

# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

## **Session 1: Sources of Wealth**

Tuesday, July 10, 2012 :: 1:00 – 2:30 p.m. EDT

## **Session 2: Real Estate and Other Assets**

Thursday, July 19, 2012 :: 1:00 – 2:30 p.m. EDT

## **Session 3: Philanthropy: Trends and Research Strategies**

Monday, July 30, 2012 :: 1:00 – 2:30 p.m. EDT

## **Session 4: Ratings and Resources**

Monday, August 13, 2012 :: 1:00 – 2:30 p.m. EDT

ACADEMIC · IMPRESSIONS

**ONLINE COURSE**



# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

July 10, 19, 30, & August 13, 2012 :: 1:00 – 2:30 p.m. EDT :: Online

## OVERVIEW

---

With the balance of wealth shifting overseas, the future of philanthropy is poised to take on a much more global face. However, the first step in your process for targeting potential international donors, prospect research, becomes exponentially more challenging in different languages, and with varying levels of data publicly available.

Join us for a unique online course experience that will help you strengthen your international prospecting skills. In four sessions, we will cover researching sources of wealth, real estate and other assets, trends and research strategies for international philanthropy, and ratings and resources for a variety of regions around the world. Between sessions, you will have the chance to practice what you've learned with a few of your own international prospects, and you'll come away with at least two full prospect profiles.

## LEARNING OUTCOME

---

After participating in this online course, you will be able to research potential international donors in key regions of the world.

## WHO SHOULD ATTEND

---

Prospect researchers at all levels tasked with providing profiles on potential international donors will benefit from this course.

## WHAT YOU WILL LEARN

---

You will learn how to:

- Locate signs of wealth and philanthropy abroad
- Understand how asset allocations differ by country
- Design more accurate country-specific capacity rating formulas
- Incorporate international work into your regular research office offerings

## HOW IS THIS ONLINE COURSE DIFFERENT FROM A STANDARD WEBCAST?

---

The Academic Impressions online course format differs from our traditional webcasts in that it offers content, networking, and activities for one group of learners over a longer period of time. This format is right for you if:

- You desire the intensity, depth, and interaction of a face-to-face conference format but wish to complete many of the components on your own time and at your own pace.
- You desire one-on-one interaction with course instructors and other course participants.
- You want to create a signature project that will directly apply to the goals you are working to achieve on your campus.
- You work well in a format where a portion of the work is self-directed.

Expand your donor base by learning how to improve and update your international prospect research skills.



# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

July 10, 19, 30, & August 13, 2012 :: 1:00 – 2:30 p.m. EDT :: Online

## COURSE FORMAT AND SIGNATURE PROJECT

This course consists of four live sessions, as well as assignments between each of the live sessions. The structure of this online course mirrors the structure of a prospect profile. The first three live sessions cover research strategies for wealth, assets, and philanthropy. The fourth live session explores ways to design effective capacity rating formulas for your international prospects and how to outfit your research office for increased international work. Tips for using international search engines and overcoming language barriers will be included throughout the course. The issues and trends described in this course will be illustrated with key examples from countries around the world.

Between sessions, you will have the opportunity to practice what you've learned through the creation of a signature project that is specific to your work and your institutional setting. Your project for this course will involve creating two full prospect profiles. You will complete the project in phases and receive feedback on the project from the course instructor each week.

**To ensure maximum interactivity and personal attention, enrollment will be limited. Take advantage of this unique opportunity while space is still available!**

## SESSION 1: SOURCES OF WEALTH

TUESDAY, JULY 10, 2012 :: 1:00 – 2:30 P.M. EDT

### SYLLABUS

- Business, careers, and compensation
  - Researching public and private company records
  - Sources of actual compensation figures and general salary trend information
- Inherited and family wealth
  - Wealth and power lists
  - Genealogy resources
  - Strategies for untangling family wealth

### ASSIGNMENTS

- Begin your search on 2-3 donors
- Note any issues you have finding your way to information
- Prepare questions for Beth and begin posting those questions on the class site
- Post completed portion of your prospect profiles to course site

## SESSION 2: REAL ESTATE AND OTHER ASSETS

THURSDAY, JULY 19, 2012 :: 1:00 – 2:30 P.M. EDT

### SYLLABUS

- Introduction
  - Overview of how asset allocations differ by country/region
  - What implications these have for your research
  - Resources
    - Reports where researchers can find country-specific asset allocation information to provide context for your own work
- Real estate
  - Who keeps track of and shares real estate records?
  - Key models of real estate transaction information sharing around the world
  - Strategies for finding real estate values and comparables (when original records are not available)

- Finding homes in another countries in addition to the one in which the prospect resides
- Other signs of wealth
  - Art collections
  - Wine
  - Boats
  - Political contributions
- Working with gift officers to make these details useful

### ASSIGNMENTS

- Continue working on your donor reports, adding the sections covered today
- Note any issues you have finding your way to information
- Prepare questions for Beth and post those questions on the class site



# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

July 10, 19, 30, & August 13, 2012 :: 1:00 – 2:30 p.m. EDT :: Online

## SESSION 3: PHILANTHROPY: TRENDS AND RESEARCH STRATEGIES

MONDAY, JULY 30, 2012 :: 1:00 – 2:30 P.M. EDT

### SYLLABUS

- Cultural and other factors encouraging or discouraging individuals to give
- Relationship between individual giving priorities and corporate philanthropy outside the US
- Information disclosure norms in different parts of the world
  - Implications for finding individual giving records as well as foundation/grantmaking details

