Volume 4, Issue 7

Andrew Caldie, Editor

The Research Report

FEBRUARY 2014

President's Column

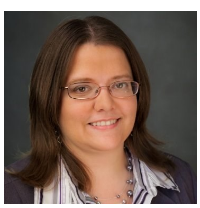
Sarah Bernstein will conclude a four-year tenure as president of APRA-WI at our May 9 conference. She most recently served as Director of Research at Marquette University, and holds a B.A. in Film Studies and an M.A. in Art History from the University of Wisconsin-Milwaukee.

Lately I feel like I have become trapped by nomenclature; I have let myself become stuck on the terms "proactive" and "reactive" research. A recent question posted on Prospect-L by Jennifer Huebner, Development Researcher at the University of Virginia, elicited answers that suggest that we define these terms by the opposition we see between them, both in terms of how we allocate our time and how we perceive our value. Those who spent a greater percentage of time on "proactive" research described their circumstances as "unusual," while those who spent most of their time on "reactive" research say they "never have time" for proactive work. These are value-laden statements, and it is interesting to note that in each circumstance, the opposite sort of statement has not been submitted: no one regrets not having enough time for reactive work, and no one considers doing mostly reactive work to be unusual. However, when we look through the replies to Jennifer's question, something more interesting emerges: the definitions of "proactive" and "reactive" work are not fixed. One respondent says "the major gifts officer will have proactive names for me to work on" and another defines this sort of activity as "reactive," and a third goes further to define proactive work as limited to "totally new prospects vs. people we lost touch with…but have data on in our database."

At Marquette, the research team does use the term "proactive" research (the team has different tactics for prospecting, which are labeled "extreme," "active" and "interactive"), but the other activities are generally described as "responsive" research. And I have let both terms – "reactive" and "responsive" – get under my skin. So what is "reactive" research, and why am I, along with so many others, so defensive about putting my talents toward it?

(see President, Page 2)

2013 APRA International Conference Recap



APRA-Wisconsin member Jenny Ziegler is Associate Director of Annual Giving at Lawrence University, and serves as president of AFP's Northeast Wisconsin chapter. Jenny holds a B.S. in Mathematics and Secondary Education from the University of Wisconsin-River Falls.

Attending the Prospect Development 2013 conference in Baltimore, MD back in August was a wonderful experience. I am most grateful to the APRA-Wisconsin chapter and everyone who donates to the chapter's scholarship for making this opportunity available. As a thank-you, I offer a summary of a few of the things I learned and a call to action for you.

In line with the various tracks the conference offers, I'll share ideas in four areas of our work: prospect research, data analytics, metrics, and data visualization. Our shops may or may not have the ability to do all of these things due to staff time or limited resources, but they are the building blocks of our work as prospect researchers as we add value to our fundraising teams.

Prospect Research

The backbone of how many of us conduct prospect research includes searching on the web, and most of the time Google is our primary search engine.

(see Recap, pg. 3)

Inside this issue:

President (from page 1)

I did a little research on "reactive" research, which, as we see in slide 12 of this 2011 WealthEngine presentation, could be defined as including research requests, profiles, event bios, ratings and ratings memos, and capacity qualifications.

Driving down the highway in the middle of a Wisconsin winter, it is all too easy to not see the forest for the trees. And that is exactly what all the tasks of "reactive" research seem to do. We are the people who focus on the trees. We describe and categorize the tree, based on its own unique characteristics and what it has in common with other trees; we look at the tree in the context of its position in the forest, and its relationship to its neighbors and the forest as a whole; we tell the tree's story, not necessarily the whole story of how it moved from acorn to bookcase, but focused on what we need to know about the tree now. We do, in fact, see the forest, and even though we often engage with it one tree at a time, we couldn't fully understand any trees without understanding the forest, too.

However, it's been quite some time since APRA replaced its oak leaf logo, and one of the ironies of my being so heavily involved with such a cutting-edge organization is that the work which fills most of my days often feels anything but revolutionary. But I have found that while those of us doing "reactive" research may not be playing with all the bright and shiny new toys, like data visualization and Big Data, we do increasingly leverage technology and creativity in our quest for efficiency, relevance, and details that are richer, broader, and deeper.

