



President's Message



By Jason Boley
APRA-IN President
Director, Research Services, Technology and Analytics
Riley Children's Foundation

It's an honor to be able to address APRA-IN members in the first newsletter since becoming President in January. We have a new board, with four new members, and there is a lot of energy in our new group. The board has already met twice in brainstorming sessions and we've already made some significant decisions. I'm happy to have this forum to communicate them to you.

The primary focus of the board so far has been to bring more structure to the board, better plan our events, and then move towards cleaning up some governance and fiscal issues. There are a few things we do well: our annual luncheon, our

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APRA-IN Annual Meeting Recap



By Roberta Werman
APRA-IN Secretary
Director of Development Research
Bethel College

This year the APRA-IN Annual Meeting took place on January 9, 2012 at the Children's Museum in Indianapolis. It was an informal time that allowed members present to share their thoughts on potential and upcoming events. A lot of great ideas were shared.

The three main areas discussed were

- Indiana Day of Philanthropy collaboration
- Beefing up the Programming schedule and
- Improving communication among members

1) Indiana Day of Philanthropy Collaboration
A discussion of whether we should join with AFP, CASE and PGGI for the Indiana Day of Philanthropy took place. Some of the needs would be volunteers from APRA-IN membership to join each committee of the Indiana Day of Philanthropy and APRA-IN would be committing to raising a certain amount of sponsorship. This conference would replace the APRA-IN Fall Conference for 2012. At least 2 sessions on prospect research would be offered.

The consensus of the members present was that this would be a good year to test this programming. It offers wider educational opportunities and would afford APRA-IN larger organizational recognition. The Board met later in January and voted to move forward with participating in this event. Thanks to our members for already stepping up to volunteer!

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conference, and the basic skills workshop. It's important to keep these events and we want to try to bring a few additional networking opportunities to members. Our first effort to do that will be a brown bag series, one for the northern, central and southern parts of the state. If you are interested in hosting a brown bag event, please contact myself or any board member.

A couple of exciting things are still in the early stages of development. We have an opportunity to partner with other philanthropy state organizations to host Indiana Philanthropy Day in Indianapolis. In December the board voted to go ahead with participation in this event in lieu of our annual conference as a one-year trial. This event provides a unique opportunity to network with fundraising, planned giving and grant writing professionals from around the state. Additionally, prospect research will be represented in the program options for the conference. The conference is set for November 15 in Indianapolis - stay tuned for more details. Additionally, planning has already started for the basic skills workshop and we should have more details on that soon.

Unfortunately, being on a board isn't always fun and games. For the last few years APRA-IN has been running a budget deficit. The board must address this. While we are blessed with some savings, we are certainly not an organization flush with cash reserves. We've already made some tough decisions. First, the board has decided to suspend for one year our annual full-ride scholarship to the APRA International conference so that this money can be used for activities that benefit more members. Frankly, applications have been low and this is by far our biggest expense of the year. Suspending this item immediately gets us out of the red. Additionally, we will charge a very nominal fee for the basic skills workshop this year to try to recoup food expenses. I think if you have attended this event you will agree that it is worth the price of admission and the cost is still very low to the point it should not scare anyone off. Long-term we will need to address the issue of regular income to our organization. Additionally, our bylaws state that we are to review them every three years, and they have been neglected since 2005. This will be added to the board's agenda for 2012.

Our membership committee has really hit the ground running. Felisa Javier-Holt and Tina Messel-Tracy have already done a great job of cleaning and compiling our membership and outreach mailing lists and are working to create some outreach communication to potential members in the state. I think it is important to increase communication with our existing members via our email list so that everyone is better informed. Additionally, we've been working hard to get the website and our Facebook presence updated with current information.

I'm really excited about the new attitude and fresh ideas being discussed by the board so far this year. I think it's going to be a great year and I hope you are excited as well.
--Jason Boley

2) Programming

There is a need for additional APRA-IN members to volunteer to help events happen. Suggestions included informal "Brown Bag" gatherings. These would be short, regional get-togethers that would allow for networking and shorter travel distances. Another thought was having more regional Webinar events from APRA International or other companies where one group could host or the cost could be shared by attending groups. If you have more ideas and/or would like to help organize a smaller, local event please [contact us](#).

3) Improving Communications

Ideas included the development of a Facebook page, which has already been completed; developing a forum for real time questions like an APRA-IN listserv or Yahoo groups; developing a welcome packet for new members (completed!); reaching out to more groups to introduce an APRA speaker's bureau; and promoting APRA-IN membership to other non-profit groups or potential prospects (in the works!).

