PROSPECT RESEARCH: A DO-IT-YOURSELF APPROACH FOR FUNDRAISERS

January 31, 2011 :: 1:00 - 2:45 p.m. EST

ACADEMIC IMPRESSIONS
WEB CONFERENCE
OVERVIEW

The persistent economic downturn continues to place increased pressure on higher education’s revenue centers, including advancement. However, what are you as a fundraiser to do when called upon to conduct more calls and visits with the same — or even less — research support as compared with last year?

Join us online to learn how to conduct your own fundamental development research to maximize your prospect visits. With an eye toward providing you with essential rank-order practices you can conduct on a daily basis, you will learn:

• How wealth and philanthropic profiles have changed since the financial collapse
• A comprehensive list of strong-prospect indicators
• Techniques for locating the top hard and soft strong-prospect indicators
• How to use liquidity information to refine your decisions

LEARNING OBJECTIVE

Conduct essential prospect research to improve your call- and visit-planning effectiveness.

WHO SHOULD ATTEND

Front-line fundraisers (including those in major/planned giving and leadership-level annual giving) with stretched or limited research support will learn how to conduct essential prospect research to improve their effectiveness as they plan their calls and visits. Please note this webcast is not for researchers or fundraisers with strong research support.

AGENDA

• Understanding the status of wealth in the US
  ◦ The IRS tables on giving
  ◦ The Capgemini Report
  ◦ Richistan
• Understanding the key indicators of strong prospects
• Techniques for locating hard indicator information
  ◦ Private business
  ◦ Public business
  ◦ Venture capital/hedge funds
  ◦ Professions
  ◦ Salary
• Techniques for locating soft indicator information
  ◦ Foundation participation
  ◦ Real estate
  ◦ Philanthropy elsewhere
  ◦ Publications and patents
• Beyond indicators: Using liquidity to refine your decisions
  ◦ Uses of income
  ◦ Non-liquid assets and their philanthropic limits
  ◦ Role in major vs. planned giving and pledges vs. deferred gifts
INSTRUCTOR

Marianne Pelletier, CFRE, Director, Advancement Research and Data Support, Cornell University

Marianne is currently managing the prospecting effort for Cornell’s $4 billion “Far Above” campaign. She has been in the fundraising field since 1988, when she joined the research team at Harvard’s University Development Office. Marianne has served as a researcher for Harvard, Lesley University, and Carnegie Mellon University, where she directed the research department. She previously served as director of annual giving and development services for Southern New Hampshire University. The president of APRA-UNY, APRA’s Upstate New York chapter, Marianne is also an associate with the Helen Brown Group, where she serves on HBG’s data mining team.

SPONSOR

WealthEngine is a leading provider of sophisticated wealth identification and prospect research and analytics to financial services firms, hospitals, institutions of higher education and nonprofit organizations.

LOGGING IN TO THE WEBCAST

After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. Each registrant will also receive an email with appropriate login information and more information regarding the event a few days prior to the start of the event. The day of the conference, you will receive another email with the same information. To participate, 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.

WHAT IS A SINGLE SITE CONNECTION?

A site connection allows a single connection to the Web conferencing software and teleconference. We encourage you to set the event up in a conference room or classroom from a single computer in order to allow multiple stakeholders from your campus to participate. Remember, as long as only a single computer connects, you can bring as many people as you want to the event. Because there are no travel expenses and only a single registration fee is required, each additional participant lowers the cost per person significantly. Purchasing a site connection and inviting everyone involved in a particular topic is a great way to provide cost-effective professional development. Please note that you will have the option to receive audio via your computer speakers or telephone.

If for any reason a relevant stakeholder cannot co-locate for the session, we encourage you to include that person by purchasing an additional connection at the reduced fee of $195 per session. This will ensure that every member of a team receives the same relevant, timely information in the most efficient way. If an interested party cannot participate at the designated time, or if someone would like to view the presentation again, an archived copy of the event will be available for 60 days. If you have any technical or purchasing questions, please contact us at 720.488.6800.

CFRE Continuing Education Credits

Most Academic Impressions fundraising-related events are applicable for continuing education credits toward the CFRE International application for initial certification and/or recertification. This program is currently being considered for approval.
PROSPECT RESEARCH: A DO-IT-YOURSELF APPROACH FOR FUNDRAISERS
January 31, 2011 :: 1:00 – 2:45 p.m. EST

REGISTRATION FORM
Make the most of the presentation: invite your whole team to participate from a single location at no additional cost.
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

REGISTRATION FEES
Postmarked on or before January 24, 2011
☐ Single Site Connection: Prospect Research: A Do-it-Yourself Approach for Fundraisers $350.00 USD
☐ Additional Site Connection $195.00 USD
(After January 24, 2011, an additional $75.00 fee for the first connection and $50.00 fee for each additional connection applies)
☐ Registrants receive a 50% discount on a CD recording of this session. Please send me the CD $175.00 USD
☐ Can’t attend the live session? Please send me a CD recording of this webcast $350.00 USD
(For CD orders outside the United States and Canada, a $35 international shipping fee will be added.)

Total amount enclosed or to be charged $

WEB CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)
Name __________________________ Job Title __________________________
Institution/Organization __________________________ Address __________________________
City ______________ State/Province __________ Zip/Postal Code __________ Country __________
Telephone ______________ Fax ______________ Email ______________

(Additional contact information for registration confirmations and pre-conference communication.)
Additional Contact Name __________________________ Additional Contact Phone __________________________
Additional Contact Title __________________________ Additional Contact 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 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, 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 November 26, 2010. A $75 processing fee will be assessed. After November 26, 2010 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.