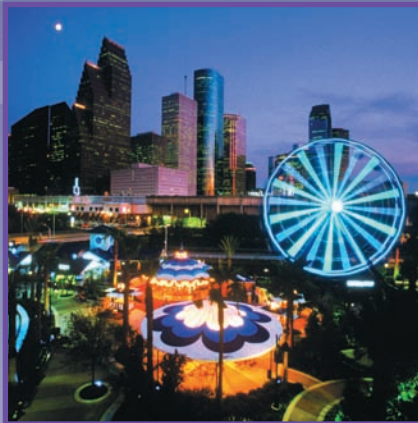


APRA Symposium

# Prospect Identification:

Discovering Donors through Proactive  
Research and Data-Driven Analysis



ASSOCIATION OF PROFESSIONAL RESEARCHERS FOR ADVANCEMENT

March 22–23, 2007

InterContinental Houston | Houston, Texas

# APRA Symposium Prospect Identification

Save the Date!...

## ...for these upcoming APRA Education Events!

Looking for a way to involve your staff or chapter in a fun, collaborative educational experience? Mark your calendar for these APRA Education Events:

### Virtual Seminars

*Qualifying Major Gift Prospects in the Field*  
May 4, 2007

*Supporting your Organization's Mega Campaign*  
August 3, 2007

*Approaches for Estimating Gift Capacity and Developing Rating Systems*  
October 5, 2007

*Habits of Highly Effective Researchers*  
December 7, 2007

### Symposia

*New Researchers Symposium (takes place at 2007 Conference)*  
July 25-26, 2007  
Sheraton Chicago Hotel & Towers  
Chicago, Illinois

*New Researchers Symposium*  
September 27-28, 2007  
Omni Charlotte  
Charlotte, North Carolina

*Management and Leadership Summit for Senior Professionals*  
October 25-26, 2007  
Hotel Marlowe  
Cambridge, Massachusetts

### 20th Annual International Conference

July 25-28, 2007  
Sheraton Chicago Hotel & Towers  
Chicago, Illinois

For more information or to register, visit

[www.APRHome.org](http://www.APRHome.org)

Photos courtesy of the Greater Houston Convention & Visitors Bureau

## Day One – Thursday, March 22

*(Please note that actual session times and order are subject to change at the discretion of faculty)*

7:30am – 8:30am	<b>Registration and Continental Breakfast</b>
8:30am – 9:00am	<b>Welcome and Introductions</b>
9:00am – 9:30am	<b>Overview of Prospect Identification</b> Explore the history and evolution of prospect identification, including fundamental concepts and contemporary trends.
9:30am – 10:30am	<b>Creating a Comprehensive Prospecting Plan</b> Discuss the focused outcomes for this program and how to develop a framework for establishing a comprehensive and integrated prospecting plan.
10:30am – 10:45am	<b>Break</b>
10:45am – 12:00pm	<b>Screenings and Surveys</b> Learn how to approach an electronic database screening by evaluating vendor services and understanding their product offerings, knowing what you want to achieve, preparing your data and implementing the results. Discuss survey instruments and tools and how data derived from surveys can be used in prospect identification.
12:00pm – 1:30pm	<b>Lunch on Your Own</b>
1:30pm – 3:00pm	<b>Introduction to Data Mining</b> Understand how to investigate and discover trends within a constituent database and extract, compile and analyze such data from one or multiple sources. Discuss how these techniques can be used for prospect identification and what tools (software) you need to be successful. Walk through real-life examples and participate in a discussion of simple descriptive statistics and basic correlation techniques.
3:00pm – 3:15pm	<b>Break</b>
3:15pm – 4:30pm	<b>Data Management</b> Understand the key elements of data management, including finding out how and where your internal data is sourced and stored, how to set up coding and filing systems to manage your analytics files, and how to demonstrate your success by tracking, evaluating and reporting results.
4:30pm – 5:00pm	<b>Faculty Q &amp; A</b>

March 22–23, 2007  
 InterContinental Houston  
 2222 West Loop South  
 Houston, TX 77027

For hotel reservations, please call: (713) 627-7600  
 Room Rate: \$149 single/double (Not including taxes)

## Day Two – Friday, March 23

*(Please note that actual session times and order are subject to change at the discretion of faculty)*

<b>8:00am – 8:30am</b>	<b>Continental Breakfast</b>
<b>8:30am – 10:30am</b>	<b>Advanced Data Mining</b> <p>One of the most powerful data mining tools is predictive modeling. Learn about predictive modeling and understand how it differs from other statistical analysis techniques. Discuss how to approach and create predictive models, what options are available and what considerations are important when testing your results.</p>
<b>10:30am – 10:45am</b>	<b>Break</b>
<b>10:45am – 12:00pm</b>	<b>Verification and Implementation</b> <p>After analyzing the results of a database screening, a survey, and/or a data mining project, having a plan of action for verifying the names and feeding the pipeline is paramount. Examine how researchers can most effectively prioritize, qualify, rate and allocate new names and information and push it out to the frontline.</p>
<b>12:00pm – 1:30pm</b>	<b>Lunch on Your Own</b>
<b>1:30pm – 2:45pm</b>	<b>Peer Review and Field Discovery</b> <p>Peer review and field discovery can be valuable components of an integrated prospect identification program, but can be difficult to coordinate and manage. Learn how to work with fundraisers and volunteers in conducting successful peer reviews that produce the most relevant and actionable information. Discuss how to explain your prospecting methodologies to others, glean information from contact reports, and encourage follow-through and ongoing dialogue.</p>
<b>2:45pm – 3:00pm</b>	<b>Break</b>
<b>3:00pm – 4:00pm</b>	<b>Traditional Prospect Identification Techniques</b> <p>Review the essential components of traditional prospect identification techniques, including reading and extracting information from newspapers, magazines and industry journals and conducting list reviews and industry or occupational analyses. Discuss the advantages and challenges of PUSH technologies and how to manage alert or electronic clipping services.</p>
<b>4:00pm – 4:30pm</b>	<b>Faculty Q &amp; A</b>

