

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

APRA-Metro DC Newsletter Summer 2003

From the President:

I am pleased to announce the long awaited APRA – Metro DC’s 2003 One Day Conference. The conference will be held on October 30, 2003 at the American Red Cross. This year’s speakers include David Shanton, Abbey Silberman, Suzanne Mink and Jon Thorson, all of whom garner large audiences and high ratings at international and national conferences. The Board has also gathered a number of talented local researchers to present at the panel discussion.

Do you ever wonder what your V.P. or D.O.D. is thinking? This year’s keynote speech may give you some insight. Suzanne Mink, Vice President of Development for the World Wildlife Fund will speak on ***A Vice President’s Perspective: The View From the Other Side.*** Ms. Mink has always had a wonderful appreciation of research and researchers. I know you will appreciate her humor and enthusiasm.

Think you know all there is to know about political contributions? Think again! Whether it is part of your routine research or you don’t think there is much value in this practice, David Shanton and Abbey Silberman’s presentation on **Money, Politics and Philanthropy** will help you to evaluate the connection between political giving and donations to your organization. These two popular speakers will discuss the relevance of political donations and present a variety of tools and techniques for assessing political giving by your donors.

Most of us are examining ways to incorporate more proactive research techniques into our practices. How can we find the

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right systems to fit our particular organization and its quirks? This year's panel will provide inspiration and ideas. Sara Edwards Asuncion (Smithsonian Institution), Cynthia Granger (George Washington University), Karen Groff (Navy-Marine Corps Relief Society) and Sean Wood (National Trust for Historic Preservation) will speak about their own experiences. The moderator, Jon Thorsen, Senior Director for Development Resources at American Red Cross, is a great proponent of proactive research and is sure to lead a lively and informative discussion.

Please see page 6 for a registration form. Registrations and payments should be post-marked by October 24 to take advantage of the membership rate. If you prefer to pay with a credit card, simply go online to <https://www.123signup.com/servlet/SignUpMember?PG=1521839182300&P=152183919116920800&Info>. You can also find more information and registration forms on our website at www.aprametrodc.org.

I look forward to seeing you on October 30th!

Sarah Parnum Cadbury

APRA 2003: 16th ANNUAL APRA INTERNATIONAL CONFERENCE

From August 13-16, research professionals from across the globe gathered in Dallas, TX to hone their professional researching skills. Participants had the opportunity to meet new colleagues, catch up with old friends, learn about new research products and services, and hear about the latest trends and practices in the field. With nearly 80 sessions and 18 workshops, the conference provided opportunities for researchers at all levels to learn something new. Fellow APRA-Metro DC member Peter Gardiner of the World Wildlife Fund shares his experiences as a first time attendee.

Peter Gardiner, World Wildlife Fund

“Sure is perdy country.” Such were the first words I heard in Dallas—coming from a passenger in the row behind me as our flight from Washington National landed at DFW. Seeing only dry grass and dust between concrete runways, I had to wonder how his view could differ so much from that outside my window. Rose colored glasses, I concluded.

I write as a member of a 3-person research team within a 34-person development department at the nation's largest environmental and conservation organization working worldwide to save endangered species and the critical habitat they need for survival—oh, alright, it's World Wildlife Fund. I've been asked to pen a line or two about the conference in Dallas in August. I have to admit, my happiness at being able to attend a gathering of hundreds of professional researchers was tempered with a bit of trepidation, what with my whole 8 months under the belt as a researcher. But, hey, what better opportunity to learn and grow in our sometimes misunderstood profession? If you get the chance to go to an APRA conference, seize it my colleagues, seize it just as you would a list of interests and connections of trustees of an elusive, wealthy foundation.

As expected, APRA put on an impressive array of presenters who, in tight timetables, shared their experience and insights on everything from ethics to e-philanthropy, benchmarking to building a research shop, to the role of research in stewardship. My favorite speakers among many were Gary Price, who presented Web Search Update, and Katherine Jankowski, who presented Foundation and Corporate Research Fundamentals. Gary is about as “plugged in” as they come, when it comes to the fast-changing state of the Web and how it applies to prospect research. His session covered the limitations of Google, which doesn't provide any answers, just links to Web pages that might contain relevant information. Once you browse through the results, you still have no sense of the authority or credibility of the sources since the results are determined by popularity. Understanding and judgment are vital to good research. Knowledge of more specialized sources save a researcher time and result in better information. No single research tool can be perfect, so it's a good idea to build up a collection of sites and learn about specialized search tools and databases relevant to your fundraising. Katherine's session included

overviews of trends in corporate and foundation research and how they fit into the larger development picture. She covered the details that a researcher should attempt to capture when compiling a profile and also gave a good overview of some “go to” sites, such as guidestar.org and the Foundation Center. All the sessions I attended featured both PowerPoint presentations along with paper handouts for members to take away. In fact, the bound conference materials provided by APRA upon check in include these collected materials for all sessions, providing a lasting source of good information on a wide variety of subjects—the Web bookmarks from Northwestern University’s research shop, for example.

