



# APRA-Metro DC Newsletter

## December 2001

### From the President:

It has been an interesting and busy year for APRA-Metro DC! We weathered some board changes, presented several programs including some new brown bag lunches, produced the newsletter on a quarterly basis, hosted a one-day conference, and finished with our Annual Meeting/Happy Hour with board elections.

We have many people to thank for the success of our conference held on Oct. 19, but I want to begin with Gloria Benton, the conference chair for the chapter. She did a fantastic job on her first APRA-Metro DC conference! With the help of the rest of the board and other volunteers, she organized the conference in less than four months.

Next, the chapter would like to thank Jon Thorsen and his staff at the American Red

Cross for hosting the conference. Jon and his staff arranged for the use of the ballroom, and assisted the chapter with site visits, room layout, logistics, and hotel information. Plus, Jon and two of his staff members participated in the panel discussion! We are very grateful for their support, especially in light of their workload after the events of September 11.

We greatly appreciate the time and effort given by our wonderful speakers—Marie Mattson, David Lawson, Jon Thorsen and the panelists, the APRA International representatives, and Joseph Bross and Gwen Hubbard from the FBI.

Also, I would like to express my thanks to Anne B. Rhodes, the president of APRA-Virginia. She met with me in August to help plan this conference, and arranged for it to serve as the fall program for the APRA-VA chapter. In addition, Anne participated in the panel discussion.

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From the President (continued from page 1)

In closing, I would like to thank the board of APRA-Metro DC, our volunteers, the attendees, and everyone else who contributed to the success of our conference and other activities.

Deborah Wallower

*Sharing Donor Information:  
An Inquiry into Researchers' Practices*

Elise Ober, Research Coordinator, Salisbury School

**Background**

When I began work as a development researcher almost four years ago, I was hired to set up a one-person research shop at a small independent school just about to launch a \$40 million campaign. The school had never had an in-house researcher before, and I, though equipped with an M.L.S. and several years' practical experience as a law librarian, had never worked as a development researcher, so together we both learned the finer points of the profession as we went along.

I quickly discovered that one of my research tasks was to discover a donor's philanthropy to other institutions, and that my director of development regarded this information as particularly useful as it shed light on questions like:

- \* whether a constituent might give a capital gift to the school, based on the premise that if he had given such a gift elsewhere, he would be capable and willing to give such a gift again;
- \* the possible size of that gift, based on the premise that if he had given a six-figure gift in the past, he might be willing to give at that level again; and
- \* his philanthropic ties to other institutions, which if particularly close and long-standing elsewhere might affect the size of the gift he would give to our institution.

Therefore, after learning as much as I could about a constituent's connections to other educational and philanthropic organizations, I would then telephone either the organization's development researcher or development office. I asked first, whether they would be willing to mail their annual donor report to me in exchange for a copy of our annual report and, if they readily said yes, thereby opening the door to a further exchange, whether they could tell me any additional information regarding that constituent's involvement, philanthropic or otherwise, with their institution.

It was the second question that met with a whole host of responses, ranging from the conservative spectrum, that they could share only the annual donor report, or dead silence in those instances where I left a message and did not receive a phone call back; to the liberal spectrum, that the constituent in question is "not a donor," is a "leadership donor in the six figure range," is a "loyal three-figure annual fund donor," a "volunteer on the Parents' Committee" and a "former trustee," is "closely connected with our institution," etc. If I needed some information confirmed, like spouse's maiden name, children's names, date of graduation, major, or address, I might ask those questions at this juncture as well. The other researcher and I, in the spirit of collegiality, might even trade some general publicly available information about this constituent, whom we discovered we now shared.

Frankly just calling another researcher about a constituent not only flags the attention of the other researcher to that constituent, to perhaps

take a closer look at that constituent, it discloses information about that constituent that the other researcher may or may not already know, namely that that constituent has a relationship, in my case usually as an alumnus or a past or current parent, to my institution. Finally, as I already knew from researching the constituent's relationship to their organization, in the spirit of collegiality and fairness, I would often share with the researcher their relationship to my organization.

However, whenever I asked the second question, I sometimes felt an initial discomfort from the researcher at the other end, and wondered whether I was crossing some unwritten rule or line, that perhaps I was putting my fellow researcher in an awkward position, or that perhaps just by inquiring I was not protecting my constituents well enough.

