



President's Message



Roberta Werman

President, APRA-IN board of directors
Director of Development Research, Bethel College

Thank you for renewing your membership this year! You make APRA-IN. As a Board we work hard to bring you workshops, conferences, webinars and social events to help all of us do our jobs better and give opportunities to meet with colleagues to share ideas. We need to know what you are thinking. What can we do as an organization to make your membership more valuable to you? Please contact any board member with ideas and concerns. My contact information is roberta.werman@bethelcollege.edu. You will find all board members contact information at the APRA-IN website <http://apraindiana.com/> under the Board Members tab.

What do you do? As prospect researchers, prospect/relationship managers and data analyst how do you explain your profession? Recent articles have portrayed our jobs in a more sinister light. More like stalkers who uncover and dig out secrets. At the recent APRA Chapter Leader summit we discussed Advocacy. One topic: How do we define ourselves?

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APRA-IN Annual Meeting Recap



By: Kate Kiser

APRA-IN Communications Chair, board of directors
Prospect Research/Database Manager, Methodist Health Foundation

The APRA-IN Annual Meeting took place on January 17 at Buca di Beppo's Restaurant in Castleton Square. We gathered together to review 2013 and look ahead to the activities of 2014.

If you weren't able to attend the annual meeting in January, here's a recap of the important stuff. The following highlights are items to take note of:

Looking back - 2013

- ✓ Chapter dues were rolled out as we were the only APRA chapter left not collecting dues & we were running in the red.
- ✓ We operated in the black!
- ✓ Roll out of new [APRA-IN web site](#) (special thanks to **Jackie Knotts** for her work on this).
- ✓ 2013 events included: Basic & Advanced Skills Workshop in June, "What I learned at APRA" webinar by Susan Fetscher in August, a fall conference at Purdue, and Indiana Philanthropy Day where APRA-IN brought in data guru Josh Birkholz.
- ✓ Three APRA-IN members were presenters at the APRA International Annual Conference – **Jason Boley**, **Darren Cooper**, and **Tanya Ford**.
- ✓ The board gathered prior to the January annual meeting to wrap up 2013 and to plan for the year ahead. The board also began the programming planning efforts for 2015.

[Editor's Note] special thanks to the dedicated programming co-chairs – **Sarah Johnson** and **Susan Fetscher** – for leading the organization of the 2013 events. And to **Jason Boley** for his work on the 2013 IPD, including his recruitment of Josh Birkholz as a guest presenter.

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Instead of letting others say who we are, what do we say? We should work together to develop this description. APRA is working on this. And, APRA-IN board members are in the forefront of the discussion. **Jason Boley** (Past President) presented in Baltimore. **Kate Kiser** (Communications Chairman) is ready to present at the upcoming Skills workshop. The question I'd like to put forth—**what are you proud of in your profession? Post it on our [Facebook page!](#)** Let's start a list that will help us define who we are as a profession.

How to Connect, Follow, Learn

Visit www.apraindiana.com and **follow** us via e-mail for the latest updates.

Connect to APRA-IN, and each other, via the [APRA-IN Facebook page](#) or the [LinkedIn Group](#) – or both!

Visit www.apraindiana.com, or subscribe to our [RSS feed](#) and **learn** something!

APRA-IN Happenings

Have some news to share?

Tell Kate Kiser at kkiser@iuhealth.org.

We'll share your news with APRA-IN members in the next Profiles.

Wanted: Expertise

Planning for 2015 programming is underway!

APRA-IN is looking for presenters (or co-presenters) to speak at future APRA-IN events, and in the general fundraising community.

We have the technology and will help with all your coordination needs. We just need your time and kernels of wisdom! This is an excellent opportunity to build your professional experience in a very encouraging and supportive environment.

Interested? Questions?

