

## President's Message



**By Sarah K. Johnson**  
APRA-IN President  
Development Analyst  
Indiana University Foundation

Welcome to the first newsletter of 2015 and the beginning of an exciting year of possibilities for APRA-IN! I am honored to be the group's president and to be able to help guide an organization that has been such a great resource for me.

We started the new year with a board retreat in Indianapolis in January. With the guidance of former APRA-IN president Michele Miller from Butler University, we dedicated time to strategic planning and thinking about what we value most about APRA-IN and where to go from here.

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## APRA-IN Spring 2015 Conference

Siblings, spouses, ancestors, descendants, and second cousins twice removed will gather at the Allen County Public Library in Fort Wayne on **Friday, April 17, 2015**, for the APRA-IN Spring Conference, *Keeping it in the Family: Philanthropy Across Generations*. The conference will run from 9:15 am to 3:30 pm. Lunch is included.

The conference will focus on family-based philanthropy. We will learn how to identify family members and connections. We will learn about the means of trans-generational family wealth transfer and family philanthropy.

Curt Witcher, Senior Manager for Special Collections at the Allen County Public Library and manager of the Genealogy Center, will talk about genealogy and prospect research. (He spoke on the same topic to APRA-IN at our Spring Conference in 1995!) Mr. Witcher was named the first Fellow of the Indiana Genealogical Society in 2006 and has received many notable honors from other genealogical societies. Allen County Public Library is considered to have one of the finest collections of genealogical materials in the country.

Marcus Knotts, Assistant Vice President of Planned Giving at Purdue University, will talk about the means that families have to pass on wealth and to include philanthropy in that transfer. Mr. Knotts, an APRA-IN board member in 2011, worked in prospect research for Purdue and for Butler University prior to his current position.

We anticipate speakers who will talk about family funds within community foundations and about researching family foundations. As we confirm those people, we will let you know.

Cost will be \$50 for APRA-IN members and \$65 for non-members. Registration closes on April 10.

[Register today!](#)

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We came up with several areas of focus but this year will see us dedicated to two: Communication & Community. You'll see these come up again and again as we strive to get better at talking with you - and listening to your feedback. We also want to build a more vibrant community, particularly online through social media and the transition to a new website.

The programming committee has already planned an excellent speaker lineup for our spring conference in Fort Wayne. With warmer weather ahead, we're looking forward to this chance to connect with our northern colleagues. We're still in the planning stages for the skills workshop to be held again in Bloomington so if you have suggestions or potential speaker ideas, let us know.

Lastly, if you ever want to chat about APRA-IN, please contact me at any time. I can be reached at [sarkjohn@iu.edu](mailto:sarkjohn@iu.edu) or 812-856-0435. I am looking forward to connecting with all of you throughout the year.

## Website Questions?

- Have a question about APRA-IN's website?
- Need to post a job on our job board?
- Forget the Members section password?
- Have suggestions for new content?

Contact webmaster Amy Pitcher at  
[apitcher@brebeuf.org](mailto:apitcher@brebeuf.org)

## Welcome New Board Members!

As you know, we held our elections for board members in the fall. We have several new faces who promise to bring great things to the board.

### Cathy Spieth

Cathy joined the board this year and serves as vice president. She has also graciously agreed to serve as the chair of both the scholarship and nominating committees. Cathy's service to APRA started even before she joined the board. She organized the 2013 Advanced Skills Workshop. That level of involvement and leadership as a member makes us happy to see her take on bigger roles.

*Cathy Spieth is the senior research analyst at the United Way of Central Indiana.*

### Ralph Rohrer

Ralph has served APRA-IN for many years including time as the group's president. After a brief break, he couldn't keep himself away and has returned for another stint on the board. If you see Ralph, tell him welcome back and thank him for his service as programming chair where he will spearhead APRA-IN's spring conference and skills workshop.

