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Please join us for our
SPRING 2011 MEETING

featuring Lawrence Henze, director – Target Analytics®
May 6, 2011 hosted by St. Norbert College
8:00 a.m. – 3:00 p.m.



Lawrence Henze, managing director of Target Analytics®, has extensive experience in 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, he has also served as vice president of predictive modeling services at USA Group Noel Levitz and president of The Philanthropic Division of Econometrics, Inc. Mr. Henze has 15 years of experience in development, raising more than \$125 million, primarily for higher education institutions. During his career, he has personally reviewed the giving histories of more than 30,000 planned givers across the country. He holds a BA in political science from Carroll College in Wisconsin, and an MA in public policy and administration and a law degree from the University of Wisconsin at Madison.

The Missing Link: The Search for Transitional Giving Prospects

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 pyramid prospects in the years to come. History further suggests that we are often content to allow these prospects to self-identify through their first transitional gift, rather than using research to seek emerging prospects so that targeted development strategies – donor relations, personal cultivation, and cultivation events – can be implemented to encourage more prospects to reach this goal more quickly.

How to Identify Planned Giving Prospects

Prospect researchers have been equipping major giving officers with information on prospects for decades, but planned giving officers have often worked only with age information to identify their prospect pool. But what about helping your planned giving operation mine your data to identify whom to target? Did you know that people who make planned gifts don't profile the same way as major donors? Did you know that prospects that profile a certain way are more likely to respond to a specific cultivation technique? Learn how to identify planned giving prospects so your organization can approach them, from the start, with the offering most likely to get the best return.

MEETING LOCATION:

St. Norbert College
100 Grant Street
De Pere, WI 54115

OUT-OF-TOWN ACCOMODATIONS

Kress Inn
300 Grant Street
De Pere, WI 54115-2119
920-403-5100 or 800-221-5070
www.kressinn.com

program

- 8:00 – 8:30 Breakfast
- 8:30 – 8:45 Welcome and Introductions
- 8:45 – 10:15 The Missing Link: The Search for Transitional Giving Prospects
- 10:15 – 10:30 Break
- 10:30 – 11:30 Q & A
- 11:30 – 12:00 Chapter Business Meeting
- 12:00 – 1:00 Lunch
- 1:00 – 2:30 How to Identify Planned Giving Prospects
- 2:30 – 3:00 Q & A

REGISTRATION FORM

Name _____

Organization _____

Address _____

Telephone _____ E-mail _____

I am an APRA-WI member (check one) Yes No

I will attend the pay-your-own-way Networking Dinner on Thursday, May 5 at Curly's Pub, Lambeau Field, Green Bay, WI (check one) Yes No

I will attend the Spring APRA-WI meeting on Friday, May 6 (check one) Yes No

PROGRAM & LUNCH (APRA-WI members, \$40; non-members, \$50; students, \$20)

Please indicate any dietary restrictions here: _____

PROGRAM ONLY (APRA-WI members, \$30; non-members, \$40; students, \$10)

Send completed form and check (payable to "APRA-WI")

Send completed registration form to: Andrew T. Caldie · Prospect Researcher, St. Norbert College · Advancement Services
100 Grant Street · De Pere, WI 54115 (920-403-3377) andrew.caldie@snc.edu