### ASSIGNMENTS

- Continue working on your donor reports, adding to the previous sections you've researched
- Note any issues you have finding your way to information
- Prepare questions for Beth and begin posting those questions on the class site
- Post completed portion of your prospect profiles to course site

## SESSION 4: RATINGS AND RESOURCES

MONDAY, AUGUST 13, 2012 :: 1:00 – 2:30 P.M. EDT

### SYLLABUS

- Rating your international prospects
  - Why the formulas researchers use for US-based research projects won't (necessarily) work for international prospects
  - How to design more accurate country-specific capacity rating formulas
- Resources for your international research office
  - Assessing your international prospect pool and institutional fundraising plans
  - Determining resource needs and finding the best databases/tools
  - Creating a budget

### ASSIGNMENTS

- Complete your 2-3 donor reports
- Submit two reports to Beth for final review

#### CFRE Continuing Education Credits

This webcast has been approved for continuing education credits toward the CFRE International application for initial certification and/or recertification.



# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

July 10, 19, 30, & August 13, 2012 :: 1:00 – 2:30 p.m. EDT :: Online

## INSTRUCTOR

---



### **Beth Bandy, Principal and Founder, International Fundraising Intelligence LLC**

Beth has more than 11 years of international research experience, spanning six continents and nearly 30 countries. In addition to serving the research needs of numerous foundations and nonprofits as a consultant, she previously was director of development research at Amherst College and managed prospect research efforts at Bennington College. Passionate about languages, she has studied French, Spanish, Italian, and Chinese (Mandarin dialect). Beth earned a bachelor's degree from Harvard University and has taken master's degree courses in public policy and management through the Centre for Financial and Management Studies at the University of London's School of Oriental and African Studies. She is the author of *China: A Guide for Prospect Researchers*.

## COMMUNICATION AND MATERIALS FOR ONLINE COURSE

---

After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. All materials for this course, including login instructions for the four live webcasts, will be housed on a course site. You will receive a URL, username, and password for this course site shortly before the course begins. (To participate in the live webcasts, you will need a computer with a high-speed Internet connection. You will have the option to receive audio via your computer speakers or telephone.)

## OPTIMIZING YOUR COURSE EXPERIENCE

---

We have designed this course for a single learner per registration. Included in your registration are credentials for the online course site, as well as the ability to receive customized feedback from the instructors on the assignments throughout the course that culminate in the signature project.

We recognize that you may still choose to participate in the four live webcasts as a team. If you choose this option, please plan accordingly for the following:

- 1) Please note that you will only receive one set of credentials for the course site, and these will be sent to the registrant. If others need access to the course site, please make arrangements to share your credentials once we provide them.
- 2) Also, you will only be able to receive feedback on one set of assignments / signature project. If multiple people are participating from your team, you will need to coordinate how to complete one set of assignments and submit them.
- 3) Finally, you should consider designating a lead team member at your site who can enter your team's responses to various interactive opportunities during the webcast.



# ONLINE COURSE: INTERNATIONAL PROSPECT RESEARCH

July 10, 19, 30, & August 13, 2012 :: 1:00 – 2:30 p.m. EDT :: Online

## REGISTRATION FORM

Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you.

Register online at [www.academicimpressions.com](http://www.academicimpressions.com)

## REGISTRATION FEES

Postmarked on or before July 3, 2012

Single site connection: Online Course: International Prospect Research \_\_\_\_\_ \$995.00 USD  
(After July 3, 2012, an additional \$75.00 fee applies for the first connection and each additional connection.)

Registrants receive a 50% discount on the CD-ROM recording. Please send me the CD-ROM \_\_\_\_\_ \$497.50 USD

Can't attend the live sessions? Please send me a CD-ROM recording of this online course \_\_\_\_\_ \$995.00 USD  
(For CD-ROM orders outside the United States and Canada, a \$35 international shipping fee will be added.)

Total amount enclosed or to be charged \$ \_\_\_\_\_

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.): \_\_\_\_\_

## ONLINE COURSE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Institution/Organization \_\_\_\_\_ Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

- Sign me up for **HEI: Daily Pulse** – impactful news, trends, and practices, sent daily
- Sign me up for **HEI: Weekly Scan** – the week's most critical news, with analysis of top stories and trends, sent on Fridays
- Sign me up for **HEI: Monthly Diagnostic** – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

## PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

### CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx) \_\_\_\_\_

Name on Card \_\_\_\_\_

Account Number \_\_\_\_\_

Exp. Date \_\_\_\_\_ Billing Zip Code/Postal Code \_\_\_\_\_

Security Code (last 3 digits on the back of Visa and MC \_\_\_\_\_  
or 4 digits on front of AmEx)

### CHECK/INVOICE

My check is included and covers \_\_\_\_\_ registration(s)

Check # \_\_\_\_\_

Please invoice me

Purchase Order # \_\_\_\_\_

(PO# not required to receive invoice)

## REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by May 4, 2012. A \$75 processing fee will be assessed. After May 4, 2012 a credit (less \$75 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.