*Ralph is the chief of research at the Purdue Research Foundation.*

### Tanya Ford

Tanya has taken over the task of membership chair and she has also agreed to co-chair our communications committee, helping create this issue of Profiles and many to come. Tanya's enthusiasm and organization skills will be a huge asset to the board, and we're glad to have her!

*Tanya works in Advancement Prospect Research and Management at Taylor University.*

### Laura Hinkley

Laura re-joined the board in 2014 to fill a vacant board position. As treasurer, Laura serves as chief number cruncher and check writer. She is working hard to keep us on budget and make sure your membership dues are managed wisely.

*Laura is the senior director of development research and advancement services at Earlham College.*

### Amy Pitcher

APRA-IN was in need of a new webmaster and Amy has cheerfully taken on the role. With her technical skills and background in database management, we know she'll be a great fit as we transition to the Wild Apricot platform, which will mean a new website, a new member database, and a new newsletter. Keep your eyes peeled for Amy's hard work.

*Amy is the senior director of research and database management at Brebeuf Jesuit Preparatory School.*

In addition, we are happy to welcome back two board members who were re-elected: Shanelle Burns (Valparaiso University) and Sarah Johnson (Indiana University Foundation).

Thank you to everyone who voted!

# Genealogy: More than Just Dates and Locations

## Emily Davis

Development Analyst  
Indiana University Foundation

Beginning a genealogy project can seem quite daunting and it is never quite as easy as it appears to be. While websites today would have you believe that you can simply plug your grandparents' names into a database and find all sorts of unknown family information, this reality happens less often than one might imagine. If you are truly serious about discovering your family's past, it lies less in online digital archives and more in family heirlooms, bibles handed down over the generations, photo albums and scrapbooks. These items are where the true stories lie and where the truth about who you are and where you came from will start to emerge. Dates and places can only tell part of the story; these items will tell you the rest.

Sometimes, however, these items are not easily accessible or simply do not exist in your family. In that case, online digital archives and databases can become your best friends. They can provide you with the basic information needed to discover where your grandparents and great-grandparents lived, worked and died. They can also connect you with distant relatives who might have some of the above items that you are lacking.

As prospect researchers, we are often tasked with not only finding pertinent birthdates and locations for prospects, but also, sometimes, for their parents and grandparents, as well as other extended family members. While this information is vital to a development officer, it can be equally vital to provide your development officer with the story of the prospect's family as such a story can contain information vital to the prospect's decision-making process, such as family values, hardships that the family may have overcome that might influence the prospect's philanthropy decisions and organizations to which the prospect and his/her family may be loyal.

Below are a few of the resources available to aid in your genealogy research. As you proceed down the rabbit hole that is genealogy, remember, while hard facts are important, finding that personal connection with a lost family member or discovering a family journal at a local historical society may mean more than all of the census data that you discover.

### [Genealogy.com](#)

Genealogy.com provides both a [message board](#) site and a place for family [home pages](#). While the message board is a quicker route for directly connecting active genealogists, the family home pages might be more useful. These pages will allow you to locate your relatives on a particular family tree, then contact the owner of the tree, who may be one of your distant relatives.

### [Ancestry.com](#)

Ancestry.com also provides message boards based on keywords, categories and family surnames.

### Other websites

Many times, a quick Google search will provide at least one family surname-related forum or message board at a location other than on the two above provided websites.

## GET MATCHED!

Are you new to research? Would you like the opportunity to work with an experienced researcher on a one-to-one basis? APRA-IN's mentoring program pairs researchers new to the field, location, or institution type 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 mentee to job shadow, or do other training as negotiated between the mentor/mentee. This is truly a unique and invaluable experience!

If this interests you or if you would like to learn more about the APRA-IN mentor program, please contact Jason Boley at [jboley@rileykids.org](mailto:jboley@rileykids.org).

# Review: Indiana Philanthropy Day 2014

## Hugh Resnick

APRA-IN Communications Co-Director  
Research Analyst  
United Way of Central Indiana

Indiana Philanthropy Day, held in the Indianapolis Marriott East in November, was chock-full of both inspiration and concrete suggestions for rethinking our day-to-day jobs, and our long-term goals.

