

APRA



ASSOCIATION OF PROFESSIONAL
RESEARCHERS FOR ADVANCEMENT
METRO DC CHAPTER

Fall 2002 Newsletter

From the President:

I trust that everyone has recovered from the hubbub of APRA's 15th Annual International Conference held in Washington, DC on August 14-17, 2002! I hope many of you had the opportunity to attend. If budget constraints prevented you from attending the conference, I suggest that you consider applying for the APRA-Metro DC or APRA International scholarships for the 16th Annual Conference in Dallas in August 2003. The conference is an excellent educational experience.

As you may know, the APRA staff handles the conference logistics, and the APRA board works on the conference sessions and speakers. This year, the members of the three local chapters had the chance to learn about the crucial role that other volunteers play! I enjoyed my volunteer experiences: stuffing conference bags, working at the hospitality desk, serving as a room monitor for a couple of sessions and serving as the local host for the board dinner with Julie Yurko at Café Atlantico.

The board of APRA-Metro DC would like to take this opportunity to thank all of the chapter members who volunteered at the conference. We appreciate the contribution of your time and energy! In addition, I want to commend the chapter members who served as key volunteers: Sara Edwards Asuncion, who chaired the Hospitality Committee; and Sarah Parnum Cadbury and Debra Erickson, who served as co-chairs of the Resource Center. Sara did a wonderful job preparing the hospitality pages for the APRA Website, supplying an array of information for the

Inside:

First APRA Conference	2
By Margeurite Smalls	
5 th Annual MARC Conference	3
By Heather Glock	
APRA Skills Sets	4-5
Join the APRA-Metro DC Board	6
Board Nomination Form	7
Membership Application	8

APRA-Metro DC Contacts:

President:	Deborah Wallower, 703-438-6028 wallower@nwf.org
Communications:	Rumana Chaudhuri, 202-429-3806 rumana_chaudhuri@usip.org
Conference Chair:	Gloria Benton, 202-728-7627 bentong@aauw.org
Membership Chair:	Sarah Parnum Cadbury, 202-454-3351 scadbury@npca.org
Newsletter Editor:	Cynthia S. Granger, 202-994-9338 cgranger@gwu.edu
Program Chair:	Nicole Courey, 202-942-2519 coureyn@usa.redcross.org
Secretary/Historian:	Heather Glock, 703-438-6056 Glock@nwf.org
Treasurer:	Rita Monner, 202-842-6579 r-monner@nga.gov
Web Manager:	Karen Dechman karen@post.harvard.edu
Website:	http://www.aprainthenationscapitol.homestead.com

The board of APRA-Metro DC would like to take this opportunity to thank all of the chapter members who volunteered at the conference. We appreciate the contribution of your time and energy! In addition, I want to commend the chapter members who served as key volunteers: Sara Edwards Asuncion, who chaired the Hospitality Committee; and Sarah Parnum Cadbury and Debra Erickson, who served as co-chairs of the Resource Center. Sara did a wonderful job preparing the hospitality pages for the APRA Website, supplying an array of information for the

hospitality desk, and recruiting volunteers for the desk and board dinners. Sarah and Debra had to ask vendors to supply and donate a wide variety of resources, recruit volunteers, and oversee all of the resources during the conference. The key volunteers worked hard to prepare for the conference, and worked long hours during the conference.

We would like to extend our congratulations to chapter member Napoleon Hendrix III, of the American Red Cross, who was the recipient of the APRA 2002 Distinguished Service Award. I would also like to salute Shelly Pellish of the University of Virginia, who was recruited by Anne Rhodes to serve as the Dean of Volunteers for the conference after Anne decided to leave Washington, DC in June to work at Rice University in Texas. Shelly did a fantastic job, and seemed quite calm and collected throughout the conference!

APRA International provided a terrific workshop for chapter leadership on Wednesday, August 14! Liz McHugh, the APRA board's vice president for member services, and Kay Ellen Farison, the executive director of APRA, presented a session on recruiting leadership and membership. The leadership recruitment section was extremely relevant to me, since the board of APRA-Metro DC is starting to think about filling the slots of board members whose terms will expire in December (including mine). The presenters provided some thoughtful suggestions for cultivating new leaders, and reminded us to think about board diversity. I also realized that our chapter needs to consider hosting more social events!

The second part of the chapter leadership workshop was devoted to a presentation by Shelby McClintock and Michael Seymour, APRA board members on the Member Services Team, on planning a successful event. While their presentation confirmed that the board of APRA-Metro DC had done many things well for its conference in October 2001, I gathered a number of ideas that should enhance future conferences and other special events, such as creating a planning timeline, preparing a budget, and applying for an APRA chapter grant.

