



Partners in Fundraising

WISCONSIN CHAPTER

APRA-Wisconsin Newsletter

December 2010

President's Column

Well, here we are – my first column as the new president of APRA-Wisconsin. I have just returned from the Blackbaud Conference on Nonprofits, where, of course, a lot of the buzz was on social networks (in all its meanings) – as it has been at many other non-profit conferences, listserves, publications and blogs.

I like to think APRA-Wisconsin has always given me the opportunity to network and be social – and that is one of the things I have treasured most about being a member. But of course, that isn't what social networking means anymore. You may remember last year, when Andy Caldie, Prospect Researcher at St. Norbert College, and Bill O'Brien, Senior Advancement Knowledge Officer at Marquette University, tweeted from the APRA International Conference and we posted their tweets on our website. Well, I am thrilled to announce that APRA-Wisconsin has just taken another step forward. A few months ago, at the suggestion of Jeff Walker, Campaign Writer and Research Manager at Children's Hospital and Health System, and a long-standing member and former president of APRA-Wisconsin, we have established an APRA-Wisconsin group on LinkedIn. What's in it for us? Simply said, it is another way to stay connected – we can share ideas, post questions, find mentors and even share job postings. Joining is easy – just log in at www.linkedin.com, go to the Group page of your

profile, search for APRA-Wisconsin, then click on Join Group. As I write this, the APRA-Wisconsin group has 18 members.

I am the first to admit that my initial response to Jeff's suggestion about forming a LinkedIn group was lukewarm at best. I think I said something along the lines that I only use LinkedIn for prospect research. Yes, I established a profile a couple years ago, but I never really used it to stay in touch with my handful of contacts. If you look for me you will see my profile is still painfully incomplete. However, after two months with our APRA-Wisconsin LinkedIn group, ten thousand commercials for *The Social Network*, and seeing what my teenage daughter has been able to accomplish on Facebook, I am finally beginning to see the point. Within a few weeks of our group being set up, a non-profit human resources director had already found us on LinkedIn and posted a job. I encourage all of you to think about how you can leverage this resource, for your own professional development and career advancement, and for discussions within and about our chapter, APRA International and our profession in general. I can't wait to see who dives in next to post something and I look forward to many conversations as we move forward. And, I think I might just block out some time one of these days to update my own profile, and to add more of you to my network.

-Sarah Bernstein

APRA-Wisconsin Membership Renewal

Be sure to respond to the recent APRA-Wisconsin membership renewal e-mail! All APRA-Wisconsin memberships are now renewed on a calendar-based annual cycle. Membership dues for 2011 will remain \$30 per year. Currently, we have 39 members. If you're aware of anyone in our field who is not currently a member, please let us know, and we'll let them know about our group. If you have any questions about your current membership status, please contact Catherine Garvens, University of Wisconsin Foundation, 608-265-9561 or e-mail catherine.garvens@supportuw.org.

-Catherine Garvens

Chapter News

I was happy to announce at our Fall Meeting that Andy Caldie, Prospect Researcher at St. Norbert College in De Pere, will be serving as our Vice President *pro tem* until the spring election. Andy is filling the position which became vacant when I was elected president.

Our Fall Meeting was also the occasion to recognize two outgoing board members. Marsha Hammer, Research Analyst at Marquette University, is our immediate past president, and Courtney Sims, Director of Advancement Services at Carroll University, has stepped down as event coordinator. Both Marsha and Courtney have made tremendous contributions to our chapter and to many of us individually. Together they have brought many high-caliber speakers to our chapter meetings, championed and helped support our first-ever collaboration with other chapters for the 2009 APRA Midwest conference, and brought a depth of experience and good humor to our board and our chapter. Marsha and Courtney will be missed at our board meetings, and in our board email conversations. However, I am pleased to report that Courtney will continue to serve as monitor for our LinkedIn group, and I am so lucky to have Marsha on my team at Marquette to mentor and guide me through my presidential adventures.

All of this movement on our board has created two opportunities for others to get involved. We currently have a vacancy for a general board seat, and for the event coordinator. Per our bylaws, "Candidates for the board must be voting APRA members in good standing, have been an APRA member in good standing for a twelve-month period preceding the nomination, and worked at least one year in a professional capacity including but not limited to advancement research, advancement services, information services or library sciences." The general board member will be a part of the board decision-making process (most decisions are made via email) and may be asked to serve on various committees. The event coordinator is probably the board position with the greatest external focus, and it provides great opportunities for networking within our profession. This position has several specific responsibilities, and the busiest times for him or her will be twice a year as we gear up for our spring and fall meetings:

- Work with meeting host and board to facilitate chapter events
- Develop and maintain event planning checklist and time line for meeting hosts
- Solicit and maintain roster of potential guest speakers, topics and host sites
- Contact guest speakers about availability and topic preference
- Arrange lodging, meals, transportation, and appreciation gifts for guest speakers
- Serve as contact person for guest speakers
- Review event planning processes and measurements of success
- Works in cooperation with other board members to complete the above, as needed
- Delivers to his/her successor all pertinent materials for which he/she is responsible

Please consider serving the APRA-Wisconsin board in one of these important positions. You may contact me or any member of the board if you are interested or have any questions.