Whether you focus on individual, corporate, or foundation research, whether you’re new at the game or a seasoned hand, there was plenty for everyone to sink their teeth into. And I’m not just talking about Texas barbecue and ribs, either. Along with margaritas and beer, local delicacies were dutifully sampled by APRA members—all in the interest of supporting local business, you understand.

Highlights for me included the memorable keynote address by Sherron Watkins, formerly of Enron, who spoke about her experiences before, during, and after her discovery of the now infamous financial irregularities at that company. And a more personal memory for me was my quiet walk several blocks from the hotel to Dealy Plaza, and the unexpected goose bumps when I rounded the corner and suddenly saw in front of me those grassy knolls, streets, underpass, and buildings eerily familiar after so many times seen on film.

Talking with other development researchers in Dallas I realized how fortunate our team here is. An all too common complaint from a surprising number of other researchers was the mismatch of expectations between frontline fundraisers and researchers. If that’s the case, remember the guy in the seat behind me on the plane. They aren’t going to easily change their perspective. Nor are you. But if you can get them to stretch a bit and look at things through your window, and if you do likewise through theirs, you’ll be amazed at the results.

THE RESEARCHER'S PERSPECTIVE: A CONVERSATION WITH GARY PRICE

Gary Price is a librarian, information research consultant, and writer based in suburban Washington D.C. A native of the Chicago area, he earned his Masters of Library and Information Science degree from Wayne State University in Detroit, Michigan. He also holds a Bachelors of Arts degree from the University of Kansas in Lawrence, Kansas. Gary is the editor and compiler of The [ResourceShelf](http://www.resourceshelf.com) (<http://www.resourceshelf.com>), a daily electronic newsletter where he posts news and other resources of interest to the online researcher. He has also compiled several well-known web research tools including [Price's List of Lists](#) and [direct search](#), a compilation of Invisible Web databases. These and other compilations have been mentioned in numerous publications including *The Washington Post*, *The Guardian*, and *The Chronicle of Higher Education*. Gary is a frequent speaker at [professional and trade conferences](#), a contributor to [Searcher](#) magazine, and the co-author with Chris Sherman of *The Invisible Web*, published by CyberAge Books.

On October 7th, I had the chance to speak with Gary about his thoughts on the Internet, research tools and the state of prospect research in general. Now two years removed from his position as a Reference Librarian at George Washington University, Gary is enjoying self-employment, and he keeps himself very busy with his duties as author, consultant, webmaster and public speaker. In August, Gary gave an insightful presentation at the 16th Annual APRA International Conference in Dallas on the current trends in Internet research tools and providing valuable tips on how to navigate these tools and save time doing it.

MM: *What advice can you offer prospect researchers when doing Internet searching?*

GP: It is important to maximize the use of free resources. No matter if you have a large or small research budget, the more sources you can find that save you time and money, the better. It's important to remember to balance the two; if you have a free resource but it takes you hours to find what you're looking for, compared to a pay service that will provide you the information in a fraction of the time, it sometimes makes more sense to use the pay service because it will save you more

time and money in the long run. Taking advantage of news alerts is also important because it saves you time and keeps you current and the more current you are, the better.

MM: *What are the biggest misperceptions about the Internet today?*

GP: While Google is a very valuable research tool, it's important to remember that other search engines matter and can provide information and services that Google does not. Alltheweb (<http://www.alltheweb.com>) is my current favorite, but the "Googlization" of the Internet has marginalized these other valuable research tools. What feeds into the problem are journalists who overuse Google and have hyped it up as the best thing on the web. Again, I want to emphasize that I think Google is a wonderful tool, but it's important to remember that there are other wonderful tools on the web. In addition, finding what you're looking for online is more than just typing two to three words into Google. As researchers, we have to take advantage of the advanced levels of search techniques available on search engines such as Google or Alltheweb. With the rise of Google and search engines on the Internet, the public library is an excellent resource that probably 98% of people don't realize exists beyond its four walls. The public library has many great electronic resources at our disposal that only requires a library card to access. This is a great free source that people should be using. What's important for all information professionals – librarians and prospect researchers alike – is that more money be put into people skills. Librarians have done a poor job marketing their resources and skills. For prospect researchers, it's vital to take the skills you gain at conferences such as APRA and train your boss. Remember, marketable skills look good to your boss.

