



Partners in Fundraising

WISCONSIN CHAPTER

APRA-Wisconsin Newsletter

July 2011

President's Column

Here in Milwaukee, one of our local television stations uses the jingle "Just Ten Minutes" to pitch their newscasts. What if prospect research had a jingle or a theme song? How often do you end up feeling it should be U2's "Still Haven't Found What I'm Looking For," or perhaps the Rolling Stones' "Can't Get No Satisfaction"?

Well, once spring finally arrived in Wisconsin this year, it all too quickly turned into summer. Like many of you, I feel this was an especially long, hard winter, with brief bursts of sunshine for some of our organizations (Badger women's hockey, anyone?) Myself, I battled a pinched nerve in my neck all winter, and normally I wouldn't use this venue to mention that, much less to complain about it, were it not for one piece of advice the spine doctor gave me. Besides the usual Sisyphean stuff (lose weight, get more exercise, improve my posture, avoid stress, get more rest), the doctor recommended getting up from my desk, away from my computer and moving around every – you guessed it – ten minutes. Yep, EVERY TEN MINUTES!

Long before we turned to the light of our televisions, laptops and Kindle screens to ward off winter's chill, our ancestors turned to storytelling around the communal fire. So, without forgetting that I have already claimed to be writing about jingles, the weather and my health, allow me to tell a little story: in a dark and chilly cubicle, on a lonely afternoon in the dead of winter in a job long ago, I stared in disbelief at the fine print of a footnote in a proxy statement, where lo and behold! There were the names of and shares held by three trusts which my prospect's husband beneficially managed – one trust for each of their three children, only one of whose names I had previously known. Did my search take ten minutes? Did I find what I was looking for? Did I at least get some satisfaction? No, not exactly, and yes indeed. It took hours of intriguing distractions and frustrating dead ends before it occurred to me to pay close attention to the proxy's fine print. And, I'll admit that by the time I returned to the proxy, I had pretty much given up on

identifying the couple's now adult children, and had moved on to other puzzles which I was hoping that same fine print would resolve. Could I have gotten up and walked around every ten minutes while in the middle of my research odyssey? Would I even have noticed when ten minutes had passed? Of course not – this was way too much fun and it wasn't long before I was sucked into the zone, and the hours were flying by. But in the middle of the tunnel, there it was, a beacon of serendipity – not only was our donor fabulously wealthy, which I could now begin to quantify, but so were each of the children, whose names I now had in hand, and could now research in turn to see if their interests mirrored those of their parents and whether the potential existed to carry their parents' relationship with my organization to the next level and to the next generation. And so it continued, I found way more than I had been looking for, a few more days flew by, the cubicle felt a little less cold and lonely, and yes, it was satisfying.

I hope each of you has had this sort of experience, for it can be the true joy of research, where often the journey is at least as rewarding as the destination – just like the epic tales shared by our ancestors by the light of the fire. For weren't those same ancestors both hunters and gatherers, whose quests took them towards clearly defined and measurable goals while allowing for the twists and turns of the accidental and the obscure? I hope those of you who wear multiple hats at your organization feel the same exhilaration as you compose an elegant algorithm, develop an innovative scoring model, uncover the donor name behind a stock transfer, write a game-changing grant, or secure a gift no one else saw coming. These things all take much more than ten minutes – but when they do happen, I know we all feel like jumping for joy, even if we keep it to ourselves. So, let's make sure we share our stories. And the rest of us will raise our torches, our Bic lighters, and our cell phones, and cheer: Encore! Encore! Encore!

-Sarah Bernstein, Marquette University

Prospect Research Day Camp (August 12, 2011 – Marquette University)

Friday, August 12, 2011, 10 am – 3 pm
Marquette University Alumni Memorial Union
16th & Wisconsin Avenue, Milwaukee, WI
Free*



Agenda:

- 10: APRA Webinar
- Noon – 1:30: Lunch on your own
- 1:30 – 3: Updates from APRA International Conference and Buddy Group breakout sessions

*There is no charge for the day camp activities, but campers will be responsible for lunch, parking and any travel expenses.

