



## President's Message



**By Jason Boley**

APRA-IN President, Assistant Vice President of Development Operations for Riley Children's Foundation

The volunteers of APRA-IN have been hard at work to provide a multitude of opportunities for our membership this fall. There are many choices! In just a few short days we will have our fall conference at Purdue University. I'm very excited about the effort we made to spice up our normal programming with a visit from the FBI.

This November we will again partner with many of our sister fundraising organizations throughout the state to host Indiana Philanthropy Day. APRA-IN is fortunate to sponsor our track's headline presenter: Josh Birkholz. For those of you who know Josh, he needs no introduction. If you are not as familiar with Josh's work, he literally wrote the book on fundraising analytics. See his book, appropriately titled Fundraising Analytics.

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## Researcher's Corner

*Tips, tricks, and hints for researchers, by researchers*

### Forecasting With Excel

By Jeanette L. Shown

**Problem:** The Annual Fund wants to be able to see what funding levels they could expect in the next five years, given ten years of Annual Fund Giving Data.

**Solution:** The linear regression in Microsoft Excel. The Y Intercept and the Slope are necessary to calculate a forecast variable.

Step 1: Enter your data into Excel:

FscI Yr	year	1976
FY 2003-2004	1	\$ 13,775.00
FY 2004-2005	2	\$ 22,105.00
FY 2005-2006	3	\$ 20,100.00
FY 2006-2007	4	\$ 28,865.00
FY 2007-2008	5	\$ 45,100.00
FY 2008-2009	6	\$ 27,068.00
FY 2009-2010	7	\$ 9,549.00
FY 2010-2011	8	\$ 38,894.00
FY 2011-2012	9	\$ 31,190.00
FY 2012-2013	10	\$ 25,244.00

Step 2: Select the column B Cell2 through Cell11, and also C Cell2 through Cell 11 (highlighted data).

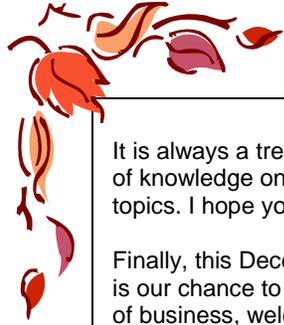
Step 3: Go to the **Insert Tab** and click on the small pointer below the **Bar Chart** icon. Select the Scatter Chart. With your data selected Excel will create your chart for you.

Step 4: Right click on one of the plotted points on the chart and select "add Trendline".

Step 5: A dialogue box will appear.

- Click the "linear" option
- Trendline name defaults to automatic
- Check "display equation on chart" box

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It is always a treat to see Josh present and share his wealth of knowledge on analytics and many other fundraising topics. I hope you can make it to this year's event.

Finally, this December we will have our annual meeting. This is our chance to gather around the holidays to conduct a bit of business, welcome new officers, and say good-bye to outgoing board members. Additionally, we are in the midst of recruiting new board members and board officers. Please consider that we need your efforts to keep APRA-IN going. We are a small organization, but we have a passionate membership. I have been so impressed with our current board members and the work they have done this year.

Finally, many thanks to board member **Jackie Knotts** for rescuing our website from a nasty virus attack this month. Jackie has worked hard to keep the registration forms up and running and is rebuilding the site from scratch. It looks great so far and I'm sure it will serve as a useful resource for us well into the future. Thanks, Jackie!

## 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](mailto:kkiser@iuhealth.org) to submit your idea or for more information.

**Editor's note:** Thank you to Jeanette Shown for her contribution to Profiles.

## New APRA-IN Web Site COMING SOON

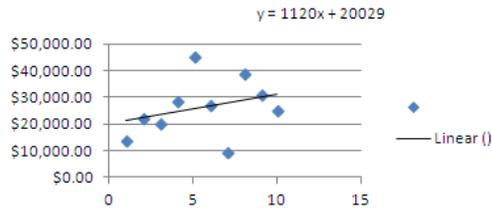
A new APRA-IN web site is in the works thanks to **Jackie Knotts**, APRA-IN board member and Webmaster.

NOTE: [www.apra-in.org](http://www.apra-in.org) is down for the time being. Please visit the [APRA-IN Facebook page](#) to get updated information while we work on the new site.

Thank you for your patience!



