

President's Message



By Jason Boley

APRA-IN President & Assistant Vice President, Development Operations at Riley Children's Foundation

I can hardly believe that I'm writing this message in December, a full year after becoming the APRA-IN President. It seems like only yesterday the APRA-IN board was meeting in February and planning out the coming year, and now that year has come and gone. I suppose it's only appropriate to recap where we've been and where we hope to go in 2013.

As I noted in the first President's Corner of 2012, this would be an experimental year for 2012, and that has proven true. We established a very positive relationship with APRA-IL regarding our basic skills workshop. This year's workshop served over 40 people and was very well received. We tried some different brown-bag type events with mixed results; the one in Central IN was very well attended. This year we also started a new partnership with AFP-IN and other

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A Review:

Indiana Philanthropy Day 2012

By **Marilyn Smith**

APRA-IN Member

Coordinator of Prospect Research, Wabash College

Indiana Philanthropy Day 2012 was held at the Indianapolis Hilton Downtown on November 15, in conjunction with National Philanthropy Day 2012. This year, after several years of marking the day with an dinner and award presentation in the evening, Indiana Philanthropy Day returned as a combined day of education and presentation of awards. The conference was co-hosted by **CASE**, **Planned Giving Group of Indiana**, **Association of Fundraising Professionals**, and **APRA**.

Two hundred fundraisers attended the all-day conference, which included an opening keynote session by Tom Ahern, of Ahern Communications, speaking on "Smart Donor Communications and Maximizing Return on Investment." His theme was "Make donors feel good and important and they will reward you with gifting." Fundraisers should emphasize telling the donors why they are great [for their giving], not why the organization is great [for the work it does] in its publications and subsequent thank you's and appeals: "You ask and flatter; you thank and flatter; you report and flatter."

Conference sessions with a research focus were presented by Tanya Ford, Taylor University, "In House Data Mining = Big Results: How to maximize Your Database's Potential to Uncover Prospects;" the team of Barbara Lee, Carol Lukemeyer, and Amy Lain moderated "The A-B-C's of Prospect Research in the Small Shop" which was an open question format with the audience also contributing to the discussion; and Patrick Rooney, PhD, Center of Philanthropy at Indiana University, presenting data results of the newly minted Bank of America survey results on "High Net Worth Individuals." There was probably something for everyone, and it is always nice to sit in on a session which isn't exactly one's professional field.

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organizations regarding Indiana Philanthropy Day.

This was the first event of its kind, and while we didn't quite know what we were getting into, it turned out very well by all reports. The board also made several key movements in securing ourselves organizationally and fiscally by assessing chapter dues and revising our governing bylaws.

This coming year should be very exciting, and we have a lot planned already! The board has discussed several goals for the coming year, including:

- A return to our annual luncheon in February with a program. See the notice in this newsletter and please plan to attend!
- We will continue our partnership with APRA-IL on basic skills. This year is scheduled to be hosted in IL and then we will trade back and forth.
- We are planning a symposium for intermediate/advanced research topics to be held mid-year.
- We will be assessing our participation in Indiana Philanthropy Day. We have already been asked to continue our participation in the event.
- And while IPD was a success, the initial feedback was that while it is good to participate with our colleagues, the content was not such that it should displace our annual conference. Therefore we hope to have an event of this type in our traditional fall timeframe.
- And while we have spoken for a LONG time about being able to provide some content for members via the web, I think we are finally close to this goal. Stay tuned for more on that topic.

That's a lot of programming! In order to pull this off we are making a concerted effort to spread the workload. This year we grew the board by two positions. We are VERY excited to welcome five new faces to the APRA-IN board. We are also making a concerted effort to incorporate members on committees who might not be able to participate in the full board. So let us know if you are interested in helping out.

Finally, I would like to say thanks and goodbye to three outgoing members of the APRA-IN board. Laura Hinkley, Earlham College, who has served as treasurer, Sue Bonneau from Ball State, and Amy Westgard from Indiana State University. We are so sad to see you go, but thank you for all your contributions!

I will see you all at an APRA-IN event in the coming year!

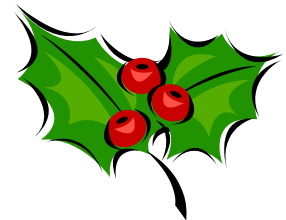


The awards luncheon program was hosted by Michael Henrich of Fox59. Ten awards were presented to individuals and organizations who were nominated by philanthropic organizations in Central Indiana, in front of an audience of 350 luncheon guests.

