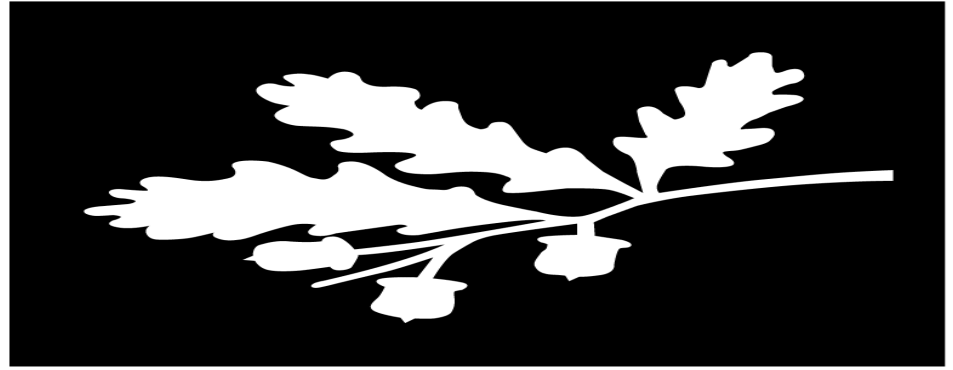


APRA



ASSOCIATION OF PROFESSIONAL  
RESEARCHERS FOR ADVANCEMENT  
METRO DC CHAPTER

## APRA-Metro DC Newsletter Winter 2004

### From the President:

I enjoyed seeing many of you at the APRA-Metro DC Conference in October. The success of an event such as this is dependent on the hard work of volunteers. Leslie Bivens, our Conference Chair and all the board members did a great job putting together a stellar conference. I am also grateful to all of our speakers. I especially want to highlight our panel, which was made up of local researchers: 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). Some of these were first-time speakers and they did a great job stepping forward to address their peers.

If you've ever considered speaking at larger venues, such as the APRA International Conference or MARC, presenting at smaller APRA chapter events or at our annual conference is a wonderful opportunity to get some experience. We are always looking for local talent to discuss techniques (advanced or basic) or research issues. Alternatively, you could host a brown bag lunch, which does not require a formal presentation – all you need is a theme and a series of questions to guide the discussion. If you are interested in doing a presentation or hosting a brown bag session, please contact me, Leslie Bivens, or our soon-to-be-named Program Chair.

Of course you don't have to speak to share your ideas – you can write an article for our newsletter. Articles can be about techniques, policies, experiences, opinions and even book reviews. If you are interested in contributing to the newsletter

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(even if you don't have a topic in mind), please contact Matt Moon.

There are lots of ways to volunteer for APRA-Metro DC. In addition to the opportunities discussed above, all of our board members would welcome support. Perhaps you want to assist with a membership mailing, add content to the web site or help with conference registration – simply contact me or the board member you would like to work with. Finally, we hold board elections every year and we are always looking for researchers to join us. Board membership is a rewarding way to round out your resume, to get involved in the research community, to develop new skills and to work with a wonderful group of people from other organizations.

Sarah Parnum Cadbury

P.S. I am saddened to inform you that Heather Francis has had to step down as Program Chair because she is no longer working in the research or development field. She will be missed and we wish her the best in her new endeavor.

## **APRA-METRO DC FALL CONFERENCE**

The APRA-Metro DC Conference in October, held at American Red Cross Headquarters, was a great success. The following photographs capture the energy and great turnout that we had. Thanks again for everyone's help in making this a great conference!



APRA-Metro DC President Sarah Cadbury opens the conference



Panel Discussion



Jon Thorsen, senior director at the American Red Cross, welcomes attendees



David Shanton discusses political giving

## **THE RESEARCHER'S PERSPECTIVE: A CONVERSATION WITH JOSH BIRKHOLZ**

Joshua Birkholz is the Prospect Development Analyst at the University of Minnesota Foundation. Joshua started his career in marketing and development for the University of Minnesota, College of Liberal Arts. He then moved into the research shop at the University of Minnesota Foundation, where he learned the value of development as individual relationship building. In the past year, as a prospect development analyst, Birkholz has concentrated on the study of the group to enhance the relationship with the individual. He has a BA from Concordia University and an MA in arts administration from St. Mary's University. Joshua lives with his my wife and two daughters, live in a WI suburb of Minneapolis. In his spare time, he conducts choir and composes music.

For the past two years, Josh has worked full time in data mining. He and his colleague Randy Bunney are regular speakers on the subject. Recently, I had the chance to speak with Josh about data mining and his thoughts on its impact in fundraising and prospect research.