MM: *What are three resources that you recommend to prospect researchers?*

GP: I have to keep it to three? That's going to be hard. All right, number one is Argali (<http://www.argali.com>). It's a great, free tool that takes disparate phone and address directories and puts it together. Number two would be Website-Watcher (<http://www.aignes.com>). Tell it to find any web page and run it at your desired time interval, and wait until it tells you what has changed on the page and highlights it for you. What's even better is that you get one month free. Another great source is the Wayback Machine (<http://www.archive.org>). It finds information removed from the web, and it has a new interface that allows keyword searching, and it's free. I'll throw in a fourth source that I really like, SEC Info.com (<http://www.secinfo.com>). It has a free email alert service that informs you when new business documents have been filed.

To see Gary's latest work, check out his free online publication Resource Shelf (<http://www.resourceshelf.com>) and sign up to receive weekly updates on the latest trends on the Internet.

APRA-Metro DC Employment Opportunities

Director of Prospect Research and Donor Stewardship American University

The Office of Development is seeking a Director of Prospect Research and Donor Stewardship. This position supports the fund-raising activities of American University by leading the research and stewardship staff in identifying, researching, and tracking current and potential donors to the university. The incumbent will provide strategy and implement policy in the stewarding of donations to the university by tracking major gifts and pledges, maintain detailed records of endowment funds, generate endowment reports for donors and university personnel, interact with high level donors and university administrators, prepare detailed donor/prospect reports for the President, Vice President of Development, deans, and major gift fund raisers, and planning and implementing donor-recognition and cultivation events along with the Office of Special Events. In addition, the incumbent will be responsible for enhancing and managing a prospect/donor moves management system and generating reports for the Senior Director of Development and Vice President of Development. Qualifications include a bachelor's degree and three to five years of related experience preferably in a research office of an institution of higher ed. Superb written, verbal, and interpersonal skills are essential, as are extremely strong organizational and computer skills and attention to detail. Other requirements are: the ability to balance multiple priorities, meet deadlines, and work both independently and as part of a team; the ability to handle confidential information appropriately; and experience using the Internet and on-line databases such as Lexis/Nexis and Autotrak and other databases to conduct research. Experience and knowledge with Datatel's Benefactor and Colleague databases is highly preferred.

Please send resume and/or application to American University, Human Resources, 4400 Massachusetts Ave. N.W., Washington, D.C. 20016; Fax (202) 885-1737 or e-mail to Careers@american.edu. An AA/EEO employer.

A One-Day Conference Presented By APRA - METRO-DC

WHEN?

October 30, 2003, from 9:00 a.m. to 4:30 p.m.

WHERE?

American Red Cross, DC Headquarters
2025 E Street, NW
Washington, DC 20006

WHY?

A one-day conference offering session, roundtable, and panel topics of particular interest to prospect researchers plus a chance to meet and network with your colleagues.

WHO?

*David Shanton and Abbey Silberman of Marts & Lundy will present a two-hour session called Money, Politics and Philanthropy: Is There a Link? They will discuss the relationship between political contributions and philanthropic giving.

*Suzy Mink of the World Wildlife Fund will present the Keynote on A Vice President's Perspective: The View from the Other Side.

*Jon Thorsen of the American Red Cross will moderate a panel discussion on Moving From a Reactive to Proactive Research Shop. Panelists include Sara Edwards Asuncion (Smithsonian Institution), Cindy Granger (George Washington University), Karen Groff (Navy-Marine Corps Relief Society) and Sean Wood (National Trust for Historic Preservation).

WHAT ELSE?

The registration fee is \$30 for members of APRA-Metro DC, APRA-Virginia and APRA-Maryland and \$45 for non-members. Registration the day of the conference is \$45 for both members and non-members. This includes a continental breakfast, lunch with roundtables, and an afternoon snack! We are also offering non-members a chance to become a member and pay the member rate immediately. That's a savings of \$15!

APRA - METRO-DC
P.O. BOX 77205
WASHINGTON, DC 20013-8205.

We encourage you to register in advance. If you plan on registering the day of the conference, please contact Leslie Bivens bivenle@omd.si.edu to let her know of your interest.

For more information and to register, please go to our website www.aprametrodc.org Credit card payments will be accepted.

If you have further questions, would like to volunteer, or have questions regarding payment, please contact Leslie Bivens at bivenle@omd.si.edu or 202-357-4300 or Sarah Parnum Cadbury at scadbury@npca.org or 202-454-3351.