Therefore, I decided to undertake an informal survey of researchers' practices on this question, with the intent of coming up with some general guidelines for myself and for other researchers on this aspect of our research.

### **The Survey**

My survey is at best a rough sampling of opinions out there, as it is based on responses to two questions on PRSPCT-L, namely, what categories of information are researchers comfortable sharing with other researchers, and where do they stand on the question of sharing a prospect rating? I also polled a number of research directors over the phone. It is nevertheless enlightening as to the thinking out there, and it can serve as a start to draw up some formalized guidelines.

I was able to gather 37 responses, the overwhelming majority of which came from development researchers at higher education institutions, so the survey is biased in that direction. Specifically, 25 responses came from researchers at higher education institutions and 12 from other institutions, which included four from arts and historic-related institutions, three from medical institutions, two from news-related institutions, one from a research center, one

from a freelancer and one from a private school

Overall, outside of the several researchers who adhered to very conservative policies at their institutions, where even an exchange of an annual donor report was prohibited, most researchers were struggling in one way or another to find a workable compromise. On the one hand, they wanted to protect their privileged and confidential relationship with their donors and, on the other hand, to maintain a collegial and helpful relationship with their colleagues in the field.

So really the focus of this article is on how the surveyed researchers juggled this fine line between the twin and competing concerns of donor confidentiality and professional collegiality when confronted with questions from other researchers regarding their constituents.

### **The AFP Code of Ethical Principles & The APRA Code of Ethics**

Both the Association of Fundraising Professionals (AFP) Code of Ethical Principles and the APRA Code of Ethics are quite clear as to our responsibility to our constituents. (See excerpts on page 4 and 5.) The AFP Code states that "members shall not disclose privileged or confidential information to unauthorized parties" and "shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization" and the APRA Code states in somewhat stronger terms that "confidential information about constituents...in oral form or on electronic, magnetic or print media are protected so that the relationship of trust between the constituent and the institution is upheld" and "constituent information is the property of the institution...and shall not be given to persons other than those who are involved with the cultivation and solicitation effort...[and]...constituent information for one institution shall not be taken to another institution."

However only the APRA Code of Ethics touches on our relationship to our colleagues in the field, stating that “only publicly available information shall be shared with colleagues at other institutions as a professional courtesy.” Since the APRA Code of Ethics does not define for us “publicly available information,” the researcher must then figure out in practice what sort of public information he or she is willing to share with his or her colleagues. Many of us have researched a constituent only to find a news story about the constituent that we may prefer to relay verbally to our director of development rather than write up in our report. Theoretically a news story falls into the realm of “public information;” however, in practice the majority of us would not share that news story out of respect for the constituent. A new researcher who responded to my survey and who attended the first APRA Boot Camp remarked that really the only guidance she received there on this question was if you ask for an annual donor report, always offer yours in exchange, and as a general rule of thumb, only ask your colleague to confirm certain information, and never ask specifically for information regarding a constituent.

One university development code I found did define public information as information that “falls under the definition of public, or directory, information outlined in the Family Education Rights and Protection Act of 1974,

**Excerpts from the APRA Code of Ethics**

1. Researchers shall adhere to all applicable laws, as well as to institutional policies, regarding the use and distribution of confidential constituent information.
2. Constituent information is the property of the institution for which it was collected and shall not be given to persons other than those who are involved with the cultivation or solicitation effort or those who need that information in the performance of their duties for that institution.
3. Constituent information for one institution shall not be taken to another institution.
4. Research documents containing constituent information that is to be used outside research offices shall be clearly marked \*confidential.\*
5. Vendors, consultants, and other external entities shall understand and agree to comply with the institution's confidentiality policies before gaining access to institutional data.
6. Only publicly available information

commonly referred to as the ‘Buckley Amendment,’” and it then interpreted that act as encompassing the following “categories of information:” name; address; age; facts and dates of enrollment; departmental concentration, certificates and honors; most recent school previously attended; theses, student publications, and records of campus extracurricular activities that are generally available in public form; and the names of officers of university-recognized student activities. However, I know from experience most researchers might confirm but would not offer either the current address of a constituent or the most recent school previously attended, and the researcher there explained that the fact that the foregoing categories of information are “public” in the legal and official

sense – i.e., a constituent’s current address, major and graduation date are published regularly in their 5-year alumni directory; certificates and honors are frequently reported in the hometown newspaper of the constituent; and extracurricular activities are reported in the university newspaper or the university yearbook available in their library—is in no way an indicator that a researcher would be willing to share this information with another researcher.

