

SPEAKERS:

Peter Wylie (Workshop): Peter, of Margolis-Wylie Associates is an industrial psychologist/data analyst who teaches advancement professionals how to mine their own databases to find predictors of giving. Wylie's new book, *Baseball, Fundraising, and the 80/20 Rule: Studies in Data Mining*, will be the basis for this workshop. Wylie's other books are *Problem Employees: How to Improve Their Performance* (Upstart Publishing, 1991), *Problem Bosses: Who They Are and How to Deal with Them* (Fawcett paperback, 1987), *Can This Partnership Be Saved?* (Upstart Publishing, 1993), and *Data Mining for Fund Raisers* (CASE, 2004).

Christina Pulawski: An independent consultant, Christina specializes in development research, prospect management and information flow for fund raising. Previously, she was Director of Development and Donor Services at Loyola University Chicago. Prior to joining Loyola, she was Director of Development Research at Northwestern University from 1994-2003, which earned "top research shop" distinction under her direction. A Chicago native, Christina earned a BA in Political Science from Northwestern and a JD from the University of Illinois. She is admitted to practice in Illinois and practiced in the fields of real estate and litigation before taking the opportunity to explore development in 1991. Christina served on the board of APRA for six years and chaired APRA's International Conferences in 1999, 2001 and 2002, developed APRA's Boot Camp and other symposia, and received the organization's Distinguished Service Award in 2005.

Lawrence Henze, managing director of Target Analytics, is a veteran speaker at nonprofit conferences and seminars on a variety of topics, including fundraising, market research, and the application of predictive modeling services to the nonprofit marketplace. The founder of Core Data Services, which Blackbaud acquired in 2001, Mr. Henze has also served as vice president of predictive modeling services at USA Group Noel Levitz and president of The Philanthropic Division of Econometrics, Inc. From his tenure with Econometrics through his current work, Mr. Henze has worked with more than 600 clients and has accumulated a wealth of knowledge on the financial, demographic, and attitudinal characteristics of philanthropic donors. He holds a BA in Political Science from Carroll College in Waukesha, Wisconsin, an MA in public policy and administration, and a law degree from the University of Wisconsin at Madison.

David Lamb is a 20-year prospect research professional and frequent speaker at professional conferences on subjects related to fundraising, prospect research, and data modeling. Currently a prospect research consultant for Target Analytics, David is recognized as one of the world's leading authorities on prospect research, data modeling, and analytics. His prospect research page is a popular and trusted list of Internet resources for prospect researchers. He has served as director of prospect research at the University of Washington and Santa Clara University. He holds a BA in sociology from Sterling College, an MA in sociology from Wichita State University, and a master's degree in divinity from San Francisco Theological Seminary. He is a frequent speaker at professional conferences, including those sponsored by the Council for Advancement and Support of Education (CASE), the Association of Fundraising Professionals (AFP), and the Association of Professional Researchers for Advancement (APRA).



2008 Spring Conference and Workshop

“Look Into the Future”

**Thursday and Friday,
May 29 & 30, 2008**

**The Hilton Columbus at Easton
Columbus, OH**

Bobbi O'Malley
Director of Prospect
Research
Baldwin-Wallace College
275 Eastland Road
Berea, OH 44017-2088

THE AGENDA

Thursday, May 29, 2008

1:00 p.m. Introductions
1:15 p.m. **Peter Wylie** Workshop begins
2:30 p.m. Break
2:45 p.m. Workshop continues
4:00 p.m. Adjourn for the day

Baseball, Fundraising, and the 80/20 Rule: Studies in Data Mining

Peter well knows that the topic of data mining and predictive modeling can be a bit dry. But this session won't be dry. It will be fun and informative. Using some data from a member institution, Peter will cover some or all of these topics as time permits: statistical modeling can help you find the right equation for fundraising success; fundraising databases are filled with gems if you know how to dig; where the alumni money is; a few data points from your own records can lead you to your best prospects; what's different about donors who give via the Web?; understanding fraternity and sorority graduates...and other alumni groups; what proportion of donors is responsible for the most giving? A case for analyzing call-center data.