*Matt Moon: Data mining has become a buzzword in prospect research as of late; as a leading practitioner in the field, could you give us your definition of data mining? How does it differ from predictive modeling (another popular term recently)?*

Josh Birkholz: Simply, I would define "data mining" as gaining knowledge or meaning from data. Certainly, different circles and different industries have different definitions. Many use "data mining" to describe the process of a computer finding meaning in data. It has become a rather broad term in contemporary usage. Predictive modeling is a tool of data mining. I would define it as using data to predict future behavior.

*MM: How did you become involved in data mining? How do you employ the principles of data mining in your shop?*

JB: We purchased our first predictive models about ten years ago. We saw limited success as the models were somewhat generic (as opposed to customized). Through market research periodicals and conferences, we became aware of shops creating their own custom models. About four years ago, Randy Bunney decided to bring in an expert to get us started. Peter Wylie of Margolis Wylie Associates began to teach us the basics. Peter and Randy noticed that I seemed to take to it. After this, I began taking professional development classes and attending conferences on data mining and statistics (KDD, DCI, Executrain.). About two years ago, the University of Minnesota Foundation decided to move me from prospect researcher to prospect development analyst. Now, it is my full time job to segment constituents, profile group characteristics, and predict behaviors. Also, one of our prospect researchers assists me in creating profiles.

Our primary uses of data mining are profiling and modeling. We profile the characteristics of constituents and major donors for the colleges and departments of our University. Additionally, we profile populations by interests and behaviors (planned giving donors, people interested in giving scholarships as opposed to capital needs.). When we create segment profiles we include a range of statistics including demographics, behaviors, and financials (among others). We also include maps showing geographic distributions of the segments, key charts, and recommendations for contact strategies.

Most of our modeling (Prospect Research shop) is used to either identify or qualify prospects for major giving. Early on we worked on projects with our annual fund department. Now, they coordinate much of their own predictive modeling and have two analysts of their own. My preferred method of predictive modeling is using logistic regression in SPSS.

*MM: What benefits have you found by using data mining?*

JB: With the annual fund it is easy to see return on investment numbers in the short term. With major giving, this is more difficult. However, the quality and quantity of our newly identified prospects have improved. We are smarter when it comes to crafting messages and determining channels. We can measure our assumptions about potential prospects to prove or disprove them. And, we can measure how well we connect with our constituents.

Understanding the database can save money for the Research shop as well. In the past, shops would screen enormous files with hard asset vendors. However, I have never found wealth to be predictive of giving. Using predictive modeling, we can determine an individual's propensity to give and then, if it is still necessary, purchase hard asset data to determine ask amounts.

*MM: What are some of the biggest challenges or obstacles you've encountered with data mining?*

JB: For every individual that sees the enormous benefit of data mining, there are those who judge by the exceptions. For example, say you have a pool of a thousand people as potential prospects of a new building fund. Perhaps, you only have the resources to make personal contacts with 200 of them. Using predictive modeling, you might have determined the 200 most likely to give to the building and chose to concentrate just on those people. Later in the campaign, you get a large gift from someone in the other 800. Some will say this anomaly disproves your model. Certainly, a single outlier does not disprove the model. However, if you desire to begin predictive modeling, get ready to field this question often. As I mentioned before, we purchased a generic model ten years ago. Since the model was not the greatest fit, some of the veteran fundraisers developed doubts about the entire science. Overcoming those doubts continues to be a challenge for us.

*MM: Before a prospect researcher decides to employ data mining in their shop, what are some factors to consider?*

JB: It is helpful to find other fundraisers, managers, and executives to help champion your cause. There are many who are open to new ideas. Educate and use them to help win over the doubters.

While data mining is rising to the surface in prospect research, it is not replacing it. When I became a full-time analyst, we needed to fill my research position. Data mining will not take the place of prospect research. And, trying to do both at once won't last once it catches on in your organization. You will need to commit to the necessary staffing.

Be willing to work with experts (consultants). Only, if you do, don't think of it as buying a model. Rather, think of it as buying their process. Learn from them and their approach to your data. If you are in higher education, use your campus resources. Quite often, students in Social Sciences learn these very techniques and can hit the ground running. You might find you have an statistics software site license as well.