Our new events coordinator will find some of his or her job already complete for 2011. Our spring meeting will be May 6 at St. Norbert College in De Pere, and will feature Lawrence Henze of Blackbaud's Target Analytics. Our fall meeting will be hosted by Marshfield Clinic, and the speaker has yet to be determined. Both of these meetings will be sponsored by Target Analytics. We welcome your thoughts about speakers for the fall meeting and for future meetings – who would you like to hear more from? What would you like to learn more about? Don't be shy! Dream big!

-Sarah Bernstein

Spring Meeting Speaker (May 6, 2011)



Lawrence Henze, managing director of Target Analytics, has extensive experience in fundraising, market research and the application of predictive modeling services to the nonprofit marketplace. The founder of Core Data

Services, which Blackbaud acquired in 2001, he has also served as vice president of predictive modeling services at USA Group Noel Levitz and president of The Philanthropic Division of Econometrics, Inc. Mr. Henze has 15 years of experience in development, raising more than \$125 million, primarily for higher education institutions. During his career, he has personally reviewed the giving histories of more than 30,000 planned givers across the country. He holds a BA in political science from Carroll College in Wisconsin, and an MA in public policy and administration and a law degree from the University of Wisconsin at Madison.

-Blackbaud.com

2011 APRA-WI Committees

Many thanks to the following volunteers!

Nomination Committee

Linda Gage, Blackhawk Technical College
Catherine Garvens, University of Wisconsin Foundation
Melanie Rayhorn, Marshfield Clinic

Scholarship Committee

Cynthia Bertsch, St. Nicholas Hospital
Marsha Hammer, Marquette University
Kathy Rechner, Lawrence University
Rose Schauer, Relevant Radio

Presidents Award Committee

Cynthia Bertsch, St. Nicholas Hospital
Andy Caldie, St. Norbert College
Ellen Finn, University of Wisconsin-Milwaukee

I will contact each committee with further details in early 2011, well in advance of the spring meeting.

-Andy Caldie

2010 APRA-WI Presidents Award

At our spring meeting in April, we honored Linda Gage of Blackhawk Technical College for her years of exceptional volunteerism and leadership within our chapter. Below are excerpts from her nomination:

“Linda has served the APRA-WI board for many years, most recently as recording secretary. But last year, Linda really went above and beyond: despite being laid off at the time, Linda continued her APRA-WI board service and served as the APRA-WI representative on the team organizing the first APRA Midwest conference. The APRA Midwest Conference was co-sponsored by APRA-WI, APRA-MN and APRA-Great Plains. The conference, held at the Mayo Clinic, attracted about 75 attendees, had several prominent speakers, and even offered CFRE credit. With all the budget cutbacks last year, few of us in Wisconsin were able to attend the conference, so Linda’s work on the committee also served to represent our commitment to collaborations with other APRA chapters, and introduced APRA-WI to a larger audience.”

“Nine or so years ago, when I was a newcomer to Prospect Research, APRA International and APRA-WI, Linda was among the people who welcomed me warmly and informally mentored me by always being available when I had a question or a problem.”

Congratulations, Linda! Also, thanks to Sandi Callaghan of Froedtert Hospital Foundation and Ann Yezzi of Alverno College for serving with me on the Presidents Award Committee.

-Andy Caldie

2010 Meeting Recaps

April 30, 2010 – University of Wisconsin Foundation

The spring meeting showcased two exceptional presentations by four of APRA-WI's very own members. In "The Prospect Rating System at the UW Foundation", Patrick O'Toole and Jodi Patek provided insight into how their team developed and customized a rating system that automatically calculates gift capacity and affinity for each constituent in their database. Jodi and I then described prospect prioritization methods at our respective institutions in a productive panel discussion.

The afternoon treated members to a memorable session from the 2009 APRA International Conference. Holly Hamilton and Bill O'Brien of Marquette University presented "Entity Relationship and Legacy Mapping as Alternative Techniques in Research", which discussed the challenges of visualizing complex social, professional, and geographic networks within one-dimensional databases. By devising creative ways to diagram known associations, they uncovered fresh potential spheres of influence.