In Elizabeth Crabtree's presentation, "Substance, Matter, Function and Form," at the 2012 APRA International Conference, she warns us that merely collecting data will render our profession "obsolete." She goes on to say:

> So, as fundraising researchers we must be able to think critically and creatively about the vast array of information we come across, we must be able to translate that information into a clear, compelling and concise synopsis of the individual and highlight and interpret the most meaningful information and relationships that have the most relevance to fundraising. This includes assessing both identified and subjective or inferred evidence of wealth, capacity, interests and relationships and connecting those to the needs and giving opportunities at our organizations. Then, we need to bring this all together in a report format that is clear, direct, and increasingly streamlined and concise.

We do, in fact, see the forest, and even though we often engage with it one tree at a time, we couldn't fully understand any trees without understanding the forest, too.

In other words, we must shift both our philosophy and our methodology in research: our philosophy must move from one of aggregation to one of strategic analysis, and our methodology must also shift from one of transcription to one combining efficiency and relevance. As we transition from cataloguers to storytellers, we must be able to leverage technology and seek innovative ways to tell more compelling stories using more efficient tools.

In *Uncharted: Big Data as a Lens on Human Culture* (Riverhead, 2013), Erez Aiden and Jean-Baptiste Michel show how they used Google's Ngram viewer to analyze cultural change from the Big Data perspective of word usage and evolution (for a better analysis of their work than I could hope to give, go to Brainpickings.org or the Chronicle of Higher Education's *Chronicle Review*). Since I have been thinking a lot lately about the various tasks in prospect research, it occurred to me that it could be very interesting to see an Ngram analysis of, say, the word "profile" in Prospect-L posts, to see how our profession has changed over time. As Crabtree's 2012 presentation showed, we still talk about profiles, and we still seek ways to improve them. Within the past month, Helen Brown highlighted profiles in two blog posts on the Helen Brown Group website.

Twenty years ago, or even ten, a profile may have been typed into a WordPerfect template, and may have involved consulting donor cards, microfiche and the filing cabinet. Today we use complex financial formulas to derive our capacity ratings. We comb through electronic screening results, SEC filings, tax assessor databases, and complex search algorithms to source the data which informs our ratings, profiles, and event bios. Today we record all our profile, rating, and event bio data directly into the database, and use custom reports to create ad hoc documents to deliver it. Maybe "document" isn't even the right term, since we don't file away what we create as a shadow record of what a prospect looked like in a moment in time, and it may not even be printed. And yet, as we search for increased efficiencies in reporting, we never lose sight of the fact that what we are ultimately doing is telling a story. That story may be told in data points, in bullet points, or in narrative, but increasingly, it must be brief and focused. Regardless of the medium, it takes knowledge, creativity, and strategy to find, filter, analyze, and report the necessary information to create a compelling story in ever more concise terms. Our goal in ratings, profiles, and bios should always be to tell a story that creates interest and informs the development of a donor-centric strategy, whether the immediate next action is to make the first phone call, cultivate affinity for our mission, solicit a gift, or steward a lifetime of generosity.

Our goal in ratings, profiles, and bios should always be to tell a story that creates interest and informs the development of a donor-centric strategy.

And along the way, we have populated the database with information that Big Data projects will later mine or visualize to better understand our constituencies and stakeholders. Big Data is inherently messy; focused research, one prospect at a time, gives us the opportunity to clean things up.

We are all passionate about the pursuit of knowledge to build philanthropy. We need to be vigilant in seeking innovation, creativity, and efficiency in all aspects of research. And we need to respect all the work we do.

Recap (from page 1)

I don't want to steal the thunder from Liz Rejman, as this was her presentation and she'll be sharing it with our chapter at our spring conference, so I'll give the short version. Google tries to help us out by remembering our searches and preferences, but that can work against us. For example, if we're always searching for people's names, Google will start thinking we're looking for directory information and fill up the results with all of the directory services and sites. There are measures you can take, such as clearing cookies and your history, but there are alternative search engines that do not try to "help" like this. Some examples are DuckDuckGo, Start Page, and Blekko. Give 'em a try!

