



2009 APRA-MN Fall Conference

September 30, 2009

Minnesota History Center

**Keynote: *Minnesota's Economy and Its Effects on Local Nonprofits***

Speaker: Jon Pratt – Director, Minnesota Council of Nonprofits

While the experts are currently debating whether or not we're emerging from the recession, nonprofits know that the effects may be felt for years to come. Jon Pratt, Executive Director of the Minnesota Council of Nonprofits, will examine the effects of the recession on our local economy and the impact it has had on Minnesota nonprofit organizations. He will also share some indications for what lies ahead for fundraising.

*Jon Pratt has worked in nonprofit organizations as attorney/lobbyist for an environmental organization (Minnesota Public Interest Research Group), regional director for an alternative foundation (the Youth Project), and as director for a coalition formed by nonprofits to reform corporate and foundation philanthropy (the Philanthropy Project). In 1982 he was campaign manager for a candidate for Minnesota State Auditor, Paul Wellstone.*

*In 1987 Jon became director of the Minnesota Council of Nonprofits, an association of 1950 organizations that sponsors research, training, lobbying and negotiated discounts to strengthen Minnesota's nonprofit sector. He has consulted with nongovernmental organizations on the development of NGO associations and services in Canada, Costa Rica, Czech Republic, Hungary, Poland, Serbia and Turkey. Jon Pratt has a law degree from Antioch School of Law, Washington, D.C., and a Masters in Public Administration from Harvard University.*

**Panel: *How are local organizations responding to the recession?***

Each panelist will have 10 minutes to present some of the challenges their organization is facing as a result of the economy and how they are responding to the challenges. The remaining time will be open for questions.

Panelists:

Claire Chang, Associate Vice President of Grants and Programs for Minnesota Community Foundation and The Saint Paul Foundation

*Claire Chang is the associate vice president for the Minnesota Community Foundation and The Saint Paul Foundation in Minnesota where she has held several positions over the past 12 years. At the Foundation Claire oversees all of the Foundations' community initiatives and its evaluation of its unrestricted grants. Prior to joining the Foundations she worked to increase family stability and vitality through direct service serving battered women and their children, family and center-based child care, child care resource and referral. Claire recently completed four years of service as a governing board member of the National Association for the Education of Young Children and currently serves on the boards of the Jeremiah Program, Twin Cities LISC, Headwaters Foundation for Justice and the Philanthrofund Foundation.*

Heidi A. Droegemuller, CFRE, Director of Development & Individual Giving, Minnesota Orchestra

*Heidi Droegemueller joined the Minnesota Orchestra in December 2006 as the Director of Individual Giving. In her current role, she co-leads the Development department and leads the individual giving team. Heidi brings more than nine years of major gift fundraising experience to the*

*Minnesota Orchestra. As Director of Major and Planned Gifts for Phoenix Children's Hospital, Heidi successfully directed a capital campaign and raised major gifts for cancer research, the Kids Kidney Center, the Children's Heart Clinic and various community outreach programs. She earned a bachelor's degree in Music Theory from Concordia College (Moorhead), and a master's degree in Music History and Literature and a professional certification in Nonprofit Management from Arizona State University.*

Deborah Mueller, Director of Prospect Development - Campaign Operations, Minnesota Medical Foundation at the University of Minnesota

*Deborah has served as a development professional for over 25 years with the Minnesota Medical Foundation at the University of Minnesota. She is currently the Director of Prospect Development – Campaign Operations, previously serving as the Director of Relationship Management. Debbie is currently serving as the APRA International President after completing her first term on the APRA board of directors as a member of the education and professional development team, the conference curriculum committee, and the conference executive committee. She has presented numerous times for APRA, APRA-Minnesota, and CASE. Debbie has also served on the APRA-Minnesota chapter board of directors as president. She earned a Bachelor of Science degree in Non-Profit Development and Leadership with extended studies in organizational communication from the University of Minnesota*

Jon Pratt, Executive Director, Minnesota Council of Nonprofits (see above)

Moderator: Tanya Pribula Cole, Campaign Manager, Minnesota Orchestra

*Tanya joined the Minnesota Orchestra Development staff in July 2007. As Campaign Manager, she works with the long-range planning, communications, data management, event planning, research, and volunteer management in support of the Orchestra's current Building for the Future campaign. She has worked in a variety of development roles for organizations including The Blake School and Minnesota Public Radio since 1993. With over six years of experience in prospect research, Tanya has previously served on the APRA-Minnesota board and as a past Programming Chair. She earned her undergraduate degrees from the University of North Dakota and lives in St. Paul with her husband, daughter and overly energetic yellow lab.*

### ***Breakout Session: Using SEC Documents in Prospect Research - A Primer***

Speaker: Jackie Henry - Director of Advancement Services, St. Olaf College

In this session, Jackie Henry will describe how to use securities and exchange documents to develop philanthropic capacity estimates for corporate officers and directors. We'll review which documents yield the richest information, explain unfamiliar terminology in POE (Plain Old English), and highlight paid and free sources used to access SEC information. After attending this session, you'll understand why phantom stock units aren't so scary, and know how to quickly locate the most relevant information for the research task at hand.

*Jackie Henry is Director of Advancement Services at St. Olaf College. She has 8+ years of prospect research experience at St. Olaf College, and 3 years of experience working for a pre-IPO corporation reviewing and revising SEC documents prior to filing. She earned a Master's Degree in Library and Information Services from the Dominican University and has presented at previous Minnesota and International APRA conferences.*

### ***Breakout Session: Data Integrity - Keeping Your Data Clean and Usable***

Speaker: Chris Courchane - Sr. Data Management & Report Specialist, Hazelden Foundation

This session will involve a discussion about practices and habits that will keep your donor/prospect database in tip-top shape. Participants in this session will have an opportunity to share tips and tricks they use in their shops to minimize data disasters.

*Chris is the Sr. Data Management & Report Specialist at the Hazelden Foundation in Center City, MN. He has 8 years of experience in working with development databases, including data entry, data management, importing/exporting, reporting, and policy and procedure documentation.*

### **Breakout Session: Partnering Research with Annual Giving**

**Speaker:** Amy Krauss, Blake School

*Amy joined The Blake School Advancement Office in 2007. Shortly thereafter, she began working in the role of Prospect Researcher. Since then, she has quickly become a positive addition to the team. She excels in streamlining prospect identification and identifying new prospects. Prior to her work at The Blake School, Amy spent several years developing, supporting, and training Access-based sales force automation databases. Amy graduated from Hamline University with a double major in physics and music.*

### **Planned Giving Prospect Identification and Research**

**Speaker:** Susan Dunlop - Development Director, American Academy of Neurology Foundation

*Susan Dunlop has over twenty years of philanthropic and non-profit management experience with special expertise in the areas of major gifts and planned giving. She is currently serving as Development Director at the American Academy of Neurology Foundation. Most recently, she served as the Director of Gift Planning at University of St. Thomas and as Senior Philanthropic Advisor at the Minnesota Medical Foundation at the University of Minnesota.*

*Susan earned her bachelor's in English and history at Westmar College in LeMars, Iowa and her M.B.A. in Strategic Planning from the University of Minnesota Carlson School of Business. She is an active member of the Minnesota Planned Giving Council and the National Committee on Planned Giving now called Partnership for Philanthropic Planning.*