

Welcome to Issue no. 17 of The Scoop!

It seems with Prospect Research there is always more to learn, more avenues to explore and ever-expanding roles to fill. With that in mind, in this issue of The Scoop, we hear first from several researchers who attended the APRA International conference for the first time this year in San Diego: our two scholarship winners, Radikha Jaggernauth and Tamara Wojdylo, reflect on their experiences at the conference; Kevin Guest, a relatively new prospect researcher at BC Children's Hospital Foundation, writes about the lessons he learned there. Suzy Mack, a Senior Development Research Officer at Toronto General and Western Hospital Foundation (TG&WHF) rounds things out with her article describing recent changes in the role of the research office at TG&WHF in *Beyond the box: research to support strategic planning*. All that and pictures from the conference as well!
 Enjoy The Scoop.

Kim Brisbin, Editor
kbrisbin@uwgt.org

From the Board

I was thrilled to meet so many fellow Canadians at the APRA International conference in San Diego this past August. Close to 30 Canadians from across the country and across sectors attended. The APRA Canada Annual General Meeting was held on Aug. 11 at 7:45 am, the earliest AGM APRA Canada has ever held. Thanks to the 18 members who got up early to make the meeting. The AGM minutes are on APRA Canada's website.

Later that evening, APRA Canada hosted a dinner for 20 Canadians. A good time was had by all. On Friday, after the sessions to finish up the conference, a group of Canadians enjoyed the sand and surf on Coronado Island, while another group took a formal tour of Coronado. Next year, the conference will be held in Orlando, Florida. There is currently a call for submissions, due Oct. 31, 2005. Please consider presenting, it would be great to increase the number of Canadian speakers. And remember, you do not have to speak on Canadian resources.

November brings APRA Canada elections. Two Director positions are currently open, each for a three-year term. A call for nominations has now been made. To learn more about what is involved in being an APRA Canada Director contact any current board member. All contact information is on APRA Canada's website.

On behalf of President Lori Bennett, the board and our members, I would like to thank Karen Maki and Marlene Affleck for their hard work and dedication to APRA Canada.

Amy Rotteau, APRA Canada Vice President & Secretary
amyr@rom.on.ca

What's inside:

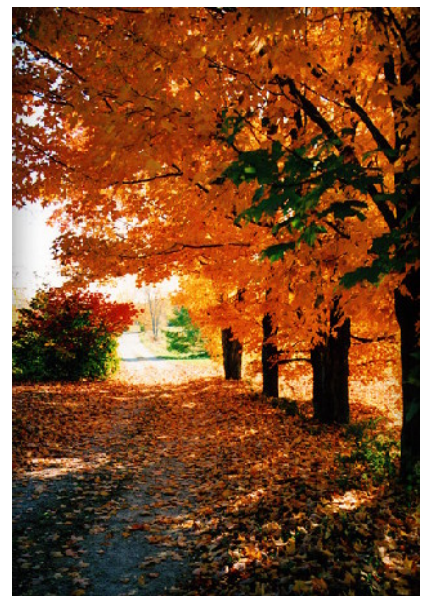
All About You - APRA Canada Chapter Information 2
 External Relations
 Mentorship
 Professional Development
 Communications
 Membership

2005 APRA International Conference 3
 Pictures
 Reflections on the conference by 2005 scholarship winners - *Radikha Jaggernauth & Tamara Wojdylo*
 Some conference statistics
 Lessons learned from my first APRA conference - *Kevin Guest*

Research the Canadian Way ... 6
 Beyond the box: research to support strategic planning - *Suzy Mack*

Capable Canadians 8
 Announcement

Contact us
 Send your comments and suggestions to us at: webmaster@apracanada.ca



All About You

APRA Canada Chapter Information

External Relations Update

We have continued to develop the External Relations portfolio and have explored contacts with universities and colleges that offer Library and Information Science programs in the hope of increasing our profession's profile.

