



## APRA of Greater New York - APRA GNY Fall Conference

Join us on Friday, September 18, 2015 for the APRA of Greater New York Annual Fall Conference, featuring speakers who are industry leaders in the advancement sector. The daylong forum will focus on how to successfully apply the techniques of identifying, researching, and cultivating prospects in the ever-changing and competitive world of philanthropy.

The daylong conference will be held at the Interchurch Center, Sockman Lounge (475 Riverside Drive, New York, NY) from 9am to 4pm on Friday, September 18th. The cost is \$75 for APRA-GNY members and \$125 for nonmembers (includes breakfast and lunch).

When

**Friday, September 18, 2015**

9:00 AM - 4:00 PM (EDT)

Location

The Interchurch Center,  
475 Riverside Drive  
New York, NY  
10115

### Registration

**APRA GNY Member – \$75.00 (USD)**

**Non-APRA GNY Member – \$125.00 (USD)**

REG

Register online @:

<https://apraofgreaternewyork.wildapricot.org>

**To register by mail, please send check or money order with your name & organization to:**

APRA-GNY  
PO Box 1105, New York, NY, 10113

Programming:

#### KEYNOTE ADDRESS

##### **Cutting Edge Communication Tools for Researchers**

Don Waisanen  
Baruch College  
9:30am to 10:45am

Separating fact from fiction, this keynote will provide a framework for the latest, evidence-based methods for presenting information and communicating effectively with people in varying settings and at all different levels of an organization. All researchers and fundraisers need to make an engaging case for their data, so this session will cover surprising ways to make the content, structure, and delivery of communication more compelling. Particular attention will be placed on working with new visual communication tools that participants can immediately implement in their professional work.

#### **The When, Why, and How of Data-Driven Fundraising**

Melissa Bank Stepno  
Target Analytics  
11:00am to 12:15pm

Fundraising analytics has become a mainstream practice. You know that there is value in data-driven fundraising, but the tough part is often determining when and how to apply to maximize your fundraising performance. Among others, two tried and true reasons for data-driven fundraising are (1) to help identify transitional giving prospects emerging from the annual fund that have the potential to become mid-to-high level donors and (2) to assess the performance of those who have already reached major donor status. In this session, we will review the findings of studies completed by Target Analytics and use the results to guide attendees toward determining some of the when, why and how questions you might want to apply to your database.

#### **Prospecting in 2015**

Marianne Pelletier  
Staupell Analytics Group  
1:15pm to 2:30pm

Prospecting is always evolving because wealth is. Join Marianne Pelletier to explore ideas in the newest versions of analytics, tweaks on using screening products, social media prospecting, and using prospect behavior chains for identification.

#### **Panel Discussion: Researching Diaspora Philanthropy**

Moderator: Estee Pierce  
Panelists: Linlin Chen Reid, Jenny Santi, Katarina (Kate) Czarniak  
2:45pm to 4:00pm

Panelists include expert practitioners from both the grant-making and fundraising industries.

The greater New York nonprofit donor base has evolved and grown from a local cadre of tristate area funders to a diversified network of international stakeholders. These new New York philanthropists represent the Diasporan, transnational wealth community - of recent arrivals, part-time New Yorkers, as well as global citizens. As researchers, we must develop unique perspective on the various and changing philanthropic landscapes of this broadly diversified prospect population. In this panel conversation, we will discuss the methodologies and resources that help us to identify, analyze, and evaluate their wealth and philanthropic potential.

Speaker Bios:



**KEYNOTE SPEAKER:**

**Don Waisanen** is an associate professor in the Baruch College School of Public Affairs, where he teaches courses and workshops in public communication—including executive speech training, campaign and advocacy strategies, media analysis, and seminars on leadership and humor. Before entering academia, Mr. Waisanen worked in broadcast journalism, as a speechwriter, and on political campaigns. He has conducted communication strategy for various domestic and transnational projects, and serves on the board of the Resilience Advocacy Project, a nonprofit helping youth transition out of poverty. He writes for The Huffington Post. He received a Ph.D. in Communication from the University of Southern California.

