

The Scoop

Raising Canadian Research

APRA Canada

Issue No. 11

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Editorial Introduction

Welcome to Issue No. 11 of The Scoop!

Well spring has come, finally! and so has the latest edition of The Scoop. We are a bit later than usual with this edition but we wanted to make sure to include the most current information on the upcoming APRA International Conference in Toronto this August. See the Capable Canadians section below for the latest information on the conference and how you can become involved. We will be including further updates in our next edition of The Scoop. Izabela Piasecka Latour, our webmaster, will be busily updating the APRA Canada website on an ongoing basis, so be sure to check that out as well, as the conference date moves closer.

We also have a great article by Cindy Neufield about getting your CFRE certification. If you have been thinking of getting it, you will find her insights helpful. Thanks to Cindy and all the other contributors for helping to make this a great edition. Keep sending in ideas and articles - we love to hear from you.

Thank you and enjoy The Scoop!

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&

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Board Address

Lori Bennett CFRE, President, APRA-Canada

Dear APRA-Canada Members:

Spring has sprung! Hopefully the weather is starting to warm up in your area of the country. Your APRA-Canada board members have been working diligently to set goals and visions for the coming year! Since our last report, we have been settling into our new board positions. They are as follows:

Lori Bennett - President

Amy Rotteau - Vice President/Secretary

Karen Maki - Treasurer

Stephanie Jonescu - Director, Communications

Brent Burbridge - Director, External Relations

Karla Benson - Director, Membership

Suzanne Huett - Director, Mentorship

Peter Coates - Director, Professional Development

Valerie Moore - Director, Regional Chairs

Issues we have examined thus far include: professional development initiatives for the coming year; ensured continued regional representation; promotion of our chapter to increase membership and to define our role and responsibilities as host chapter for the APRA-International Conference being held in Toronto, August 11 - 14, 2004.

Speaking of the conference, I highly recommend you include the cost of this conference in your budget submissions! This truly is the premier professional development opportunity for our profession. The networking opportunities are tremendous as you will meet professional researchers not only from across Canada, but the United States and Europe as well. Also, I know the hospitality committee will have some great activities and suggestions for you to enjoy your stay in Toronto. Stay tuned for more details!!

Please do not hesitate to contact myself, or any board member, with your questions or concerns about the chapter and the services it provides. You can find our direct links at www.apracanada.ca. Please keep in mind that we are dedicated volunteers and want to ensure this is a viable entity that will address the needs and issues of the members. With that, please have a wonderful spring and I hope to see you all in Toronto.

All About You:

APRA-Canada Chapter Information

Regional Chairs Update

Valerie Moore, Director, Regional Chairs

A special thanks to those continuing Regional Chairs! Welcome to 4 new Ontario Chairs:

- *Sue Lockett*, Major Gifts Officer, St. Mary's Hospital Foundation
- *Marcia Steeves*, Research & Stewardship Officer, Friends of Fleming College Foundation
- *Sarah McCarthy*, Research Associate, Richard Ivey School of Business
- *Katherine Foss*, Research Consultant, Ketchum Canada

Regional Chairs play an important role in marketing and executing professional development events, and in promoting membership in APRA Canada in their areas.

We also have a note from the previous Regional Director, Janice Cunning, Ketchum Canada, regarding the Toronto Region Christmas event - a bit unseasonal but the pictures (attached pdf files) will likely still be entertaining:

A group of prospect researchers from across the GTA came together in early December for the APRA-Canada holiday party. Everyone enjoyed the food and the chance to mingle. Photo one shows former APRA-Canada board members Pat and Barb alongside new board member Brent. Photo two shows Ester from Seneca, Tseten from Credit Valley Hospital, Kathie and Michelle from University Health Network, and Shannon from Ketchum Canada. A special thank you to APRA-Canada for sponsoring this event and to Ketchum Canada for hosting.