We are also looking to grow our visibility within the various chapter regions by initiating or improving connections to other fundraising and charitable groups. If you have any suggestions of organizations that would make good APRA Canada partners, please e-mail me your comments.

Lauren Burgess, APRA Canada External Relations Director
lburgess@stratfordfestival.ca

Mentorship Update

I am pleased to report that we have currently matched up all those members who requested mentors. We have a number of individuals who are willing to serve as mentors and others who are willing to consider this in the future.

If I have missed your request for a mentor, please e-mail me.

Marlene Affleck, APRA Canada Mentorship Director
marlenea@twu.ca

Professional Development Update

The next APRA Canada professional development session will be held on Wednesday, Nov. 30, from 12-1:30 pm EST.

We are delighted to announce that Lisa Thomas, Director of Development Research and Relationship Management at the University of Washington, will present on *Prospect Research and Management in Campaigns*. Lisa will discuss:

The Silent Phase - Feasibility and Preparation: Prospect Research and Management play a huge role early in campaigns, from constructing gift pyramids to assessing donor bases and prospect pools. The first part of this presentation covers key roles and responsibilities of research and prospect management, including database analysis, prospect identification, prospect management, reporting, and working with vendors and campaign counsel. The Public Phase - Endurance and Innovation: Once a campaign goal is announced, new challenges

include maintaining momentum and keeping prospect pools fresh and viable. The second half of the presentation explores the changing role of research as a campaign goes public, including working with volunteers, projecting gift income and creative prospect identification.

Lisa Thomas directs the University of Washington's prospect identification, research and management efforts, heading a team of 14 information professionals who work with more than 100 fundraisers in support of a \$2 billion campaign. Lisa speaks regularly about prospect research, identification, management and analysis to a variety of regional and national audiences, and has both written for and edited the professional development research journal *Connections*. She recently served on the board of directors of the Association of Professional Researchers for Advancement (APRA) as a vice president, and previously was president of APRA-NW, APRA's Northwest regional chapter. Proud to work for her alma mater, Lisa holds bachelor's and master's degrees in communication research from the University of Washington.

Registration information, along with the site hosts will be e-mailed to members over the coming weeks and can be found on the APRA Canada website. The cost for the session remains unchanged - \$10 for APRA Canada members, \$20 for non-members. Again, given the teleconference connection costs incurred by APRA Canada, there is a minimum fee of \$30 per site (if there are, for example, only two at a particular site, the cost would be \$15 rather than \$10 per participant). We look forward to your participation.

Peter Coates, APRA Canada Professional Development Director, pcoates@unb.ca

Communications Update

No news - just a request for writers and other contributors to The Scoop and the APRA Canada website. If you think you have a great idea for an article or you take some great pictures at your next regional event, please send them to me or Kim and our webmaster will post them on the Members Only section of the website, or we can run them in The Scoop.

Stephanie Jonescu, APRA Canada Communications Director, jonescu@hhsc.ca

All About You

Membership Update

As of Sept. 11, 2005, APRA Canada had 171 members. Included in the total number of members and the statistics below, are some lapsed members (36 in total). Efforts are being made to re-engage as many lapsed members as possible.

You can now update your personal information directly online at www.apracanada.ca in the Members Only section. The members' directory has also been fully operational for a couple of months now. Search tips are available on the search page in the Members Only section. But remember

Geographical Distribution	Number of Members	Organization Type	Number of Members
Alberta	18 (10%)	Arts	5
British Columbia	34 (20%)	Community	5
Manitoba	4	Consulting	11
New Brunswick	5	Education	70
Nova Scotia	9	Environmental	2
Ontario	79 (46%)	Health	35
PEI	1	Religious	1
Quebec	15 (9%)	Other	4
Saskatchewan	5		

that your results in using the directory are only as good as the information that is provided to us. So please update your contact information should it change.

Izabela Piasecka-Latour, APRA Canada Membership Director
ipiasecka-latour@conestogac.on.ca

APRA International Conference

A few happy faces from the conference:



Derek Michael, University of Alberta, Phoebe Slantex, APRA International board member, Barb Fanning, University Heath Network, and Paloma Gonzalez, McGill University.



