



## Conference Presenters

### **THURSDAY, MAY 14, 2015**

#### **Finding Prospects**

##### **Presented by Margaret King, InfoRich Group**

Marge King has extensive experience in the nonprofit sector and has been part of the executive management team for two internationally recognized nonprofit institutions. In addition to raising millions of dollars for her clients, she has broad experience raising capital support as well as developing and organizing nonprofit boards and advisory councils. She is a highly-skilled fundraiser and is the founder/president of InfoRich Group, Inc. Her writings include: FMSI Magazine's "Research: A Strategy For Raising A Million Dollars," and Fundraising Success Magazine's "Focus on Prospect Research: What You Don't Know – and How it Can Hurt You." Marge has spoken at several professional associations including AFP, the Sptitz National Teacher's Conference, the North American Maritime Ministry Association's National Conference, the Association of Independent Information Professionals, and others. She is a member of the adjunct faculty at Delaware County Community College and Eastern University where she teaches business and fundraising courses at the undergraduate and graduate levels. Marge holds a BS Degree from Cabrini College, an MBA from St. Joseph's University, and a post graduate certificate from Harvard University, Kennedy School of Government.

#### **Leadership and Career Development**

##### **Presented by Karen Isble, University of Michigan/Immediate Past President, APRA International**

Karen Isble oversees the information and technology programs that provide the infrastructure for the University of Michigan's fundraising activities, including data management and integrity, gift and records administration, prospect development and analytics, reporting and information analysis, web and e-communications, and application development for the University of Michigan's development community of 500+. She serves on the Office of University Development senior management team and the Victors for Michigan Campaign leadership team. Prior to joining Michigan in 2006, Karen served for seven years as Administrative Director for the Chamber Music Society of Detroit, having begun her fundraising career with the Chicago Symphony Orchestra and Chicago's Goodman Theatre. Karen currently serves as immediate past president of APRA International, having served on the board since 2010. She speaks regularly at national and regional chapter conferences for APRA, CASE, the Big Ten Development Conference and AFP. Karen holds a bachelor's degree from Harvard University and a master's degree from the University of Michigan.

#### **Project and Time Management**

##### **Presented by Dr. Meredith Hancks, Western Illinois University**

Dr. Meredith Hancks is Director of Prospect Research and Management for Western Illinois University where she conducts research, builds predictive models, writes reports, and creates tools to assist in portfolio management. She chairs the Best Practices Project for the Association of Advancement Services Professionals after several years chairing the Best Practices in Prospect Development team, and is a former Vice President for the Illinois chapter of the Association of Professional Researchers for Advancement. She has presented at APRA-IL and AASP in addition to presenting several webinars on research for frontline fundraisers. She is at work on her fourth book on prospect development for CharityChannel Press. You can view Meredith's blog at [meredithsdailymusings.wordpress.com/](http://meredithsdailymusings.wordpress.com/) and follow her on twitter: @mhancks. Dr. Hancks holds a BA (2000) and an MBA (2005) from North Park University in Chicago, and an Ed.D. (2013) from the University of Minnesota.

**FRIDAY, MAY 15, 2015**

### **International and Advanced Research**

#### **Presented by Jay Frost, Senior Partner at Jerold Panas, Linzy & Partners**

Jay Frost is a leader in discovering and exploring major fundraising opportunities for nonprofits around the world. He serves as Senior Partner at the legendary firm of Jerold Panas, Linzy & Partners, and as President of Fundraisinginfo.com, a donor research company. Previously he has served as Chief Strategy Officer at WealthEngine, President and CEO at WealthID, Director of Major Gifts at the International Rescue Committee, Editor and Co-Founder of WFC/International Philanthropy, Development Associate at Meridian International Center, and Program Specialist at the National Endowment for the Arts. He is an active industry, leader, educator, and author; a member of the CASE Industry Advisory Council; APRA Board Member; and popular presenter at conferences in the US, Europe, and Asia. Jay holds designations from the Interlochen Arts Academy in Creative Writing and Music, and a BGS Degree in Communications and Theatrical Productions from the University of Michigan.

