



**Association of Professional Researchers for Advancement,
Greater Houston Chapter's 2009 Summer Workshop**

"In Your Own Backyard – Leveraging the Resources at Hand"

Date: Friday, June 12, 2009

Time: 7:45am – 12:30pm

Location: University of St. Thomas campus, 3800 Montrose Boulevard
http://www.stthom.edu/Visitors_Community/Maps/Index.aqf
Free Parking – Moran Center Garage (building #26)
Morning session - Jones Hall (building #14)

Cost: \$35 APRA-GH members; \$35 APRA-SW members, \$55 non-members
\$70 for APRA-GH membership and workshop attendance

RSVP: Holly Harrison [contact info: [713-942-3453](tel:713-942-3453) or harrishr@stthom.edu]
<http://www.apragreaterhouston.org/>
http://www.apragreaterhouston.org/pdf/APRA_GH_Workshop_2009_Registration.pdf

Keynote

Charles Headley

Executive Director, Advancement Services
Southern Methodist University
8:15 -10:00am

"Multi-layered Approach to Engaging Your Constituency"

Charles is leading a project to replace SMU's donor information system. Part of this design effort requires an assessment each constituency group (faculty, students, alumni, parents, donors, friends, athletic event ticket holders, musical/arts event ticket holders, etc.) to distill strategies for communicating with and maximizing the level of engagement for each. He'll share his valuable ideas and insight in this informative session.

Breakout Session 1

10:30 – 11:20am

**A: Historical Perspective on Houston's
Philanthropic Families**

Presented by: Jim Parsons

Many of Houston's most prominent philanthropic families have had influence not only in the city of Houston, but also beyond its borders. Through history, anecdote and photos, Jim will focus on some of those families — including the Cullens, Fondrens, Claytons and the Joneses — and will explain how their generosity has helped shape Houston, Texas and the United States.

B: Donor Advised Funds - a primer

Presented by: Stephen Maislin

Learn how community foundations work, the different types of charitable funds under management, and how donors participate in directing charitable contributions. Additional insights on the extent to which multi-year commitments are possible, and the availability of public information for the foundation.



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Breakout Session 2

11:30– 12:20pm

A: Research on a Budget – how to get the most information with no budget

Presented by: Ali McLane

Learn how to achieve the biggest return on investment using research resources you already have, plus get the skinny on low cost and no cost resources you can put into action at the office the next day. Learn how to turn data into Actionable Intelligence on a budget!

B: Leverage Social Networking to Advance Nonprofit Awareness Community Involvement & Fundraising

Presented by: Aaron Long

Learn how to leverage social networks like [Facebook](#), [Twitter](#), [Flickr](#) and [Digg](#) to grow your donor base. Aaron will share case studies of organizations that have made a splash in the online fundraising world, with strong online strategy and a basic knowledge of powerful tools. Learn new ways to organize your fundraising activities online and what tools to use to grow your Community as never before.

Speaker Biographies



Charles Headley currently serves as executive director of advancement services at Southern Methodist University. Prior to SMU he was senior director, Education and Healthcare Sector with Kintera, an innovative provider of Web interaction software for nonprofit organizations. Charles was one of the founders of Prospect Information Network which developed P!N ProfileBuilder, a comprehensive approach to finding, profiling and monitoring major gifts prospects. Kintera acquired Prospect Information in March 2004.

Charles began his career in the fields of library and information science, and computer programming. He was with Marts & Lundy from 1984-1988, and helped to develop the fundraising industry's first computerized prospect screening service. He then served two years as Vice President of The Information Prospector, a Washington DC based prospect research firm. From 1990–1998 he was with CDA/Investnet, helping them develop their securities matching service and their FACT\$ family of identification services. He received a bachelor's degree from McKendree College, a master's degree from the University of Illinois and a master's degree in business administration from Bernard Baruch (CUNY) in New York City.

Jim Parsons is director of the Museum of Houston (www.museumofhouston.org), a digital archive and exhibition project sponsored by Greater Houston Preservation Alliance (GHPA). A graduate of the University of Houston, he has worked for several years as co-chairman for GHPA's Walking Tours Program. Jim is the co-author of *Houston Deco: Modernistic Architecture of the Texas Coast*.



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Stephen Maislin is President and CEO of the Greater Houston Community Foundation where he works with families to achieve their charitable goals. When Steve joined the GHCF staff in July 2001, he brought eighteen years of experience in wealth transfer and financial planning from positions with the Houston offices of KPMG and Fidelity Investments and local firms Comiskey Kaufman, Inc., and The Maislin Company. At KPMG he was Director, Personal Financial Planning Practice and presented seminars and workshops for the Association for Advanced Life Underwriting and the State Bar of Texas.

Steve is a graduate of the Wharton School of the University of Pennsylvania (B.S. in Economics) and the University of Texas School of Law. He grew up in Houston and graduated from St. John's School. He is an active participant in the Houston community, including service on the boards of the Jewish Community Center of Greater Houston, the American Diabetes Association, and the Houston Jewish Community Foundation.



Ali McLane is a Consultant with Dini Partners. She works with clients to enhance and build prospect management, identification and research programs as well as assisting with data and database optimization across all departments.

As one of the developers of Prospect Information Network (PIN), a wealth-screening and consulting company, Ali pioneered the use of software to identify, profile and segment prospects using multi-layered interests, wealth and patterns of giving – invaluable information for nonprofits seeking support. During her nine years with PIN, Ali advised more than 500 clients on the effective use of wealth, personal interests and affinity data to further their missions.

Ali received bachelor's and master's degrees in communications studies from Texas Tech University. She is a co-founder, past president and board member of the Southwest Chapter of the Association of Professional Researchers (APRA). Ali is president of APRA of Greater Houston and is a charter member of the Association of Advancement Services Professionals, serving on their best practices committee.



Aaron Long is the Business Development Director and an equity partner at Schipul. An accomplished artist, animator and businessman, Aaron is responsible for overseeing the sales team for Schipul – The Web Marketing Company and Tendenci™ - Membership Management Software.

Aaron previously functioned as Creative Director and has piloted online marketing for hundreds of clients from around the globe. Some of his teams' past achievements have been discovering new ways to measure web analytics, integrating social software that helps business, and educating the community on the best way to reach a market and have

money left over for profit.

Aaron is a graduate of Texas Tech University with a B.F.A. in Studio Art. He is also a family man, draws a mean caricature, and can find an image on a Google search faster than any other human being alive. You can read what Aaron is up to on his Blog at

www.longstation.com.