Whether you are fishing for information or just want to network, come for the whole day or just a part. Pre-registration will be advised but not required, and walk-ins will be welcome as space allows. Watch the APRA-Wisconsin website, <http://www.apra-wi.org/home.html>, our LinkedIn group, and your email for further details as they develop, or contact sarah.bernstein@marquette.edu.

Bring the family - there are many other activities in and around Milwaukee the weekend of August 12th:

Wisconsin State Fair: http://www.wistatefair.com/11_web/

Milwaukee Brewers vs. Pittsburgh Pirates: http://milwaukee.brewers.mlb.com/index.jsp?c_id=mil

Milwaukee Art Museum: Summer of China: <http://mam.org/>

Milwaukee County Zoo: Butterflies! In Living Color: <http://www.milwaukeezoo.org/>

Harley-Davidson Museum: Weird Wild Wonders: http://www.harley-davidson.com/wcm/Content/Pages/HD_Museum/Museum.jsp

Discovery World Museum & the Dennis Sullivan: <http://www.discoveryworld.org/index.php>

For more information, see Visit Milwaukee at <http://www.visitmilwaukee.org/>

Fall Meeting (October 21, 2011 – Marshfield Clinic)



Marianne Pelletier, CFRE, has been in the fundraising field since 1988, when she joined the research team at Harvard University's Development Office. She has served as a researcher for Harvard and Lesley University, and as Director of Advancement Research at Carnegie Mellon University. She is currently Director of Advancement Research and Data Support for Cornell University. Pelletier has served as Director of Annual Giving and Development Services for Southern New Hampshire University. She also worked with Datatel's clients on the Benefactor product and process improvement. She has a bachelor's degree from Rockford College and an MBA from Southern New Hampshire University, and is president of APRA's Upstate New York chapter, and newsletter editor of her local hand spinning guild. (Source: www.sharetraining.com)

Our meeting host, Melanie Rayhorn of Marshfield Clinic, and our event coordinator, Kate Benford of Meriter Foundation, deserve our gratitude for their efforts to secure a speaker and ensure another exciting professional development opportunity for APRA-Wisconsin. Additional details will be announced as the date draws nearer.

Chapter News

The APRA-Wisconsin Spring Meeting, which featured Lawrence Henze, Managing Director of Target Analytics™, was a huge success. Once again, I would like to recognize our sponsor, Target Analytics™, and our host, St. Norbert College.

APRA-Wisconsin recently held elections to its board, and I would like to welcome the new board members who will be serving in terms from 2011-2013: Andy Caldie of St. Norbert College, our recent Vice President *pro tem*, is the newly elected Vice President; Kate Benford, of Meriter Foundation, is the newly elected Event Coordinator; Marianne Siess, of the UW Foundation, is our new Membership Secretary; and Marsha Hammer, of Marquette University, is our new Board Member (Marsha is also the immediate past president of APRA-Wisconsin). Once again, our chapter has a full board, and I couldn't be more thrilled to welcome all this new talent as we move forward! Many thanks to this year's Nomination Committee for securing candidates and facilitating the election: Linda Gage of Blackhawk Technical College, Catherine Garvens of the University of Wisconsin Foundation, and Melanie Rayhorn of Marshfield Clinic.

You will find contact information for the entire board at the end of this newsletter, and I encourage you to

consider any of our board members as go-to people for questions or concerns about APRA and about research in general.

I would also like to recognize our two outgoing board members by echoing the comments I made during our Spring Business Meeting. Catherine Garvens, of the UW Foundation, has served our chapter over the last several years as Membership Secretary. In addition to those duties, Catherine also designed and administered a membership survey in 2009, the results of which we still use today. Catherine has already volunteered to be the new "Unofficial Photographer" for our chapter meetings. Kathy Graff, recently retired from the UWM Foundation, was a founding member of APRA-Wisconsin, a Board Member Emerita, and our "Unofficial Photographer." Kathy was one of the first researchers I met from Wisconsin – at the 2000 APRA International Conference – and one of the first to welcome me to the Wisconsin chapter. Kathy was always a font of research wisdom, experience and institutional memory. I think, though, it might just be her dry sense of humor some of us remember best and continue to miss the most. We wish Kathy all the best in her retirement.