Mentorship Update

Suzanne Huett, APRA Canada Director Mentorship

As the new Director of the Mentorship Program, I would like to take this opportunity to thank those of you who have been involved in the program. What a truly unique and invaluable experience to assist new researchers in the Profession!

Remember what it was like starting out as a prospect researcher, wondering where to start? Having someone to call to answer questions was so valuable.

Your help is needed as a mentor. If you are working in the development research field, have at least one year of research experience and are a member of APRA Canada, please consider becoming a mentor to a fellow researcher. To participate, check out the Mentorship section on the website or contact suzanne.huett@dal.ca.

External Relations

Brent Burbridge, APRA Canada Director External Relations

The External Relations portfolio is newly separated from the Membership portfolio and largely undeveloped. We will be trying to develop new relationships with other organizations of interest to the Canadian prospect research community, such as the Association of Fundraising Professionals, in our first year. Any feedback members have on this idea, or ideas on any other initiatives the External Relations portfolio might undertake, can be forwarded to me at brent.burbridge@sickkids.ca.

Professional Development Update

Peter Coates, APRA Canada Director, Professional Development

The first APRA Canada professional development session for 2004 has been confirmed!

Research in Small and Large Shops, Thursday May 13th from 12-1:30 pm EST

Lauren Burgess, senior researcher with the Shaw Festival has agreed to present on research from the small shop perspective, while *Marg Amyot*, senior development research co-ordinator with the University of Manitoba will provide a perspective from the larger shop. Topics are expected to include defining a mandate, setting priorities, managing expectations of fundraisers, selecting resources and prospect identification. They will also speak on the challenges faced by their respective shops. Additional details will be posted shortly on the 'L' about registration and site locations.

We're also pleased to report that thanks to the efforts of Jane Griffith, the previous professional development chair, and Izabela Piasecka Latour, our web master, and with the generous cooperation of past presenters, many of the previous APRA Canada professional development sessions are now available on the APRA-Canada website (Members Only Area).

The Professional Development Committee is always looking for more speakers - we are already planning for our next event in the fall. If you are interested in speaking, have a topic you would like to be covered or are interested in being a site host, please contact Peter Coates at pcoates@unb.ca.

Research the Canadian Way

Cindy Neufield CFRE, SAIT Fund Development, Calgary Alberta

Professional Certification – CFRE for Me?

First - A Bit About Me

Until March 2004, I had been the Coordinator of Prospect Research at my institution. Prior to that, I had managed the Advancement Services office where gift processing, tax receipting, database and mailing list management and other financial services were part of the daily life of the Fund Development office. In earlier days, I was more of a jack-of-all trades in a three-person office doing a lot of the things required of a small Fund Development operation including event planning and donor recognition. Recently, I have specialized in prospect research and prospect management for a major capital campaign with a Fund Development staff of nineteen.

Towards CFRE

I began my journey towards obtaining my Certified Fund Raising Executive (CFRE) designation many years ago, but in 2003, I put it down in writing on my performance plan as something that I wanted to pursue. Personally, I saw the CFRE as recognition - that I had studied the full range of activities in a Fund Development operation and had thus increased my understanding and value to my organization; as future job security should I need to or want to change jobs; and finally as a chance to stretch my academic muscles in a shorter timeframe than could be achieved by pursuing a graduate degree (I still may do that one of these days).

About the CFRE Exam & Application

The CFRE Examination tests your knowledge in several areas including: current and prospective donor research, securing a gift, relationship building, volunteer involvement, management and accountability. You may not have had direct experience in some of these areas, but it is still possible to pass with some directed study. Prior to writing the exam however, you are required to submit an application to the CFRE organization to determine whether you are eligible to write. Many people say that preparing the application was more difficult than the exam itself.

I found the application process very affirming because I was writing down all of my education, professional development, volunteer involvement and my work on fundraising campaigns. If you have worked as part of a team raising dollars, you are allowed to count those fundraising successes on your application, even if you did not make the asks yourself. You can count membership or leadership on committees at work or outside of your workplace. You can count presentations that you have done or articles that you have written towards the minimum points required. Each section of the application requires a minimum number of points to be counted towards that category, in order for you to be considered eligible. The main determining factor is the number of years you have spent in the fundraising field in any capacity. The minimum requirement is 5 years or 60 months. These do not have to be continuous months, however, but they have to have been worked within the 8 years prior to your application.