So, the real question becomes what sort of public information are researchers WILLING and COMFORTABLE sharing with other researchers at other institutions as a professional courtesy within the framework of our ethics codes?

## **The Practice**

### **Higher Education**

As I promised anonymity to all the participants, I will simply refer to each participant as participant “# 1,” “#2,” etc. Also, as I did not conduct the survey in a formal manner by asking each researcher the same set of questions, their responses will vary as to content.

Among the 25 higher education institutions surveyed, nine followed conservative policies, and among those nine, five were located in the Northeast, two in the Southeast, one in the Midwest and one in the West. Also of interest is that the Ivy League institutions polled fell into this conservative category. Here are the findings:

- #1 had no in-house written policy but the researcher stated very clearly and firmly that the institution would not share any information about their donors including their graduation date and major and would only share their annual report.
- #2 also had no in-house written policy. However, they would share their annual report and they might tell a researcher that a constituent was currently on a committee there IF it was printed in a current university telephone directory or on their

website. They would not share the graduation year or the major except on a case-by-case basis. If someone wanted to confirm if a constituent had once been a trustee there, they would probably refuse as at that level of their constituency, they take extra precautions to protect their privacy. Also when constituents give anonymously, then the greatest of pains are taken to release no information at all about those constituents.

#3 frequently did not even publish an annual donor report, so they could not share it with other researchers. However, they would share majors and degrees; otherwise everything else about a constituent was off limits. They do encourage colleagues to search their website, however, as significant gifts are always posted there.

#4 stated quite categorically and definitively that they never share any information about donors with other researchers, and that includes their annual report, which they only mail to select groups, for example, the trustees of the university. Since they cannot share any information, they consequently never call other researchers at other shops to confirm or exchange public information. However, the researcher expressed a hope that in the future, they might revise their policy, and share their annual report with “peer institutions” or “institutions that have significant long-standing ties to the university like prep schools” so they could then benefit from an exchange of some annual reports from some institutions.

#5 said they do not publish an annual report, they are very protective of their donors, and will only share with other researchers suggestions on where to find certain kinds of information. The researcher there added that they frankly have not been probed by other researchers, that this simply has just not come up in their office! The researcher felt also that since there appears to be a growing trend among donors to give anonymously, that we as researchers need to be more cautious than ever to protect their privacy.

#6 stated that they do not publish an annual report, that they share no gift information and that if a colleague read something in a newspaper, and wanted confirmation, they would probably refer him/her to the President's office. The researcher also said they quite simply do not get that many requests of this nature.

#7 would share only published information, that is, information in an alumna or alumnae directory or an annual donor report.

Excerpts from the AFP Code of Ethical Principles and Standards of Professional Practice:

AFP members agree to abide by the AFP Standards of Professional Practice, which are adopted and incorporated into the AFP Code of Ethical Principles.

Professional obligations

1. Members shall not engage in activities that harm the members' organization, clients, or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical, and legal obligations to their organizations and their clients.
3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer, or employee to the benefit of the members or the members' organizations.
5. Members shall comply with all applicable local, state, provincial, and federal civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.

Presentation of information

12. Members shall not disclose privileged or confidential information to unauthorized parties.
13. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.
14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to, or exchanged with other organizations.
15. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)\* for the type of organization involved. (\* In countries outside of the United States, comparable authority should be utilized.)

[AFP Code of Ethical Principles & Standards of Professional Practice, Adopted 1964; amended October 1999]

#8 said they would share their annual donor report but otherwise, everything else about a constituent was confidential.

#9 said that she “never asks a question that she is not willing to answer about [her] own constituency,” that she feels strongly that a researcher should exhaust all her own resources first before she seeks the help of colleagues, that a researcher should “not ask if a constituent is a donor” as that is proprietary information, but that there are those times when a colleague is researching someone with a very common name, and just needs to confirm with another researcher that the “John Doe” he/she is researching is the correct “John Doe.”