Data Analytics

When we conduct data analysis, we are seeking answers to questions. Before we can find the answers, we first must understand the question and frame our thinking to solve real-world problems of gift officers. The golden rule is to keep it simple. For example, let's take the age-old question: who should gift officers visit? Of course they have their favorites, but maybe those are not the best possible prospects to be spending time and energy on. If you have an engagement score (or similar measure) and financial capacity ratings, you can make a quick chart, like the one shown below:

Low Financial Capability High						
	5	16	4	-	59	10
	4	42	3	4	122	35
	3	1,721	75	109	1,554	142
	2	3,598	142	342	2,415	210
	1	4,313	62	476	1,795	84
		1	2	3	4	5
		Low	Current Interest or Involvement			High

On the horizontal axis, we have their current interest or involvement score in 5 categories ranked from low to high. On the vertical axis, we have their financial capacity in 5 categories from low to high. With the additional shading, it is easy to see that the top priority prospects are those who have a score of 4 or 5 on both scales. Once those are taken care of, you can move out and down from there. Those who have either low financial capacity or low engagement do not usually make good prospects. See where your current portfolios fall, and realign as necessary.

A few resources to further your data analytics skills are Lynda.com, Coursera, and statmethods.net.

Metrics

We use metrics for reality testing of whether goals are being met and what progress is being made. Metrics are ideal to use as a productivity tool to get yourself or your gift officers back on track. What you decide to measure should be aligned with your strategic goals and revisited as goals and context change, such as whether you are in a campaign.

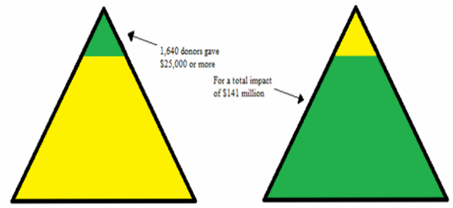
Month	Visits	Asks	Amount Asked	Stage Progressions
July	8	8	$228,000	8
August	12	1	$318,043	9
September	3	3	$160,000	10
October	6	5	$1,000,000	12
November	8	12	$228,000	15
December	3	8	$255,000	12
January	2	3	$505,000	9
February	8	4	$100,000	4
March	11	1	$185,000	2
April	13	4	$143,000	8
May	13	5	$205,000	9
June	5	6	$307,000	11
Total	92	60	$3,634,043	109
Average visits per month: 7.7				
Average number of asks per month: 5				

Pictured above is a sample of a report measuring what a gift officer has accomplished. For each of the categories (visits, asks, amount asked, stage progressions), a goal can be set, and this report will let you know if the goal is being met and where improvement or more focus is needed. As I mentioned, metrics are intended to be a productivity tool, not a disciplinary tool. It is a tool to aid the collaboration between research and gift officers, not to serve as a bone of contention.

Data Visualization

Most of us in research and data are analytical people who understand numbers and charts quite easily. Our gift officer counterparts are great with people, but not always as great at understanding what the numbers mean in raw form. Visuals or pictures can help tremendously, and this is where data visualization comes in. It is a presentation method that makes sense to your audience and promotes understanding.

Anyone who's been in fundraising for any amount of time has heard of the donor pyramid, so it is an easily recognizable and understandable image for fundraisers. We've also *heard* that 10% of our donors give 90% of our money, or some similar statistic. If you take the donor pyramid visual and use it to *show* this stat, as in the image below, you make it much more understandable.



Sweet spot?

So where's the sweet spot in all of this? It's our work leading to bigger and better major gift success! Every shop is different, and you can only do so much with the resources you have, but our collective goal is to do the best we can for our teams to raise as much money as we can for our organizations.

Moral of the Story

Go to the conference! Connect with other researchers! Learn more! Enjoy the experience! One of my favorite parts was going down to the waterfront and enjoying an authentic Baltimore meal of blue crabs.

Put Prospect Development 2014 on your calendar and sign up! It's July 30-August 2, 2014 in Las Vegas!

APRA-Wisconsin's delegation at Prospect Development 2013 in Baltimore, from left to right: Kelsey Parman (Beloit College), Andy Caldie (St. Norbert College), Amanda Robillard (Carthage College), Lisa Ellis (Ripon College), Jenny Ziegler (Lawrence University), Ryan Redemann (University of Wisconsin Foundation), and Lori Maassen (University of Wisconsin-Eau Claire).

Don't Miss Out—Register Now!