-Sarah Bernstein, Marquette University

Spring Meeting Recap



The spring meeting, held May 6 at St. Norbert College, featured two presentations from Wisconsin native Lawrence Henze. The first, entitled "Pyramid Power—Transitional Giving for Building Strong

Fundraising Pyramids", presented strategies to proactively identify emerging prospects whose gifts have increased beyond the annual fund's traditional domain, but have not yet attained major-gift level or received personal cultivation. The second, "Prospect Research for Planned Gifts", suggested predictive modeling strategies to identify planned giving prospects and individualize their cultivation strategies. Both sessions were marked by amusing anecdotes, timely tips, and keen insight into relevant research topics, and the fall conference promises more of the same!

-Andy Caldie, St. Norbert College

MARC Conference Recap

On June 15, I had the opportunity to attend the MARC conference at Pace University. For those of you who don't know, MARC is APRA's Mid-Atlantic Chapter, and this year they held a New Researchers Symposium for people newer to development research. The day-long symposium was run by Helen Brown, David Eberly and Deborah Reinhardt Youmans, and covered a wide range of topics and research techniques. I found the day to be enormously helpful, particularly the sessions on evaluating wealth indicators and researching corporations. The faculty was excellent and it was well worth the rather whirlwind trip to Manhattan. It was also interesting to speak to researchers outside the Wisconsin area, and speak a bit more with researchers from non-academic settings during the lunch break. I definitely recommend looking to other APRA chapters for their events – this was a perfect training session for me.

-Julia Dimick, Marquette University

2011 APRA-WI Presidents Award

At its spring meeting, APRA-WI honored Catherine Garvens of the University of Wisconsin Foundation for her exceptional volunteerism and leadership within our chapter. Below are excerpts from her nomination:



“This year’s recipient has been a member of APRA-Wisconsin since 2004, and has served the chapter as Membership Secretary since 2007. She has been an invaluable asset not only to the chapter, but also to the presidents she has served. When the board decided to streamline the job descriptions and duties of board members in 2008, she took on the job of coordinating the meeting, leading the discussion, writing up the changes, and putting together the amended by-laws for a chapter vote. When the board decided to survey our membership to get a sense of how we can better serve them, she once again jumped in and volunteered to pull together questions for the survey, develop the survey, and compile the data we received. As a result, in the future we will be able to meet the needs of our members and help our chapter grow. She has earned our respect, our appreciation, and this year’s Presidents Award.”

Congratulations, Catherine! Also, thanks to Ellen Finn of the University of Wisconsin-Milwaukee and Cynthia Bertsch of St. Nicholas Hospital for serving with me on the Presidents Award Committee.

-Andy Caldie, St. Norbert College

2011 APRA-WI Scholarship

I am pleased to announce that the APRA Scholarship Committee has awarded this year’s scholarship to Ann Yezzi, Administrative & Research Assistant at Alverno College. Ann, a member of APRA-Wisconsin for the last two years, plans to use the \$675 scholarship to defray expenses to attend the 2011 APRA International Conference in July, and we will all look forward to her recap of the conference as a first-time attendee in our fall newsletter. Ann previously served our chapter as a member of the 2010 Presidents Award Committee.

I would also like to recognize the hardworking members of this year’s Scholarship Committee: Cynthia Bertsch of St. Nicholas Hospital, Marsha Hammer of Marquette University, Kathy Rechner of Women’s Fund of the Fox Valley Region, and Rose Schauer of Relevant Radio. With a record number of scholarship applications, their task was particularly daunting.

This year, the APRA-WI Scholarship provides \$675 toward the 2011 APRA International Conference or other professional development event. Approximately eight years ago, a number of then-current APRA-WI board members worked to establish our APRA-WI scholarship. We award this scholarship on a biennial basis, and have now bestowed it upon four previous recipients: Michelle Gishkowsky, Marsha Hammer, Melanie Rayhorn, and Linda Gage. Watch your email and our website for the next scholarship award in 2013!