*MM: Are there any common misconceptions or myths you have found associated with data mining?*

JB: I'll point out an error. Commonly, I will run across someone who profiles a selected group and creates a ranking system based on the top characteristics from frequency distributions. This is dangerous territory. These ranking systems are often not predictive or even inversely predictive. It is important to use a random sample (not a selected pool) and at the very least measure the relationship to a specific behavior. After you create the score, be sure to test it against the behavior. Other common problems result from using data that exists because the behavior exists. An individual might receive your fundraising magazine because they gave to your organization. While there will be a strong relationship between this mailing list and giving, you should not use it to predict giving. As you study your data, these data relationships will become clear.

*MM: You and colleague Randy Bunney gave a very informative virtual seminar on data mining last December. Do you have any conferences or seminars coming up?*

JB: As we both spoke so much over the past couple years, we are taking a short break. So, nothing is on our schedule right now. When I spoke at the CASE researcher's conference, I noticed a number of statistical analysts from other Universities. I am thrilled to see this development. Now, I hope to learn from them. A dialogue will only help this area of our industry.

## Book Review by Jon Thorsen

### *DATA MINING FOR FUND RAISERS—A STARTER'S GUIDE* (By Peter Wylie)

By Peter Wylie

Data mining is one of the hot topics in development – and research in particular – these days. A casual review of APRA chapter programs reveals numerous sessions devoted to this topic; the term pops up repeatedly on prospect-1. As with many buzz words, data mining (much like "proactive research" before it) can be simultaneously more and less than it appears, depending on how it is handled.

It is therefore a distinct pleasure to see an acknowledged expert in the field of data mining weigh in with a truly valuable contribution. Peter Wylie, an industrial psychologist with many years of experience in bringing the principles of data analysis to the non-profit world, brings us *Data Mining for Fund Raisers*. The book is a self-described "starter guide" that seeks to strip the mystery from fundamental data management and analysis techniques, and to apply those techniques in some fairly sophisticated manners.

Wylie is refreshingly up-front about his expertise – and the application of it. Noting the time and effort he has placed in the study of statistics, he cheerfully notes, "You, on the other hand, are most likely not a statistics expert (or you wouldn't be reading this guide)." These two factors – the author's expertise and the manner in which the text is addressed to those that do not possess it – often conflict in professional literature, but here find harmony.

In an early example from the book, Wylie recommends to consulting clients a simple breakdown of rankings into quartiles, to which they respond "That doesn't seem very fancy." His reply can be seen as the theme of the book – "Exactly. We're trying to get a message across to vice presidents. We need to keep it simple."

And that's the beauty of this work – the author's ability to take a subject he clearly knows and loves and present it in a way that makes it resonate to those of us who have the same end in mind but less affinity for the means. By using practical examples that speak directly to the type of work we do, Wylie accomplishes the improbable task of making statistics *exciting*. This principle is followed throughout, extending even to an explanation of the various ways to calculate averages (and why we want to use both the median and the mean, but can safely ignore the mode).

Beginning with three key concepts of statistical analysis – sampling, variables and relationships among variables – Wylie presents a detailed study that is, in essence, one extended practical example. Though the example addresses a University setting, it is clearly applicable for any organization. Indeed, factors analyzed include data elements that any organization may be expected to collect, such as the existence of an e-mail address or business phone number.

When analyzing the various factors, Wylie presents data in a clear manner suitable to the process. Even better, he explains the importance of each factor examined. For example, Wylie couples a presentation of the statistics for "Mean and median total giving for records with and without e-mail addresses" – a potentially off-putting calculation – with an explanation beginning, "Here's what I see when I look at this table and chart."

Even when the issues grow more complex, such as distinguishing between causality and prediction, the explanations remain lucid and precise, the examples practical and illustrative.

If I have any complaint, it's that the author makes matters almost *too* basic at times – one can almost feel him pulling back from explications that might stray too far to the technical. Since development researchers, a stated target audience for the work, continue to push envelopes in data analysis and management, it would be helpful to delve deeper into details of doing so.

But this is a minor quibble for a book that intends to be a popular guide to what is still a fairly complex topic. (It may even help make the case for a more advanced, follow-up volume.) Even for those who've dabbled in data mining, this guide offers new information presented in a straightforward manner that is immediately useful. As a general guide for the field, it's an ideal place for anyone interested in the topic to start.