**Simone Joyaux** ([simonejoyaux.com](http://simonejoyaux.com)) was the morning's keynote speaker, and she was fantastic. Focusing on "the experience economy", she began with "Fundraising is not about money; it's about the donor's aspirations." She then began to expound on a number of points, including the idea that development offices should focus on improving service quality, because "donor retention is the great unturned stone" (Adrian Sargeant). How does one accomplish this? In a phrase: Multiple Engagements.

There was a break, and then I attended the session "The Donation Equation" by Brian Gawor, from [RuffaloCody](http://RuffaloCody). He gave an enjoyable, but hard-hitting presentation on how the Millennial generation gives (or doesn't), and how organizations and academia need to adapt. His thesis was that "A 'like' is not a check." We as fundraisers need to adapt our engagement strategies to deal with a generation that doesn't have a lot of money, is much more attuned to social media, and wants to see a direct correlation between their gifts and your results. [As a sidenote, we had him give the same presentation at UWCI, and it was quite well-received.]

I then attended the mid-morning session "How Public and Private Partnerships Work." It was primarily an explanation by the [Simon Youth Foundation](http://Simon Youth Foundation) of how they do their job, and how they get results. Interesting, but not closely related to what we're doing.

The Awards Lunch was very affecting. The Lifetime Achievement Award was given posthumously to Kris Kindelsperger of Johnson, Grossnickle and Associates who passed away unexpectedly in June, 2014. The award was received by his daughter, who gave a very poignant speech. Cindy Simon Skjodt was the Outstanding Philanthropist for her work with

the IU Foundation and the Indianapolis Zoo.

Simone Joyaux returned to give a post-lunch extension of her morning remarks: "Keeping Your Donors: Building Profitable Relationships That Last." In addition to sharing some wonderful anecdotes, the primary takeaway for me was her contention that "donors need to be thanked seven times for a gift."

The final session of the afternoon brought a high-level report on giving habits of high net worth individuals from Grace Baranowski of the IU Lilly School of Philanthropy. The presentation centered on information gleaned from Giving USA 2014, free highlights of which can be downloaded [here](#).

Other sessions focused on planned giving, board involvement in fund development, and "effective storytelling across channels." If these topics are of interest to you, I would highly recommend attending next year's event. The cost was \$165 for APRA members.

## FREE Admission!

Yes, we said free! APRA Indiana offers the **Kathy K. Wilson Educational Scholarship Award** to members who want to grow in the research profession. The scholarship funds will cover the admission fee to either conference this year.

- April 17, 2015 – "Keeping it in the Family: Philanthropy Across Generations." Spring Conference, held in Fort Wayne, IN
- August 27, 2015 – Skills Workshop, held in Bloomington, IN

To apply, please fill out our [online application](#) before March 6, 2015. If you have any questions, please call Cathy at 317-921-1346.

## Call for Submissions!

Consider writing an article for the newsletter!

For more information, please contact Tanya Monroe-Ford ([tnford@tayloru.edu](mailto:tnford@tayloru.edu)) or Hugh Resnick ([hugh.resnick@uwci.org](mailto:hugh.resnick@uwci.org))



## APRA Data Analytics

### Boot Camp

November 2014

*Increase your job skills and improve your marketability*

By Cathy Spieth, United Way of Central Indiana

Data analytics is a growing area of the prospect research field, plus learning this area can improve your marketability in other industries. This was my big take-away from the APRA Data Analytics Boot Camp conference in November 2014. I was also intrigued by the idea that you have to develop a story to make the data analytics useful to your organization. We all like a good story, right?

Are you interested in trying a data analytics project in 2015?

