



Summer 2008

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Message from the President

Dear Members:

As our colleagues gather this week in Denver for the APRA International Conference, I invite you to learn more about APRA-Southwest and our upcoming plans. If you are attending the APRA Conference, please join us at the [Chapter Meeting on Wednesday](#) afternoon (more information below).



We will be launching our mentorship program soon. This will be a great opportunity for members to share their expertise with each other in order to further our profession and our institutions' missions and goals. An [overview of the mentor program](#) is in this newsletter and we will talk about it at the chapter meeting in Denver.

Members of the chapter board met earlier this summer for our annual strategic planning retreat and we are working towards the goals set there. Among our plans is a membership drive. While we work on ways to recruit new members from Texas, Oklahoma, New Mexico and Louisiana, we invite you to encourage your colleagues in research and prospect management to join us.

Our chapter held a successful one-day conference this past April at Children's Medical Center in Dallas and plans are underway for next spring's conference, which will be a two-day event. Also in the works are events to be held regionally within our chapter area. Look for more information on these from our regional chairs later this fall.

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.

Hope to see you all in Denver,

[Will Elliott](#)
APRA-SW President
The Museum of Fine Arts, Houston

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APRA-SW Chapter Meeting in Denver



A chapter meeting will be held in conjunction with the APRA International Annual Conference in Denver. We will have an informal gathering in the **Granite Room at the Hyatt Regency Denver on Wednesday, August 20th from 4:45 to 5:45 p.m.** to discuss upcoming plans for the chapter. Join us for networking and updates as we get ready to hit the mile-high city for a week of information overload.

Area Speakers at APRA International Conference

Some of our area colleagues will be featured speakers at the upcoming APRA International Conference in Denver. They are sure to represent us well.

Jennifer Shimp-Bowerman (Southern Methodist University, and APRA-SW Board Member)

Session 404, Saturday 8:30-10:00 a.m. - *Prospect Management: From Visioin to Implementation*

Diane Crane (University of North Texas, and former APRA-Texas President)

Session 206, Thursday 8:30-10:00 a.m. - *A Prescription for Success - Making Philanthropy a Priority at Your Healthcare Institution*

Amy New (University of North Texas)

Session 413, Saturday 10:30 a.m. - 12:00 p.m. - *Research Beyond Major Gifts*



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Strategic Planning

The APRA-SW Board of Directors held a **strategic planning retreat on June 27, 2008** at Southern Methodist University in Dallas, Texas. The one-day retreat was a follow-up to last year's retreat and focused on moving forward with those plans, assessing our progress and determining new goals and tasks for the coming year.

Some of the recommendations/outcomes of the retreat included:

- Create a membership recruitment plan, including a new membership brochure.
- Draft plans for a new [Mentor Program](#), as recommended in the results of the recent membership survey.
- Begin plans for a two-day Conference in Spring 2009 in the Dallas area.
- Firm up plans for regional meetings.
- Look into offering Webinars/Podcasts this year.
- Create a marketing/sponsorship plan for conferences and other services.
- Migrate to a new chapter Website with a fully-functional member directory and other online processing features.
- Establish a schedule of broadcast e-mails to increase communication to members.
- Continue with quarterly electronic chapter newsletters.
- Draft more specific position descriptions in preparation for the November chapter Board nominations process.

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.

Mentor Program

Thanks to the input from the recent membership survey, a new Mentor Program is being established.



Our redesigned Mentor Program will allow us to grow as a community by sharing techniques and experiences with each other. Headed by program chair [Andrea Heitz](#) of Texas Christian University and Communications Chair [Michel Hudson, CFRE](#), of 501(c)onsulting, the program will initially be divided into two segments to address our members' needs.

The first segment is designed for long-term, broad-based mentoring between new researchers and more experienced professionals. Individual matches will be made by the program liaison, based on a number of factors including geography and preferred form of contact. A [sign-up form](#) for this Direct Match mentoring is now available on the APRA-SW Website. ([Word version](#))

The second segment aims to help those who need short-term mentoring within a particular area of expertise. The mentee will use the online APRA-SW Directory to find other members who are experts in various fields and are willing to help others in those areas. Until the Directory is launched, members may contact Andrea for such short-term matches.

These redesigned programs will benefit everyone involved, giving experienced members a chance to share what they've learned with newer professionals who, in turn, will bring their own ideas and experiences to the table.

Before participating, **mentors and mentees should be familiar with guidelines and requirements for the programs.** Both groups, for example, require membership in APRA-SW and adherence to the APRA International Code of Ethics. A detailed [set of guidelines](#) for Direct Match participants is available on the APRA-SW Website. ([Word version](#))

For Direct Match mentoring, participants must also be willing to commit 6-12 months to the program.

Other expressions of the Mentor Program are in the works, and we are open to new ideas and new members of the committee. If you have an idea or want to help on the committee, please contact either [Andrea](#) or [Michel](#). If you'd like to participate in the programs, check the Website for sign-up forms and guidelines.

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Helpful Resource - FINRA BrokerCheck



If you're looking for information on stock brokers, this site may be a big help. The Financial Industry Regulatory Authority (FINRA) was created in July 2007 through the consolidation of NASD and the New York Stock Exchange. It is the largest non-governmental regulator for all securities firms doing business in the United States. The FINRA BrokerCheck is a **free online tool** to help investors check the professional background of current and former FINRA-registered securities firms and brokers. <http://www.finra.org/InvestorInformation/InvestorProtection/ChecktheBackgroundofYourInvestmentProfessional/index.htm>

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Job Announcements

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

People Updates

If you have news to share - new jobs, new hires, or just news - send it to the [APRA-SW Communications Chair](#).

APRA-SW Board member **Michel Hudson, CFRE**, of 501(c)onsulting, just had the 3rd Edition of her highly popular *Prospect Research Fundamentals* published by [Stevenson, Inc.](#) Available in both online (PDF) and hard copy versions, the manual includes proven methods and research strategies, and the latest trends in research and technology to help make major gift fundraising efforts more successful. She will also be presenting a Webinar in November for Stevenson, Inc. on "How to Make Your Website More Donor Friendly."



Save the Dates

APRA-SW Chapter Meeting: Granite Room at the Hyatt Regency Denver on Wednesday, August 20 from 4:45 to 5:45 p.m.

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>

APRA Advanced Relationship Management Symposium: October 2-3, 2008 Houston, Texas <http://www.aprahome.org/tabid/686/Default.aspx>

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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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If you would like opt out of all future e-mails from APRA-SW please send an e-mail with 'opt out' in the subject line to [APRA-SW](#).