October 1, 2010 – Froedtert Hospital Foundation

David Lawson and Lori Hood Lawson headlined the fall meeting with two timely topics: "Where is the New Wealth? (Wisconsin Edition)" and "The New Math of Wealth Estimation". The Lawsons highlighted recent economic trends affecting the business sector, and suggested numerous resources for identifying potential pockets of wealth in areas of innovation and probable growth. They also shed light upon the relative value of traditional capacity indicators, such as real estate and stock ownership, and recommended new ways to factor these values into wealth estimates.

Both 2010 meetings were characterized by illuminating insights and dynamic discussions. The coming year will bring further opportunities to enhance our skills and advance the profile of our profession!

-Andy Caldie



APRA International Conference Recap

How can you learn the latest trends in research and network with researchers from around the world? At the APRA International annual conference, of course! The 23rd International Conference was held in Anaheim, California, in August. Marianne Siess, from the UW Foundation, and I attended the four-day conference representing Wisconsin, and Kathy Graff from UWM attended a pre-conference workshop. Marianne and I also volunteered to work the registration table and had a great time! 650 people attended the conference, 29% for the first time, and 10 people from outside of the USA. There were great networking opportunities – from the roundtable lunches, to breakfasts and sessions, to the annual meeting and luncheon.

Sessions that really had an interest for me included: Raising the Profile of Research; Conducting Major Gift Portfolio Analysis; Researcher to Investor; and Intellectual Property: Rights, Reason, and Research! One of the great things about the conference is the internationally known speakers that we attract. Speakers such as Elizabeth Crabtree, Marianne Pelletier, Dan Lowman, and Jeffrey Ouellette not only disseminate helpful information, but make the presentations interesting! Everyone should be able to take something useful back to their organizations.



Without a rental car, about the only fun thing to do in Anaheim was to take a walk to Disneyland. It was fun to see Mickey Mouse in person after being a Mouseketeer for so many years! The next conference will be July 27–30, 2011, in Austin, Texas. Be sure to apply for our APRA-Wisconsin Grant that will go a long way to paying for your registration and expenses. If attending the international conference is out of the question, you can use your grant to pay for your local APRA-Wisconsin meetings or other educational opportunities available through APRA International. Take advantage!

-Marsha Hammer

More Updates from APRA International

Membership

As you already may have heard, membership dues for APRA International will be going up next year. For many years, International members have been paying \$150/year. International has notified us that 2011 dues for renewing members will be \$175 if paid before 12/31/2010 and \$195 after 12/31/2010. Dues for new members are already \$195.

Volunteering

APRA International always has a wide range of volunteer opportunities, from committees and task forces to working conference registration tables. Volunteering is a great way to network and meet researchers from across the country. Please bookmark www.aprahome.org to stay abreast of all the developments and opportunities APRA International offers our profession.

Conferences

Save the dates! APRA International Conferences for the next two years have been announced:

24th Annual International Conference July 27–30, 2011

Hilton Austin
Austin, Texas

25th Annual International Conference August 1-4, 2012

Hilton Minneapolis
Minneapolis, Minnesota

As you are planning your budget for next year, please note that International hopes to keep conference pricing about the same as 2010.

-Sarah Bernstein



APRA-WI Board of Directors 2010-2011

President (through 4/12), Sarah Bernstein, Marquette University, (414) 288-8489, sarah.bernstein@marquette.edu

Vice President (through 4/11), Andrew Caldie, St. Norbert College, (920) 403-3377, andrew.caldie@snc.edu

Events Coordinator (through 4/11), Open Position

Membership Secretary (through 4/11), Catherine Garvens, UW Foundation, (608) 265-9561, catherine.garvens@supportuw.org

Communication Coordinator (appointed position), Michelle Schultz, Aurora Health Care, (414) 219-4768, michelle.schultz@aurora.org

Treasurer (through 4/12), Patrick O'Toole, UW Foundation, (608) 263-0377, patrick.otoole@supportuw.org

Recording Secretary (through 4/12), Linda Gage*, Blackhawk Technical College, (608) 757-7739, lindagage1017@att.net

Board Member (through 4/11), Open Position

Board Member (through 4/12), Melanie Rayhorn, Marshfield Clinic, (715) 387-9190, rayhorn.melanie@marshfieldclinic.org

Unofficial Archivist (ongoing) and Past Treasurer (2000-2002), Mary Kay Ohmer*, Marquette University, (414) 288-1512, mary.ohmer@marquette.edu

Past President (2001-2002, 1995-1996), Gail Anshus*, (414) 476-6117, ganshus@wi.rr.com

Past President (1997-2000, 1993-1995), Cynthia Bertsch*, St. Nicholas Hospital, (920) 459-5175, cbertsch@sns.hshs.org

Unofficial Photographer (ongoing) and Past Treasurer (1998-2000), Kathy Graff*, UW-Milwaukee Office of Development, (414) 229-3014, kjgraff@uwm.edu

Board Member *Emeritus