APRA Partners in Fundraising
WISCONSIN CHAPTER

APRA-Wisconsin Newsletter

January 2012

Editor's Note

In lieu of the President's Column, this edition showcases a contribution from two APRA-Wisconsin members, Jeff Walker and Ellen Finn of UW-Milwaukee. Please join me in thanking Jeff and Ellen for sharing their creativity and insight with all of us.

-Andy Caldie, St. Norbert College

Research Re-Landscaping at UWM: A Dialogue on Preparing for the (Inevitable) Next Campaign

Jeff Walker (denoted below as JW) and Ellen Finn (EF) are Director of Research and Assistant Director of Research, respectively, in UW-Milwaukee's Development and Alumni Relations office. In this piece, they discuss how their operation has evolved in terms of function, capability, and communication.

EF: What were the top priority tasks of your job description when you started, and what are they now?

JW: I was fortunate to inherit a strong, respected constituent research program, which had been led and built up by the same researcher (Kathy Graff, my former boss) for some thirty years. Previously, the top-of-the-pile responsibilities included profiles (i.e., Word documents manually prepared and linked to specific records in our Millennium database), prospect-management-related data entry and reporting, and new major gift prospect identification. Presently, the landscape looks a little different.

For instance, profile production has been automated, at least as much as possible. Information requests now prompt the research team to update key data-fields in Millennium. When that's finished, the Development Director who asked for the information can run a pre-formatted profile report: a bullets-style "Introductory" version, for early-stage constituent contacts; or a more extensive "Advanced" version, when a solicitation is at hand. Even for requests from the Chancellor or Vice Chancellor, brief bullet-points have generally displaced the traditional, time-intensive profile.

Prospect management reporting has been shifted entirely from the Director's ongoing "to do" list to yours, as the Assistant Director. Some reports have been eliminated; others have been streamlined; and the pre-distribution processes of reviewing and tweaking recent visit-notes have largely been shifted to team managers, away from the research area. Further changes in reporting are in the works, too. Gradually, after we reach consensus on our most important team metrics, we will move from a monthly cycle of paper- and PDF-based reports to a set of any-time, real-time data displays, available to our colleagues via Millennium.

The driver for all of this "re-landscaping" is clear: We need to free up more and more research time for high-potential prospecting. Strategically filling the front-end of the old-style prospect pipeline will be crucial for the success of UWM's next campaign -- whenever it comes.

I'm wondering: As you reflect on your time at UWM, how have these recent research-area changes felt to you? What has the experience been like? What has surprised you the most? What are you learning? What are your big-ticket Research Hopes and Dreams for the next couple of years?

EF: As you mentioned, my duties shifted significantly, which has been exciting. There was a period of time after your predecessor's retirement and before your arrival where I was on my own. Much of it I was ready for, but there were some more nuanced areas that had been masterfully managed by a Director who had her extensive departmental history to draw on. When I wasn't sure how to proceed in her absence, it allowed the opportunity for me to interact more with Senior Staff, who agreed it was time to revise some policies. Upon your arrival, you encouraged me to take more leadership roles, which – in turn – allowed me to see the bigger picture, as I became privy to operations issues beyond research.

(EF) I've been pleasantly surprised at how much more versatile our Millennium database is than I previously thought. I learned that knowledge of research's role varied among the Development Directors, but they got up-to-speed pretty quickly after a series of one-on-one training sessions. You allowed me to take the lead in group training sessions for our database upgrade, which resulted in the discovery of a new strength. I received much positive feedback, and the Directors call me more often rather than staying in the dark about a procedure.

My Research Hopes and Dreams for the coming years would be a tailored data mining and predictive modeling plan for each fundraising division. We are all being asked to "do more with less," due to state budget cuts, but I don't want the schools with fewer wealthy constituents to be neglected in the search for major gifts. We also have two new schools with no alumni, and planned giving prospects who require a different approach. Our plans for each don't have to be overly complex, but I'd like us to take the time to find the significant patterns for each division, so that our Development Directors may use their time more efficiently. From there, perhaps their portfolios can be tailored to reflect the characteristics unique to their divisions.

And speaking of "time": In switching to campaign mode, how did you decide to allocate the research area's time differently?