Coming together to share ideas for the direction of our chapter in 2012 was very beneficial; thanks to everyone for their input. Many of these projects have already begun and we all look forward to a productive year.

--Roberta Werman

APRA-IN Happenings

It was announced that **Rita Waltz** was recently promoted to Assistant Director of Research of the Indiana University Foundation. Rita started as a research assistant in 2003 and has been promoted several times over the years due to her outstanding performance. Rita has provided research support to many units from Engineering & Technology to Nursing and beyond. For the past 6 years, Rita has spent the majority of her time partnering with the Kelley School of Business. Congratulations, Rita!

Kate Kiser has left the Advancement Research Manager position with the Indianapolis Zoo after almost four years with the organization. She now serves as the Database/Prospect Research Manager with the Methodist Health Foundation.

Have some news to share? Contact Kate Kiser at kkiser@iuhealth.org.

Researcher's Corner

Workshop Review: *The Art and Science of Donor Development*

By Roberta Werman
Director, Development Research
Bethel College, Mishawaka

Editorial note: in 2011, Roberta Werman attended The Art and Science of Donor Development workshop presented by Advancement Resources in Cedar Rapids, Iowa.

When I chose to attend this workshop I knew it would not be a place where I would learn new research techniques or how to better manage or work with my data. My expectations were to be able to understand the gift asking process in greater detail. I went with the goal of seeing how the research I do could be more relevant to the gift officer and maybe what types of information might be more useful.

This is one of the best workshops I have ever attended. It accomplished my goals plus much more. The presentation moved along quickly, combining presenter discussion and group involvement beautifully. I came away with a better understanding of the donor officer's process. The workshops focus looked at the gifting process through the donor's eyes. They present you with a button that reads: "It's **NOT** about ME". It is changing the focus from what can you give to my institution to how can we help you have a meaningful philanthropic experience. What is the donor's passion and how can we help them to fulfill that passion. The subtle shift in approach is amazing. Of course they have science to support this process and how it helps increase donation amounts.

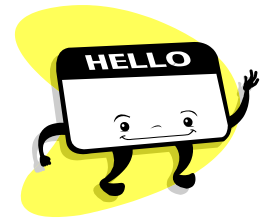
Materials were provided for use without additional purchases to assist in the process. The Donor Commitment Continuum offers an alternative way to the traditional moves management levels that reflects a more donor relationship model than a gift asks model. Advancement Resources also provided a very useful Donor Tracking Folder.

They demonstrated how to understand your donor's personal strengths to help develop better communication so you may present them with better decision-making criteria for the gift asks. It was amazing to me how easily you could discern the personality traits in a brief conversation. I was given a personal strength report which was also very accurate. Especially considering I only answered a few questions.

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New Member Profile

Compiled by
Shanelle Burns
APRA-IN board member
Director of Research and Prospect
Management
Valparaiso University



Meet....*Huyen Nguyen*



Huyen is Assistant Director of Regional Analysis of the Midwest at the University of Notre Dame. In this role, she leads research and analytic support for the Midwest region which includes procuring new prospects, maintaining prospect management for the fundraising team, and supporting the Senior Director for the region.

She holds a Bachelor's Degree in Business Administration from Notre Dame with a double major in Management and Theatre. Huyen was able to attend Notre Dame mostly due to undergraduate scholarships and financial aid, a direct result of work the Development office does, and she now loves being part of the philanthropic community and being able to give back to the University.

Huyen is currently spending most of her time planning her summer wedding in the Dominican Republic and also enjoys cooking, baking, movies, t.v. and volunteering with the Notre Dame Costume shop.

Missed a Newsletter?

To browse archived newsletters, visit the newsletter section in the members only area of www.apra-in.org.

I was given the opportunity to role play as a major gift officer and practice the techniques with other attendees. I practiced conversation techniques to help donors be able to discover and express what they were passionate about. I also had the opportunity to serve in a consultant group for a gift officer who was looking for a way to approach a donor. The consultant group posed questions to the officer to help them develop a donor strategy. It was a very useful experience.

What I went away with as a researcher:

1. A greater understanding of the Development Officers process.
2. Awareness of personality traits which is not only beneficial in working with donors but co-workers.
3. A better understanding of how I work and relate to others.
4. New donor commitment continuum (moves management) which is more donor relationship centered.
5. Inspired me to look for ways to better communicate with development officers.
6. Great networking.

On behalf of the APRA-IN board of directors and members, thank you for sharing your experience and review, Roberta!