## APRA-Metro DC Employment Opportunities

### **Individual Giving Researcher The Brookings Institution**

**Special Education/Experience Requirements:** An undergraduate college degree; minimum of three years of development experience; understanding of development cycle and the information used in advancing prospect relationships; strong background working with computers, relational databases (Raiser's Edge preferred) and internet research, specifically gathering financial data and capacity for donors and prospects

**Special Knowledge/Skills Requirements:** Successful candidates will have strong research skills, be resourceful and proactive, with strong analytical and evaluative skills; demonstrate the ability to process, analyze, organize, package, and share information in a useful manner; have excellent oral and written communication skills; pay attention to detail, and possess strong organizational skills; be a self-starter with the ability to work under pressure and meet deadlines; work well independently and as part of a team; handle sensitive and confidential information appropriately; be flexible about handling special projects

**Salary:** high 30's (salary level 20)

**To Apply:** Mail, e-mail ([hrjobs@brookings.edu](mailto:hrjobs@brookings.edu)), or fax (202-797-2479) resume and cover letter to Ms. A. Morton, reference job #1904. Only those selected for an interview will be contacted.

**Basic Function:** Responsible for gathering and analyzing data from a variety of sources to evaluate prospective donors. This includes a regular review of publications, on-line sources, in-house documents and other appropriate sources of information. Analyze research data to create briefings for the President, Vice Presidents, Senior Directors of Development, Trustees and others as needed. Responsible for conducting research in an ethical manner as defined by the ethics statements of APRA, NSFRE, and CASE.

### **Development Associate AARP Foundation**

#### **Responsibilities:**

- Serves as a member of the Institutional Support or Major Gifts/Planned Giving team with special responsibilities for writing and managing the prospect and donor relations program.
- Conducts research on individual, corporate and foundation prospects as well as government entities and other nonprofit organizations to determine capacity and inclination to financially support the AARP Foundation and to help develop long-term, meaningful relationships with donors.
- Is constantly updated on new methodology, tools and resources for prospect research.
- Produces complete and accurate profiles on corporations, foundations and individual prospects.
- Drafts briefings for top level meetings with donors and prospects
- Gathers information from program staff and drafts compelling letters, concept papers and proposals on AARP/Foundation programs.

- Contacts donors and prospects for cultivation and solicitation as appropriate.
- Continuously monitors and enforces donor confidentiality.
- Responsible for overseeing complete, accurate and up-date institutional donor database or working with Manager of Development Operations to ensure accurate individual donor database.
- Provides back-up support to the major gifts/planned giving team or institutional support team.
- Demonstrates “World Class” cultural attributes and behaviors in all interactions.

**Qualifications:**

- Minimum bachelor’s degree.
- 2 - 5 years experience in a broad range of development and campaign activities with an emphasis on prospect research and prospect management.
- Excellent analytical, communications and presentation skills.
- Experience in drafting accurate and compelling profiles, briefings, proposals, letters and reports on a time-sensitive basis.
- Familiarity with a vast array of research sources, as well as a demonstrated competency with windows-based word processing, spreadsheet and presentation software.
- Meticulous attention to detail.
- Excellent customer service skills.
- Demonstrates “World Class” cultural attributes and behaviors in all interactions.

**Development Prospect Researcher  
George Washington University**

Functions and Responsibilities:

To assist in acquiring and managing information about constituents of the University or Medical Center.

Characteristic Duties & Responsibilities:

1. Compiles and analyzes detailed biographical and other publicly available information on individuals and organizations to determine a prospect’s relationship to the University, interests, and giving capacity.
2. Identifies local and national foundations that may be potential contributors to existing programs and/or capital campaign gifts.
3. Conducts in-depth research on the backgrounds of the directors of the board and high- ranking corporate officials and cross-reference these individuals with other corporate affiliations and University or Medical Center prospects.
4. Maintains up-to-date constituent files.
5. Performs computer entry of pertinent donor data and retrieves related statistical data as required.
6. Reads and clips assigned periodicals and circulates important prospect data to Advancement office staff.
7. Participates in quality management activities to streamline development office processes.

Entry-Level Qualifications (required):

A Bachelor’s degree or an equivalent combination of education, training, and experience is necessary.

A minimum of one year of experience conducting information searches is necessary.

Familiarity with personal computers, to include database and word processing applications is necessary.

Previous prospect research experience is desirable.

GW offers a comprehensive compensation package that includes health insurance, a savings plan, and tuition benefits for employees, their spouse/partner and dependent children. To apply, please refer to requisition R000012601 and submit a resume via the Staff Employment Opportunity Search feature available at: [www.gwu.edu/~hrs/eo](http://www.gwu.edu/~hrs/eo) or submit a resume, which includes the requisition number to: The George Washington University, Dept HRS, 2033 K Street, NW, Suite 220, Washington, DC 20052. Fax# 202-994-9609.

GW is an Equal Opportunity/Affirmative Action Employer.