Step 6: You may have to left click and move the equation, but your slope-intercept equation which is calculated from the regression will appear.



Step 7: To calculate the Forecast you create a formula in another column.

A	B	C	D	E
Fscl Yr	year	1976		1120
FY 2003-2004	1	\$ 13,775.00		20029
FY 2004-2005	2	\$ 22,105.00		
FY 2005-2006	3	\$ 20,100.00		
FY 2006-2007	4	\$ 28,865.00		
FY 2007-2008	5	\$ 45,100.00		
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In **Column E**, using the  $Y = mx + B$  or  $Y = 1120x + 20029$ , we will create the following formula in C11 or D11 after the original data.  $=\$E\$1 * B1 + \$E\$2$

**Definition:**  $\$E\$1$  = absolute value of Cell E1. This number (the slope) will stay constant.  $\$E\$2$  = absolute value of Cell E2. This number (the intercept) will stay constant. B1 will change as you drag the formula down the D column. B1 represents the period of time, in this case in years.

Step 8: Copy the formula down by left clicking on the cell and then placing your cursor over the lower right hand corner on the tiny black square until it turns into a black cross  $+$ ; then left click and drag down the number of time periods you need.

Now you have your forecasted donations for the time periods you specified!

**Jeanette Shown** is an APRA-IN board member and 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.

## APRA-IN HAPPENINGS

This box has been empty for a long time. Which prompts the question: really....are we *THAT* boring?

If you have news you'd like to share in the newsletter, send your updates to Kate Kiser at [kkiser@juhealth.org](mailto:kkiser@juhealth.org).

## Welcome!

APRA-IN would like to ensure we welcome all new members that have started their position in the past calendar year

**Holly I. Gibson**  
Research Associate  
Indiana University Foundation

**Benjamin Jackson**  
Development Research Associate  
Purdue University

**Tina Landon**  
Research Associate  
Purdue University

**Linda Lauer**  
Manager of Philanthropic Information  
Parkview Health System

**Kenneth P. McCune**  
Database Manager  
Indiana State Museum & Historic Sites

**Lori Pope**  
Assistant Director of Regional Analysis  
University of Notre Dame



## APRA-IN Dues Coming in December

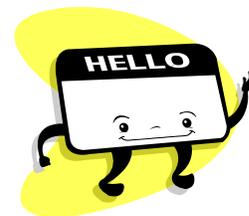
Reminder! To keep APRA-IN thriving and up-to-par with other state chapters, we will begin collecting dues by December 2013.

Chapter dues will be \$30 annually for a December to December time period, just like the APRA-International dues.

Please send any questions or concerns regarding APRA-IN dues to Felisa Javier-Holt at: [felisa.javier-holt@rose-hulman.edu](mailto:felisa.javier-holt@rose-hulman.edu).

## New Member Profile

Compiled by:  
**Felisa Javier-Holt**  
APRA-IN board member  
Manager, Prospect Research  
& Tracking, Rose-Hulman Institute  
of Technology



Meet Ken McCune...



**Ken McCune** is the database manager for the Indiana State Museum Foundation in Indianapolis, Indiana. In that role, Ken manages the Indiana State Museum's donor and member database.

Ken originally worked in the tire industry in retail and wholesale sales. Ken's background is in business, and he attained a Business Administration degree from Miami University in Ohio.

After retiring from his career in the tire industry, Ken decided that he wasn't quite ready for retirement. He then decided to jump into a second career by starting with graduate school. Ken is one of the first graduates from Indiana University's dual degree program of Library and Information Science from the School of Informatics and Computing and the Lilly Family School of Philanthropy, earning an M.L.S. (Master of Library Science) and an M.A. in Philanthropic Studies.

Ken currently loves his position at the Indiana State Museum Foundation because it gives him a chance to put the skills he learned from his Library Science program into practice. Also, Ken enjoys finding information about those who are most important to the Indiana State Museum Foundation.

Ken and his wife Karen enjoy spending time with their cat and dog. When he's not working, he spends his time reading, collecting Lionel trains. Ken also enjoys all aspects of history and baseball.

## CALLING Experienced Researchers...



Are you willing to share your prospect research knowledge?

We would love to have you participate with or rejoin **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](mailto:felisa.javier-holt@rose-hulman.edu).