Study Groups

Even before I started my application, those interested in writing the exam who were also members of the local chapter of Association of Fundraising Professionals (AFP), gathered to form study groups about six months prior to our potential exam date. We had volunteers who had obtained their CFRE and had offered to be coaches to the various study groups. I thought being in a study group was the best part of the whole process,

since we had an opportunity to bounce opinions off each other, we had the support of someone who had been through it, and we could ask questions and struggle together toward a full understanding of the material. Different groups took different approaches with some opting to read books from the recommended reading list and prepare book reports to be shared. Our group chose to use study materials from the old Survey Course in Fundraising. The Survey Course (now called the AFP CFRE Review course) is an option if you want an overview of all of the material likely to be covered in the exam. The AFP Chapter in your area, or sometimes your local post-secondary institution may even offer this course.

Our group met biweekly over the course of the six months, each taking a turn at preparing study notes for a chapter and then presenting them. The study notes would be helpful when it came close to exam time and we had to review our material repeatedly. Practical first-hand experience is probably the best teacher, but I learned a lot about areas in which I had little direct experience such as planned giving or case statements.

Once we were accepted to write the exam, the studying became a little more intense. In the closing weeks we met weekly, and we began to get heartily sick of our material. The exam is four hours long, 225 multiple-choice questions, 25 of which are test questions for future exams and don't count toward your result. The minimum pass is 144 questions. I am happy to say that I was successful, along with three of my colleagues, and I can now use the CFRE designation. I will need to recertify in three years, as long as I am still working in fundraising.

What are the benefits?

Besides pride in achievement, I have more confidence in my opinions, respect from management and colleagues, and certainly transferable knowledge. The CFRE is a recognized professional credential and more non-profits are putting it into their job postings as either a requirement or a preference.

If CFRE is for you...

If you are considering this path, take a look at www.cfre.org for the application, sample test questions, and examination dates in your area. For information on the CFRE Review Course, go to www.afpnet.org and click on Education and Career Development. The CFRE Review course is available through group presentation or through a self-study course.

I have really enjoyed my last two years in Prospect Research, and being a member of APRA and APRA Canada. Currently, I have been given a new opportunity to work in donor stewardship at my institution, and I look forward to the challenges and the new knowledge I will gain.

Capable Canadians: Movers and Shakers in Canadian Research

Appointments

Cindy Neufeld, Prospect Research Coordinator at SAIT Fund Development, completed her CFRE certification, November 2003. See Cindy's article in the Research the Canadian Way section above for more information on getting your CFRE certification.

Karla Benson has been promoted to Senior Research Officer at the University of Victoria and *Marnie Coulter* will be joining her as a Research Officer in May 2004. Marnie was formerly a Development Officer in the Faculty of Human and Social Development at the University of Victoria.

Announcements

From *Harold Rennie*, *Statistics Canada*:

The Spring 2004 issue of the Statistics Canada publication *Perspectives on Labour and Income* was released, March 19. One of the articles looks at the earnings of health workers, comparing 1991 and 2001 Census data. This article has appeared previously in an online edition of *Perspectives on Labour and Income*. Also included in this issue, in the "Key labour and income facts" section, is a profile of women entrepreneurs, that is, women who are self-employed, with or without employees.

The Spring 2004 issue of *Perspectives on Labour and Income*, Vol. 16, no. 1, is now available for \$20.

Also, available is our Income Statistics Division released the results of the 3rd Quarter 2003 Trusteed Pension Funds Quarterly Survey.