## **APRA UPCOMING EVENTS**

### **FOUNDATION CENTER TOUR!!!**

**When? May 5, 2004**

**Where?** 1627 K Street, NW, Third Floor  
Washington, DC 20006-1708

Join us for an informative and entertaining tour of the Foundation Center. Whether you're a seasoned researcher or new to the profession, this chance at a behind-the-scenes tour of one of the most important resources for Prospect Researchers is a can't-miss opportunity! Check out the Foundation Center library and see the resources you didn't know existed! We look forward to seeing you there!

### **VIRTUAL SEMINAR with SUSAN HAYES MCQUEEN BEST PRACTICES FOR PROSPECT MANAGEMENT AND TRACKING SYSTEMS**

Policies and processes that support the effective and efficient use of time and resources is a persistent and growing concern for many nonprofit organizations. Successful systems can serve as a critical management tool for goal setting, progress reporting and campaign planning, but require collaboration, consistency and user-friendliness. Learn how to develop, design and direct a dynamic prospect management and tracking system that will support, unite and advance the strategic goals of development and promote fund-raiser accountability. Discuss best practices in using a prospect management and tracking system to maximize major gift fund-raising efforts.

**Date: May 18, 2004**

**Time: 12:00 noon - 2:00 p.m. Eastern Time**

**Presenter: Susan Hayes-McQueen**  
Associate Director, Relationship Management  
University of Washington

Susan Hayes-McQueen is the associate director of Relationship Management at the University of Washington in Seattle. In her role, she attempts to make sense of the conversations between fund raisers and the database, while promoting the goals of management and protecting the needs of donors. Before accepting her recent position, Susan was an Annual Giving fund raiser. A speaker at several conferences focusing on Prospect Management, Susan has been in the development field for seven years. A proud alumna of the University of Michigan, she has worked toward her Master's Degree at the University of Washington.

To register online, go to <https://www.krm.com/regonline/rfavcregs.nsf/rfa8322-0> or go to <http://www.aprahome.org/pdfs/VSregform518.pdf> for a registration form.

**MARC 2004**  
**Seventh Annual Mid-Atlantic Researchers Conference**  
**Wednesday, June 9th-Friday, June 11th, 2004**  
**Johns Hopkins University, Baltimore, Maryland**

The Seventh Annual Mid-Atlantic Researchers Conference will feature pre-conference workshops, a keynote address by Jon Thorsen, Senior Director, Development Resources for The American Red Cross, breakout sessions, and roundtable discussions geared toward new and experienced development researchers.

MARC 2004 is co-sponsored by the following chapters of the [Association of Professional Researchers for Advancement \(APRA\)](#): APRA-Metro DC, APRA-Maryland, APRA-Greater New York, APRA-Upstate New York, PREP/APRA, APRA-Greater Philadelphia, and APRA-Virginia.

**Registration for MARC 2004 will close on May 10, 2004. Late registration will be accepted for forms and payments posted from May 11-May 21, 2004; an additional fee of \$50/ person will be charged for late registration.**

**Registration forms and payments posted after May 21, 2004 cannot be accepted.**

This year, MARC will accept credit card payments (MasterCard and Visa only); please be sure to fill out the credit card section at the bottom of page one of the form if you are choosing this payment option. If you prefer to pay by check, please make your check payable to MARC.

***ATTENTION: CHANGE IN MEMBERSHIP DUES!***

***When? June 1, 2004***

***How much? \$25***

***Renew your membership now to take advantage of the original membership rate of \$20. All membership renewals must be post-marked by May 31.***

**MEET OUR NEWEST BOARD MEMBER**

Katherine M. Fritzsche (Kate) is Treasurer for APRA-Metro DC. Kate has been a Development Associate for Prospect Research at the National Gallery of Art for nearly two years. Prior to working at the Gallery, she was a Grants and Contracts Specialist at the Smithsonian Institution's Office of Sponsored Projects, and a Publications Assistant at the Smithsonian's American Art Museum. She has a Bachelor's degree in English from Lawrence University and will receive a Master's degree in Art History from George Washington University in May 2004. Kate replaces her colleague at the National Gallery of Art, Rita Monner. Rita completed her term as Treasurer at the end of 2003.

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## 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 \$25.00 payable to APRA-Metro DC to:

\_\_\_\_\_

City \_\_\_\_\_

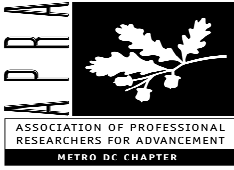
APRA-Metro DC  
P.O. Box 77205  
Washington, DC 20013-8205

State \_\_\_\_\_ Zip \_\_\_\_\_

*Check of \$20 will only be accepted until May 31, 2004*

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**