

THE CHRONICLE

The Newsletter for the Carolinas' Association of Professional Researchers for Advancement
www.netpath.net/~capra

May 2007 Vol. XV No. 2

From the Board

Dear CAPRA Members,

At our board meeting in January, we discussed exciting changes that are in the works. Your input, thoughts and suggestions are greatly valued so please know that you are welcome to be in touch to share any concerns or ideas.

One of the greatest benefits of CAPRA membership is our website. We post a membership directory that affords you the opportunity to network with other colleagues. Additionally, we post meeting events and reviews as well as job opportunities. The incoming board member who was responsible for the website has changed positions; his highly sought technological skills took him to a new position outside of development research. From his initial review and critique about necessary changes to the website, the board began the process of pursuing the possibility of changing the name of our organization from CAPRA (Carolinas Association of Professional Researchers for Advancement) to APRA-Carolinas. The board has also agreed to contract the website maintenance to a small company going forward.

One of our greatest challenges is that our web address is not at all intuitive (www.netpath.net/~capra). (I still have to look it up when I need to get to the membership directory.) For a bit of historical perspective, Netpath is an internet service provider that we contracted with to host the site free of charge after a minimal monthly fee for dial-up. Because this was a "free" site, we did not have our own domain name. Given the size of our organization and our volunteer driven effort, this worked well enough for quite a few years. We can be proud that we were among the first chapters of APRA to create and maintain a website for our membership. We are now at a time in our organizational history where the potential for growth is on the horizon. We want our membership and those looking for information about our organization to be able to access our website quickly. Because the "CAPRA" moniker has been

utilized by another organization that is not research related, we considered alternative domain names and the natural choice seems to be APRA-Carolinas.org. We have taken the necessary steps to secure that as a domain name. Our next step was to consider the requirements of APRA and the necessary legalities of a name change with respect to our IRS nonprofit designation. APRA requires that their board approve all name changes prior to the membership being notified - <http://www.aprahome.org/NameChangeProcedures/tabid/182/Default.aspx>.

We have received their board's approval. Now it is your turn to share your thoughts and feelings about this change. In all honesty, I must share that I have some mixed emotions tied more to sentimentality and tradition. Change never comes easy! ;-) That said, there are quite a few reasons why this would be a very positive step for our organization. We have an opportunity to use this name change as a promotional tool to market our chapter which would increase our exposure and ultimately our membership. Increased opportunities for continuing education in the field of research make us all of greater value to our respective organizations. Additionally, more members will create more networking and mentoring opportunities as well as greater opportunity to provide programming of interest and value to our members. Another positive factor to changing our name to APRA-Carolinas is a closer association to our parent organization. APRA has become an accepted and respected organization in the field of fundraising and this name change more directly demonstrates our affiliation as a chapter providing our organization greater name recognition and credibility.

The board feels strongly that this change should have the support and approval of the membership. Please take a moment to cast your support for changing the name of our organization from "Carolinas Association of Professional Researchers for Advancement" to "APRA-Carolinas". You can do this by simply sending an e-mail to LaDonna Lindgren at llindgren@tnc.org with a subject line of

“Support” or “Reject”. You are welcome to share your reasoning. All responses will be shared with our Board at the next board meeting on June 8. We need to hear from you before May 31. We will assume that no response equals a vote of “Support”.

Please feel free to contact me directly if you have questions or concerns that I can address. Thanks so much!!

Joy Martin, President
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New Web Site and Logo Coming Soon!

*By the CAPRA Marketing Committee Members:
Robin Banker (NC State University), Sonia Barbre
(Winston Salem State University), and Lydia Perez (UNC-
Chapel Hill)*

We are proud to report that the marketing committee of the board has contracted with a local company to redesign our existing web site and create a new corresponding logo. Work is underway to give our site a more streamlined and professional appearance and to update its components. In addition, our web designer will update the site monthly or bi-monthly as needed to keep information up-to-date. Our new logo will be sleek, modern and pay homage to APRA, but will be unique to our organization. We are very excited about this project and look forward to letting our members know when the site is up and running. Stay tuned...

Recent Meetings

March Virtual Seminar

*By Lydia M. Perez, MLIS, Prospect Research Analyst,
Corporations & Foundations, UNC-Chapel Hill*

APRA’s virtual seminar in March, “Researching Corporate and Foundation Prospects,” was presented by Christina Pulawski. She shared ways to hone one’s skills in the basics of researching, evaluating and preparing to approach foundations and corporations for funding.

Topics included:

- Free and for-fee sources, pros and cons with examples
- Search strategies – accurately matching the research to the need
- Key elements to look for when evaluating a potential institutional prospect
- Methods for proactively identifying appropriate corporate or foundation prospects
- Collating and presenting research findings for a variety of assignments

As a prospect researcher specializing in corporate and foundation research, I found her suggestions regarding research product options (always consider the need!) very helpful; the use of sample templates will push me to create new tools and think before using the same report for all requests. She also reiterated the importance of researchers “stepping back” to consider our respective organizations’ environment and relationships, as an integral aspect of adding value to what could easily become boilerplate information.