In addition to the chapter leadership workshop, some of the other conference highlights for me were David Lawson's session on "Where's the Money Now," Karen Greene's presentation on "Campaigns at Special Constituency Organizations," and Jean Anderson's session on "The Truths and Myths of Determining Net Worth."

The APRA conference is always great for networking, making new friends and catching up with long time friends and colleagues. See you next year!

Deborah Wallower

First APRA Conference BY MARGUERITE SMALLS

I would like to thank the APRA-Metro DC chapter of APRA for selecting me as its 2002 APRA conference scholarship recipient. The experience afforded to me by attending the conference was tremendously valuable in cultivating my interest in prospect research. This has been a critical year for my professional growth. After making the transition from a large

development shop to a small one, I found myself thrust into a prospect research role. Without formal training or a senior researcher on whom to rely, I gained as much knowledge as I could through attending free seminars and searching Internet sites for tips.

At the conference, of particular interest to me was the track entitled ‘Prospect Research 101,’ which was designed for people who had little or no previous research experience. The sessions called ‘Fund Raising 101 and the Role of Research’ and ‘Individual Research and Profile Writing’ proved most valuable to me, as they provided a framework

for researching prospects and a concise method for preparing a detailed profile.

I am grateful to APRA-Metro DC for giving me the opportunity to both learn from experienced researchers and gain knowledge vital in advancing my career.

5th Annual Mid-Atlantic Researchers Conference **By Heather Glock**

I had the pleasure of attending the Mid-Atlantic Researchers Conference (MARC) on June 12-14, 2002 at the C.W. Post Campus of Long Island University. MARC offered an affordable, high quality educational opportunity for its approximately 100 attendees. The conference was co-sponsored by APRA-Greater New York, APRA-Greater Philadelphia, APRA-Maryland, APRA-Metro DC, APRA-New Jersey, APRA-Western Pennsylvania, APRA-Virginia, and PREP/APRA. Workshops were offered on Research Essentials, Intermediate Research, Advanced Research and Management, and Technology.

The conference began with a keynote address by Robert Ottenhoff, president of GuideStar in Williamsburg, VA. GuideStar has created, and is constantly updating, a database of information on all IRS-recognized 501(c)(3) nonprofit organizations eligible to receive tax-deductible contributions. The GuideStar database currently comprises information on more than 850,000 nonprofit organizations. Basic program and financial data about these organizations are available for free on the

GuideStar web site, www.guidestar.org. It was quite interesting to learn that the entire process - from a nonprofit filing a Form 990 with the IRS, to the time that GuideStar posts the information online - takes approximately 150 days!

The Research Officer Training Class (ROTC) was offered at this year’s conference. ROTC is a new program developed by APRA for intermediate research professionals. APRA allowed MARC to present this program to test the viability of this potentially portable educational program.

Thank you to the Conference Chair Pamela Poland, all of the volunteers, sponsors, speakers, and staff of Long Island University for organizing a great conference! I look forward to attending MARC again in June 2003. Ilana Lester, Manager of Prospect Research at Amnesty International USA, will serve as Conference Chair. Feel free to contact Ilana at ilester@aiusa.org or 212-633-4243 for further information about MARC 2003.

APRA Skills Sets

Not only are conferences a great way to network and meet colleagues and friends, as Chapter President Deborah Wallower says in ‘From the President,’ they are also a great way to learn new skills and to hone existing skills. In that vein, and with permission from APRA International, APRA-Metro DC provides a reprint of the APRA Skills Sets. The Basic Skills Set and the Advanced Skills Set were developed by a committee of APRA International member volunteers with many years of experience in advancement research, and formally adopted by the APRA Board in the summer of 1998. The following has been printed with APRA permission from the APRA International web site, www.aprahome.org.

APRA BASIC SKILLS SET

DEFINITION OF TERMS

Proficiency: Experienced at accomplishing the activity.

Knowledge: Detailed grasp of details, specifics and shades of meaning; practice has been intense and/or frequent; could instruct others.

Understanding: Comprehend the philosophy supporting the issue, policy or procedure.

Awareness: Recognition of terms and broad understanding of meaning; actual practice may be minimal and infrequent; could not instruct others.