Cecilia Tupper Hay, BC Children's Hospital Foundation, Karen Maki, University of British Columbia and Amy Rotteau, Royal Ontario Museum Governors.



Our two 2005 APRA Canada Scholarship winners - Radikha Jaggernauth, Heart and Stroke Foundation of Ontario and Tamara Wojdylo, VGH & UBC Hospital Foundation.

Pictures courtesy of Karen Maki, UBC. For more, please go to the Members Only section of APRA Canada's website.

APRA International Conference

Reflections on APRA International's 2005 Conference

by APRA Canada's Scholarship Winners

Radikha Jaggernaut:

As I headed off to San Diego for my first APRA conference I had a certain comfort level since I knew five other Canadians who were also attending the conference. Upon arriving at the Manchester Grand Hyatt I realized there were about a 1,000 other registered attendees. Did the small number of Canadians at the conference (32 in total) seem lost among all these attendees? No. Despite our relatively small numbers, APRA Canada members' presence was felt with the hosting of a breakfast roundtable discussion and an APRA Canada dinner night. My Canadian peers from BC to Quebec offered advice, suggestions and, most of all, an open invitation to call upon them in a time of need.

Being new to the non-profit industry and with the assigned duty of setting up research services for major gifts at the Heart and Stroke Foundation of Ontario, many sessions at the conference would have added more value to my role. But there were only so many that could fit into a four-day schedule. All ten sessions I attended provided insight and ideas and I am already implementing some key learning. APRA provided a bound copy containing most of the presentations and I hope to make the time to browse through the presentations of those sessions I could not attend.

After a full day at the conference, I looked forward to the no-host and hospitality events offered in the evenings. The most memorable was my visit to Hotel del Coronado including the one-hour guided tour. Our tour guide was fun and entertaining. After the tour and a quick walk around the square, Karen Maki (UBC), Karen Stribula (Wesleyan University) and I enjoyed a lovely dinner at the Boathouse. What a way to remember San Diego!

I thank APRA Canada and HSFO for offering me this opportunity. I come away with new knowledge and confidence that will help me progress as a prospect researcher.

*Radikha Jaggernaut
Major Gifts Researcher
Heart and Stroke Foundation of Ontario*

Tamara Wojdylo:

In late June, I received a phone call informing me I was one of two recipients of the 2005 APRA Canada scholarship. Bursting with enthusiasm, I headed across the border for this professional development opportunity. From Aug. 10 to 13, I enjoyed great workshops, fantastic presentations and fabulous networking with colleagues. On the last day of the conference, I walked away from the hotel energized with new skills and ideas to offer. Every session provided practical lessons to add to my repertoire of best practices.

I gained clarity on my role and what I can contribute. A prospect researcher is a skilled analyst and strategist, providing a professional service beyond administrative support to the major gift and planned giving team.

Prior to this conference, I was not aware of all the facets of prospect management which is a responsibility recently added to the research function. Our prospect and suspect tracking reports are impressive, however I was not aware how fundraiser reporting and accountability could significantly enhance our prospect management process. I'm excited to bring some new tools and better analysis to my organization. I'm working on a list of recommendations for my supervisor, and hopefully some minor changes are just around the corner.

I hope this will encourage any researchers who have not been to an APRA International conference to apply for the scholarship next year.

Submitted with gratitude.

*Tamara Wojdylo
Research and Prospect Coordinator
VGH & UBC Hospital Foundation*

APRA Canada offers scholarships to the annual International conference each year. A call for applicants is sent out each year to APRA Canada members a few months prior to the conference.

