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APRA-IN NEWSLETTER

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Get Involved

Join APRA-IN

The Prospect Research profession is more important now than ever before, and you *can* make a difference at your organization. Membership in APRA-IN entitles you to:

- Discounted programming rates
- Access to experienced mentors
- Networking opportunities
- Leadership opportunities
- Access to a vast network of professional colleagues!

Membership is open to all researchers, prospect management professionals, front-line fundraisers and others who have an interest in the field of prospect research and seek to foster a positive association with the philanthropic community.

Easy on the Budget: APRA's New Regional Conference

By: Emily Ulrich

If you can't go to the APRA International Conference for whatever reason, consider attending APRA's new offering -- the APRA Regional Conference (ARC). Picture the international conference, then shrink it down to a smaller version that's specific to a particular region. That's ARC. The plan is to hold ARC annually, balancing it geographically with the location of the international conference.

I attended the first ARC on June 6-8 at the Marriott O'Hare in Chicago, and I thought it was nearly as good as the two international conferences I have attended. Here's how a Midwest ARC is better than the international conference, in my opinion:

- You don't have to fly.
- It's shorter (two overnights instead of three).
- It's smaller (about a hundred versus hundreds).
- It's cheaper. (My employer paid about \$1,100 to send me to ARC, which covered conference registration, hotel, food, and travel. In comparison, it costs about \$2,500 to attend the international conference.)

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Member Spotlight

Josephina Latuszek

Development Services Coordinator
The Children's Museum of Indianapolis, IN

What book are you currently reading?

The Defense by Steve Cavanaugh, which I'm enjoying quite a bit.

Favorite vacation spot?

I have loved Italy each time I've been there, though my husband took me to Atlantis for our honeymoon and that was also lovely!

Hobbies

I'm a huge movie buff, and I also write fiction (as well as do volunteer editing for new/aspiring fiction writers) in my spare time.

Get matched

Join our mentorship program

[Mentorship](#) is a benefit of being a paid APRA-IN member. Mentorship matches will be created based on areas of interest and experience levels. Communication can be via e-mail, telephone, face-to-face meetings or any combination - it's up to the mentor and mentee. Relationships will last as long as both parties find them beneficial.

Please note that it is possible to have a mentor and also be one.

Volunteer

Support your chapter

Interested in volunteering at the APRA-IN Skills Workshop? Email us at apra.indiana@gmail.com.

Spring Conference

By: Susan Fetscher

This year's Spring Conference took place on May 10 at the University of Indianapolis. The day started with refreshments and networking. It was great to see familiar faces along with meeting new colleagues.

The keynote speaker, Bob Swaney, kicked off the event with a great presentation about Organizational Confidence and its Role in Fundraising.

Next the group heard from Matt Georgi, Vice President/Creative Director of CVR, who spoke about marketing ourselves and why those who take initiative succeed.

After a delicious lunch and some great discussions, Marilyn Kuhn from the IU Lilly Family School of Philanthropy discussed Time Management and Goal Setting. This was a great presentation, and has helped me focus my time and energy which is important, especially as my organization has just finished a major capital campaign.

Our final speaker of the day was Leigh Anne Johnson with the Indiana State Library. She introduced us to the resources available to us through the Library and how to use them.

These benefits won't be as good when ARC is held outside the Midwest, but it's still good to have two conferences to choose from. My overall ARC experience was positive, from the seven presentations ("breakout sessions") to the keynote speakers. I especially enjoyed "Open Space Conversations," roundtable discussions where the attendees got to choose the topics and could decide how long to participate in each discussion. We brainstormed as a group and decided on nine conversation topics -- ranging from "How do you tell people what you do?" to "How do you make a case for salary or resource increases?" Ad hoc secretaries took notes at each table, and APRA e-mailed the notes to everyone later that day.

My verdict on ARC: Kudos to APRA International for offering more options for professional development. I left feeling just as inspired as I felt at prior international conferences. And I didn't have to deal with air sickness.

- Emily Ulrich is a research associate for the Purdue Research Foundation in West Lafayette, IN.

Congratulations!



APRA-IN would like to recognize former president Vicky Martin on her retirement. After nearly three decades of service to the Indiana University Foundation, Vicky is ready to start an exciting new chapter filled with family, travel, and gardening. Vicky served on the APRA-IN board for a number of years and later made the leap from researcher to front-line fundraiser. She continued to serve APRA-IN by sharing her experience and insight as a speaker at chapter conferences. Congratulations on your retirement, Vicky! We wish you the very best!

An unusual/fun fact about you

Working at The Children's Museum is a career change for me. Prior to this, I was an attorney with a background in family law and international law. I'm much happier working at the museum! (I suppose that's interesting, right?)

Register Now for the APRA-IN Skills Workshop

Date: August 11, 2016

Time: 8:30 a.m. to 2:30 p.m.

Location: Earlham College, Richmond, Indiana

The APRA-IN Skills Workshop will be August 11, 2016, at Earlham College in Richmond, IN. The workshop will provide an engaging venue for new and seasoned prospect researchers to gain new skills and expand their perspectives.