Since the event is at the American Red Cross, please check our website in case of unforeseen circumstances (inclement weather or national disaster) for postponement or cancellation notices.



APRA METRO-DC

ONE-DAY CONFERENCE

OCTOBER 30, 2003
 American Red Cross, DC Office

Conference Registration Form

Name: _____

Title: _____

Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ E-mail: _____

REGISTRATION FEES

Advance Registration

- Member **\$30**
 (APRA Metro-DC, APRA MD, APRA VA)
- Non-member **\$45**
- Become a member of APRA Metro-DC for \$20, and pay the Member rate! **\$20**
 (Save \$15!!)

Day of Conference Registration

- Member and non-member **\$45**

Dietary Needs

- Vegetarian Non Vegetarian Other _____

Would you like to be a volunteer?

Send completed registration form with check to:

P.O. Box 77205
 Washington, DC 20013-8205

**ADVANCED REGISTRATION IS PREFERRED
 REGISTRATION FORMS MUST BE POST-MARKED BY OCTOBER 24, 2003**

If you have questions, please contact Leslie Bivens at bivenle@omd.si.edu or 202-357-4300 or Sarah Parnum Cadbury at scadbury@npca.org or 202 454-3351

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 2003. Please consider joining us! We are seeking candidates for the following positions:

Secretary/Historian
Treasurer

Board service is a two-year term beginning on January 1, 2004. Elections will be held at a chapter social event in early December 2003. 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 14, 2003.** 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:

Secretary/Historian – Responsible for records of the chapter including but not limited to minutes of Board meetings and the Annual Meeting. Makes a call for nominations for Board elections, receives the nominations and prepares a slate of candidates. Contributes to tasks of the other chairs as needed; records plans, goals, and progress of the chapter. Keeps records of all events, especially major events like conferences and, as the Board deems fit, prepares a written account of the conduct of such events for publication and/or future reference.

Treasurer – Responsible for the financial activities of the organization including but not limited to dues management. Recruits a committee to assist. Reports on matters of fiscal management to the Board at least quarterly and to the membership at the Annual Meeting. Prepares financial report for APRA International.



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:

- Secretary/Historian
- Treasurer

Name of Nominee: _____

Organization: _____

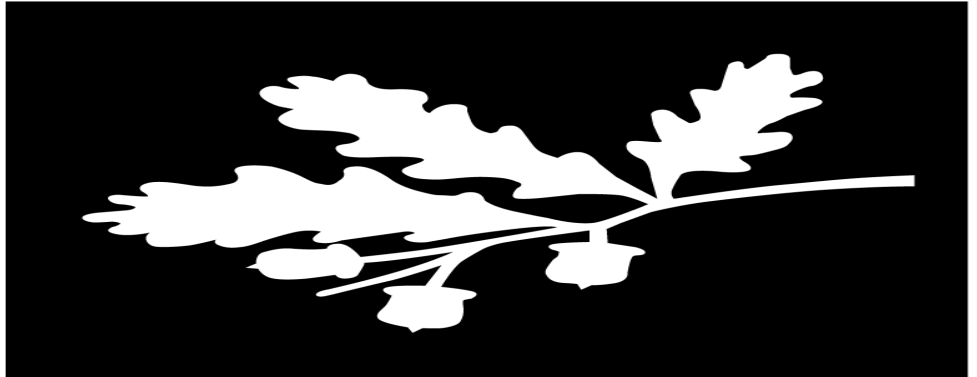
Address: _____

Phone: _____

Email: _____

Please forward this form by **November 14, 2003** 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 28, 2003.

APRA



ASSOCIATION OF PROFESSIONAL
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METRO DC CHAPTER

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 paying for a personal membership.

I am renewing my membership.

My employer is paying for an institutional membership.

Name _____

Work Phone _____

Title _____

Work Fax _____

Organization _____

E-Mail _____

Address _____

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

City _____

APRA-Metro DC

P.O. Box 77205

Washington, DC 20013-8205

State _____ Zip _____

Chapter membership provides you with the following benefits:

- Informative and engaging research-related programs and tours (such as the Library of Congress), opportunities for professional development and networking, and access to the best minds in the Washington, DC area;
- Regular “Brown Bag” lunches to meet other professionals for information exchange;
- Scholarship opportunities to attend the APRA national conference;

- The quarterly APRA-Metro DC newsletter, containing information about upcoming programs, recent events, research articles, Internet search tips, new member listings, and job openings in development research and related fields; and
- A copy of the most recent APRA-Metro DC Membership Directory, currently available in print format.



P.O. Box 77205

Washington, DC 20013-8205