JW: I've touched on several of the more significant specific changes. Throughout, the guiding principle has been simple. If the return on the investment of research staff time wasn't appropriate, I looked for ways to minimize, re-assign, or eliminate.

One change I didn't mention before was the addition of a second Student Research Assistant, who will be with us part-time during the school year and quite likely full-time in the summer. With two students able to absorb most of the routine data entry, such as employment and family-relationship and death updates, you and I can stay focused on other priorities.

EF: What has become a high research priority that maybe wasn't before, and what – if anything – are we discontinuing?

JW: New prospect identification really has emerged as our highest priority. Data mining, predictive modeling, and non-U.S. prospecting will be moving into our "research spotlight" more and more.

Research used to be responsible for setting all of the Prospect Manager and Team Member links in Millennium, as requested. Now, our gift officers can self-assign, provided they follow the team-endorsed policies. (The research area monitors the assignment updates through automatic, behind-the-scenes email alerts.) Research also used to enter all solicitations in our Millennium-based proposal log; soon, gift officers will be entering their own proposals. This should free up even more time for the research team's various prospecting initiatives.

EF: Were your decisions based on knowledge gained from experience in the field, or did you rely on the advice of researchers at institutions that had already made similar transitions?

JW: Prior experience was helpful to draw on, certainly, as was reading up on the latest trends – and networking – in the research community nationwide. In addition, over the past few months, you completed a very valuable Research Shop Best Practices report, which tapped the expertise and insights of researchers in Wisconsin and across the country.

What were your major takeaways from that project? Were there any questions you had expected to collect interesting answers for that actually didn't pan out? Based on your findings, what are our most important growth opportunities, as a research team?

EF: What struck me most about this project was discovering that we are further along technologically than some of our peer institutions, despite having a smaller research staff. This is in great part thanks to a seamless relationship we have with the UWM Foundation's IT staff. I had hoped for more detailed descriptions of their moves management tracking, how they define the greyer areas of the cultivation cycle, and how this is incorporated into fundraiser performance metrics. In retrospect, I realize I posed the question too vaguely.

Overall, this project confirmed for me that major gift prospecting is our crucial area for growth and that the changes we are making are exactly what we need to do to reach this goal.

When reprioritizing research's services, how did you communicate the changes with Senior Staff and the Development Directors? Was this well-received? Did anything have to be reversed or significantly revised?

JW: I report to the Vice Chancellor for Development and Alumni Relations and am a member of her Senior Staff. Communication has been regular, detailed, and results-oriented, and the feedback has been great – very, very supportive. A lot of the research changes have been connected to larger "culture changes" for our entire Development and Alumni Relations team, and so many changes in such a compressed time-span can … well, "present challenges." Pacing the roll-outs has been critical, along with the open communication.

Research Re-Landscaping at UWM (continued)

(JW) My delight in the changes we have been able to implement so far and my confidence in what's coming can all be tied, in part, to the Vice Chancellor's strong backing of research – she really, really "gets" and appreciates what we do – and our team's core values: hard work, adaptability, collegiality, dedication, and mutual respect.

How do you feel the roll-outs have gone? What stands out for you about the occasional resistance or the overall support, as these changes unfolded?

EF: They have all been welcome changes, but their tremendous amount of interdependency can make the progress feel like it happens in fits and starts. You and I serve on multiple work groups whose decisions are sometimes delayed until a different work group meets. So much of the overlap of the work groups has to do with the structure of a university. Our Development Directors are assigned multiple and very different fundraising priorities. In addition, one donor can donate to several programs covered by different Development Directors. Any attempt to design reports around this kind of overlap requires a tremendous amount of forethought. It's easy to get bogged down in the confusion, and I credit our new Chief Operating Officer with maintaining the forward momentum of all of the work groups.

While trying to collect and analyze data in a more sophisticated way, we simultaneously aim for simplified reporting and more user-friendly database interfaces. We've had incredibly productive meetings with key players, the total backing of Senior Staff, and willing guinea pigs to test changes before global implementation. However, none of that changes the reality that our Development Directors don't have sufficient clerical support at this time. I've felt that to be the cause of most resistance, and I'm deeply sympathetic to it. We are lucky to have collegial co-workers, who are always willing to look for compromise in how to fairly distribute "doing more with less" with a tight budget. We've had to delay a few roll-outs, but communication was key in knowing why and how to address it.