APRA-Wisconsin's Spring Conference
Friday, May 9, 2014
Carthage College, Kenosha, WI

Session 1: Bursting the Internet Filter Bubble
Session 2: Believe You Can Fly—A Tweetorial for Prospect Researchers
Session 3: Using Digital Insight to Its Fullest

Liz Rejman, CFRE has spent her entire career in the not-for-profit sector, bringing her dynamic expertise to health care, education, and the arts. Professionally, her focus has been on database management and prospect research. She has a particular interest in social media as a research tool and the effect of personalization of the internet on balanced research. Liz currently sits on the APRA International Board of Directors and is Co-Chair of the 2014 APRA Canada conference. She has presented on various topics related to prospect research at conferences for APRA, AHP, and AFP. She recently transitioned from full-time researcher at a large hospital foundation to Head of Development and one-person fundraiser for Museum London (Canada). Liz can be found on Twitter under the handle @erejman, and blogs on occasion at erejman.wordpress.com.

The registration form, link to a campus map, and hotel information can be found on our website at apra-wi.org/images/APRA-WI_2014_Spring_Meeting.pdf. Thank you to our sponsors, Target Analytics and LexisNexis, and to our conference organizers, Amanda Robillard of Carthage College and Luke Brown of Lawrence University.

Carthage

Target Analytics®
A Blackbaud Company

LexisNexis®

Save the Date!

APRA-Wisconsin's Fall Conference
Friday, September 26, 2014
University of Wisconsin Foundation, Madison, WI

Lawrence Henze (left), Principal Consultant for Target Analytics, will return to his alma mater to speak. Lawrence previously headlined our Spring 2011 conference at St. Norbert College, where he presented two insightful and well-received sessions. This conference will also feature a presentation from chapter member Carrick Davis (right), Prospect Development Analyst for UW Foundation. Further details will be announced as they become available.

Call for Volunteers

As APRA-Wisconsin prepares for another promising year, members have several opportunities to help maintain our momentum. Please consider volunteering for a committee or running for a board position! Thank you to all of last year's committee members, who are welcome to volunteer again this year or in the future.

-Nomination Committee: Recruits potential board members, presents a slate of candidates, and oversees the election. Four board positions will be open in 2014: President, Treasurer, Recording Secretary, and Elected Board Member. (If you would like to run for one of these positions, please note that further information will be forthcoming via email once this committee is formed.)

-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 2014 conference.

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

Chapter News and Conference Highlights

Once again I would like to thank Julia Dimick, who most recently served as Research Analyst for Marquette University, and Luke Brown, Director of Research and Advancement Operations for Lawrence University, for organizing one of our most interesting conferences, Taking Care of Business, on September 27, 2013 at Marquette University. Our morning speaker, Mark Egge (below), Director of Prospect Research at Carleton College, demystified SEC filings for us, and helped us figure out some of the math. But I think what a lot of us took away from his presentation is that even SEC filings can be fun!

In the afternoon, Marquette law professor Ed Fallone clarified many of the legal and financial nuances which guide the structure of private businesses. Jenny Ziegler, Associate Director of Annual Giving at Lawrence University and recipient of the 2013 APRA-Wisconsin Scholarship, delivered our first-ever Prezi presentation to share her experience of the 2013 International Conference in Baltimore. Bridget Kelly, Marquette junior and student worker in research, welcomed us in the morning. And I would be remiss if I did not once again thank our sponsors, TargetAnalytics and Lexis/Nexis. After all, I won the Target Analytics door prize – a Kindle Fire HD!

APRA International's first Education Week (Feb. 10–20) is already a memory. You may have noticed that our chapter did not have any formal contribution to the curriculum. We simply did not have anyone submit something. But we'd love to change that in the future by working together to identify speakers and topics and to create presentations. Presenting at a chapter conference is a great way to get your feet wet. Another way is to lead a basic research group for your local AFP.

As you know, over the last few years I have been working with Donna Triplett and the AFP of Southeastern Wisconsin to build a relationship between our organizations. As a result, Milwaukee researchers have led presentations and workshops, and participated in panel discussions. Presenting an introduction to prospect research is a great way to get comfortable speaking to a group, while delivering information you know like the back of your hand. I know similar efforts are underway in the Green Bay/Fox Valley area and in Madison. Share your experiences with us!