A few statistics from the conference:

- 1,001 total registrants; 33 Canadian
- 4.5% of registrants were from outside the US – Canada, United Kingdom (6), Australia (2), Switzerland (1)
- 2 Canadian speakers – Peter McKinley, consultant and Rod Skinkle, Research Director, Academica Group

APRA International Conference

Lessons learned from my first APRA conference *By Kevin Guest*

The 18th annual international conference in San Diego this August was not only my first APRA conference but also my first conference as a professional. I have to thank my director at the BC Children's Hospital Foundation for making my attendance possible by insisting that two members of our staff attend the conference and for juggling our professional development budget to make it happen.

The last time I visited the United States in 1997, I was on a family vacation to none other than San Diego. San Diego is very similar to Vancouver, with its seawall, the breeze, the temperature, and the look of the condo towers downtown (some of which were developed by a Vancouver-based company).

I was a bit nervous about the trip and what to expect at the conference, but my anxiety waned and my excitement grew as I began spotting other researchers like me with the APRA tote bag. I found myself feeling proud and inspired to be in the company of nearly 1,000 like-minded individuals.

The days were full, beginning with roundtable discussions at breakfast, attending sessions, a lunch with the rest of the attendees, more sessions, and then the option of participating in tourist or social activities. Being relatively new to the profession, I initially felt inhibited to speak up during discussions or to introduce myself to other participants. But after a while I realized that I had grown in my ability to perform this work and felt pleased to come from an institution that already embraces and practices much of what I observed and learned.

“Researchers today do more synthesizing than gathering.”

I was generally impressed with the calibre and enthusiasm of the presenters and attendees at the sessions. The atmosphere was very open and candid, and often I could identify with the struggles and achievements that other researchers expressed. I think that was one of the most important lessons I learned: as much as you may feel alone in this position, you are not. The individuals I encountered were kind and willing to help, and every researcher has the potential to impart knowledge that can expedite or enhance another's work.

The two sessions that I most enjoyed were not presentations but discussions. One was a panel discussion entitled “Research, a Changing Profession” and the other was an open forum called “Proactive versus Reactive—Finding the Right Mix.”

In the first session, the fact that researchers today do more synthesizing than gathering was highlighted. As important as advanced search skills are, you must be able to put the information into context and present it in a format that is digestible and not overwhelming.

Coming from several years of post-secondary education it has been tough for me to incorporate a “less is more” philosophy into my research products. Also, researchers have to consider themselves fundraisers and be aware of the purpose of philanthropy, its role in the community, and its place

“Researchers need to be prepared to change, to always look for more effective ways to provide our colleagues with useful information.”

in an organization. The panel stressed that it is still necessary to bring curiosity, passion and interest to the job, but to also incorporate business skills. Research for advancement will only become more technical and analytical, and the process needs to be tied to the organization's bottom line.

The second session complemented the first, but the tone of the discussion was more practical than ideological. Proactive work is all that we researchers do without being asked. Although attendees came from a broad range of institutions, all agreed that our work requires balancing time and resources. There were many advocates of more concise research products in the form of quick proactive reporting which would be more useful closer to solicitation than larger reports. A good product might only require a snapshot and brief financial data, and apparently many development officers don't miss the narrative. The research department has to maintain communication with other departments, but also has to learn to say “no.” The main point of the session was researchers need to be prepared to change and to always look for more effective ways to provide our colleagues with useful information that advances the organization's cause. The facet of fundraising in which we work is certainly valued and appreciated, but we can garner even more respect by thinking ahead and in new ways. We are often reluctant to promote ourselves and our services, but it has to be done, and can be accomplished with something as simple as a regular newsletter.

The other highlight of this conference was meeting several other Canadian researchers. It is nice to be

Continued on p.8

Research the Canadian Way

Beyond the box: research to support strategic planning *By Suzy Mack*

The Development Research department at Toronto General and Western Hospital Foundation (TG&WHF) recently underwent a name change. Our new name, *Development Research and Strategic Analysis*, does not so much mark a new direction for the research team, but rather signals how the work of the team has expanded over time. Our role has evolved beyond traditional prospect research to include research in support of strategic planning by the Foundation's leadership. At TG&WHF, strategic planning has become fully integrated into our Foundation's decision-making structure. We analyze the best practices of other national and international non-profits to assess our competitiveness, identify benchmarks and assess product branding for the foundation. We monitor and report on trends in the philanthropic sector and examine external factors, such as new government policy, that may have an impact on what we do at the Foundation. But why, and why the Research team?