The remaining 16 higher education institutions surveyed followed more liberal policies, and among those, four came from the Southeast, four came from the Northeast, four came from the Midwest, two came from the West and two were anonymous.

#10 stated that overall, she would handle such inquiries on a request-by-request basis. For example, if she knew the researcher and knew she adhered to ethical standards in her work, she might share information like “he is a major or mega donor here” or “he is a closely affiliated donor here.” However, she would never share gift ranges and never share any information not already in the public realm.

#11 would share the graduation date and major and might confirm information. However, whether she shared an annual donor report or gift ranges would depend a lot on who is asking and whether there might be a possible exchange of information, and overall this decision would be made on a case-by-case basis.

#12 stated she would verify degrees and majors, share their annual report and might confirm a large gift or a board membership. Also she might say he is “an annual fund donor” but would stop short of saying he is a “major gift donor.”

#13 said he would try to be as “helpful as possible,” would be willing to share their annual report and say whether a prospect is a “major gift prospect” or a “loyal donor” and has even sent obits to fellow researchers when he has spotted their institution mentioned in the obit. However he would stop short of sharing gift ranges.

#14 said that she was a new researcher, that overall she could not “see any reason why I wouldn’t help a fellow researcher in any way I can especially if the person *is not a prospect* for my university” and otherwise she was following the guidelines suggested at the APRA Boot Camp.

#15 said she was always comfortable swapping annual reports, and otherwise, she always checked with her supervisor, and usually got the go ahead to share “committee involvements,” “spouse information” and whether a constituent is “a donor or not a donor” with the understanding that the favor would be returned some time.

#16 said she would share anything that has been published in an alumni directory or an honor roll or that can be found in public records. However, she would not share giving, unless published in the honor roll, and she would not give out home addresses or family information or “anything that would violate the constituent’s privacy.”

#17 would share a gift range and confirm information that is public. However, she would not share information gathered in the course of research as it would be too time-consuming and costly.

#18 said he did not have a problem sharing for example that “Mr. X has supported our institution at the President’s Circle level for the last 10 years” or “Did you know that he is a huge supporter of the opera?” as this type of information is generally public anyway and gleaned from annual reports. He added that frequently obtaining information from other institutions is the best information one can find on a constituent, though he has found you have to offer tidbits in return.

Overall, he will share only public information with researchers, and generally he follows the rule that if a researcher can eventually find it on his/her own, then he can share it.

- #19 said he would share a graduation date and major, and whether a constituent “is or is not a donor” and whether he is “an annual fund donor or a capital donor.”
- #20 would share an annual report and “public information readily obtainable,” like an article on a constituent.
- #21 said she would share the annual report and “some public information with higher education institutions seeking information about alumni we have in common.”
- #22 said she would share the annual report and “hard to find public information not on databases but in files,” like an old news clipping. For example, she once contacted an alum’s husband’s alma mater because she could not locate his obit anywhere and they were able to provide it for her. Beyond that, her competitive instincts came into play, and she felt the researcher should not have access to her research and do his or her own research.
- #23 would share public information, such as a donor roll. She also might mention a professorship named after a constituent, as this is public, she might say if the constituent is an annual fund donor, and, if she had the time, might look in a file and share a news story. As far as addresses are concerned, she would ask the questioner “what do you have?” and either respond “that is what we have” or “that is not what we have” and leave it at that. Overall, she likes to be as collegial as possible, saving her colleagues an extra step where possible, without betraying the donor’s trust in any way.
- #24 felt it was okay to share information when both parties already know something about the prospect in question, and that she had traded remarks about a family that was a prospect at both their institutions, though had kept it general, and did not delve

beyond statements like “x has been quite approachable” or “x has been a good supporter” or “yes, x is related to so and so who founded that company.”

Otherwise, she is very cautious about sharing information to which only her institution is privy, and she hopes she continues to have good instincts as to where to draw that line. However, she feels that “sometimes you just need a direction to pursue in your research, and sometimes a little piece of information can give you that direction,” like the constituent in question is indeed related to the family that founded that company.