## APRA-IN Board Elections

### CALL FOR NOMINATIONS



We need you! Do you know someone with great ideas about how to grow our APRA chapter? Are you looking for a way to become more involved in APRA-IN and gain leadership experience? If so, consider nominating yourself or someone you know for the APRA-IN Board!

We are accepting nominations through October 31, 2013.

To submit a nomination, please contact the APRA-IN board nominating committee:

**Shanelle Burns**

[Shanelle.Burns@valpo.edu](mailto:Shanelle.Burns@valpo.edu)

**Felisa Javier-Holt**

[felisa.javier-holt@rose-hulman.edu](mailto:felisa.javier-holt@rose-hulman.edu)

**Roberta Werman**

[roberta.werman@bethelcollege.edu](mailto:roberta.werman@bethelcollege.edu)

## APRA-IN Webinar : 26<sup>th</sup>

### APRA Conference Recap

By: **Susan Fetscher**, Grant and Research Coordinator at the University of Southern Indiana Foundation and APRA-IN board member

APRA's 26<sup>th</sup> International Conference, held this year in Baltimore, was filled with great speakers, networking with colleagues and vendors, and all of the latest concepts and information. For those who couldn't attend, I hosted a webinar on "What I Learned at the APRA's International Conference."

Some highlights from the conference: keynote speaker Jon Duschinsky spoke on changes in philanthropy and why he now seeks out researchers/techies at parties instead of avoiding them - we are the ones who know what changes are coming and how to adapt. I attended mostly prospect management sessions, as that is the world I'm currently living in, with a few general and campaign research sessions thrown in, too. A group of attendees from Indiana were able to get together for dinner one evening and had a great time getting to know each other and catching up with old friends.

If anyone would like the PowerPoint of the webinar, please email me at [sfetscher@usi.edu](mailto:sfetscher@usi.edu) and I will email it to you.





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# PENTERA

Modern Planned Giving Marketing

Friday, November 15, 2013 8:00a.m. – 4:30p.m.  
Indianapolis Marriott East, 7202 E. 21st Street, Indianapolis

**Register by October 15 for the early bird rate.  
All registrations due by November 5, 2013.**

2 Prospect Research sessions! [Joshua Birkholz](#) (Analytics)

[View the Agenda and other conference details](#)

[Register Now](#)



Join fellow data analytics, prospect research and relationship management executives at [APRA's Management & Leadership Symposium](#), November 7-8 at the Hilton Dallas/Park Cities in Dallas, Texas.

The program brings together a distinguished faculty of advancement practitioners, consultants, and leading management and topic specialists who have successfully led organizations, units, and projects of varying focus, size, environment, and complexity.

**Symposium topics:** Project management, metrics & measurement, "managing up", campaign-related issues, talent management, communication styles, strategic planning, and more.

For more information and to register, visit [www.aprahome.org/symposium](http://www.aprahome.org/symposium). [Reserve your room](#) at the Hilton Dallas/Park Cities by October 16 to ensure the greatest savings.

## Save the Date! APRA International Conference 2014

The 27<sup>th</sup> APRA International Annual Conference takes place from July 30, 2014 through August 2, 2014 at The Cosmopolitan of Las Vegas in Las Vegas, NV.

Don't miss your opportunity to showcase your expertise as a presenter at the conference. [Submit your presentation](#) proposal by Friday, October 4.

## Download 2013 APRA-I Conference Sessions (\$)

12 popular sessions are now available for purchase. [See the list of sessions.](#)

**FREE:**

The [entire APRA Talks session](#) is available to view now – no login or purchase necessary!

## Upcoming Programming/Events

WHAT	WHEN	WHERE
APRA-IN fall conference	October 4, 2013	Purdue University
APRA Management & Leadership Symposium	November 7-8, 2013	Hilton Dallas/Park Cities Dallas, TX
IN Philanthropy Day	November 15, 2013	Indianapolis Marriott East, 7202 E. 21st Street, Indianapolis
APRA-IN Annual Meeting	December 6, 2013	Buca de Beppo 6045 E 86th St Indianapolis, IN 46250
<b>Free Online Programming!</b> 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: <a href="http://www.aprahome.org">www.aprahome.org</a>

Online registration is available for select events.

### Wanted: Expertise

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](mailto:sarkjohn@indiana.edu)

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

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