"...strategic planning has become fully integrated into our Foundation's decision-making structure."

Increasingly, there has been a trend within the philanthropic community for non-profits to adopt management practices, such as strategic planning, from the for-profit sector. This is likely because many board members and major donors come from the business world. While business organizations must compete for customers and market share to remain viable, non-profit organizations must compete for resources - gifts, grants, volunteers, staff or strategic partners. Strategic planning is a management tool that leads to an increased understanding of the challenges and opportunities that face an organization. Effectively done, it outlines a course of action that optimizes resources and allows an organization to maximize its impact and achieve its mission. Strategic planning requires an organization to look at the big picture, to take a wide look around at all of the factors (both internal and external) that impact performance. This is where the research team comes in.

Over the course of the broader University Health Network (UHN) campaign, the TG&WHF research team had done a great deal of work examining similar Canadian and American organizations. This work looked at campaigns run by peer organizations identifying their strengths and innovations in

governance, planned giving, major gifts fundraising, events and a number of other factors. Last spring, two factors came together as catalysts and initiated a new, in-depth round of planning. First, TG&WHF with its two UHN partner foundations completed a successful fundraising campaign. Second, TG&WHF underwent a change in board leadership with the arrival of a new chair. The time was right for the Foundation to assess where it was and where it wanted to go, so Development Research and Strategic Analysis was born.

Why the Research Team?

The research team was a natural choice to provide support to the Strategic Planning Committee since the team had a proven track record. It had always functioned on a corporate library model and provided value-added information to Foundation staff. This included fielding requests for research on fundraising topics outside the realm of traditional prospect research. The team members had in-depth knowledge of the Foundation, its funding priorities, fundraising programs, and the greater philanthropic sector. They were also highly skilled source miners and were willing and able to expand their skill sets and search in nontraditional resources. This new relationship is not a one-way street. It represents a professional development opportunity - research team members must now think strategically about developments in the fundraising, business and marketing sectors and consider the impact these developments have on the Foundation. The role of the researcher has expanded to include more of an advisory and analytical function.

Research to Support Strategic Planning – New “Product” Directions

The Environmental Scan

The TG&WHF environmental scan, which is a confidential, proprietary document, is published by the research team on an annual basis or updated for the strategic planning committee as requested. The scan provides the Foundation's leadership with an overview of where the organization is and helps them to assess opportunities and threats facing the Foundation. It looks at many external factors including: economic, social, demographic, and philanthropic trends; legislation affecting the philanthropic sector; health sector funding; health trends; world events; and technology. Many resources are consulted when compiling this type of report including: government backgrounders, bank

Research the Canadian Way

studies, professional association reports (such as those produced by the Canadian Bankers Association and the Ontario Hospital Association), Statistics Canada reports, newspaper articles, Conference Board of Canada reports as well as philanthropic literature. The environmental scan is instructive when assessing future directions. The results of the scan may also lead to additional research such as collecting information about new revenue streams.

Competitive Analysis

Much of the research done at TG&WHF to support strategic planning looks at peer organizations. This type of analysis assesses the competition, identifies strengths in their fundraising programs and best practices, establishes benchmarks and compares branding and positioning. By taking a hard look at competitors we can answer these questions: What do our peers do well? What are they doing that is innovative? Are these things that we should or should not be doing? What do we do that they do not? How do we distinguish ourselves? How do we compete for resources?