- #25 shared how she handled the *Other Philanthropy* section of her report, that she “would reserve that section for publicly announced gifts found in donor lists and foundation returns,” i.e., Mrs. X gave \$25,000 to the zoo, and “references that the donor volunteers in conversation with your development officers,” i.e., Mr. X told DO John Smith that he bought a table at This-or-That holiday benefit and the cost of the tables ranged from \$1,250-\$5,000. Also “if you know the donor has a name on a building at her alma mater’s campus, find out if she gave the money for new construction or renovation, the year, and any indicating factors regarding the cost of the building and, therefore, you can come up with a ballpark guess as to the dollar range of her gift in order for her to secure the naming opportunity.”

### Other Institutions

Among the 12 other institutions surveyed, seven followed a conservative line, the remaining five a more liberal line.

On the more conservative side:

- #1 a Canadian arts institution, would be willing to exchange annual reports since the information in it “has been approved by our donors for publication.” Otherwise, if asked “we would not provide details beyond what was written in our annual report, for example, the extent of a prospect’s involvement with our organization, how much they have given us, any details on their

life we have gathered through close contact, etc.” and we “would not share information like age, birth date, educational degree, interests or gift range on the belief that such information is easy for any researcher to find if the donor is wealthy or a high ranking business person.” Overall, she felt “if you are taking the time to ask a researcher a question, you should ask one that cannot be easily answered on your own due to lack of resources or lack of knowledge.” Otherwise, if you “cannot find the information you need in public sources and cannot find someone connected to your organization who can provide the needed details,” then you are simply out of luck. She has noticed that generally “Canadian donors are more sensitive about what is published about them in America” so this “may affect information sharing policies at Canadian nonprofit institutions.”

#2 a medical institution, would only share public information available in newspapers, magazines, etc. and any internal information, unless published, should be kept internal. As a result, she would refrain from telling another organization whether a constituent is “a donor” or “not a donor” or “size of a gift” unless the donor had already made it public.

#3 also a medical institution, will only share or confirm what is in its annual report, or on a website or in a press release, and added that “she has been in the field 15 years, and this has never changed”.

#4 a news group, would neither share information nor solicit information from other researchers for a very practical reason, that he needs to cite a source for his data, and a source needs to be “demonstrable” – i.e., he needs to be able to revisit that source later and provide it as documentation. “I would feel uncomfortable identifying another organization’s researcher in a profile, and if the information turned out to be incorrect, I would be accountable.”

#5 also a news group, would share annual reports only, and might confirm an address

if time was of the essence. Otherwise, “I am being paid to find out this information, and I would be reluctant to use another’s work product.”

#6 a research group, felt an exchange of annual reports would be acceptable, if the institution allows it, but her particular institution does not as a rule. She then pointed out that at the heart of my question is really another question, my fiduciary responsibility to my institution. “The institution is spending time, money and resources to develop a relationship with a specific donor” and “fundraisers know it is difficult to find the key to open the door to some of these donors” so consequently, it would be “absurd to share this hard-won information for free” and might be “similar to leaving one’s job and taking a copy of the database with you and sharing it with your new employer.” She concluded with the thought that “I cannot imagine the possible upside of locating some basic information on a prospect quickly is worth the downside of giving another institution easier access to your biggest donors.”

#7 a private school, had no in-house written policy. The school’s researcher, an in-house researcher for the first time, said her instinct would be to “exchange annual reports,” otherwise share “no information except the vaguest,” like “he is a donor or not a donor.”

Then on the liberal side:

#8 a medical institution, would be willing to share any published or public information with other researchers in a quid pro quo fashion, but would not share any internal information that “comes via fundraisers or trustees” such as a prospect’s health, relationships, or gift amounts. “I see no reason to compel other researchers to totally reinvent the wheel each time with a prospect” as “I may have information that took hours to put together on one prospect, and another researcher may have similar information on a prospect that I am interested in.”