The process begins by identifying a business need. Common models are in the areas of direct mail, major giving, upgrading donors, and planned giving. Jason Boley said, "His first project was conducted with a consultant who gave the project more validity." Later he was able to do more projects in-house. If you need help identifying a business need, one of the following books may help generate an idea for a project. These books were recommended by the presenters at the Data Analytics Boot Camp conference: *Fundraising Analytics, Using Data to Guide Strategy*, by Birkholz; *SCORE!* by MacDonell and Wylie; *Data Science for Business* by Provost and Fawcett; *The Signal and the Noise* by Silver.

If you need a little more help, plan to attend the Skills Workshop hosted by the APRA-Indiana chapter later this year. More details for this conference will be relayed in future newsletters and posted on the website, <http://apraindiana.com>. APRA International will also host future conferences on this topic and you can learn about them on their website, [www.aprahome.org](http://www.aprahome.org). A third option is to reach out to one of the following APRA-Indiana members who are actively doing data analytics projects for their organizations: Jason Boley (Riley Children's Foundation), Dean Esteves (Butler University), Jeremy Sheiko (Purdue University), and Hugh Resnick (United Way of Central Indiana).

If this seems too challenging, then start with the end in mind. Kate Chamberlin, a conference presenter from Memorial Sloan-Kettering Cancer Center, suggested learning how to make your data visual and talk about it as an interesting story. To see a great example of how to make the data visual and tell a story, please search for Hans Rosling who is a public health expert and data visionary. His presentation can be viewed [here](#). I plan to implement a little of both of these ideas in 2015. If you decide to dabble in data analytics or visualization, I hope you will share your experience with me at [cathy.spieth@uwci.org](mailto:cathy.spieth@uwci.org). I'd love to hear about your experience.

Remember, *the secret of getting ahead is getting started!*

## Member Profile

*Meet Hugh Resnick*

Compiled by Hugh Resnick  
APRA-IN Communications Co-Chair  
Research Analyst  
United Way of Central Indiana

Hugh is a part of the Strategic Information team at United Way of Central Indiana in Indianapolis. He is part of an expanding team of researchers that includes APRA-IN vice president Cathy Spieth. Hugh is responsible for a nascent program of analytics at UWCI. Historically, the department has been simply the reporting/database management wing of the organization, reporting to the fundraising and community impact teams. Hugh's goal is to make strategic information more proactive, delivering actionable information rather than historical reports.

To that end, Hugh spends most of his time staring at Excel spreadsheets and the company database. He also helps Cathy with prospect research, both on an individual and a corporate level; a must, given the workplace-focused mandate of United Way. Hugh has been with UWCI for two-and-a-half years.

Hugh is new to the field of prospect research, though he has spent much of his career in the non-profit world. He has worked for a number of different arts organizations, including Lyric Opera of Chicago and the Indianapolis Symphony Orchestra. His mother was at one point a big-band singer, and his father was a corporate executive, so the melding of the two disciplines as a career was a goal of his from early on.

To that end, his education has been focused on both music and business, though never at the same time. He has a BA in Music from Kenyon College, an MA in Musicology from The University of Chicago, and an MBA in Marketing and Decision Support Modeling from the Kelley School of Business at IU Bloomington.

Hugh lives in Greenwood with his wife, two daughters, and Fritz, a Great Pyrenees/Golden Retriever mix. When not at work, he sings for both love and money, occasionally writing multi-paragraph profiles of himself.

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## Take a look at upcoming programming!

WHAT	WHEN	WHERE
<p><b>Keeping it in the Family: Philanthropy Across Generations</b></p> <p><b>APRA-IN Spring Conference</b></p> <p><u>TOPICS:</u> Family-based Philanthropy Generational Wealth Transfer Community Foundations</p> <p><u>SPEAKERS:</u> Curt Witcher Marcus Knotts ...and more!</p>	April 17, 2015	Allen County Public Library Fort Wayne, IN
<p><b>APRA-IN Skills Workshop</b></p> <p>Basic and Advanced Tracks</p>	August 27, 2015	Indiana University Foundation Bloomington, IN

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