Infirmary, New York Philharmonic, Pennsylvania Ballet, Pennsylvania State University and Milton S. Hershey Medical Center, Philadelphia Museum of Art, Providence College, Salvation Army Metropolitan Division, San Francisco Museum of Modern Art, Sidwell Friends School, St. Mary's College of California, Teachers College, Columbia University, Temple University Health System, Tufts University Medical Center, University of California Irvine and University of California Irvine Medical Center, University of California, Los Angeles Health System, University of Chicago Medical Center, University of Chicago Medical and Biological Sciences Division, University of Colorado Foundation, University of Florida Foundation, University of Maryland System Foundation, University of Missouri Columbia and University of Missouri Health System, University of New Hampshire, University of Notre Dame, University of Pittsburgh Medical and Health Sciences Foundation, University of South Carolina, University of Washington, University of Wisconsin, Milwaukee, United States Naval Academy Association & Foundation, Vanderbilt University and Medical Center, and YMCA of Metropolitan Chicago.

MEET THE SPEAKERS

ALISON SOMMERS-SAYRE | APRA PRESIDENT | EXECUTIVE DIRECTOR, DEVELOPMENT INFORMATION STRATEGY, PRINCETON UNIVERSITY

Alison Sommers-Sayre has more than 20 years of experience in business intelligence, information management and data-driven strategic planning within higher education, corporate environments and consulting capacities. She joined Princeton University as the Director of Development Research in 2004, preparing for a billion+ dollar campaign. Currently Sommers-Sayre is the Executive Director of Development Information Strategy, managing Prospect Development & Research, Analytics & Data Management, Technology Services, Alumni & Donor Records and Business Services. She has been a speaker at APRA, MARC, CASE and AFP conferences and is the current President of APRA. She is an honors graduate of the University of Chicago for which she has been an active alumni volunteer.

JEFF KULA | ADMINISTRATOR, CLEVELAND CLINIC PHILANTHROPY INSTITUTE

Jeff Kula is currently the Administrator for the Philanthropy Institute at Cleveland Clinic. He oversees the day-to-day operations of the department, including budgeting and financial analysis, strategic planning, and talent management. In a previous role, Jeff managed the Prospect Research and Prospect Management functions for the Philanthropy Institute. Jeff has been with Cleveland Clinic for 7 years. Prior to that, he spent 8 years with McMaster-Carr, where he managed supply chain operations in a large distribution center environment. Jeff has a BS in Business from John Carroll University and an MBA from Baldwin-Wallace College.

MICHAEL LONDON | DATA ANALYTICS SPECIALIST, CLEVELAND CLINIC PHILANTHROPY INSTITUTE

Michael London is currently a Data analyst and Tableau Server Administrator at the Cleveland Clinic Philanthropy Institute. His primary functions are focused on donor analytics, metrics reporting, direct mail reporting, prospect reporting, and financial reporting. Prior to working at the Cleveland Clinic Michael spent 3 years as a corporate investigator for Sears Holdings Corporation where he created and implemented dozens of fraud detection reports and algorithms that detected hundreds of cases and millions of dollars in fraud per year.

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, prospect management, and analytics 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
2014—Rob Boley, Wright State University and OPRN Past President

EILEEN FITZGERALD OPRN CONFERENCE SCHOLARSHIP

2015 Scholarship Awardees: Jennifer Nettles (New) and Grace Bowman (New)

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, business intelligence, 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 joined the board of OPRN in fall of 2008 and has served in multiple roles. She earned a Bachelor of Science in Speech in Marketing Communications from Emerson College. She resides in Upper Arlington, Ohio, with her husband Nick.

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. Alhassan, 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

Barbara Waitkus Billings, OPRN Mentoring and Website Coordinator
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.

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."

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.

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.

MEET YOUR OPRN BOARD OF TRUSTEES

Monique Rogers-Dogbey, OPRN Trustee
Monique Rogers-Dogbey 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 as Parliamentarian on the Executive Board of West Virginia State University National Alumni Association. She is a member of the Association of Professional Researchers for Advancement, Council for Advancement and Support of Education, and National Association of Parliamentarians. 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 a Senior Advancement Research Specialist at Kent State University. She has been part of the university's Division of Institutional Advancement since 2008. Previously, she served as a prospect researcher for the Ohio Presbyterian Retirement Services Foundation headquartered in Columbus, Ohio. She is a member of the Association of Professional Researchers for Advancement and serves on the board of the Ohio Prospect Research Network. She is a 2014 graduate of Kent State University's Institute for Excellence and has presented at the Greater Cleveland Chapter of the Association of Fundraising Professionals.

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 Social Media Coordinator
Sarah is the Assistant Director of Advancement Services at John Carroll University. She joined John Carroll in 2012 as the Director of Prospect Management and Research. 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. Before that, she had roles with the ACLU of Ohio and the Western Reserve Historical Society Library and Archives. Sarah is a trustee of the Ohio Prospect Research Network as well as a member of APRA and CASE. She 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
Stephanie Jewell, OPRN President
Patty Keller, OPRN Secretary & Sponsorship Coordinator
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