Do you think there were any major stumbling blocks due to something unique to UWM?

JW: Quirks abound – with every team, every team member, every database, every institution. But, in my book, "quirky is good" – the oddball twists and turns are just part of the story, and make the day-to-day adventure all the more "interesting."

I think the Development and Alumni Relations team is a very fortunate group. We know what we are doing, we know how to work well together, and we are always reaching for ways to do what we do even better. In terms of UWM, we have a great Chancellor on board and a vibrant campus community, and we have many inspiring stories and programs and dreams to share throughout the greater Milwaukee area and beyond.

What stumbling blocks have you experienced since you've been at UWM? How did those compare to blocks you saw and wrestled with at your prior organizations?

EF: Last year, we hired a lot of additional Development Directors without simultaneously adjusting some reporting procedures and deadlines. With your support, I was able to raise awareness among Senior Staff as to why this was a priority, and we have since developed a new system that is satisfactory to everyone. I think it's also given Senior Staff a greater appreciation for what we do. UWM has a more contemporary view of the role of research than my prior organizations, where prospect research was more of a mystery to the other staff. UWM's embrace of prospect research may be one of the few good things to come out of state budget cuts. Necessity is the greatest teacher, and I feel we are doing a good job judiciously choosing the most appropriate research tools for our institution.

Of all of these research changes, which do you expect to keep after the campaign?

JW: Oh, my – this is a rich question. I doubt any of the in-house, campaign-related changes will be "reversed," post-campaign. In fact, I think the close of our next campaign will, quickly enough, open the door to – yes, brace yourself – another wave of Exciting Changes. The technology tools we researchers use are part of that story, but I think it's larger than that. Philanthropy is, at its core, all about change – so it's pretty much inevitable. How we respond to it and manage it is the key.

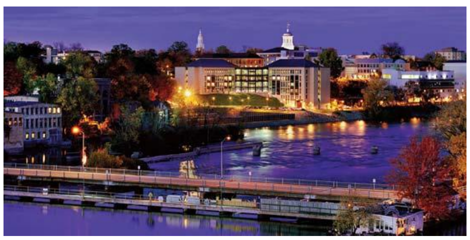
-Jeff Walker and Ellen Finn, UW-Milwaukee

Our members' thoughts, insights, and observations are appreciated! If you especially enjoyed this feature, please consider contributing a column of your own. Send your ideas and topics of interest to andrew.caldie@snc.edu.

Save the Dates!

Spring Meeting: Friday, April 20, 2012
Lawrence University, Appleton, WI

Michael Quevli, president of APRA International and consultant with Target Analytics™, began his career in prospect research in 1996 at AIDS Project Los Angeles. He was at the Keck School of Medicine of USC for seven years and was responsible for overseeing the Development Research team before joining Kintera P!N (now Target Analytics, a Blackbaud Company) in 2005. Quevli was the membership chair for two terms with the California Advancement Researchers Association, where during his tenure membership increased from 165 to 300. He has served on the board of the LaurelGrove Theatre and has been a consultant to various nonprofits in Southern California. Quevli served three consecutive terms on the Stephens College Alumnae Board. He has been a frequent speaker for APRA and APRA chapters, and was an instructor at the College of Extended Learning at Cal State Northridge in prospect research and prospect management. Quevli is a recipient of the 2004 CARA Service Award and the 2007 Stephens College Alumnae Service Award. (*Source:* www.aprahome.org)



Our meeting host, Lucas Brown of Lawrence University, and our events coordinator, Kate Mason of Meriter Foundation, deserve our gratitude for their efforts to secure an outstanding speaker and to facilitate another high-quality event for APRA-Wisconsin. Additional details will be announced as the date draws nearer.

Fall Meeting: Friday, September 28, 2012
University of Wisconsin Foundation, Madison, WI

The speaker for this meeting will be announced at a later date. Please watch your email and our website, www.apra-wi.org, for more information as it becomes available.

Chapter News and Meeting Highlights

Our first-ever APRA-Wisconsin Research Day Camp was offered August 12, 2011, at Marquette University, and featured a webinar presentation by Armando Zumaya, Chief Development Officer at Playworks in Oakland, CA. We also held a roundtable discussion of best practices in research.