Please contact **Sarah Johnson** at sarkjohn@indiana.edu

Looking Ahead

- ✓ We have over 50 active, paid members in APRA-IN.
- ✓ A Skills Workshop for both basic and advanced Researchers is planned for June 2014 with an exciting Keynote Speaker (see pages 4 & 5).
- ✓ APRA-IN programming is expanding to include social, regional Happy Hour events (see page 4 for more details and to RSVP).
- ✓ The Kathy E. Wilson APRA-IN scholarship award is being reinstated. [Apply online](#) by 4/14/14 to attend the Skills Workshop or IPD Day for free.
- ✓ APRA-IN and APRA International are exploring better technologies to improve Chapter communications. Stay tuned!
- ✓ This is the year of Prospect Research advocacy. Efforts are being made by APRA and other chapters, including APRA-IN, to promote the education of Fund Raisers and other Development leaders about the importance of Researchers & Analysts being invited to the strategic table! Want to contribute? Start the conversation on APRA-IN [Facebook page!](#)

Annual meeting attendees reviewed 2013 together and discussed where APRA-IN is headed in 2014. **If you would like to share your ideas and/or volunteer your time in 2014, please contact a board member.** The success and usefulness of this chapter depends on *all* of its members and their bright minds. Thank you for your support and participation and we look forward to your 2014 contributions!

Once the meeting portion of the January event concluded, attention was turned to the speaker of the day, FBI Intelligence Analyst Grant Henry. Agent Henry's presentation provided an overview of his position with the FBI, his duties, and the challenges he faces regarding researching individuals—by all accounts, super cool! Aside from a security clearance and purpose of his research, Agent Henry's daily job duties sounded well...just like a Prospect Researcher's. The parallels were fascinating. Attendees learned a lot about cross-over potential within the world of Research jobs and it's safe to say many of us walked away with database-envy that day.

Thanks to everyone who braved the cold that day and gathered together to wrap up the year and discuss 2014.

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.

[Editor's Note] *special thanks to this issue's guest writers **Sabrina Stradtner** and **Susan Fetscher**.*

Researcher's Corner

Newspapers & Prospect Research

By: Sabrina Stradtner

Research Analyst, Valparaiso University

As a prospect researcher with experience as a genealogist I find that I use many of the same research skills in prospect research but not all of the same resources. For example, I have yet to visit a cemetery in order to complete a donor profile. But one of my favorite genealogical resources, newspapers, is also a treasure trove of information for prospect researchers. Most current newspapers can be easily viewed online for free although some do charge for access. Some newspapers even give online access to older archived issues. For historic newspapers it might be necessary to use a database such as Newspaper Archive, NewsBank, or Proquest's National Newspapers. In some cases microfilm might be the only way to view an old newspaper.

Current and historic newspapers are the best source for obituaries. Beyond confirming that someone has passed away obituaries can also clarify family relationships and often give details about career history and philanthropic interests. Most newspapers also publish information about local business leaders such as who's who lists or top 40 under 40. Some newspapers have created special awards for business leaders and the corresponding articles detailing who received these awards are great resources for career information.

Newspapers capture a moment in time and the articles in them may contain information that has long been forgotten or fallen through the cracks. Because of this historic newspapers can be the right place to turn when encountering a research brick wall. I was recently trying to confirm that a prospect's father was also an alumnus but no record of him existed. An article in a local newspaper from the 1960s confirmed that not only did the father graduate in the 1930s, but the grandfather was an alumnus from the late 1890s. In another instance I was only able to find information about a pre-internet era family business from archived issues of a newspaper. When information is hard to find or missing newspapers, current and historic, can often fill in the gaps.

Sabrina Stradtner has been a research analyst at Valparaiso University since March 2012. She previously worked in the genealogy department at the Valparaiso Public Library. She has a B.A. in History with a minor in Humanities from Valparaiso University and a Master of Library Science from Indiana University – Indianapolis.

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Tips & Tricks for a Small Shop

By: Susan Fetscher

Grant & Research Coordinator, USI Foundation

Prospect Research is always an adventure, and nowhere is that more evident than in small shops. I handle all of the prospect research and prospect management duties at the USI Foundation and it is only about 60% of what I do. Here are a few key things I have learned in the past five years.

Develop relationships with your DO's and key staff.

Understand their needs and make sure they also understand yours. Everyone is working toward the same goal, which is easier to meet when all parties are on the same page and understand each others' roles in the process. Also, many DO's can handle simple research on their own. Try holding a 1 hour research seminar or give out tips at each staff meeting. If they can look up the simple things, it will free up your valuable time for larger projects.

Leave a trail of breadcrumbs.

In a small shop, the researcher often wears many hats. Keeping good records and notes on each active project is an essential part of the job, especially when you are regularly pulled away from research to focus on other tasks. I tend to be old-school and still use handwritten notes, but I am sure to digitize anything that needs to be permanently archived.

