



Spring 2008

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Message from the President

Dear Members:

Welcome to the new APRA-SW newsletter, *Directions*. The title holds several meanings that are relevant to our chapter:

- Guidance or supervision of action or conduct;
- Assistance in pointing out the proper route -- usually used in the plural as in "asked for directions;"
- The line or course on which something is moving; or
- A guiding, governing, or motivating purpose.



APRA-SW is definitely moving along a new course, with a motivating purpose - namely to better serve our members and other professionals in the field. Researchers are well-known for their willingness to guide others and provide answers for those seeking directions, and our chapter strives to reflect that in its programming and in this new resource.

I want to thank everyone who organized or presented at our [conference](#) last month in Dallas. It was a great success. Aside from the top-notch sessions and networking, we were able to announce the establishment of a [new chapter award](#), the Jonathan Lindsey, PhD, CFRE Service Award. I was very glad that Jonathan was able to be there for the presentation of the award and was pleasantly surprised we were able to keep the secret that he would be the first recipient of his award.

Much of our new enthusiasm and programming is the result of the [strategic planning retreat](#) we held last May in order to find a path of better guidance for the chapter. Out of this came new [Mission](#) and [Vision](#) Statements, along with a new structure and planned programs. The Board will hold a follow-up meeting this June to review our progress and make plans for the upcoming year.

I invite you to play a role in the chapter's future course - attend events, submit information and articles for the newsletter, serve on committees and respond to surveys like the one for a new [Mentor Program](#) mentioned below. Your active participation will help us build a stronger organization and keep us moving in the right directions.

Feel free to [contact me](#) or any of the APRA-SW Board members if you have questions or suggestions for how the group can serve your needs better.

[Will Elliott](#)

APRA-SW President

The Museum of Fine Arts, Houston

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Spring Conference - *Beyond Expectations!*



Our Spring Conference, held at Children's Medical Center in Dallas on April 25th, truly lived up to its title - we had great topics, great speakers and more than 40 attendees bringing the event *beyond our expectations*. Eight sessions in two tracks (*Research 101* and *Advanced Research*) were focused on a Campaign theme.

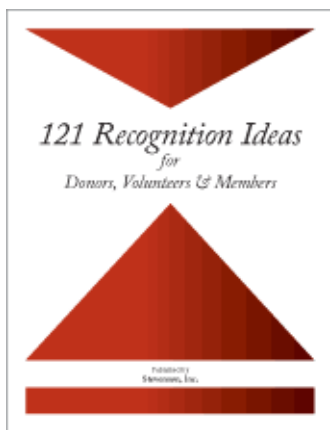
David Van Lone of the American Heart Association started things off for those new to research with an overview of tools to help them get their programs up and running in a campaign. Advanced researchers learned about new ways of attracting long-term donors through Websites and e-philanthropy from **Michel Hudson, CFRE**, of 501(c)onsulting. **Ali McLane** of Kintera, Inc. covered the basics of relationship management, while **Jennifer Shimp-Bowerman** of SMU dealt with the strategic role of research throughout a campaign.

Kathy Friend, CFRE, Senior Director of Development for Children's Medical Center, was our keynote speaker, and kept us laughing and nodding our heads in agreement as she spoke of how important research and researchers are in the fundraising process. In the afternoon, **Paulette Butterworth** of Southwestern University discussed the fundamentals of data mining and **Jennifer Bell Riley** of Texas Tech University made a presentation on planned giving prospecting in a campaign. We finished up the day with a joint session on *Building a Collaborative Development Team* from both the researcher and front-line fundraiser's perspectives, provided by our hosts **Alex Sizemore** and **Ann Davidson** of Children's Medical Center.



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Door Prize Winners



Not only did the Spring Conference attendees get loads of useful information, but several of them got even more to take back to work.

Nathan Holloway of Southern Nazarene University received **121 Recognition Ideas for Donors, Volunteers and Members**, a manual with step-by-step advice on ways to steward those who support the efforts of an organization.

Colleen St. Clair of All Saints Health Foundation won **Successful Capital Campaigns: From Start to Finish, 2nd Edition**, a resource manual with easy-to-use resources that can be used throughout the campaign process.



Both books were generously donated by Stevenson, Inc., a publisher of nationally-acclaimed newsletters and hands-on manuals that cover a range of nonprofit topics from fundraising to volunteer

management and special events. (www.stevensoninc.com)

Debbie Murray of the University of North Texas Health Sciences Center at Fort Worth went home with a **gift certificate** for a 25% discount on an **APRA International Virtual Seminar**. This was a prize the chapter won at the 2007 APRA International Conference for participating in the APRA Anniversary Chapter Contest.

