



Northwest  
Chapter

## 2024 Apra-NW Conference

**Thursday, May 2, 2024**  
**Virtual Conference**



### **Keynote Session: Asking Questions - Ruminations On How To Be A Better Professional**

9:00 - 9:50

Today, as we listen to our esteemed panelists and presenters discuss the changes in our field and the impact those changes will have on our organizations, our keynote will ask us to focus on the connection between ourselves and our organizations. To be aware of that connection, we must ask ourselves questions that best position us to help our organizations endure change and grow. Join Steve Grimes for an honest conversation on the questions he believes are useful to foster that connection and how we can use those questions to also foster growth within ourselves.

### **Presenter: Steve Grimes, Director of Prospect Development and Analytics, Legal Defense Fund NAACP**

Steve Grimes (he/him) started his career as a prospect research/development professional in 2006 at St. John's University as a development researcher. In 2012, he moved on to academia as a doctoral student at Rutgers University studying the sociology of emotions. Just as the Trump administration came into the White House in 2016, he felt that the academic route was not the path for him, and decided to return to fundraising as a prospect research analyst at the American Civil Liberties Union (ACLU) in the national office. In 2018, when an opportunity came available to work at Jazz at Lincoln Center, he became the organization's first Director of Development Strategy & Analytics. In 2020, at the beginning of the Covid pandemic, Steve was fortunate enough to be recruited by the NYC Mayor's Office as their Assistant Director of Data Analytics for the New York City Mayor's Office of Data Analytics (MODA), where he was proud to serve his home as a 'native' New Yorker. Wanting to return to something familiar, but different, Steve came back to the fundraising world in 2021 as a consultant with The Helen Brown Group (HBG) where he served as the firm's Assistant Director of Data Insight. Recognizing that his strengths were best suited for a brick and mortar organization, Steve moved on from HBG to the Legal Defense Fund at the NAACP in 2023 as the organization's first ever Director of Prospect Development and Analytics.

When times allows, Steve enjoys video games, journaling, baking oatmeal cookies, breathing fresh air, and marvelling about the amount of luck he has had during his career.

## Session Panel: The New Normal in Practice

10:00 - 10:50

What's old is new again? An election year that feels too familiar and continuing global crises. How do we create a positive work environment and foster team culture when the 'new normal' can feel a little bit like a déjà vu? In this session, you will hear from people managers that are intentionally leading their teams with a human-centric, community-building approach.



### **Facilitator: Megan Tedeschi**

Megan Tedeschi (she/her) is the Director, Prospect Intelligence for UNICEF USA where she guides the strategic direction of the prospect identification and research team. Previously, she was a Senior Prospect Analyst at The George Washington University focusing on corporate and foundation research and relationship management. She served as the Assistant Director of Prospect Research at Johnson & Wales University in Providence, Rhode Island and spent six years at the Museum of Fine Arts, Boston as a development assistant for planned giving and then as a Development Officer, Prospect Research. She holds a B.A. in art history from Boston University.



### **Panelists: Brandon Baez, Assistant Manager of Prospect Research, Oregon Food Bank**

Brandon Baez, (He/Him/El) is the Assistant Manager of Prospect Research and Management at the Oregon Food Bank (OFB). Brandon has been at OFB for 3 years and previously was a front-line fundraiser at a mid-size arts organization in San Diego CA. A fun fact about Brandon is that he is a very active person, he plays multiple soccer teams and loves to spend time at live music events.



### **Anna-Liisa Little, Director Prospect Management and Research, Fred Hutchinson Cancer Center**

Anna-Liisa Little (she/her/hers) is the Director, Prospect Management & Research at Fred Hutchinson Cancer Center. She has been at Fred Hutch for 12 years. Previously, she was a Project Manager, Market Research Manager, and Senior Research Analyst at Microsoft. She holds an MLIS and an MA (Political Science) from the University of Washington and a BA from Haverford College. She serves as the Secretary for the Ballard Little League and is the former Membership Coordinator for Apra NW. Anna-Liisa lives in Seattle and enjoys hiking, birding, and gardening with her husband and two children.



### **Kim Palumbarit, Director of Prospect Development, Seattle University**

Kim Palumbarit (she/her/hers) is the Director of Prospect Development at Seattle University. Before working at SU, Kim was the Student Affairs Officer at Columbia University in New York at the Weatherhead East Asian Institute. Kim began her 15+ year career in higher education at Emory University in Alumni Relations and coordinating South and East Asian programs in Emory College. Kim leads the BIPOC in UA Caucus at Seattle University and is a member of the Maple Leaf Community Advisory Committee for LIHI. Kim holds a bachelor's degree in Political Science from Emory University in Atlanta, GA. Kim lives with her family in Seattle. When she's not Zooming into meetings, she enjoys camping on the coast, dining at So Moon Nan Jib and Maldon salt on cookies.

