



Indiana
Chapter



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Spring Conference

[Registration Deadline March 7!](#)

Join your colleagues from across the state for a day of education and networking!

The full agenda and details can be found on the [Apra Indiana website](#).

The cost is \$55 for Apra Indiana members and \$70 for non-members.

Register today!

Annual Meeting Small Shop Panel Recap

At the Apra Indiana Annual Meeting, three of our members participated in a panel discussion on working in small shops. Participants in the panel were Cathy Spieth, Riley Children's Foundation; Jennifer Wagle, Brebeuf Jesuit Preparatory School; and Tanya Ford, Taylor University

The three of them responded to questions collected prior to and during the December meeting. Below are some highlights from the panel discussion.

Question: How do you prioritize prospect management and research in an office where you have to wear many hats?

Cathy: I ask the fundraising manager what projects and research they found useful in the previous year. Then I confirm what work they would like for me to continue in support of fundraising. I also introduce a new idea or two for next year's work. This helps me keep my job interesting to me.

Jennifer: I hold a monthly meeting with our fundraisers to check in on prospect management and various projects and goals we have set. This is an opportunity for me to share new prospects as well as to see how their cultivation and stewardship efforts are progressing. We also discuss any new initiatives and how I can best assist them with those.

Tanya: The ebb and flow of work changes based on the season. Once I recognized this and segmented my work by "season", I found I was better able to balance my responsibilities. Example: I know in May and June that I will be focusing on researching incoming new parents in preparation for the fall semester; April is always an intense effort to support any research request the development officers need for fiscal year end asks; the end of January and end of August will be for portfolio management and review with the development officers. I try to schedule bigger projects around these known events.

Question: What are some of the greatest challenges working in small shop?

Cathy: It is difficult to remain focused on the projects that we all agreed to at the start of the year. It helps to meet monthly with the fundraising manager to review the big projects, as well as, the small requests that have popped up. The manager can then help me set priorities.

Jennifer: Prioritizing all of the different projects and facets of my role can be a challenge. Periodically, I meet with our Senior VP to prioritize the requests I have received in the context of the full scope of my position.

Tanya: The amount of work requests that come in each week that force me to abandon a project and focus my efforts elsewhere. When researching prospects or building out reports (especially reports), these numerous interruptions can take me away from my current project for hours or days at a time. I found that when I picked my original project back up I was duplicating work because I could not remember what I had done so far. I have learned to carefully document my work/steps as I go along. This can be tedious at the time but is well worth the effort.

Question: Small shops often have limited budgets. What are your go-to resources that you think are worth paying for? Likewise, what are some of your favorite free resources to help stretch your budget?

Cathy:

Paid: Apra Indiana (website, social media and fellow members), Indianapolis Business Journal, Alumni Finder

Free: Assessor's databases, LinkedIn, FEC

Tanya:

Paid: Lexis Nexis, LinkedIn subscription, Apra International membership, Apra chapter membership and wealth gift capacities ratings.

Free: Talkwalker, SEC.gov, County Assessor Databases, Indiana State Library, and Indiana Secretary of State.

Question: If you were interviewing someone like me whose only experience in prospect research is at a large shop, what would you describe as the benefits of working in a smaller office? What do you enjoy most about your role?

Cathy: I like the close working relationship I have with the fundraisers because we all sit near each other. I also like the variety of projects I work on each year, and that the projects change.

Jennifer: I enjoy the collaborative nature of my relationship with the fundraisers. We talk everyday and it benefits our process that I know their various styles well. I do many different types of tasks and projects in the course of a day or week and that keeps things interesting.

Tanya: I have easy access to the development officers, which allows for more in-depth discussions about their research needs and how they are using the information. I really enjoy the variety of my job. I am able to work on numerous types of projects throughout the year instead of just research or prospect management.

Founders' Scholarship

Apra Indiana members who have been around for awhile might remember that there used to be a scholarship that supported attending the Apra International Conference. For budgetary reasons, the board was forced to discontinue this scholarship. Good news!! The Apra Indiana board is excited to share the scholarship is back! The Apra Indiana Founders' Scholarship will cover the costs of any Apra-affiliated conference registration plus a one year membership with Apra International (if applicant is not already a member). One of the goals of Apra Indiana is to promote professional growth and attending a large conference can be an opportunity to share ideas, meet colleagues, and learn what's new

Renew Your Membership!

Don't forget to [join Apra Indiana](#) for 2018!

Membership comes with great benefits including:

- discounts on professional development events,
- opportunities for networking, and
- the chance to join committees or the board.

Please contact [Tanya Ford](#) with questions.

in the industry. The scholarship will be awarded to an Apra Indiana member based primarily on financial need. This year, nominations for the award must be submitted by **March 30, 2018** to be considered. Be sure to go to the [website](#) for a full list of criteria and how to apply.

New PRSPCT-L

The new [PRSPCT-L](#) is a discussion group and mailing list of subscribers who work in non-profit fundraising, specifically those engaged in prospect research, data mining and analytics, and relationship management. A webinar was held regarding the new format and changes. It can be viewed [here](#).

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