Find a research buddy.

You will want someone to discuss issues, best practices, and frustrations with, and sometimes only another researcher will suffice. Attend APRA and APRA-IN events to meet other researchers. It's a good idea to find someone who uses a similar database and software. Also get to know your local research librarians – they can be very helpful when stuck.

Learn from the big shops.

We might not have the resources, but we can still learn from what the big shops are doing. They tend to be ahead of the curve on new trends in research, prospect management, and analytics. This can help your organization plan for short term and long term needs and goals.

Susan Fetscher serves as the Grant & Research Coordinator for the USI Foundation. She also sits on the APRA-IN board of directors and serves as the Programming Co-Chair.



SAVE THE DATES!

APRA-IN Skills Workshop

Two Tracks Included: Basic & Advanced

Tuesday, June 10, 2014

Indiana University Foundation, Bloomington
8:30a.m. EST – 3:30p.m. EST
Registration & breakfast begins at 8:30a.m.
Registration opens May 1, 2014

A robust day of programming, with something for every level of Researcher, is on tap for the 2014 APRA-IN Skills Workshop!

Basic Track – The Goods

Capacity Worksheets

Presented by: Dean Esteves, Butler University

Development Staff Orientation: Research 101

Presented by: Kate Kiser, Methodist Health Foundation

Ethics & Due Diligence

Presented by: Susan Fetscher, University of Southern Indiana Foundation

Advanced Track – The Goods

Using Metrics to Communicate the Value of Research

Christina Pulawski, Independent Consultant

Research Before, During, and After a Campaign

Presented by: Michele Miller, Butler University

Prospect Management

Presented by: Jackie Knotts, Purdue Research Foundation at Purdue University

Prospect Development 2014: APRA's 27th Annual International Conference

July 30 – August 2, 2014
The Cosmopolitan, Las Vegas, NV
[Registration is now open!](#)

Highlights:

- ✓ 54 expert-led education sessions within six tracks, including:
 - Prospect Research
 - Relationship Management
 - Partners in Fundraising
 - Management & Professional Development
 - Campaigns
 - Data Analytics or Prospect Identification
- ✓ 12 Pre-Conference Workshops
- ✓ New Researchers and Data Analytics symposia
- ✓ Keynote speaker: Una Osili, PhD, Indiana University Lilly Family School of Philanthropy
- ✓ APRA Talks: The Leadership Edition, a roundtable discussion and networking event

For full conference details, travel questions, and other conference information, click [here](#).

APRA-IN Researchers' Night Out!

Join your fellow Researchers for
dinner or drinks

April 10, 2014

Bloomington - Irish Lion, 5:30 p.m. EST

Contact **Sarah Johnson** at sarkjohn@iu.edu if you plan to attend.

April 17, 2014

Indianapolis – Ralston's on Mass Ave, 6:00p.m. EST

Contact **Jen Book** at jbook@rileykids.org if you plan to attend.

For Next Time....

Interested in organizing a Researchers' Night Out event in your region? Contact the APRA-IN Programming Committee Chairs:

Susan Fetscher - susan.fetscher@usi.edu

Sarah Johnson - sarkjohn@iu.edu

Complimentary Webinar Easy Database Segmentation with RFM

April 16, 2014, 10-11am EST

Presented by:

Jason Boley

AVP, Development Operations, Riley Children's Foundation
Immediate Past President, APRA-IN board of directors

Registration coming soon! Watch

<http://apraindiana.com/events/> for more details or subscribe to the RSS feed for updates delivered to your inbox!

Attend a 2014 APRA-IN Event for FREE!

Apply for the Kathy K. Wilson Educational
Scholarship

The scholarship is awarded to an APRA-IN member and covers fees for the 2014 Skills workshop or the 2014 Indiana Philanthropy Day conference.

[Apply online](#) by **April 14, 2014**. The scholarship winner will be notified by May 1. To be eligible you must be an APRA-IN member in good standing.