The closing keynote session speaker at the end of the day was Dan Pallotta, founder of Pallotta TeamWorks, who spoke on "Nonprofits Need to Invest and Innovate." Dan spoke passionately, backing up his argument with a vast amount of supporting data which encourages the non-profit charitable sector to take the upper hand in making a case for standing its ground, justifying quality "overhead" to accomplish its objectives, rather than cowering to the media's onslaught as they publicly berate a charity's expenses of attracting high caliber employees, and that somehow doing so is not a justified use of the funds it raises.

In addition to attending individual sessions of interest, the conference was a good way to meet people from a wide range of philanthropic organizations and their jobs within philanthropy.

Marilyn Smith is an APRA-IN member and serves as the Coordinator of Prospect Research for Wabash College. She started at Wabash College in 1998 in the Department of College Advancement as major gifts administrative assistant; then became the Coordinator of Donor Relations and established their first donor relations program. Marilyn has been the Coordinator of Prospect Research since 2009. She says she still feels new to research and finds attending even basics sessions at conferences helpful; for reminders and for new ideas from Colleagues. Marilyn would like to thank all of the presenters at the research sessions!



Write Something!

Would you like to contribute something to *Profiles*? If you have a topic of interest or an opinion piece, please share with us. Contact Kate Kiser at kkiser@iuhealth.org to submit your idea or for more information.

Editor's note: Thank you to **Marilyn Smith** for her contribution.

CALLING Experienced Researchers...

Are you willing to share your prospect research knowledge? We would love to have you participate in or rejoin the **APRA-IN's Mentoring Program!**

APRA-IN's Mentoring Program pairs new researchers with veteran research professionals 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 allows mentees to job shadow, or does other training as negotiated between the mentor/mentee.

New members will now have Mentors assigned to them as they join the APRA-IN chapter. If you are seeking a mentor, please let us know!

If becoming a mentor 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? *You can fix it!* Update your information on the APRA-IN web site.

Go to: www.apra-in.org/member99/update.php and click "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

Want an Advanced Research Seminar?

Jackie Knotts and **Cathy Spieth** are developing an advanced prospect research seminar to build upon the basic skills seminar that APRA-IN offers.

But they need our help to make this a reality:

- Topics - What skills would you like your staff to learn/improve in 2013?
- Speakers - Recommendations? Can we use your name to make a connection?
- Committee Members - Can you recommend someone from your staff or would you be willing to volunteer?
- Attendees - Do you have the funds to send staff to an advanced skills seminar for \$40 - \$75/person?

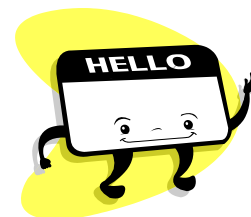
Please contact Jackie or Cathy so we can provide this great programming opportunity.

Jackie: 765-496-2175 or jknotts@purdue.edu

Cathy: 317-921-1346 or cathy.spieth@uwci.org

New Member Profile

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



Meet **Laura Pinhey**...



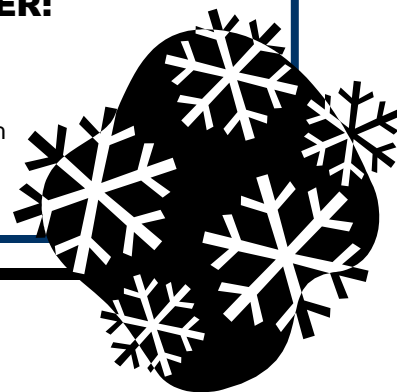
Laura Pinhey works as a Systems Analyst for a software development corporation in Bloomington where she tests customer-specific software for "bugs" and writes software documentation and user guides for clients. Her professional path has been one of research/reference services and writing. Past work includes coordinating reference and editing services for a government-funded education information system, writing a consumer column for a newspaper, and working for both a public and a genealogy library. She also spent a brief time as a patient care tech while considering a profession in nursing. While she enjoyed helping people, she realized her real passion was for research and writing, and after stumbling across a job ad for a prospect researcher, Laura was delighted to find what she believes to be a great professional fit.

Since that time she has been exploring the field, reading and researching it, attending several APRA-IN workshops and events, and most recently, joining APRA-IN. She's been blown away by how supportive and helpful the people she has met have been and is excited about where this industry may take her. Laura holds a BS in English from the University of Southern Indiana in Evansville and a Master of Library Science (MLS) degree from Indiana University Bloomington. She is also taking a self-paced genealogy course offered by the National Genealogical Society. She is a self-professed genealogy addict, loves to write fiction, read, knit and do yoga and swing kettlebells for fitness. Every once in a while she and her husband also enjoy scanning shortwave radios for stations broadcasting from faraway countries.