Our first step is to identify a group of similar organizations in terms of mandate, size, programs, and/or fundraising priorities. At TG&WHF, we conduct a detailed annual analysis of selected peers and report findings on each of these organizations to senior management. This analysis identifies our peers' annual revenues, revenue streams (whether from events, major gifts programs, cause marketing, or strategic partnerships), campaign information (such as launch date, length, fundraising goal, funding priorities and status), fundraising strengths, and innovation in programs. This information is drawn from peer websites, annual reports, donor reports, press releases and newspaper and magazine articles. Our report is supplemented by monthly monitoring by the research team – emerging developments at each peer organization are communicated as they occur to the Foundation's executive management group.

Trends Analysis

A third type of report undertaken by the research team is a quarterly trends analysis report. This report identifies key trends within the philanthropic sector and monitors changes in external factors (such as business trends or emerging legal issues) that impact the environment in which the Foundation operates. While not as comprehensive as a full-scale environmental scan, the focus of this report is on emerging trends. It enables the Foundation to be agile, responsive and innovative, to stay ahead of the

curve and on the leading edge of new developments. The research team monitors developments that impact the fundraising sector. For example, the team monitors a variety of sources including media reports and bank studies which track changes in donor giving patterns, motivations for giving, and business trends that may lead to shifts in wealth. This quarterly report enables the Foundation to gain competitive advantage and facilitates a quick and creative response to changes in the external environment.

Measuring Success

The TG&WHF research team has been supporting strategic planning in a focused manner since April although select scans were completed previously. While quantitative measures are elusive at such an early stage in a new process, we have had positive feedback and seen continued requests for this type of research from board members and the executive management team. We have also had requests to perform competitive research for narrower campaign priority areas within the Foundation. In these instances, the research is used to support the development of business plans for specific

“The role of the researcher has expanded to include more of an advisory and analytical function.”

fundraising programs. Most tellingly, we have seen changes in Foundation processes that can be directly attributed to the work of the team such as changes in advertising initiatives and donor communications.

What Lies Ahead?

The research team has already seen an increase in the number of requests for work that supports strategic planning and this trend is expected to continue. The team has also seen increased demand for research on questions that are wider in scope than strategic planning. For example, we have been asked to examine the impact of external events on the philanthropic sector as a whole. As Foundation board members and staff see and experience the benefit of this type of research, they find new ways to apply it to other aspects of their work. In response, the team continues to refine the content and format of reports based on the feedback of board members and the management team. We continue to expand our knowledge of the strategic planning process and learn more about the information needs of those whose job it is to decide the future of the Foundation. Several areas that have been identified as logical avenues for future

Research the Canadian Way

professional development include: opportunities that expand the researcher's knowledge of marketing, management and business practices; information gathering strategies; and project management techniques. Expanding the team's toolbox will allow us to further refine research outcomes.

Although the shift from traditional prospect research to the inclusion of planning research is challenging at first, it represents an exciting opportunity for members of the research team to make valuable and insightful contributions to the future direction of the organization.

Suzy Mack is a Senior Development Research Officer at Toronto General and Western Hospital Foundation, University Health Network. She has worked as a development researcher for more than seven years. A graduate of the Faculty of Information Studies at the University of Toronto, Suzy also holds a business degree from Ryerson University.

Lessons learned - continued from p. 5

able to put a face to a name and to experience the camaraderie amongst APRA Canada members, especially at an Irish pub after a long day of learning and networking! Even being delayed at the San Diego airport with another Vancouver-based member turned out to be enjoyable and enlightening. So, again, I am thankful for having the opportunity to attend the conference and found it to be an inspiring and invigorating event.

Kevin Guest has been a research coordinator with BC Children's Hospital Foundation in Vancouver since February. He has an MLIS degree from UBC. He worked as a research assistant in UBC's Faculty of Arts Development Office as well as in the Community Services Group Library at the City of Vancouver, before joining BC Children's Hospital Foundation.

Capable Canadians

Announcements

Preet Virk has moved from Prospect Researcher to Manager of Awards Fundraising at Simon Fraser University.

To all Toronto area APRA Canada members: Katherine Foss, your regional representative, is busily working away to prepare yet another fabulous Holiday get-together. Details to follow.