Thanks to Cindy Manshack and Queens University for hosting.

May Virtual Seminar

*By LaDonna Lindgren, Research Associate, The Nature
Conservancy, NC Chapter*

Andrew Brown presented APRA’s May virtual seminar on “Qualifying Prospects in the Field”. He explained how qualifying meetings are important to ensure the efficient use of your fundraising resources to find prospects that have an identifiable pathway from cultivation to stewardship. He defined the qualification process as the gathering of data from proactive research, networking and conversation to the verification and evaluation of that data to determine how to move the relationship forward.

This seminar was geared to benefit out-the-door fundraisers (we had a couple in attendance) as well as researchers as he shared open-ended questions the fundraisers could use to expand upon information uncovered by research staff. He encouraged fundraisers to know the types of assets that indicate wealth and gave a quick overview of some of those indicators including the various types of private businesses and investments.

After the seminar, CAPRA president Joy Martin asked if there were any questions about the presentation or otherwise. The topics we discussed ranged from prospect screenings and how to handle the wealth of information they uncover to how to get fundraisers out the door on qualifying calls with (or without) much research. We ended the afternoon by sharing our career paths to our current positions. It's always nice to be able to combine APRA's educational programs with a more personal exchange of ideas.

Thanks to Nancy Westfall and Mount Olive College for hosting the seminar.

Mentoring – A Great Benefit

By Joy Martin, Director of Development Research, Elon College

What is a mentor?

“A mentor is a guide; an advisor, someone on your side; loyal, interested, trusted and most importantly, experienced in areas that you may not be.”

Why have mentors?

Research is fun work, but it can be lonely work, especially in small organizations where one individual wears multiple fundraising hats. Research can be equally daunting for those with responsibility for managing research programs. CAPRA offers a mentoring service for researchers and fundraisers to help them maximize their potential for your organization.

In particular the service aims to help by:

- Increasing skills and advancing the learning curve
- Capitalizing on achievements and aspirations
- Enhancing inspiration and motivation
- Promoting self-confidence and self esteem

Having a mentor can add a critical component to staff training for new arrivals or for individuals changing roles within an organization. It is also an excellent opportunity to develop new skills or enhance institutional knowledge.

How does it work?

CAPRA will connect you with an experienced research professional to work with you or your staff. The choice of mentor will be based entirely on your needs, your location, and the type of organization

you work for. Time and involvement can be negotiated keeping in mind that this capacity is offered voluntarily and respect for your mentor's personal obligations must be considered. Support can be provided face to face, over the phone or via email.

The mentoring arrangement could involve:

- Helping to develop work plans and professional goals
- Talking through immediate difficulties
- Advising on professional development
- Enhancing work-related skills
- Providing constructive feedback on plans, applications, policies, procedures, and approaches
- Preparing for specific presentations/meetings

In all cases, it is important for the mentor and the individual being mentored to have an initial meeting to talk about what can be achieved and to discuss the best approach. Regular interactions should be planned to discuss objectives and review effectiveness.

If we can help you find a mentor or if you would like to volunteer to be a mentor, please contact Joy Martin at jmartin27@elon.edu or by phone at 336-278-7467.

Welcome New Members:

Dan Barmmer, Prospect Research Analyst, UNC-Chapel Hill

Sonya Chambliss, Manager of Prospect and Donor Research, UNC-Charlotte

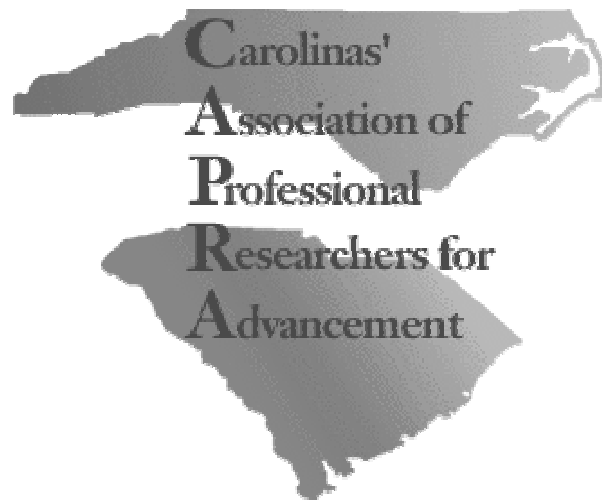
Zachary Danner, Prospect Research Analyst, UNC-Chapel Hill

Ann Laliotes, Prospect Research Manager, East Carolina University

*****Announcements*****

Annual renewals are due in July –look for an upcoming email with details on how to keep your membership current!

Dates for future meetings will be announced soon. Contact Robin Banker at (919) 515-3452 or rlbanker@gw.fis.ncsu.edu to volunteer to host an APRA Virtual Seminar.



CAPRA

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