



## President's Message



**By Jason Boley**

APRA-IN President & Assistant Vice President, Development Operations at Riley Children's Foundation

**This column marks my last "President's Message" for APRA-IN as my term ends on December 31.** I have been honored to act as President for the past two years and they certainly flew by quickly.

I'm proud of the efforts we have made over the past two years. We have formed new partnerships, such as partnering with APRA-Illinois on the basic skills workshop. We've held to our normal schedule of events with informative local speakers. We've hosted our very first online webinar events, two in the past year. We have revised our bylaws and we are continuing to revise our infrastructure to better manage our organization.

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## 2013 Review:

### Indiana Philanthropy Day

**By Ralph Rohrer**

APRA-IN Member

IPD planning committee (representing APRA-IN)  
Chief of Research, Purdue University

Indiana Philanthropy Day is a collaborative effort of the Indiana chapters of AFP, APRA, and PGGI. IPD was held on November 15, 2013, on the east side of Indianapolis. Conferences held by I-CASE and the School of Philanthropy during the same time competed with IPD for attendees.

**Penelope Burk** gave the conference's opening talk. (She also spoke at APRA International in Minneapolis.) Her topic was *Donor Centered Leadership* but she focused mostly on the cost of turnover among fundraisers. Costs include missed opportunities with donors as well as the costs of hiring and training.

I attended two sessions in the Planned Giving track. I was glad I was wearing a suit.

**Claudine Donikian** of Pentera talked about marketing legacy gifts. She anticipates more planned gifts as the Silent Generation ages. Marketing can measure its success by the return on investment (rather than number of postcards returned) and should utilize multiple approaches and multiple touches. 5% of Americans leave bequests and most will not tell the organization about the bequest. She urged identifying donors of 6 gifts in the past 10 years (Cornell looks at donors of \$500+) and using certain identifiers: 40 – 60 years old, household income of \$100K+, religious service attendees. She also urged marketing targeted at life stages. She mentioned marketing to women by including stories about the impact of smaller gifts and by featuring women in illustrations. She cautioned that even wealthy women fear that giving away money will leave them as bag ladies.

**Emil Kallina's** talk on spotting life events covered the money events that may trigger a planned or outright gift, specifically the sale of business or of business assets or of real estate. He did not say how the fundraiser could identify when these events might occur other than through contact with the donors. He said that people pop onto our radar as wealthy in the year that the event occurs. He anticipates a rise in the use of CRUTs as taxes increase.

The highlight of the lunch was the presentation of the Indiana Philanthropy Awards, two of which went to children.

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In the past two years I've become buoyed by efforts made by APRA International to reach out to and support the individual chapters such as APRA-IN. While these efforts sometimes feel like steering the Titanic, good things are starting to happen. All chapter Presidents now gather in Chicago in February at the national headquarters. It is a great opportunity to hear what other chapters are doing well and to have open communication with national leaders. We are beginning to see some tangible results. I happen to sit on the APRA committee addressing chapter resource sharing and I think we will see some good information and partnerships roll out from those efforts this year.

Finally, this marks the second year we have partnered with AFP-IC, PGGI and PRSA Hoosier Chapter on Indiana Philanthropy Day. I was excited to attend this event for the first time this year, and I'm happy to say I was really surprised by the quality of the content and the event. It was a large event and provided an excellent opportunity to network with peers that I don't get to see very often. We brought in Josh Birkholz from Bentz whaley Flessner as our featured speaker and he was excellent! I'm already looking forward to next year.

Finally, I'm very encouraged by the pretty much unanimous consent that beginning to collect dues for our chapters is a good thing. Many of you have already sent your dues in - thank you! This shows your commitment to our organization and is a vote for the value of our mission and what we do as volunteers. **My holiday wish for APRA-IN is that over the next year these funds provide us new opportunities to bring in content beyond what we normally see.** We as board members have our work cut out for us to provide you with a good return on your investment.

I hope everyone has a happy and healthy holiday season!

**Editor's note:**

Many thanks to **Jason Boley** for his outstanding service to the APRA-IN board and chapter during his tenure as board president. The APRA-IN board would like to express their deep appreciation for his leadership and good sense. Jason remains on the board as immediate past president.



9-year-old Carl Biddings IV gave his own money and raised more to sponsor a YMCA basketball team. Pre-teen Lauren Harmon raised money for penguins at the Indianapolis Zoo. John Mutz received the lifetime achievement award.

My speech professors at Wabash who said to speak with "Room Filling Energy" would have delighted in **Josh Birkholz's** presentation. His talk on Fundraising Analytics covered the two afternoon sessions in the Research track. Here are some of my take-aways:

1. Bobbie Strand has written a new book about prospect research.
2. People who give asynchronously may be giving from assets and the liquidation of assets rather than from income.
3. Prospect management systems should feed fundraisers the type of prospects with whom the fundraiser has been most successful.
4. In predictive modeling, identify how the desired people (e.g. major donors) are different from the rest of the people.
5. The strength of a predictive model depends on having a statistically significant number of people who have done the desired action. He generally looks for about 200 people.
6. Reports can change behavior, e.g. fundraiser activity, if the report is timely enough so the person can react and respond to the triggering behavior, if it addresses the self-interest of the person, and if it establishes peer pressure (e.g. a fundraiser seeing the number of contact reports filed by peers will be encouraged to file her own).