The APRA-Wisconsin Board met on August 12, 2011, during the Research Day Camp. We discussed and brainstormed several issues facing the Chapter, including list management, speaker suggestions, our scholarship, and this newsletter. One exciting development that came out of this discussion was Treasurer Patrick O'Toole's analysis of eleven years of budget history. Patrick's analysis revealed that we are in a strong enough financial position to consider offering our scholarship on an annual basis instead of biannually. This was heartily endorsed by the Board, and I was thrilled to announce this change at our Chapter Business Meeting in September. Another exciting development was Membership Secretary Marianne Siess's suggestion to house our membership lists on Google Docs, so that all board members would have password-protected access to the lists. Only Marianne has edit privileges to add or change membership data, but we now have one centrally stored list which any board member can consult, and we no longer have to worry about the inaccuracies and potential security risks inherent when many duplicate copies are floating around.

At our Fall Conference on October 21, 2011, hosted by Marshfield Clinic, we welcomed Marianne Pelletier, CFRE, Director of Advancement Research and Data Support for Cornell University, who spoke about data mining. The presentations were very thought-provoking, and even got us out of our seats as we enacted the power of cluster analysis. The day provided excellent takeaways for both large and small research organizations. Once again, I would like to recognize our sponsors, Target Analytics™, LexisNexis for Development Professionals, and Marshfield Clinic.

-Sarah Bernstein, Marquette University

Membership Update

APRA-Wisconsin's membership currently stands at 40, including five new members so far this year. It's not too late to renew your membership for 2012! If you need further information, please email marianne.siess@supportuw.org.

-Marianne Siess, University of Wisconsin Foundation

Call for Volunteers

As APRA-Wisconsin prepares for another promising year, members have several opportunities to help maintain our momentum by volunteering for the three committees listed below. Special thanks to all of last year's committee members, who are welcome to volunteer again this year.

-Nomination Committee: Recruits potential board members, presents a slate of candidates, and oversees the election. Four board positions will be open in 2012: President, Treasurer, Recording Secretary, and Elected Board Member.

-Scholarship Committee: Requests and reviews applications for the APRA-Wisconsin Scholarship, which funds professional development activities such as the APRA International Conference.

-Presidents Award Committee: Requests and reviews nominations for the annual APRA-Wisconsin Presidents Award, to be presented at the Spring 2012 meeting.

If you would like to serve, please email andrew.caldie@snc.edu with your preference. Thank you for your consideration!

-Andy Caldie, St. Norbert College

Updates from APRA International

Membership
APRA International membership renewals were sent to current members in December. Membership can be renewed via credit card on the International website, or by mail.

The APRA International 2012 budget includes line-items for a *Member Needs Assessment* and a *Salary and Demographic Survey*. If you are a 2012 member of International, watch your email for further information as these initiatives develop.

Conferences
-APRA 25th Annual International Conference: August 1-4, 2012, Hilton Minneapolis, Minneapolis, MN

-MARC (Mid-Atlantic Researchers' Conference): June 25-27, 2012, Mason Inn, George Mason University, Fairfax, VA (a short drive from Washington, DC)

Registrations for both conferences will open on March 1, 2012.

Volunteering
APRA is planning a year-long celebration commemorating its 25th anniversary, and is looking for people to help plan and implement the effort. All subcommittees have staff support, so the time commitment is manageable. Projects launching soon include:

- Chapter, Leadership and Vendor Video Subcommittee
- Website Subcommittee
- Social Media Subcommittee
- *Connections* contributors

Please contact mvalerio@aprahome.org for more information.

Website
APRA International is in the process of upgrading its website, www.aprahome.org, with a projected launch date of March 1, 2012. Chapters will continue to have dedicated pages on the website.

-Sarah Bernstein, Marquette University

2011-2012 APRA-Wisconsin 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 Mason, Meriter Foundation, (608) 417-5303, kmason@meriter.com

Membership Secretary (through 4/13), Marianne Siess, University of Wisconsin Foundation, (608) 265-2712, marianne.siess@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*, retired, (920) 960-9223, cebertsch@charter.net

*__Board Member *Emeritus*__