APRA-IN Skills Workshop Christina Pulawski To Serve As Keynote

APRA-IN is thrilled to announce Kenote Presenter, **Christina Pulawski**. Her presentation, *It's all Politics – What's Next When Good Work Isn't Enough*, will be held in an afternoon joint- basic and advanced session at the APRA-IN Skills Workshop June 10, 2014. Describing the upcoming talk, she writes "...Research was seen as a head-down role, with minimal interactions with other departments or colleagues. Not anymore! One of the most important components to creating professional success is managing alliances and relationships. We'll discuss the challenges of understanding the unwritten rules of your workplace and navigating hierarchical relationships in your organization. Learn how to exert some control over them and find out why "politics" doesn't have to have a negative connotation."



Christina Pulawski

Christina Pulawski is an independent consultant specializing in development research, prospect management and information flow for fund raising. Previously, she was Director of Development & Donor Services at Loyola University Chicago, overseeing the areas of research, prospect management, data management, systems, and stewardship. Prior to joining Loyola, she was Director of Development Research at Northwestern University for nearly ten years, which earned "top research shop" distinction under her direction. A Chicago native, Christina earned a BA in Political Science from Northwestern and a JD from the University of Illinois. She is admitted to practice in Illinois and practiced in the fields of real estate and litigation before taking the opportunity to explore development in 1991.

Christina completed a six-year term on the board of APRA serving as Vice President for Education and Professional Development and Secretary-Treasurer. She chaired three of APRA's International Conferences, developed APRA's Boot Camp and other symposia, and received the organization's Distinguished Service Award. She has also served as President of APRA's Illinois Chapter and was a founding member and vice president of the Association of Advancement Services Professionals (AASP). She co-chaired AASP's inaugural Summit, several CASE Development Research and Campaign Research conferences and received CASE's Crystal Apple Teaching Award. She has frequently published, presented, and guest lectured on the field of prospect research, prospect management, and advancement services for APRA, CASE, Indiana University Center on Philanthropy and AFP.

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 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: **Jason Boley** via e-mail at jboley@rileykids.org.

2014 APRA Award Nominations Due March 31

Have you or one of your colleagues made significant contributions to the fundraising research industry or nonprofit organization? If so, nominate yourself or your colleague for a **2014 APRA Award**. All nominations must be submitted for consideration by **March 31, 2014**.

The 2014 APRA Awards include:

- APRA Distinguished Service Award
- APRA Professional of the Year Award
- APRA Foundation Margret Fuhry Grant
- APRA Scholarship

Each applicant must be an APRA member in good standing at the time of nomination. A committee of APRA members will select award winners. Awards will be presented at Prospect Development 2014, APRA's 27th Annual International Conference, July 30 through Aug. 2, 2014, at The Cosmopolitan Las Vegas. Additional details and applications for each are available on [APRA's website](#).

APRA Connections Call for Authors

APRA is seeking interested authors for its quarterly magazine, *Connections*. It is the premier information resource for professionals in fundraising research, analytics and relationship management. If you are interested in writing for *Connections*, please contact Managing Editor **Dennis Coyle**.

Upcoming Programming

WHAT	WHEN	WHERE
Webinar: Easy Database Segmentation with RFM <i>Presented by: Jason Boley, Riley Children's Foundation</i>	April 16, 2014 10a.m.-11a.m. EST	Your desk Webinar link to be emailed!
APRA-IN Researchers' Night Out! <i>Multi-city event for fun and socializing</i>	April 10, 2014 & April 17, 2014	Bloomington - Irish Lion & Indianapolis - Ralston's
APRA-IN Skills Workshop: Basic & Advanced	June 10, 2014	Indiana University Foundation Bloomington, IN
APRA's 27th Annual International Conference	July 30 - August 2 2014	The Cosmopolitan Las Vegas, NV
Indiana Philanthropy Day	November 15 2014	TBD
APRA-IN Annual Meeting: Holiday Cheer (2014 in Review - Looking ahead to 2015)	TBD	TBD

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

Profiles is a quarterly publication of the Indiana Chapter of the Association of Professional Researchers for Advancement.

APRA-IN President: Roberta Werman Roberta.werman@bethelcollege.edu
 Newsletter Editor: Kate Kiser kkiser@iuhealth.org
 Webmaster: Jackie Knotts jmknotts@prf.org
 Website: www.apra-in.org

APRA-IN is the Indiana chapter of the Association of Professional Researchers for Advancement (APRA), an international professional association of development research and prospect management professionals. We are proud to be the first organized state chapter, founded in 1988.