Friday, May 30, 2008

8:00-9:00 a.m. Registration & Continental Breakfast
9:00-9:30 a.m. Welcome/Announcements
9:45 -10:45 a.m. Breakout Session 1 (Please select 2 of 3 speakers)
11:00-12:00 noon Breakout Session 2
12:15-1:30 p.m. Lunch (provided)

1:30-3:00 p.m. **Keynote Address – Christina Pulawski**

The Future of Research and How We'll Get There: “If you're standing still, you're moving backwards.” This session will look at the effect that changes in the philanthropic environment will have on our work, and we'll discuss positioning your shop, regardless of size, to meet that future.

3:15-3:45 p.m. Door prizes/closing remarks
3:45 p.m. Adjournment

Friday speakers sponsored by:



Hotel Reservations

The Hilton Columbus at Easton is a AAA 4-Diamond, full-service, upscale hotel located within the Easton Town Center. Shopping, dining and entertainment are only steps away. OPRN has reserved a block of 30 rooms for **\$169** per night, single or double occupancy. Attendees must make their own reservations. Please call **(614) 414-5000** by **May 8, 2008** to make a reservation. Mention OPRN for your discount. After this date, the prevailing rate will apply. Check-in is after 4 p.m. Checkout is at 12 noon. Payment is due upon arrival. Baggage storage is available for early arrivals.

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

Conference Registration

Conference Fees:

\$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 May 16, 2008**, 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: Natasha Thomas, OPRN Board Member, 3879 Maidens Larne Drive, Columbus, OH 43221. Questions? Call Bobbi O'Malley, Conference Chair, (440) 826-2741 or bomalley@bw.edu, or visit OPRN's website: <http://www.oprn.org>.

Conference Directions:

From Cleveland (North):

Take I-71 South to Interstate 270 East to Easton Exit (Exit 33) – exit onto Easton Way. **Remain on Easton Way through two traffic lights. Make right on Chagrin Drive and right into hotel parking lot (hotel is on the corner of Chagrin Dr. and Easton Way).**

From Cincinnati (West):

Take I-71 North to I-670 (to Port Columbus International Airport). Remain on I-670 to I-270 North (approximately 1 mile). Take Easton exit (exit 33) onto Easton Way. Proceed as above.

From East:

Take I-70 West to I-270 North. Take Easton exit (exit 33) onto Easton Way. Proceed as above.

From Toledo (Northwest):

Take I-75 South to I-23 South. Continue on I-23 South to the Columbus Outerbelt. Take I-270 East to Easton exit (exit 33) onto Easton Way. Proceed as above.

REGISTRATION FORM

2008 OPRN Spring Conference

The Hilton Columbus at Easton

Name: _____

Title: _____

Organization: _____

Address: _____

Phone: _____

Email: _____

Is this your first OPRN conference? (please circle): YES NO
Any dietary requirements: _____

I will attend:

_____ **Both days, May 29 & 30, 2008**

_____ Thursday only, May 29, 2008

_____ Friday only, May 30, 2008

Please select **2** choices:

Lawrence Henze – “There Ought to Be a Law: Best Fundraising Practices We Probably Do Not Practice (and the Role of Research in Making This Happen).” – Over the years, nonprofits have adopted practices that have “weathered the test of time,” but are they really the best practices – or are we sticking with the precedents because we fear change? If we could start from scratch, what would we introduce as best practices? Presented from a researcher's perspective, this session will propose best practice solutions, from direct mail and donor relations to prospect development and goal setting. Learn how to break away from practices that are less than the best and seek new levels of success for your organization.

David Lamb – “Prospect Tracking and Management.” Good prospect management means employing systems to make sure that top prospects are moving steadily toward making a gift. We'll look at best practices and sample reports that you can take back and implement in your office.

Christina Pulawski – “Setting Prospect Identification Goals.” One of the most pervasive fundraising myths is “you can never have too many prospects.” Prospect identification is a key (and fun) component of Research's contribution to the fund-raising cycle, but the volume of activity is rarely in synch with needs. We'll look at data, tools and methods for balancing the various aspects of research work in your shop, to ensure that ALL your institution's information needs are being addressed. We'll especially focus on setting relevant goals for prospect identification, and how to choose from various types of projects to meet those goals.

Breakout Session #1 _____

Breakout Session #2 _____