### **Best Practices Panel Discussion**

~ **Steffanie M. Brown** has been the Manager for Prospect Research and Development Services at Florida Institute of Technology since 2011. She has over sixteen years' experience in development in higher education, including eight years in prospect research and management. Steffanie holds a BA degree in sociology from the University of West Georgia and a Master's of Divinity degree from Louisville Presbyterian Theological Seminary. When she is not in the office, Steffanie maintains a very active social media presence. Away from the Web, she also enjoys beach time, participating in 5K and shorter-distance races, cooking, yoga, reading, needlework, and attending sports events (especially PGA golf events, Brevard County Manatees baseball, and all FIT sports).

~ **Michael Lasala** is an advancement research and prospect management professional with 13 years of experience supporting capital campaigns at private and public universities. He is currently the Director of Research and Prospect Development at Rollins College, where he provides leadership in the areas of prospect research, portfolio optimization and pool management. Prior to joining Rollins, Mike was the Director of Research and Prospect Management at Florida International University (FIU), and a senior research analyst at Yale University where he addressed hundreds of research requests of varied complexity to successfully close gifts in support of the University's \$3.5 billion capital campaign. Mike holds a bachelor's degree in business management from Central Connecticut State University and is a 2013 graduate of FIU's Leadership Education Advancement Program (LEAP). He is currently a student in the Executive MBA program at Rollins College's Crummer Graduate School of Business from which he is expected to graduate in 2016.

~ **Pam Spencer** has served the nonprofit sector for the last seventeen years, focusing on various areas of fund development, including prospect management and research, front-line fundraising, and organizational executive leadership. She has served APRA as chapter president of APRA Michigan, and she is a member of APRA International. As a fundraiser, she has secured individual major gifts and corporate sponsorships, written corporate and foundation grant proposals, and coordinated countless special event fundraisers and educational workshops. She has worked on three major campaigns. Pam has worked for social service organizations, arts organizations, and higher education institutions. Additionally, she has served in a variety of areas: campaign and strategic planning, major gifts solicitations, annual fund drives, event planning, proposal writing, moves management, and prospect research. Pam received her master's degree in Nonprofit Management from Eastern University (Philadelphia) and currently serves as Director of Research and Prospect Management at Florida State University.

### **Strategy and Relationships**

#### **Presented by Kathy McDonald, Sharon Brown and Sarah Johnson, University of Florida**

~ **Kathy McDonald** has been spent the last decade putting her curiosity to good use as a Researcher, and more recently a Prospect Strategy Analyst, with the University of Florida Foundation. During that time she has worked with most of the units at UF, both academic and non-academic. Kathy is an innovator in her field, initiating, developing and heading new programs such as POP and Special Teams proactive projects, as well as piloting the recently-created Prospect Strategy Analyst position. She is a long-time member of APRA Florida and has enthusiastically attended both state and international conferences. She is also a former board member of APRA Florida, where she served as Chief Information Officer. Kathy holds a B.A. in Interdepartmental Studies from Wartburg College and both a B.A. in Journalism and an M.A. in English from Iowa State University. She discovered through a team-building exercise several years ago that she is a peacock at heart and has since embraced the idea of making the space around her beautiful and the people around her happy.

~ **Sharon Brown** has worked in prospect research at the University of Florida Foundation for almost 10 years, most recently as a Prospect Strategy Analyst. She is happy to have found a career that marries reading, writing and being curious, and even happier to be giving back to her alma mater. Proactive research and identifying new prospects is her passion. A longtime APRA member, Sharon is a past member of the scholarship committee. Prior to finding her career in development she worked variously as a county budget analyst, administrative assistant and office manager/bookkeeper. Sharon has a degree in Political Science from the University of Florida.

~ **Sarah Johnson** is a Director of Development for the College of Engineering at the University of Florida. Prior to coming to Florida she was a fundraiser at The Ohio State University, where she worked with the College of Food, Agricultural, and Environmental Sciences. A seasoned professional, Sarah presented at CASE District V in 2013.