Keynote: What's in it for me: the Career Trajectory of a Prospect Development Professional

Bond Lammey, Managing Associate, Bentz Whaley Flessner

Bond T. Lammey is a managing associate at Bentz Whaley Flessner specializing in prospect development. Bond's experience ranges from higher education to academic medicine, large and small social service agencies, and national and local member/cause organizations. She is accomplished in principal gift prospecting, working with non-natural constituencies, daily wealth screenings, and comprehensive prospect development strategies.

Prior to joining BWF, Bond led prospect research efforts at the University of Chicago, where she oversaw the central prospect research team and developed integrated strategies with prospect management, analytics, corporate and foundation relations research, and non-central research teams.

Bond received her Bachelor of Arts in Sociology and her Master of Management in Nonprofit Administration, both from North Park University in Chicago, Illinois. She is on the board of APRA International and has presented at CASE, SunGard, and APRA conferences.

Basic Sessions:

1. TBA
2. TBA

Thanks to everyone who made this year's Spring Conference a success!

Congratulations

This year's winner of APRA-IN's Kathy K. Wilson Scholarship is Nora Crosen, a development assistant at The Center for Hospice and Palliative Care!

Advanced Sessions:

1. Using Social Media - Emily Davis, Development Analyst at Indiana University Foundation

Come learn how to mine and utilize social media resources, such as Facebook, LinkedIn, and Twitter, for prospect research profiles!

2. So Much Data! Tips to Avoid Feeling Overwhelmed by Wealth Screening Results - Bond Lammey, Managing Associate, Bentz Whaley Flessner

Wealth screenings are helpful, but they aren't a magic bullet. When our organizations approve a significant investment for a one-time comprehensive wealth screening, it's up to prospect development teams to interpret and use this data in a meaningful way. This session will provide some tips to consider pre-wealth screening, discuss best practices for working through screening results, and provide examples where organizations have had fundraising successes following a wealth screening project. Participants will walk away with some concrete next steps and templates for developing a wealth screening implementation plan.

Registration for the conference is now [open!](#)

Awards -- Pick me! Pick me! Pick me!

Raise your hand if you like to receive awards? Who needs to let their organization understand a little bit more about what they do? If so, let APRA-Indiana help you meet that goal. There are two awards that you may be eligible for at the Annual Meeting in November with a little bit of effort. (You must be a current member to win these awards.)

1. Service Award

Win an award for the length of time you have been a member of APRA Indiana! If you are an APRA-Indiana member, go to the website (apraindiana.org) and log in. Follow the path of Members Only> Member Directory> search for your name> be sure a date is in the field called, "What year did you join APRA-IN?". Enter the date you first joined APRA-Indiana. If your department rotates the membership, enter the first year you joined APRA- Indiana.

2. Project Award

If you have completed a project that was well received by your department or organization, complete the application to win an award for external recognition! This is great to include on resumes, bios, etc. It helps build credibility with others. Please contact Cathy Spieth at cathy.spieth@uwci.org for an application.

If you have development goals we can help you or your department with, please contact Cathy Spieth at cathy.spieth@uwci.org.

Unusual Project

Have you worked on a project that you think other prospect researchers might be interested in? Do you want recognition for a project you are proud of? Then send an article to Cathy Spieth and she will help you post it in the newsletter plus help you enroll to win the Project Award. To start the process, I'll share a project I worked on about 3 years ago and repeated this year.

I've recently completed a project that my fundraisers really appreciated – a peer screening with a group of volunteers. **What, this isn't unusual?** You mean you've done one of these before? Hum . . . did you use Survey Monkey to collect the results? I did. This is where my peers usually raise an eyebrow at me. Did you react the same way???

Yes, I used Survey Monkey to collect the results of the peer screening. How did I do this? United Way of Central Indiana uses Survey Monkey to conduct many surveys. I used it to find out which prospects the volunteers know and how well they know them. Your peer survey was probably very similar.

Why did I use this vehicle to collect the data versus an Excel document? Our fundraisers were concerned that this list could be shared with others if we emailed an Excel spreadsheet. They also felt passing out paper sheets would take lots of time to compile later. Using Survey Monkey allowed us to collect the data on 300 prospects in about 20 minutes from our volunteers and maintain confidentiality. This allowed our fundraisers to make the volunteer assignments for the prospects with the best fit possible. And we did it fairly quickly and easily. I did have to massage the results of the data to import it into the database but it was still easier than compiling paper sheets!

I hope you found this idea interesting and I would love to hear about the work you are doing.

Cathy Spieth

United Way of Central Indiana

Upcoming Events

Title	Date	Location	Featured Speaker
Prospect Development 2016: APRA's 29th Annual International Conference	July 27-30, 2016	Gaylord Opryland Resort & Convention Center, Nashville, TN	Risa Mish
APRA International Indiana Meet Up	July 28, 2016	Puckett's Nashville	
APRA-IN's Skills Workshop	August 11, 2016	Earlham College, Richmond, IN	Bond Lammey
APRA-IN's Annual Meeting	November 3, 2016	Taylor University, Upland, IN	

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