New Chapter Award Honors Lindsey



The chapter has established a new award to honor individuals for their achievements in the field of prospect research and/or support of the prospect research community. **The award has been named for Jonathan A. Lindsey, PhD, CFRE**, the distinguished mentor of many APRA, APRA-Texas and APRA-Southwest members. **Lindsey was chosen as the first recipient of his namesake award**, which was given to him at the Spring Conference in Dallas. In response, Jonathan Lindsey offered his "profuse thanks and appreciation for

the honor you have bestowed in naming the APRA-SW Service Award in my honor, and then naming me the first recipient."

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Strategic Planning

The APRA-SW Board of Directors held a **strategic planning retreat on June 8, 2007** at Southwestern University in Georgetown, Texas. Facilitated by current APRA-SW Board member **Michel Hudson, CFRE** of 501(c)onsulting, the one-day retreat focused on discussing ways APRA-SW can improve how the Board operates and how the chapter serves the prospect research community in our four-state region. Hudson, who has consulted with other chapters in their strategic planning efforts, prepared two surveys to help in the planning efforts. The first survey was for the board members and covered strategic planning issues. The second survey was for all chapter members to develop a well-rounded understanding of our members' backgrounds, assess member needs, and measure our chapter's performance in meeting those needs. The results of the surveys were discussed at the retreat and helped chart the direction for some of the planning efforts.

Some of the recommendations/outcomes of the retreat included:

- New [Mission](#) & [Vision](#) Statements.
- Consider one annual [Conference](#) planned in DFW area each year.
- Consider offering a two-day Conference every other year.
- Partner with [APRA-Greater Houston](#) for a second Conference each year.
- Continue to work collaboratively with AASP, AFP, AHP, CASE, United Way and other organizations as opportunities are presented during the year.
- Set up more localized regions for "social gatherings" throughout the year: Austin, DFW, Houston (with APRA-Greater Houston), San Antonio, Louisiana, New Mexico/West TX, and Oklahoma.
- Create a [Mentor Program](#).
- Establish a [Service Award](#).
- Increase/improve communications vehicles.
- Pull together a marketing plan for internal and external audience.
- [Restructure the Board](#) to better assign responsibilities and carry out the strategic planning objectives.



More information on these new initiatives is available in this newsletter, and we will continue to update you throughout the year on our progress towards these new goals. Please contact any of the [APRA-SW Board](#) members if you have any feedback or questions on our strategic plan.

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New Mission Statement

"The Association of Professional Researchers for Advancement-Southwest is a regional chapter of an international organization for people invested in prospect research and related fields that support nonprofit fundraising. The mission of this organization is to provide opportunities for education, networking and professional development for nonprofit professionals throughout Texas, Oklahoma, Louisiana and New Mexico."

New Vision Statement

"APRA-SW will be recognized as the premier regional resource for fundraising professionals who are dedicated to meeting the research and information needs of the area's nonprofit community. It will be supportive, innovative and take risks, while remaining an inclusive and self-sustaining group."

Mentor Program

Andrea Heitz heads up a new Mentoring Committee that has been charged with creating a Chapter Mentor Program. Before they can create one, however, they would like some direction from you in determining the format and tools that would best suit your needs. Please help out with this important project by taking a few minutes to fill out **an online survey that will be launched soon**. Your input is vital and will assist the whole chapter.



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APRA-SW Board of Directors

Here is your new Board and the roles they assumed January 1, 2008:

President: [Will Elliott](#), Museum of Fine Arts, Houston

Vice President/President-Elect: [Dr. Bruce Wilson, Jr.](#), United Way of Northwest Louisiana

Secretary/Treasurer: [Paulette Butterworth](#), Southwestern University

Regional Directors:

New Mexico/West TX: [James Bixler](#), St. Johns College

Louisiana: [Pinki Diwan](#), LSU Foundation

Austin/San Antonio: [Jada Garrison](#), University of Texas at Austin

Mentoring: [Andrea Heitz](#), Texas Christian University

Communications: [Michel Hudson, CFRE](#), 501(c)onsulting

Oklahoma: [Beverly Lyles](#), Southern Nazarene University

Sponsorships/Marketing: [Jennifer Shimp-Bowerman](#), Southern Methodist University

Programming: [Alexandra Sizemore](#), Children's Medical Center Dallas

Dallas/Ft. Worth: [Colleen St. Clair](#), All Saints Health Foundation

Past Presidents:

[Sheri Lazare](#)

[Ali McLane](#), Kintera, Inc.