-Sarah Bernstein, Marquette University

APRA-WI Membership Update

APRA-Wisconsin membership currently stands at 36. New members for 2011 include Kathy Rechner, Program Coordinator at the Women's Fund for the Fox Valley Region, and Sarah Pabbathi, Manager of Prospect Research and Management at Carroll University. Annual renewal notices will be forthcoming toward the end of October 2011.

-Catherine Garvens and Marianne Siess, University of Wisconsin Foundation

APRA-WI Website Update

Our chapter's website is again fully functional and up-to-date! After a period of dormancy, the APRA-WI website is being actively maintained once again. We encourage you to browse the website at your convenience. You can find the website at: <http://www.apra-wi.org/>.

At our chapter's website, you will find information on membership, awards, upcoming events, employment, leadership, and contacts.

You might wonder what types of information can be posted at the chapter's website. These brief guidelines might help you better determine what to share with the webmaster.

- Hosting a Meeting? If you plan to host a chapter meeting, you are encouraged to share background information (e.g., lodging, restaurants, etc.) about your city. This background information can be very helpful for chapter members travelling from out of town.
- Pictures from a Chapter Meeting? If you have pictures from a past APRA-WI meeting that you would like to share, we encourage you to send them. (If you do want to share pictures, please use JPG format and a "Web – Small" size no larger than 448 by 336 pixels. Please do not send copyrighted images.)
- Upcoming Event? If you are aware of a research-related event that might interest other members of the chapter, please share the information. If the event is from another APRA chapter, please ensure that you point out this fact. (We don't want to take credit for another chapter's activity.)
- Job Announcement? If you would like to notify the chapter about a prospect research job opening, we would benefit from this information.
- What File Formats? If you do wish to submit an item for inclusion on the website, the webmaster can accept items in MS Word, MS Excel, and PDF formats. As mentioned above, pictures should be in JPG format. We can work from drafts, so your submission doesn't need to be perfect, but having a document in electronic format is very helpful.

Your thoughts are welcomed. Please browse our chapter's website. If you would like to see additional information, or if you have ideas for improvement, please contact Patrick O'Toole, who has volunteered to serve as the chapter's webmaster. You can reach Patrick at patrick.otoole@supportuw.org or (608) 263-0377. Thank you!

-Patrick O'Toole, University of Wisconsin Foundation

Updates from APRA International

Conferences

If you are planning to attend this year's International Conference, please consider volunteering. Volunteering at the conference generally does not require a huge time commitment, and is a great way to meet fellow researchers.

Also, keep your eyes peeled for a Wisconsin Chapter Meeting at the International Conference. We will have a room and time set aside, but this will not be an agenda-driven event, just a chance to get together casually.

24th Annual International Conference

July 27–30, 2011

Hilton Austin
Austin, Texas

25th Annual International Conference

August 1-4, 2012

Hilton Minneapolis
Minneapolis, Minnesota

Membership

APRA International has set a goal of increasing its membership by 10% over 2011-2013. On a quarterly basis, APRA International sends out their statewide roster of International members. The most recent list, from March 2011, shows a significant drop for Wisconsin members. In 2010, there were 33 International members from the state of Wisconsin, while in 2011, there are only 21. International does plan to follow up with members who have not renewed. They are also surveying chapter board members for ideas to improve Chapter/International relationships, and to increase membership.

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 <http://www.aprahome.org> to stay abreast of all the developments and opportunities APRA International offers our profession.

-Sarah Bernstein, Marquette University



2011-2012 APRA-WI Board of Directors

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

Vice President (through 4/13), Andrew Caldie, St. Norbert College, (920) 403-3377, andrew.caldie@snc.edu

Events Coordinator (through 4/13), Kate Benford, Meriter Foundation, (608)417-5303, kbenford@meriter.com

Membership Secretary (through 4/13), Marianne Siess, University of Wisconsin Foundation, (608)265-2712, marianne.sieess@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 4/12), Melanie Rayhorn, Marshfield Clinic, (715) 387-9190, rayhorn.melanie@marshfieldclinic.org

Board Member (through 4/13), Marsha Hammer, Marquette University, (414)288-6580, marsha.hammer@marquette.edu

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) 459-4714, cbertsch@sns.hshs.org

***Board Member Emeritus**