Welcome NEW MEMBER:

Julia Sloope

Development, Events and Research
Coordinator at Park Tudor School
jsloope@parktudor.org



Introducing Our New APRA-IN Board Members

The Class of 2016

Susan Fletscher Sarah Johnson Karen McTague
Jeremy Sheiko Jeanette Shown

Susan Fetscher is the Grants & Research Coordinator for the University of Southern Indiana Foundation. She was born and raised in Evansville, went to Purdue (Boiler up!) and earned her BA in Communication, then returned home. She plans to start working on her MA in Liberal Studies at USI in the fall of 2013. Susan has worked at USI for 8 years, and 4 of them have been in research. She is married and has a 3-year-old son and two dogs. Susan digs reading, movies, crafting, and trivia nights.

Sarah K. Johnson joined the Prospect Management & Research team at the Indiana University Foundation in January 2011. In her role as a Research Associate, she researches individuals and foundations and partners with development officers to increase support for Indiana University. She works with a variety of units including the university library system, the School of Informatics, the School of Public Health, and the IU Southeast regional campus.

Sarah holds a BA in journalism from Northwestern University and a MLS degree from Indiana University.

Karen McTague is the Director of Development for the Blackford County Community Foundation. She has served on the APRA-IN board in the past as president and secretary, and has organized conferences and luncheons throughout the years. Before her position at the Foundation, she worked at Anderson University as the Grants and Research Officer and established their research area in the Development Office. Karen has served on various non-profit boards throughout the east central Indiana region. She earned her MA and BS degrees in Journalism from Ball State University.

Jeremy Sheiko joined the Development Research Services team at Purdue as a Research Associate in September 2007. Prior to joining Purdue, he worked for a small non-profit located in Manassas, VA as a Donor Relations & Communications Officer. Jeremy earned a BA in Political Science from Christendom College (Front Royal, VA) in 2005. He is originally from the Detroit area, but grew up in Lexington, KY. Jeremy and his wife, Mary— a Lafayette native, have two daughters.

Jeanette Shown serves as the Research Manager at Culver Academies in Culver, IN. Previously, she taught at the University of Washington in the Center for Social Science and Computation and the Institute of Technology. She is also a game designer and digital animator.

Missed a Newsletter?

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

APRA-IN 2013 Board

Members

Jason Boley
Shanelle Burns
Susan Fletscher
Felisa Javier-Holt
Sarah Johnson
Kate Kiser
Jackie Knotts
Karen McTague
Tina Messel-Tracy*
Jeremy Sheiko
Jeanette Shown
Roberta Werman

The 2013 Officer candidates are as follows (Jan. voting)

President : Jason Boley
Vice President: Roberta Werman (new candidate)
Secretary: Karen McTague (new candidate)
Treasurer: Jackie Knotts (new candidate)

Researcher's Corner

Tips, tricks, and hints for researchers, by researchers

Advanced Operators

By: **Jeremy Sheiko**, Research Associate, Purdue

No matter if you work at an organization with a large resource budget or one with next to none, much of the work we do as researchers is still done through basic web searches using search engines like Google and Bing. Research has shown that even doing basic things like using multiple search terms can improve the efficiency of search queries. But, nothing will improve your efficiency and ease the frustration of wading through pages of irrelevant results than learning to use the advanced search operators available on both Google and Bing. The following are the operators I use most often and find to be the most helpful.

AND / (+) (Bing/Yahoo only) – In Bing/Yahoo, the AND /plus operator requires the term immediately following it to be included in the search results. Google does not use this operator anymore.

Minus (-) – The minus sign excludes the term immediately following it from your search. So, a search of Bill Gates – foundation would return results include results mentioning Bill Gates, but exclude those that include the word foundation. It is the same as the Boolean operator NOT.

OR / (|) – The Boolean operator OR (alternatively you can use |) is used when any or all of the terms can be included in the results. I use it most often when searching for name variations.

Quotation Marks (" ") – Placing your search term(s) in quotes will search for the exact word or phrase to be searched for. This is one of the more commonly used operators, but it can also be used in less common ways. Including common misspellings of your search term(s) in quotes can yield results that otherwise would be missed, and you can also include the wildcard operator, the asterisk (*), inside quotes (in Google only).

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Asterisk (*) (Google only) – In Google, the asterisk can be used as a wildcard. Wildcards are especially helpful when used within quotation marks. For example, by placing a wildcard in between the first and last name of someone you are researching within quotes, e.g. “Jeremy * Sheiko”, you will get all the results that you would with “Jeremy Sheiko”, but also results that include middle name or initial, as well as results where a spouse is named, such as Jeremy & Mary Sheiko.

