

**An Introduction to Prospect Research  
Workshop**  
18<sup>th</sup> March 2010  
10:00-16:00  
**Rm 539, Birkbeck College, Malet Street Building**  
**Agenda**

**Introduction**

Networking & Registration - **9:30-10:00**

1. Introductions

**The Role of the Researcher**

2. Prospect Research – what does the fundraiser need to know?
3. Prospect Research Case Study

**Tea Break 10:55-11:10**

4. Exercise One – Profiling – Issues arising

**Planning**

5. Prospect research project management
6. Creating a research brief and a research plan
7. Exercise Two – drafting a research brief

**Lunch – 12:15-13:00**

**Research Resources**

6. The Rich: Where do we find them?
7. A review of prospect research sources
8. Building a prospect research library
9. Using the internet

**Hands-On research**

11. Estimating wealth – some issues
12. Methods for estimating wealth
13. Wealth estimate case studies

**Tea Break 14:30 – 14:45**

15. Wealth estimate case studies: continued
16. Exercise Three – Wealth estimates

**Using Research 15:40**

17. Timely use of research
18. Planning your approach
19. Feeding back into the research loop

**6 Habits of the Fastidious Researcher**

**Review of session and questions – 15:45-16:00**