- #9 an arts organization, said “she would provide exactly what is published in the annual report, that “Mr. X is a donor at the Y level which is \$250,000 and above,” that “he is on the board” and that he “is on x committee” because all this is published in the annual report which can be obtained just by attending a performance there. However, unless a specific amount was noted in a press release or another public source, she would never divulge the specific amount though she might say that a constituent gave a “high or middle or low six figure gift” and is “a subscriber or merely a ticket buyer.” She would share business and title, but she would not share home address or telephone information, as that just seems too intrusive. Overall, her instinct is to be as cooperative as possible as there may come a time when she needs the cooperation from the researcher asking for the information.
- #10 a freelancer, might share or confirm age or birth date; middle initial and/or spouse name; correct address and phone; and education and degrees, information which she has found publicly in the course of her research.
- #11 an arts organization, said “sometimes a minute exchange of information can be helpful” and shared an instance where she was able to provide a researcher a birth date for her constituent, in exchange for that organization’s relationship to her constituent. “It was minor and not quickly available in the public arena.”
- #12 an arts institution, said, “I remember that one researcher wanted to know a dollar figure, and I wouldn’t give her that. But I am willing to part with the following information: whether or not someone has been on our board or held some other leadership position; whether she or he has been a consistent or more sporadic donor, for how long and at what general level (Symphony Society = \$1,500 or more, etc.); any data I may have about gifts to other organizations (all of which is culled from the Internet and other organizations’ program books and annual reports and is,

therefore, presumably fair game); spouse’s name, if I know it; involvement with other organizations about which I happen to know. I use only free sources and the local paper, and so can the other researcher, so why not save him/her the time! I guess the short answer is that I’ll share anything I know that doesn’t involve specific dollar amounts or information that the donor has shared with us in some confidence. I am happy to save a fellow researcher some time, but not at the expense of a breach of confidentiality.”

### Prospect Ratings

I asked researchers on the “L” how they would feel about sharing ratings, out of an idea that the rating, particularly the inclination half of the rating, would be very useful in evaluating a constituent’s current standing at his or her other charities. For example, if he was currently rated very high in inclination at another of his charities, then perhaps it behooved us to rate him a little lower in inclination at our institution at this time.

Well, the researchers surveyed were unanimous in their strong opinion that ratings should not be shared under any circumstances. The central argument against sharing a rating was that a rating, particularly the inclination half of the rating, is highly subjective, based on a unique and privileged relationship with the constituent, and as such, should be treated as confidential. Other reasons stated were:

- that a lot of hard work goes into coming up with a rating, both the work of researchers and the seasoned judgment of development officers in the field, so a rating should be proprietary to the institution.
- A rating cannot mean anything to another institution if taken out of context, as a high capacity rating at a smaller institution may actually be a low capacity rating at a larger institution, and a high inclination at one institution may have no bearing whatsoever on inclination level at another institution.

- A rating alone cannot tell very much without knowing what is behind the rating, as a prospect could be rated highly in terms of capacity, but you still have to discover whether that capacity is liquid or tied up in real estate or in a business.
- Finally, knowing the rating is not helpful and might even be detrimental because if a DO visited a constituent knowing how involved he or she was with another institution, he may not give the proper attention that the constituent deserves from his organization. “Cultivation is all about relationship building, and how can you build a successful relationship if you go into a call with blinders on.”
- A more conservative group that thinks their time and their work product is valuable, and therefore both should be proprietary to the institution. They also said they would need to cite a source that is verifiable, and a statement from a researcher is simply not verifiable.

in general, a good rule of thumb might be to always ask the researcher his or her stance on this question, and respect it either way. For now, when it comes to evaluating a constituent’s philanthropy to other institutions, besides foundation returns and news articles, an annual report is a useful source. As far as the future is concerned, two competing forces are clearly at work and we as researchers are definitely caught right in the middle. On the one hand, I have in my office a newsletter called *Philanthropy in Europe: The news source on leading philanthropists in Europe* which writes short profiles on top philanthropists, focusing on the source of their wealth, their foundations and their giving priorities. This opens the door to the eventuality of there existing someday a database of top philanthropists, where you could search for generic profiles on philanthropists in the UK or Spain or the US. Clearly guidelines would have to be established at the outset as to what sort of information could be included in those reports on a database. On the other hand, as this information proliferates in the public realm through online and web databases, donors will become savvier and take pains to hide their wealth and give anonymously, so institutions may either feel pressure to no longer exchange annual reports or may modify their annual report to be a straight list without gift categories.

## Conclusion

Most of the researchers surveyed that work at institutions that publish an annual report are willing to either share or exchange their annual report with other researchers. Also most researchers are more than willing to offer suggestions on where to find certain types of information as illustrated almost daily on PRSPCT-L.