Site: – The site: modifier is most commonly used to restrict a search to a particular domain, for example site:purdue.edu. It is best to only include the domain and not the protocol (http://) or server (www.) portions of the URL when using this. This operator can be used in conjunction with the minus (-) operator, which can be particularly helpful when getting many unwanted results from a particular domain, such as Wikipedia.org.

Tilde (~) (Google only) – Typed by holding down shift and pressing the key next to the 1 across the top of the keyboard, the tilde operator returns results including the word immediately following as well as similar words. A good use I have found for it is to include ~donation when researching a prospect’s giving to other orgs, as it will return results using the terms gift, contribution, etc. as well as donation.

Filetype: – The filetype: operator is used in conjunction with the suffix of the file type you would like to restrict the search to, such as pdf, doc, etc. Using the previous example of looking for giving to other organizations, a search of “first name * last name” ~donation site:.org filetype:pdf would return pdfs from .org websites including your prospect’s name as well as the word donation or similar words, which will often return annual reports of organizations they donate to.

Intext: (Google only) – The intext: operator in google is used to require the results include the term immediately following the operator to be included in the body text of the page. Only the term immediately following is used with operator; alternatively you can use the operator allintext: to require all the terms following to be included. I started using this operator more when Google stopped recognizing the AND/+ operators; those operators are still valid on Bing/Yahoo and achieve the same basic result.

An important thing to remember is that search queries, like math equations, are carried out in the order they appear; and parentheses can be used to group operations together to have them carried out first. For example, you could group together various search terms for name variations: (“Bill * Gates” | “William * Gates”) before adding in your other search terms. Often times you will get better results.

There are many other operators available on both Google and Bing, but these are the ones I use most often. For additional operators for Google, check googleguide.com/advanced_operators_reference.html; for Bing check msdn.microsoft.com/en-us/library/ff795620.aspx. Google offers an online course, Power Searching Google, available at powersearchingwithgoogle.com/. The course includes brief videos describing how to use different operators and constructs queries, and includes exercises as well. Google also has a site, A Google A Day (agoogleaday.com/), that presents a daily problem to solve using search. Another of my favorites is a blog maintained by a researcher at Google, Daniel Russell, called SearchReSearch (<http://searchresearch1.blogspot.com/>). Every Wednesday he presents a search challenge, most of which are quite difficult. The solution is posted the following day. He also has posts discussing different operators, as well as strategies for constructing more effective queries.

I hope these tactics will help you to find more relevant information in less time, and with less frustration. And as we all know, a little less frustration is something every researcher can appreciate!

SAVE THE DATE

APRA-IN Annual Meeting!

2/15/2013: The Children’s Museum of Indianapolis
11:00 am EST to 3:00 pm EST
Speakers: **Jeanette Shown, Dr. Eugene Tempel**
Cost: \$30/APRA member, \$35/non member
Coffee and lunch included.

Come for the programming, stay for the camaraderie. And meet the new APRA-IN board members!!

Dr. Eugene R. Tempel To Present At Annual Meeting



Founding dean of the School of Philanthropy at Indiana University, Dr. Eugene R. Tempel is leading the planning and organization of the world’s first school dedicated to the study and teaching of philanthropy. Dr. Tempel is a nationally known expert on philanthropy and the nonprofit sector and former executive director of the Center on Philanthropy at Indiana University.

Dr. Tempel led the Indiana University Foundation from 2008 – 2012. Dr. Tempel came to the IU Foundation with over 25 years of nonprofit leadership, administration, and fundraising experience, including serving as executive director of the Center on Philanthropy at Indiana University and its nationally recognized Fund Raising School. He played a key role in the establishment of the Center in 1987 and in transforming it into a leading national resource for education, research, and training in philanthropy and the nonprofit sector. He has mentored many of the nation’s most successful executives in philanthropic fundraising.

Dr. Tempel is a popular presenter and has authored numerous columns, articles, and other publications in the field. His professional experience includes teaching, training, and consulting internationally.

Upcoming Programming/Events

WHAT	WHEN	WHERE
APRA-IN Annual Meeting	February 15, 2013	Children's Museum of Indianapolis
APRA-IN Basic Skills Workshop in conjunction with APRA-IL	TBD	TBD in Illinois
APRA-IN Advanced Research Workshop	TBD	TBD
25 th Annual APRA International Conference	August 2013	Baltimore, MD
APRA-IN board meetings (phone & in person)	2013	
IN Philanthropy Day	2013	TBD
Free Online Programming! Don't forget to check out the free online programs offered by APRA International to APRA International members.		For more details, visit APRA's website at: www.aprahome.org

Registration information will be sent out closer to the events, or check the APRA-IN website at www.apra-in.org.
Online registration is available for select events.

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