SKILLS

General Fund Raising

- Knowledge of donor types: individual, corporate, foundation and government.
- Understanding of cultivation process/cycle: identification, qualification, cultivation, solicitation and stewardship.
- Awareness of the definition of philanthropy and the motivations behind charitable giving.
- Awareness of the different units within overall fund-raising programs and how the various jobs and responsibilities among these programs require different support and services from prospect researchers. These programs include annual giving, campaigns (capital, endowment and comprehensive), major gift fund raising, planned giving, grantwriting, gift records and stewardship.

General Prospect Research

- Proficiency in recognizing wealth indicators.
- Proficiency in identifying prospects.
- Knowledge of ethics statements by APRA, CASE and other appropriate associations.
- Understanding of a donor's rights.
- Understanding of the role information plays in prospect development throughout the prospect cultivation cycle.
- Understanding of what constitutes relevant and strategic information and how to analyze the data to support prospect development.
- Understanding of the distinction between public and private information.
- Recognition of the difference between proactive research (taking the initiative in identifying and qualifying prospects) and reactive research (responding to directives or requests for research).

Institutional Knowledge

- Knowledge of your organization's mission, history, programs, goals and philosophy.
- Knowledge of your organization's funding needs and goals.
- Knowledge of your organization's culture and the staff's work style.

Resources

- Proficiency in locating relevant information in a variety of formats: including hard copy, telephone calls, online and conversations with staff and volunteers.

- Proficiency in locating additional resources by asking questions of librarians, government employees and colleagues.
- Proficiency in acquiring appropriate, sound information that is affordable for a nonprofit fund-raising operation.
- Knowledge of primary resource providers (online and hard copy, government and commercial, internal and external).
- Understanding of electronic resources and their uses, including CD-ROMs, online services and the Internet.

Online Searching

- Understanding of information management in a database structure, particularly the ability to manipulate and retrieve data.
- Awareness of the type and scope of data available online.
- Awareness of search techniques.

Reporting

- Proficiency in writing clearly and concisely.
- Proficiency in synthesizing material from multiple sources into a coherent and accurate presentation.
- Proficiency in appropriate management of confidential information.

Systems

- Knowledge of word processing software.
- Knowledge of organization's record-keeping systems and information retrieval capabilities and protocols so as to be able to use in conducting research.

Organization

- Proficiency in basic file maintenance principles.
- Proficiency in responding to requests and obtaining information in a timely manner.

Interpersonal and Workplace Skills

- Proficiency in communicating effectively with diverse audiences in conversations and through documents.
- Proficiency in conducting an informational interview with people who request information and with those from whom information is sought.
- Proficiency in listening skills.
- Proficiency in independent work.
- Proficiency in working jointly with colleagues in a team effort to reach organization goals.

Professional Development

- Knowledge of available training and educational opportunities to develop skills and to keep abreast of trends within the profession.
- Recognition of advancement officer positions and their roles within advancement.
- Recognition of assessment tools and evaluation procedures for monitoring your own performance against organization goals.

Copyright .1998 APRA

APRA ADVANCED SKILLS SET

DEFINITION OF TERMS

Proficiency: Experienced at accomplishing the activity.

Knowledge: Detailed grasp of details, specifics and shades of meaning; practice has been intense and/or frequent; could instruct others.

SKILLS

General Fund Raising

- Proficiency at supporting and participating in prospect management.
- Knowledge of gift vehicles: cash, securities, real estate, in-kind, personal property.
- Knowledge of types of planned giving vehicles such as trusts, bequests, pooled income funds.
- Knowledge of appropriate fund-raising strategies for different organization types.
- Knowledge of volunteer roles, identification, training, recognition and support.

General Prospect Research

- Proficiency in conceptualizing and developing proactive prospecting methodologies to support organization goals.
- Proficiency at identifying prospects through constituent list segmentation, electronic database screening, and peer/constituency screening and rating.
- Proficiency at understanding wealth indicators, including income (estimated or public), assets such as property and inside stockholder data, luxury items, valuable collections, philanthropic activity, and private foundations.
- Knowledge of ethics statements by APRA, CASE and other appropriate associations.

Institutional Knowledge

- Proficiency with the history of your organization's field (arts, education, health, social services, etc.).
- Knowledge of current trends within philanthropy and your organization's industry.

Resources

- Proficiency with business terms, documents and practices.
- Proficiency with government documents such as IRS Form 990, deeds and property tax assessments.
- Proficiency with legal documents such as wills and charitable trusts.

- Proficiency at formulating an online search strategy and either executing it directly or requesting the search through a trained librarian or other searcher.
- Knowledge of electronic sources available through the Internet.

Reporting

- Proficiency at developing reports that support planning and decision-making.
- Proficiency at formatting data so that it is easy to read and understand.
- Knowledge of commonly used reporting formats for communicating information relevant to a request.