By the time I finished hearing Josh, my brain was full. But I attended the closing session with keynote speaker **Angela Sinickas**, a communications expert. She advocates calculating the return on investment on a particular communication using a benefit cost ratio. She specified three questions for each communication. First, what organizational impact could this communication have? Second, what would be the impact if we did not communicate it? Third, how can we quantify the value financially?

IPD had a nice array of vendors this year, including **Kathy Wilson** of Donor Search. We thank her for her support of IPD.



## 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 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).

## How to Connect, Follow, Learn

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

## APRA-IN Happenings

### ***Promotions***

**Denise Gentry**, new title: Director of Prospect Research, DePauw University

**Haley Whalen**, new title: Development (Database, Donor & Prospect) Services Manager, Indianapolis Children's Museum

**Cathy Spieth**, United Way of Central Indiana, new title: Senior Research Analyst - Prospect Research

### ***Moving On***

**Daren P. Cooper** is leaving Purdue University at the end of 2013 after 11 years. He has worked in Development Research Services for Purdue since 2006. Happily, Darren became engaged in August of 2013 and is moving to Rochester, MN where his fiancé is located. Darren's job search is under way so if you have a contact or know of a great place to work in that area, please reach out to Darren at [dpc@bmcweb.net](mailto:dpc@bmcweb.net)! APRA-IN will miss you Darren and we wish you luck with the wedding planning and job search.

## New Member Profile

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

### Meet Mary Ramsey...



**Mary Ramsey is a prospect management associate at the Indiana University Foundation in Bloomington, IN.** Mary joined the IU Foundation 28 years ago and has been involved in Prospect Management for the last 17 years.

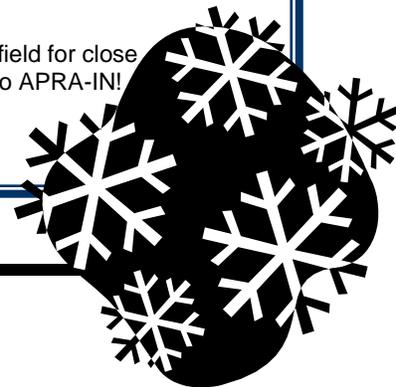
In Mary's current role in Prospect Management, she works with development officers to grow their donor coordination and communication. Mary's efforts seek to help them capture and track philanthropic relationships using Indiana University's Prospect Management Program (PMP) and central alumni/donor database. When development officers have problems with the database processes or are simply learning IU's systems for the first time, she provides advice, direction, and training.

When Mary arrived at the IU Foundation, she embraced the higher education atmosphere. Mary said the environment gave her the encouragement and courage she needed to enroll at Indiana University. Mary earned her Associate degree in 2010 through the School of Continuing Studies. Mary is in her junior year of college, and she is looking forward to earning her Bachelor's degree with minors anticipated in Nonprofit Management (SPEA), Music, and Creative Writing.

There are two things Mary loves best about working in prospect management: interacting and training development officers, and working with prospect management data. She likes teaching the value of keeping information functional so it works with various reports and serves well across the vast history and future of the university to other staff. Mary's relationship with development officers is something she values and takes pride in.

When not at work, Mary says books are special friends in her house. She enjoys reading novels and short stories, especially those set in other time periods or other cultures. The most prized book on her shelf is an unabridged Webster's dictionary that belonged to her grandmother.

Even though Mary has been in the field for close to 30 years, she is a new member to APRA-IN! Welcome, Mary!



# The Times, They Are A-Changin'

By Augie Freda

Campus Data Steward, University of Notre Dame

Bob Dylan, in the song of the same title, says: "Come gather 'round people wherever you roam and admit that the waters around you have grown, for the times they are a-changin'."

I find my times are a-changing as I leave the field of Prospect Management and Research after almost 12 years and the field of fundraising after almost 17 years. I've taken on a new role at Notre Dame in the Office of Information Technology, overseeing our Data Governance efforts. Knowing my audience, I'm sure you'll Google that if you're curious about "Data Governance", so I won't explain that here!

Almost 12 years! It's amazing how comfortable one becomes being in the same field and role for so long. In spite of that comfort, I'm equally amazed at how much our field has changed.

When I began in Prospect Research in January, 2002, "electronic screening" was relatively new, Facebook still needed an "edu" email address to sign-up and no one was talking much about predictive modeling. Now, predictive modeling is a staple of our toolbox, there are a dozen or so social networking "venues" to help find people and we're looking more at relationship mapping and marketing indicators than ever before. These times, they are a-changin'!

In 2002, we were almost solely focused on "how much" a prospect can give, leaving the rest of the philanthropic questions about our donors and prospects to the fundraisers. Now, our work is to assess not just "how much" but equipping our institutions with "why" might someone give, "what" are they most likely to support and, sometimes, "with whom" of our fundraisers will they work best? It's no longer "just the facts, Ma'am" as Dragnet's Joe Friday would say ... now we enhance the facts with our opinions and expertise as consultants and partners.