## Corporate Ratings Task Force: Corporate Capacity Ratings vs. Engagement Score

11:00 - 11:50

A few years back, Prospect Development at the University of Washington (UW) formed a Corporate Rating Task Force to consider updating our methods for corporate capacity ratings. Through conversations with CFR fundraisers at UW and prospect development peers nationally, we found that the concept of a corporate engagement score is increasingly more valuable to fundraisers than a corporate rating. Fundraiser feedback showed that engagement, although harder to quantify, may serve as a better indicator of relationship potential. This session will provide an overview of where this task force started, how the project evolved, key learnings and take-aways, and where we are to date with implementing our findings at UW.



### **Presenter: Allison Patzwald, Senior Research Strategist, University of Washington**

Allison Patzwald (she/her) joined the Prospect Development team at the University of Washington in 2008 and is currently a Senior Research Strategist. Her favorite research projects involve data analysis, and she is always excited to learn new Excel formulas and data visualization techniques. She lives in Lynnwood, WA, with her husband and three kids, and enjoys craft projects and annual trips to Whistler, BC, with her family. She received a masters degree in public administration from the Evans School of Public Policy & Governance at the University of Washington in 2007 and a B.A. in sociology and law, societies, and justice from the University of Washington in 2004.



### **Presenter: Matt Kujawa, Research Strategist, University of Washington**

Matt Kujawa (he/him) has worked as a Research Strategist at the University of Washington since 2006. Matt has presented on corporate and foundation prospect research topics at past Apra and CASE conferences and is interested in how this sector has grown and changed over the years. In his free time, Matt likes doing yardwork at home in North Seattle and listening to music. He received an M.A. in international studies from the University of Washington in 2003 and a B.A. in political science from the University of Minnesota, Morris, in 1991.

---

## **Apra-NW Board Meeting and Awards (OPTIONAL)**

1:00 - 1:50

Join the board for our annual business meeting and announcement of our Cecilia Hogan and membership scholarship awardees.

---

## **LOVE in Practice: Identification Beyond Financial Metrics (Interactive Sharing Session)**

2:00 - 2:50

How do we include more than “Show me the money” as indicators to building authentic relationships with donors? How do we find prospects using metrics centered around love and equity? In a follow up to Building Relationships based on LOVE, Melissa will share a pilot project that has developed from the initial work of measuring love, building a process and test using non-financial engagement points to determine potential prospects in coordination with frontline fundraisers input. Then, we’ll break out into smaller groups to brainstorm other data points we could use to identify potential prospects. We’ll end the session with a highlights share out.



**Presenter: Melissa Yale, Senior Developer of Prospect Research & Management, Oregon Food Bank**

Melissa Yale (she/her/hers) joined Oregon Food Bank 9 years ago, the last 6 years on the Prospect Research and Management team and prior to that as a frontline fundraiser working with affinity groups to coordinate and manage large annual fundraisers. Before finding a profession that fit her purpose, she was a mechanical engineer developing consumer technology products and earned her MBA. Melissa enjoys spending time at the theater as a volunteer usher, growing tomatoes, and testing new cooking experiments.

---

**CRM Conversions and Change Management**

3:00 - 3:50

Working with leadership and frontline teams on change management for major changes like CRM conversions is key to a project's successful adoption. Caroline and Jessica will share stories and lessons learned from their recent CRM conversions (Caroline's at Oregon Health Sciences University Foundation is very fresh, and Jessica's at University of Washington happened last spring).



**Presenter: Jessica Balsam, Senior Director of Prospect Development, University of Washington**

Jessica is the Senior Director of Prospect Development at the University of Washington. She is past president of Apra-NW, the 2016 recipient of the Apra Distinguished Service Award, and the recent chair of the Apra Advocacy and Editorial Advisory committees. Jessica has worked in development for the arts and higher education for two decades. She originally moved from the Midwest to the Pacific Northwest to work as a glassblower.



**Presenter: Caroline Oblack, Senior Director of Research, Prospect Management, and Analytics, Oregon Health Sciences University Foundation**

Caroline Oblack (she/her) is the Senior Director of Research, Prospect Management, and Analytics at the OHSU Foundation and has been with the organization for 13 years. Caroline is an avid volunteer with Apra and has served on the boards of Apra International, Apra-NW, and Apra-VA. She regularly serves as a mentor and advocate for those in the prospect development profession, and is a frequent speaker for webinars and at industry conferences. In 2021, Caroline was awarded the Distinguished Service Award from Apra International, and the Cecelia Hogan Award from the Apra-NW Chapter.