Systems

- Proficiency in maintaining a prospect tracking system (electronic or paper).
- Proficiency with organization's record-keeping systems and information retrieval capabilities and protocols.
- Knowledge of relational databases and spreadsheet software.
- Knowledge of types of data necessary to support constituent relations.

Organization

- Proficiency at prioritizing and managing multiple, diverse, on-going projects.
- Proficiency at planning and setting meaningful objectives, integrating the work of prospect research into overall advancement office goals.
- Knowledge of basic budget procedures.

Interpersonal and Workplace Skills

- Proficiency in making oral presentations in diverse settings.
- Proficiency in promoting or advocating prospect research.
- Proficiency in organization's job and performance evaluation process.
- Knowledge of principles of management, leadership, conflict resolution, negotiation and motivation.

Professional Development

- Proficiency in staying abreast of trends in the field.

JOIN THE APRA-METRO DC BOARD!

The volunteer board of the APRA-Metro DC chapter will have several vacancies at the end of its fiscal year in December 2002. Please consider joining us! We are seeking candidates for the following positions:

President
Communications Chair
Conference Chair
Membership Chair
Website Chair

Board service is a two-year term beginning on January 1, 2003. Elections will be held at a chapter social event in early December 2002. You can nominate yourself or a colleague. To submit your nomination please complete the form included in this newsletter. **The deadline for nominations is November 1, 2002.** If you would like more information about the nomination process or the positions, please contact:

Heather Glock, APRA-Metro DC Secretary/Historian
Phone: 703-438-6056
E-mail: glock@nwf.org

Position Descriptions:

President – Calls Board meetings and sets the agenda, and chairs Board meetings unless another Board member has been delegated to do so. Oversees and guides the operation of Board committees, and presides at the chapter's Annual Business Meeting. Represents the chapter at national meetings. Responds to external inquiries about the chapter as appropriate.

Communications Chair - Oversees chapter communications, including but not limited to the Website, and electronic and hard copy publications. Works with program and conference committees to ensure that the chapter's activities are actively promoted and marketed. Submits to news letters articles and information on chapter activities. Reports on the work of the committee at the Annual Meeting.

Conference Chair - Responsible for conferences including but not limited to an annual conference or other training program distinct from the regular programs. Plans and oversees conferences in accordance with general guidelines set forth by the Board at its first meeting of the year. Recruits a committee to organize and conduct conferences including recruiting speakers, finding a venue, and planning content. Assigns tasks and oversees progress. Reports on the work of the committee at the Annual Meeting. For external conferences, acts as chapter liaison and may add extra committees as required.

Membership Chair - Responsible for the recruitment and retention of members, including but not limited to mailing membership renewal notices, sending welcome packets to new members, contacting lapsed members, and providing membership forms at all programs. Assists the Treasurer in the maintenance of the membership database. Produces the membership directory on an annual basis. Reports on matters of membership growth at least quarterly and to the membership at the Annual Meeting.

Website Chair - Responsible for designing and maintaining the chapter's Website, including but not limited to announcements of conferences and program activities, a list of Board members and key volunteers, copies of newsletters, and local job postings



APRA-METRO DC BOARD NOMINATION

You may nominate yourself or another individual you think would be a great addition to the Board. If you nominate a colleague, please discuss this with the individual before submitting this nomination. The nominee must agree to run for the Board position.

I nominate the following individual for the position of:

- President
- Communications Chair
- Conference Chair
- Membership Chair
- Website Chair

Name of Nominee: _____

Organization: _____

Address: _____

Phone: _____

Email: _____

Please forward this form by **November 1, 2002** to Heather Glock via fax (703-438-6045), email (glock@nwf.org), or mail (National Wildlife Federation, 11100 Wildlife Center Drive, Reston, VA 20190).

All nominees will be contacted by a Board member by November 15, 2002.

APRA



**ASSOCIATION OF PROFESSIONAL
RESEARCHERS FOR ADVANCEMENT
METRO DC CHAPTER**

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 _____

Work Phone _____

Organization _____

Work Fax _____

Title _____

E-Mail _____

Address _____

Please return this form, along with your check for \$20.00 payable to APRA-Metro DC to:

APRA-Metro DC
Post Office Box 77205
Washington, DC 20013-8205

City _____

State _____ Zip _____

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 national 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;
- A copy of the most recent APRA-Metro DC Membership Directory, currently available in print format, soon to be accessible as well in an online version exclusively for members;
- 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.



P.O. Box 77205

Washington, DC 20013-8205