Welcome New Members!

Nikki Aleman

Donor Relations Specialist
Sigma Theta Tau International

Nadine Baker

Prospect Research Specialist
Manchester College

Dean Esteves

Advancement Researcher
Butler University

Cindy Krou

Operations Manager of Development
Culver Academics

Jeanette Shown

Research Manager
Culver Academics



CALLING New (and experienced) Researchers...



Would you like the opportunity to work with an experienced researcher on a one-to-one basis? Are you willing to share your prospect research knowledge? Do you ever have research questions you'd like to send out to fellow researchers as your sounding board?

We would love to have you participate with or rejoin APRA-IN's Mentoring Program!

APRA-IN's Mentoring Program pairs new researchers with veteran research professionals in similar shops or geographic areas on a one-to-one basis. The role of the mentor is to provide information on resources, provide professional advice/support, act as a sounding board for ideas, be a confidant, and allow mentees to job shadow, or do other training as negotiated between the mentor/mentee. If your time and travel abilities are limited, let us know if you would prefer to serve as a mentor or mentee primarily via distance.

The program would also like to provide a way for researchers of all skill levels to connect and share ideas. For example, are you an experienced researcher but using a new database system? Would you appreciate the opportunity to work with someone skilled in that same system?

If this interests you or if you would like to learn more about the APRA-IN Mentoring Program, please contact: Felisa Javier-Holt via e-mail at felisa.javier-holt@rose-hulman.edu

Update Your Information

Have you recently changed jobs? Has your phone number or e-mail address changed? Have we misspelled your name in our records?

You can fix it!

Update your information on the APRA-IN web site.

Go to:

www.apra-in.org/member99/update.php

Click on "Update My Personal Information"

Password Reminder...

Visit <http://www.apra-in.org> to stay involved in APRA-IN.

To access the members-only section:

User name: apra-in

Password: in-apra

Save the Date!

25th Annual APRA International Conference

2012 APRA ANNUAL INTERNATIONAL CONFERENCE

When: August 1–4

Where: Hilton Minneapolis; Minneapolis, Minnesota

APRA will be celebrating its 25th anniversary of the conference in the city that hosted the first annual conference, Minneapolis, Minnesota. [Stay tuned](#) for more information regarding housing, registration and educational sessions at this year's conference.

Highlights of this year's conference:

- 47 education sessions
- 12 pre-conference workshops
- Two symposia
- Top-rated keynote speaker
- Roundtable discussion and networking event
- Vendor seminars
- Dedicated exhibit hall hours

Wanted:

APRA-IN Brown Bag Hosts!

APRA-IN is coordinating a series of "Brown Bag" events for Researchers in the same geographic area in Indiana to gather, network, and learn more about the field. We hope to either host or tune into informative webinars during these meetings. We thank our fellow members in the South Bend area and Central Indiana who have already volunteered to host a few "Brown Bag" events! Stay tuned for more details coming soon.

We would love to offer "Brown Bag" meetings in other parts of the state, specifically the southern areas of Indiana. If you are interested in volunteering to be a host or coordinating with a fellow Researcher in your area to lead a session, let us know! Contact: Jason Boley, jboley@rileykids.org.

BASIC SKILLS WORKSHOP

Build a strong foundation



New to Advancement Research and not sure where to start? We can help!

The Basic Skills Workshop addresses elementary research techniques and issues and is geared for those new to Advancement Research. This workshop serves as a great refresher course as well, and provides a perfect overview of prospect researcher for development professionals.

Details

When: TBD (June 2012)

Where: TBD

Cost*: APRA-IN members: \$15*

Non-members: \$25*

****lunch included!***

Stay tuned for registration details.

For more information, contact Amy Westgard at awestgard@indstatefoundation.org.

Upcoming Programming

WHAT	WHEN	WHERE
APRA-IN Basic Skills Workshop	June 2012	TBD
Indiana Philanthropy Day	November 15 2012	
APRA-IN Brown Bag	TBD	TBD
<p style="text-align: center;">APRA Virtual Webinars</p> <p style="text-align: center;">Stay tuned for announcements about how you can attend an APRA International webinar at a location near you!</p>	TBD	Host Locations: TBD
<p style="text-align: center;">Free Online Programming!</p> <p style="text-align: center;">Don't forget to check out the free online programs offered by APRA International to APRA International members.</p>		For more details, visit www.aprahome.org

Registration information will be sent out closer to the events.
Check the APRA-IN website at www.apra-in.org for event details.
Online registration is available for all events.

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