## Faculty Bios



**Joshua M. Birkholz** is the director of DonorCast, people-driven analytics by Bentz Whaley Flessner. His areas of specialty include data mining, metrics for nonprofit fundraising, and constituent relationship management.

Joshua provides services and counsel in program and constituency analysis, segmentation, building data mining programs, developing strong prospect management and tracking methodologies, and implementing integrated prospect identification systems. His cutting-edge data analysis and information strategy techniques help clients to understand their people and maximize the impact of major, annual, and planned gift development.

Prior to coming to Bentz Whaley Flessner, Joshua engineered analytics and metrics strategies as a data mining analyst for the University of Minnesota Foundation. He is a sought-after speaker and presenter in the field of analytics, prospecting, and constituent relationship management. Joshua earned his bachelor of arts from Concordia University-St. Paul and his master of arts in arts administration from St. Mary's University in Winona, Minnesota.



**Marianne Pelletier, CFRE** is the director of Advancement Research and Data Support at Cornell University. She has been in the fundraising field since 1988, when she

joined the research team at Harvard's University Development Office. Marianne has served as a researcher for Harvard, Lesley University, and Carnegie Mellon University. She was also Director of Annual Giving and Development Services for Southern New Hampshire University and worked for Datatel serving 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 also an associate with the Helen Brown Group, and serves as a key member of the Group's data mining consulting services team.

March 22–23, 2007  
InterContinental Houston  
Houston, Texas



# APRA Symposium

## Prospect Identification:

### Discovering Donors through Proactive Research and Data-Driven Analysis

The APRA Prospect Identification Symposium explores proactive research techniques and innovative, data-driven analysis methods to inform decision-making, build fundraising programs, and drive prospect identification, segmentation and strategy. This intensive two-day seminar will focus exclusively on best practices, emerging technologies, and comprehensive systems for identifying new prospective donors. As an advanced professional skills topic this program is targeted to researchers and data analysts with three or more years of experience and directors of research, relationship management and database systems, consultants and fundraisers who are interested in staying abreast of contemporary strategies and technologies in prospect identification.



### *Who Should Attend*

- Senior researchers who want to learn advanced statistical skills for identifying prospects
- Directors and managers of advancement services, prospect research and relationship management
- Development professionals interested in understanding contemporary prospect identification methodologies
- Fundraising consultants



**Association of Professional  
Researchers for Advancement**  
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# Registration Form

## APRA Prospect Identification Symposium **March 22–23, 2007** Intercontinental Houston • 2222 West Loop South • Houston, Texas • (713) 627-7600

Please type or print. Each attendee should use a separate form.

NICKNAME (for name tag use): \_\_\_\_\_

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ SUITE: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE/PROVINCE: \_\_\_\_\_ POSTAL CODE: \_\_\_\_\_

COUNTRY: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

- I am an APRA member.  
\$445 (Member Rate)
- I am not an APRA member, but am joining with this registration form. I have enclosed an additional \$150 for membership dues. (This option allows you to register at the member rate.)  
\$595 (\$445 Member Rate plus \$150 Membership Dues)
- I am not a member of APRA and am registering as a non-member.  
\$545 (Non-Member Rate)

\$\_\_\_\_\_ TOTAL PAYABLE TO APRA (Registration forms will not be accepted without payment.)

Payable in U.S. currency only. Payment may be deductible as an ordinary and necessary business expense. Consult your tax advisor for further advice.

### Method of Payment:

- Check
- Visa
- MasterCard
- American Express

CREDIT CARD NUMBER: \_\_\_\_\_

EXPIRATION DATE: \_\_\_\_\_

NAME OF CARDHOLDER: \_\_\_\_\_

SIGNATURE OF CARD HOLDER: \_\_\_\_\_

TOTAL ENCLOSED: \$ \_\_\_\_\_

Please contact the APRA office if you need to change any information on this form.

Please indicate any accessibility needs.

### Cancellation Policy:

Cancellations will be refunded, less a \$50 administrative fee, if received by March 1, 2007. Unfortunately, cancellations made after this date are not refundable.

### Return this registration form with payment to:

Association of Professional Researchers for Advancement  
1461 Paysphere Circle • Chicago, IL 60674  
Phone: (312) 321-5196 • Fax: (312) 673-6966 • E-mail: [info@APRAhome.org](mailto:info@APRAhome.org) • [www.APRAhome.org](http://www.APRAhome.org)