However beyond that, the researchers surveyed fall into two groups:

- A liberal group that might go a little beyond what is in the annual report alone and share additional information internal to the institution that is somewhere in the public realm as well and perhaps not easily accessible. This would include information like a major or degree, which is public through the Office of the Registrar, but sometimes involves writing a letter first; an old clipping not found online; a press release; or a general statement that can be surmised from the annual report, like a prospect “is a major donor” or “an annual fund donor;” and

## **APRA-Metro DC's Annual Meeting**

By Deborah Wallower

APRA-Metro DC held its Annual Meeting/Happy Hour on Friday, November 30, 2001 at the 17<sup>th</sup> Street Bar and Grill in Washington, DC. It was an opportunity for members to socialize and to elect new board members!

The bylaws of the chapter give the board the authority to nominate and appoint board members if there are vacancies during the course of the year. If the president's slot becomes vacant, the board can select someone from the existing board as the new president, but s/he must be confirmed by the membership at the next meeting.

I am grateful that the members were kind enough to confirm me as president at this meeting! In addition, we recognized board members who were nominated and appointed by the existing board during the year, as well as a key volunteer:

Conference Chair – Gloria Benton, AAUW Educational Foundation

Membership Chair – Sarah Parnum Cadbury, National Parks Conservation Association

Newsletter Editor – Cynthia Granger, George Washington University (key volunteer)

In the September 2001 newsletter, the chapter issued a call for board nominations. We had two vacant positions, and two board positions where the board member's term was going to expire in December. The chapter members in attendance at the Annual Meeting elected the following continuing and new board members to two-year terms of office:

Communications Chair – Rumana Chaudhuri, U.S. Institute of Peace. (Rumana served as program chair prior to her election to this position.)

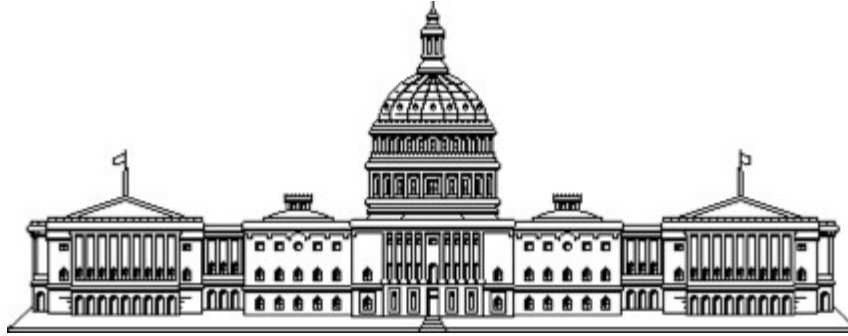
Program Chair – Nicole Courey, American Red Cross

Secretary/Historian – Heather Glock, National Wildlife Federation

Treasurer – Rita Monner, National Gallery of Art

Congratulations to everyone nominated, appointed and elected in 2001! I want to thank our board members and other volunteers—continuing and new—for the generous contribution of their time, knowledge and energy.

**Stay tuned for next issue's Book Review: Where the Money Is by Helen Bergen!**



## APRA METRO-DC MEMBERSHIP APPLICATION

Note: Please print clearly; this information will be included in the membership directory unless otherwise requested.

*Please circle all that apply:*

*I am a new member.*

*I am renewing my membership.*

*I am paying for a personal membership.*

*My employer is paying for an institutional membership.*

Name \_\_\_\_\_

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Organization \_\_\_\_\_

Work Fax \_\_\_\_\_

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Chapter membership provides you with the following benefits:

- Informative and engaging research-related programs and tours (such as the Library of Congress), opportunity for professional development and networking, access to the best minds in Metro-DC;
- Brown Bag lunches for information exchange;
- Scholarship opportunities to attend the APRA international conference;
- The APRA Metro-DC newsletter, containing useful information about upcoming programs, recent events, search tips, new member listings, and job openings in development research and related fields;
- Access to the member-exclusive sections of the web site;
- A copy of the most recent APRA Metro-DC Membership Directory, currently available in print format; and
- Opportunity to be "in the loop." You will be included on the APRA Metro -DC e-mail notification list. Be the first to find out about upcoming programs and other events.

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