**Melissa Bank Stepno** is the Consulting Team Lead & Manager for Target Analytics, a division of Blackbaud, Inc., where she is responsible for managing a team of consultants and consulting services related to strategic implementation of data analytics projects. Prior to assuming her current role in 2014, she served as consultant at Target Analytics for nine years. Her areas of focus included the impact high net worth philanthropy on major giving programs and on helping organizations develop effective research and prospect management operations. Melissa has also worked for both Boston University and Boston Ballet and has served on the boards of NEDRA, AFP’s Northern New England Chapter and Brandeis University’s Alumni Association. She received her BA from Brandeis University and masters’ degrees in Arts Administration and Higher Education Administration from Boston University.

**Marianne Pelletier** is managing director of Staupell Analytics Group, and all-about-data firm focused on the non-profit sector. She has over 25 years’ experience in analytics, prospect research, database management, and annual giving. Her prolific writing and speaking engagements emphasize using a step by step approach to improving fund-raising, along with maximizing automation in order to free up human resources. Her book, *Starting Your Analytics Shop: A Workbook for Non-Profits*, is slated to come out this summer.

**Estee Pierce** is associate director of prospect research at New York University's department of University Development and Alumni Relations. She previously was a senior research analyst in the development department of Memorial Sloan-Kettering Cancer Center. Before entering the nonprofit field, Ms. Pierce worked as a financial reporter and news editor for Dow Jones. She is an active member of the Association of Professional Researchers for Advancement, and serves on the board of APRA-GNY. Ms. Pierce holds a BA in English literature and art history from Vassar College and an MS in fundraising and grantmaking from New York University’s George Heyman, Jr. Center for Philanthropy and Fundraising.

**Linlin Chen Reid** is a senior research analyst at New York University's department of University Development and Alumni Relations. At NYU, she spearheads global research operations, overseeing prospect research for the international initiative to engage alumni, parents and friends of the global network university. Prior to joining NYU, she was a prospect researcher at the Harlem Children's Zone. From 2008 to 2011, Ms. Chen worked as a prospect research analyst at the University of Chicago. Ms. Chen graduated from the School of the Art Institute of Chicago in 2008 with a master's degree in arts administration and policy. She also holds an MFA and a BFA from Nanjing Arts Institute. Her personal research interests include contemporary art and its market.

**Jenny Santi** is a philanthropy advisor to some of the most notable ultra high net worth philanthropists and changemakers in Asia and around the world. She is the Regional Advisor to Asia at the Hawn Foundation (started by Academy Award-winning actress Goldie Hawn), a Mentor at The HUB in Singapore, and is a Social Entrepreneur in Residence at INSEAD. From 2008 through 2012 she was Southeast Asia head of UBS’s Philanthropy Services department. She has organized dozens of events convening leaders in philanthropy and civil society, and in 2011 conceptualized and led together with INSEAD the largest study on Asian family philanthropy. Ms. Santi did her MBA at INSEAD and Wharton; and graduated summa cum laude from the Ateneo de Manila University. She has attended New York University’s Heyman Center for Philanthropy & Fundraising, and is a Chartered Advisor in Philanthropy. She is the author of the forthcoming *The Giving Way to Happiness: Stories and Science Behind the Transformative Power of Giving*, to be published in October by Penguin Randomhouse.

**Katarina (Kate) Czarniak** is senior manager of the Synergos Global Philanthropists Circle, a dynamic network of philanthropic families from across the world committed to using their time, influence, and resources to fight global poverty and social injustice. Prior to joining Synergos in 2014, Ms. Czarniak spent three years in the Kyrgyz Republic at the University of Central Asia, an Aga Khan Development Network initiative that brings an international standard of education and research to the mountainous communities of Central Asia. As Deputy Head of Development, she led the university’s fundraising, program development, and partnership building efforts in the Kyrgyz Republic, Tajikistan, Kazakhstan, and Afghanistan. Ms. Czarniak holds a MA in International Relations from Syracuse University’s Maxwell School of Citizenship and Public Affairs and a BA from the University of Rochester.

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The Association of Professional Researchers for Advancement of Greater New York (APRA-GNY) is the local chapter of the International Association of Professional Researchers for Advancement. APRA-GNY seeks to educate and to encourage professional development among our membership with a goal of enhancing the strategic plans of nonprofits seeking philanthropic support. Established in 1997, our membership represents a diverse section of the fundraising community in the nonprofit capital of the world!

For more details about joining APRA-GNY, please contact [memberinfo@apragny.org](mailto:memberinfo@apragny.org).