



Georgia Chapter

OPTIMIZING DATA AND REVITALIZING PROSPECT MANAGEMENT

Spring Conference

May 15, 2020

This meeting is virtual and is available to you through ZOOM. Register in advance for this webinar:

https://zoom.us/webinar/register/WN_I7nEtPtsQ_OUiIJwquDeQ

After registering, you will receive a confirmation email containing information about joining the webinar.

All times are EST

Schedule – Friday, May 15th

9:00 am Welcoming Remarks

9:05 – 11:00 “Data Management, Governance, and Analysis: Tips and Tricks to Establish Strategic Information Management Environments”

Dwight Dozier, CIO, Georgia Tech Foundation

Chris Cannon, CRFE, President of Zuri Group’s Strategic Services

Dozier and Cannon will review the essential data management components, followed by the keys to creating effective data governance regimes. With data management and governance clarified, participants will learn about the ways that data analysis is evolving in the nonprofit sector in the effort to raise more money and build better relationships.

11:00 - 11:15 Break

11:15 – 11:45 Chapter Business

11:45 - 12:45 Lunch



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12:45 – 1:45 ***“Stop Focusing on Clean-up and Make Something Fun To Look At”***

Holly Weimer, Associate Director of Prospect Management, University of Georgia

Over clean up during your meetings with Fundraisers? Need a new way to see things? Just by asking the right questions and listening, you can use Excel to create easy to modify reports and charts that are fun to look at that aren't all about clean up. This presentation will give you a quick look into my thought process and how we extract data from our system and use it in Excel to show progress to goals and pipeline development.

1:45 – 2:45 ***“Transforming Prospect Management into Solicitation Management”***

Juan Garcia, Assistant Vice President for Advancement Strategy and Campaign Director, University of Texas at Austin

This session will provide an overview of the Texas Development transformation of its prospect management system into a culture that drives major gift (\$100K+) prospect solicitations. The speaker will describe the implementation of a strategy that included an overhaul of policies, procedures, performance metrics, roles, and development practices to maximize major gift solicitations and gift officer productivity. The session will include an overview of the major challenges, strategies implemented to change behaviors and culture, and a summary of the successes and results.

2:45 – 3:00 **Break**

3:00 – 4:00 ***“Fundraising with Special Collections”***

Chantel Dunham, Director of Development, University of Georgia Libraries, The Georgia Review and UGA Press

Fascinating treasures in university libraries special collections offer unique ways to engage alumni and their friends and families. Though Libraries have no alumni of their own, they do have our institutional, community, state, and national history that connects to nearly everyone in some way. Additionally, the library is the academic heart of the university; it is the one place on campus that truly touches the lives of every student.

At the UGA Libraries we have been using our special collections to entice, to teach, and to truly touch those who have joined us for these special programs, dinners, and experiences. This session will explore our successes, some slip-ups, and the ways UGA research and prospect management teams support our efforts.

4:00 **Closing remarks**

4:15 **Adjourn**



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SPEAKER BIOS 2020 SPRING CONFERENCE



Dwight D. Dozier
CIO, Georgia Tech Foundation

Dwight D. Dozier is the CIO of the Georgia Tech Foundation, responsible for the leadership, strategic direction and oversight of all Foundation and enterprise advancement technology solutions. Preceding Georgia Tech, Dwight served as senior associate vice president of advancement at the George Washington University, responsible for the areas of alumni relations, advancement services, constituent relations, and markets.

Prior to his work at GWU, Dwight served as the associate vice president of university advancement and advancement services at the University of Louisville, assistant executive director of alumni services at The Pennsylvania State University, and as manager of biographical records and systems analyst at Washington State University. With more than 38 years of experience in higher education advancement, Dwight is an active participant in his profession, currently serving as a member of the board of directors for the Association of Advancement Services Professionals.

Additionally, he has been a faculty member, presenter, and summer institute and conference chairs for CASE (Council for Advancement and Support of Education) and has served as a commissioner on the CASE National Commission on Philanthropy in Washington, D.C.. Dwight was also involved with CASE Kentucky as a board member, annual conference chair, and president of the organization. Dwight is a graduate of Washington State University and an active jazz musician.



Chris Cannon, CFRE
President, Strategic Services
Zuri Group
Author, Fundraising Operations

Chris is the author of *An Executive's Guide to Fundraising Operations* (Wiley, 2011) and a regular speaker at CASE, AASP and other industry leading conferences.

Chris currently serves as President of Zuri Group's Strategic Services where he advises dozens of the world's largest fundraising organizations on strategy and operations. Chris lives in St. Louis with his wife and two children.



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Holly Weimer
Associate Director of Prospect Management
University of Georgia

Holly serves the Research and Prospect Management Team at the University of Georgia as the Associate Director of Prospect Management. With both a Bachelors and Master's Degree in Accounting, Holly is no stranger to data and analytics. In her role as Associate Director, Holly has taken her interest in technology and quantitative analysis to develop new processes for the Development team at UGA. Holly is constantly looking for ways to utilize newly learned formulas and tricks, and believes that there is always more than one way to slice the data. Holly has been at the University of Georgia for nearly 11 years. When she isn't building spreadsheets, Holly enjoys puzzles, sewing and crime TV.



Juan Garcia
Assistant Vice President for Advancement Strategy and Campaign Director
University of Texas at Austin

Juan Garcia is a strategic leader with a history of successfully leading and implementing complex transformational projects in large and decentralized organizations. He focuses on assisting organizations transform strategic plans and business objectives into organizational results.

Juan achieves results through innovative solutions driven by strategic analysis, data analytics, and building trusted business relationships. Juan's approach is to develop a collaborative environment with colleagues and assisting team members grow in their careers. He is comfortable in stretching his boundaries and working to meet the needs of multiple and diverse stakeholders. Juan is fluent in Spanish and successfully completed international assignments in Latin America and the Middle East.



Chantel Dunham
Director of Development, University of Georgia Libraries, The Georgia Review and UGA Press
University of Georgia

Chantel Dunham is the first Director of Development for the University of Georgia Libraries. Starting from scratch 26 years ago, she has enjoyed the challenge of establishing a Fundraising Board, finding prospective donors, creating unique events, and igniting some enthusiasm for this hidden "treasure" of the University of Georgia. Prior to this, Chantel owned a corporate gift business in Southern California, and a corporate travel company in Maui, Hawaii.

Originally from Lafayette, Louisiana, Chantel has a degree in Public Relations from the University of Louisiana at Lafayette. Since working with the University of Georgia Libraries, she has been involved with the planning and fundraising for the \$45M Special Collections Libraries Building which opened in February of 2012. She has developed an active and generous Board of Visitors and has helped develop and endow the Georgia Writers Hall of Fame program as well as created signature engagement events like White Glove Dinners, a Date with History and travel programs around the state and beyond that have attracted the University's top donors.



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