If people want more information, they should contact Harold at his Statistics Canada e-mail address: harold.rennie@statcan.ca

Conferences

APRA International Conference *Research Without Borders: Exploring Global Boundaries*, Sheraton Centre, Toronto Ontario, August 11 - 14, 2004

The Annual APRA International Conference is coming up in August this year and we've got the first of the information updates for you. Details of the conference as well as what to do and see in Toronto can be found at the APRA website www.aprahome.org and on the APRA Canada website www.apracanada.ca.

Conference Scholarships

Once again APRA Canada members will be invited to apply for funding that will enable them to travel to the APRA International Conference. This year, since the conference is being held in Toronto, we will be offering more funding than ever before in an effort to get as many Canadian researchers to the conference as possible. Look for a scholarship-related email from APRA Canada in the next two weeks. The details will also be available at www.apracanada.ca soon.

We need you as a volunteer!!!

The [APRA International Conference 2004](#) is seeking volunteers to help during this year's international conference at the Sheraton Centre Toronto, August 11-14th. It's a fun way to become involved, meet colleagues from around the world, and contribute to the development of an exciting conference.

Volunteers are needed in various capacities including:

Pre-Conference	Assembling conference attendee bags several days prior to conference.
Registration Desk	Distributing attendee packets, badges, and conference bags, and offering general assistance and directions to conference registrants.
Hospitality Desk	Answering questions about Toronto - things to do, places to see, great restaurants. Also coordinating registration for planned activities and managing the APRA message center.
Room Monitors	Assisting session speakers by ensuring AV equipment and room requirements have been met and notifying APRA staff if problems with equipment, venues, or handouts are encountered. Distributing and collecting evaluation forms.
Resource Centre	Computer Lab Volunteers are needed to open and close the lab, assist attendees with computer issues and monitor usage. Library Volunteers are needed to maintain resource materials, answer questions about publications, CD-ROMs and assist with the raffle. We also need volunteers to help with set up and break down of the Resource Centre.

If you are interested in volunteering, please contact the conference volunteer co-chairs, **Janice Cuning** or **Suzy Mack**. Indicate your area (or areas!) of interest and times when you are available. We will be happy to answer any questions you may have. Thank you for your consideration.

Janice Cuning
jcunning@ketchumcanada.com
416-340-9710, ext. 245

Suzy Mack
suzy.mack@uhn.on.ca
416-340-4800, ext. 6328

Conference Logistics Team

APRA-Canada members who would like to offer their assistance, please refer to the contact information in the table below.

Role	Name	Contact Information
Volunteer Co-Chairs: Schedule and recruit volunteers to act as room monitors as well as staff the Resource Centre, Hospitality Desk and pre-registration desk.	Janice Cunning Senior Research Consultant, Ketchum Canada Inc.	jcunning@ketchumcanada.com 416-340-9710, ext. 245
	Suzy Mack Senior Research Development Officer, Development Research, Toronto General & Western Hospital Foundation	suzy.mack@uhn.on.ca 416-340-4800, ext. 6328
Hospitality Co-Chairs: Coordinates Thursday restaurant Board dinners and Friday optional event. Creates web site of Toronto attractions and works at the Hospitality Desk to answer attendee questions.	Pat Hetherington Coordinator, Development Research, St. Michael's Hospital Foundation	hetheringtonp@smh.toronto.on.ca 416-864-6060, ext. 6164
	Natasha Vasiliou Research Manager, Sunnybrook and Women's Foundation	natasha.vasiliou@sw.ca (416) 480-6100 ext. 7963
Resource Centre Co-Chairs: Obtains the research resources for display in the centre. Works in the Centre to respond to attendee questions.	Christine King, Manager, Development Research, Toronto General & Western Hospital Foundation	Christine.king@uhn.on.ca 416-340-4800, ext. 4315
	Lori Bennett Senior Prospect Researcher, Prospect Research, University of Alberta	lori.Bennett@ualberta.ca 780-492-0328
Roundtable Coordinator: Creates the program for roundtable sessions.	Arno Bangert Director, Research and Prospect Management, British Columbia's Children's Hospital Fdn	abangert@cw.bc.ca 604-875-2685