[David VanLone](#), American Heart Association, National Center



Left to right: Ali McLane, David VanLone, Alexandra Sizemore, Paulette Butterworth, Beverly Lyles, Will Elliott, Jennifer Shimp-Bowerman, Andrea Heitz, Colleen St. Clair, Michel Hudson, and Jada Garrison.

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Helpful Resource - Puget Sound Grantwriters Association



For those of you involved in grantwriting, or if you just want to know more about writing grant proposals, this site's FAQs section can provide some much-needed answers. <http://www.grantwriters.org/grantwriters/faq-main>

Some of the questions included in their Grantwriter FAQs:

- How can I research corporate grants?
- How can I become a freelancer?
- How can I improve my writing style?
- How do I start my new job?
- How do I establish a grants program?
- What about government grants?
- Where can I find international grants?
- What should a contract include?

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Job Announcements

For job announcements, please visit our Website at www.APRASW.org/job.html.

People on the Move

If you have news to share, send it to [Michel Hudson](#), APRA-SW Communications Chair.

The following APRA-SW people recently changed positions. *Congratulations!*

Dr. Bruce Willson, Jr., Vice President/President-Elect of APRA-SW, has joined the United Way team as the Executive Director of the United Way of Northwest Louisiana. Previously, he was the Assistant Dean for Development at Louisiana Tech University.



Larry Clark joined the American Heart Association's National Center as a Prospect Research Consultant in March of 2008. Mr. Clark's previous experience in prospect research includes work as a Prospect Research Associate at Ohio Wesleyan University and as the Director of Prospect Research at Capital University in Columbus, Ohio. In addition to his experience in prospect research, Mr. Clark has previously worked in corporate marketing as well as project management. Mr. Clark will support the American Heart Association's Major Gift program around the country and will be based at the American Heart Association's Affiliate in Columbus, Ohio.

Dan Grzenia has joined the American Heart Association as a research consultant. He joins the organization's National headquarters in Dallas, helping to grow the AHA's major gifts program and providing research support to their affiliate offices nationwide. Dan previously worked as a researcher at Southern Methodist University for more than seven years where he oversaw multiple research projects, including their annual parent screening process.



David VanLone has accepted the position of Senior Vice President of Donor Relations for the Great Rivers Affiliate of the American Heart Association. He will manage the Major Gifts operations for this five state region, which includes Pennsylvania, Delaware, West Virginia, Ohio, and Kentucky. A founder of APRA-SW and a former president of both APRA-TX and APRA-SW, David will resign his position as a current board member for APRA-SW in July as he relocates to Philadelphia, PA. In the past, David directed research for Southern Methodist University's \$500 million campaign and the \$70 million campaign completed by Presbyterian Hospital, Dallas. David has served as Development Resources Consultant at the National Center of the American Heart Association since July 2006. His focus has been the development of the National Major Gifts Strategic Resources Unit which helped in the development of the Affiliate Major Gifts Program nationwide, resulting in 27 outright gifts of six figures or more across the national organization last year and the execution of the 2007-2008 campaign, already the most successful Major Gifts campaign in the AHA's history.

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Save the Dates

APRA Virtual Seminar Replay: Ready to Launch: A Strategic Planning Approach to Campaigns

June 6 - July 3, 2008

Presenter: Alison Sommers-Sayre

Time: Download and watch at your convenience

<http://www.aprahome.org/Default.aspx?tabid=83>



APRA Virtual Seminar Replay: Supporting Your Organization's Mega Campaign

June 6 - July 3, 2008

Presenter: David Lawson

Time: Download and watch at your convenience

<http://www.aprahome.org/Default.aspx?tabid=83>

APRA - Greater Houston Presents. . .Prospect Research: Art and Science

June 5, 2008 at University of St. Thomas in Houston

\$35 APRA - Greater Houston & APRA-SW Members; \$55 Non-Member;

Join AGH and attend the conference for \$70

Please RSVP by June 1st!

http://www.apragreaterhouston.org/pdf/Workshop_2008_Registration.pdf

MARC 2008 - 10th Anniversary Conference: June 11-13, 2008 at Bucknell University.

<http://www.aprahome.org/Default.aspx?tabid=650>

APRA New Researchers Symposium: August 20-21, 2008 in Denver, Colorado

<http://www.aprahome.org/tabid/648/Default.aspx>

21st Annual APRA International Conference: August 20-23, 2008 in Denver, Colorado

<http://www.aprahome.org/tabid/515/Default.aspx>

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