Six of those 12 years were spent serving as a member of the APRA-IN Board, including a year as president. I have enjoyed watching many of you grow, change and adapt as well. I enjoyed every minute of my time in service to our chapter and I enjoyed every interaction with each and every one of you with whom I had the opportunity to be engaged. And the chapter ... my, how that's a-changin'! Joint events with other chapters, much more "small shop" participation and leadership and so much more robust programming!

I look forward to watching how, wherever you roam and however much your waters grow, you lead the field forward! Keep up the great work and, until we meet again, I'll wish you well and great success!

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*Augie Freda is the former Director of Development Research at Notre Dame, former APRA-IN Board Member and past president of the APRA-IN Chapter.*

## APRA-IN 2014 Board

### Members

Jason Boley  
Shanelle Burns  
Susan Fletscher  
Felisa Javier-Holt  
Sarah Johnson  
Kate Kiser  
Jackie Knotts  
Karen McTague  
Jeremy Sheiko  
**Marilyn Smith\***  
Roberta Werman

**\*Welcome new board member, Marilyn Smith!**

The APRA-IN board approved the following 2014 Officers at the 12/6/2013 board meeting.

2014 Board Officers, effective 1/1/14:

President: Roberta Werman\*  
Immediate Past: Jason Boley  
Vice President: Karen McTague\*  
Secretary: Marilyn Smith\*  
Treasurer: Jackie Knotts

*\*new officers*

## SAVE THE DATE APRA-IN Annual Meeting!

**Date:** January 17th, 2014  
**Time:** 11:30 a.m. – 3:00 p.m.  
**Where:** Buca Di Beppo  
6045 E. 86th St., Indianapolis, IN  
**Cost\*:** \$30/APRA-IN member; \$35/non-member

[Register Today!](#)

Registration is open from 12/17/13 through 1/14/14

The meeting includes a presentation by FBI Intelligence Analyst, Grant Henry, on Research in Other Professions. Join us!

FMI and to register, visit <http://apraindiana.com/events/>.

*\*Those that already paid their registration for the original event date may register for free via the registration link above.*

## Researcher's Corner

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

### Building a Foundation Research Toolkit

**By Emily Ulrich**

Research Associate at Purdue University

If you are looking for ways to grow your philanthropic support, consider researching some of the more than 80,000 foundations in the United States. Unlike with an individual donor, you don't have to determine whether a foundation is philanthropic – all of them are. Rather, the task here is finding which foundations best match your organization's mission. Here are a few tools to help you get started.

#### Subscription databases

Subscribe to a database such as Foundation Directory Online or FoundationSearch if your budget allows. This type of resource is essential if you plan to do foundation research on a regular basis. Subscription databases offer sophisticated capabilities like keyword searches that simply cannot be replicated in a Google search.

#### Lists

A free source for lists of top funders is Foundation Center's new online tool, Foundation Stats (<http://data.foundationcenter.org>). Among other benefits, the site allows you to identify the top 50 foundations for 11 subject areas or 18 population groups served. You can also filter by the geographic location of recipients. Another great list is The Chronicle of Philanthropy's daily update of new grants. To access this resource, visit <http://philanthropy.com>, click on "Fundraising," then select "New Grants."

#### Foundation websites

While some foundations actually do not have websites, the majority do. Use these as your primary source of information; they are likely to be more current than information published by a third party.

#### 990-PFs

The tax forms filed by foundations, especially the 990-PF, are an information goldmine. Within these documents you'll find a detailed list of grants made during the tax year, often including descriptions that allow you to see if the foundation funds the kinds of programs/services you provide. Access 990-PFs through your subscription database or by creating a free account with GuideStar ([www.guidestar.org](http://www.guidestar.org)).

Happy hunting!

## 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 Ralph Rohrer, Augie Freda, and Emily Ulrich for their contributions.*

## 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)

## APRA-IN Dues Are Due!

Reminder! To keep APRA-IN thriving and up-to-par with other state chapters, **APRA-IN chapter dues are due....now! By the end of the year, please.**

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

Please visit the [member page](#) at [apraindiana.com](http://apraindiana.com) to submit your dues & complete the membership application.

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).



## Upcoming Programming/Events

WHAT	WHEN	WHERE
APRA-IN Annual Meeting	January 17, 2014	Buca Di Beppo 86 <sup>th</sup> Street, Indy
APRA online education week (free) <i>New programming!</i>	February 10, 2014	<a href="http://www.aprahome.org/p/cm/ld/fid=455">http://www.aprahome.org/p/cm/ld/fid=455</a>
APRA-IN Basic Skills Workshop in conjunction with APRA-IL	TBD	TBD in Indiana
APRA-IN Advanced Research Workshop	TBD	TBD
26 <sup>th</sup> Annual APRA International Conference	July 30, 2014	Las Vegas, NV
IN Philanthropy Day	November 2014	TBD
<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>

Registration information will be sent out closer to the events,  
or check the APRA-IN website at <http://apraindiana.com/events/>  
Online registration is available for select events.

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Association of Professional Researchers for Advancement.

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