Soon our spring cycle of elections, awards, and scholarships will begin anew, so think about volunteering for one of our three committees, and please consider nominating someone for the Presidents Award, applying for our scholarship (Vegas, baby!) and/or running for a board position.

-Sarah Bernstein

Updates from APRA International

The work of the APRA Chapter Committee continues. Recent accomplishments include changes to the Chapter Leaders Forum and listserve to expand access to all chapter officers and board members. This will facilitate problem-solving, relationship-building, and sustainability by opening communication to multiple chapter leaders. Through the work of the Chapter Committee, APRA International has brokered an agreement with the website and management association vendor Wild Apricot, providing chapters a discounted price for its services.

APRA International has also opened up the Chapter Leaders' Summit, held in Chicago in late February, to all chapter officers and board members. APRA-Wisconsin Vice President Andy Caldie and board member Lisa Ellis will join me in representing our chapter at the summit. We will report back via email and in person at our Spring Conference.

APRA International is currently soliciting applications for the International Board, several awards, and its scholarship. Think about nominating someone whose work you respect and admire! Find out more here.

Finally, work continues on the APRA Body of Knowledge. The Body of Knowledge catalogues skills along three main tracks: prospect research, data analytics, and relationship management. The Body of Knowledge is a deeper and broader collection of skills than the current skill sets (International members can access the current skill sets here), and will also inform the development of educational tracks for conferences and webinars.

Upcoming Conferences and Symposia

MARC New Researchers Symposium
May 27–28, 2014
Doubletree Philadelphia Center City

Mid-Atlantic Researchers Conference (MARC 2014)
May 28–30, 2014
Doubletree Philadelphia Center City

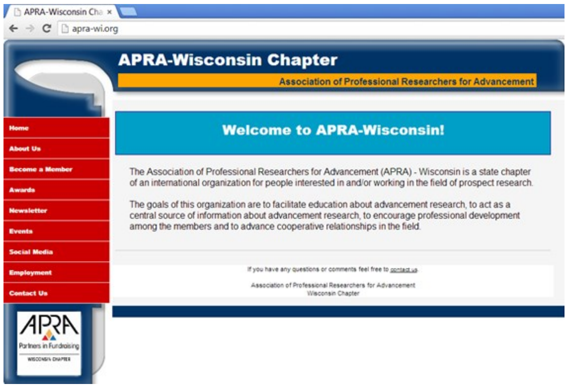
Prospect Development 2014: APRA's 27th Annual International Conference
July 30–August 2, 2014
The Cosmopolitan, Las Vegas

-Sarah Bernstein

The Resource for Fundraising Research, Analytics and Relationship Management

Call for Submissions

Our members' thoughts, insights, and observations are always appreciated! If you especially enjoyed this issue of The Research Report, please consider contributing a column of your own. Send your ideas and topics of interest to APRA-Wisconsin's newsletter editor, Andy Caldie, at andrew.caldie@snc.edu. Feel free to provide feedback on the new layout as well!



Also, check out our website at apra-wi.org for chapter news and updates! Feel free to send questions, comments, and suggestions to our volunteer web administrator, Linda Knight, at knightlinda49@yahoo.com.

2013-14 APRA-Wisconsin Board of Directors

President (through 4/14), Sarah Bernstein, (414) 333-9192, sarahb210@aol.com

Vice President (through 4/15), Andrew Caldie, St. Norbert College, (920) 403-3377, andrew.caldie@snc.edu

Events Coordinator (through 4/15), Lucas Brown, Lawrence University, (920) 993-6027, lucas.a.brown@lawrence.edu

Membership Secretary (through 4/15), Kate Mason, Agrace HospiceCare Foundation, (608) 327-7164, kate.mason@agrace.org

Treasurer *pro tem* (through 4/14), Amy Disch, Meriter Foundation, (608) 417-5303, adisch@meriter.com

Recording Secretary (through 4/14), Vacant

Board Member (through 4/15), Marsha Hammer, Marquette University, (414) 288-6580, marsha.hammer@marquette.edu

Board Member *pro tem* (through 4/14), Lisa Ellis, Ripon College, (920) 748-8349, ellisl@ripon.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

Past Recording Secretary (2008-2012), Past Secretary/Membership Secretary (1999-2005), Linda Gage*, Blackhawk Technical College, (608) 757-7739, lindagage1017@att.net

Board Member *Emerita