

More charities are recruiting dedicated teams of prospect researchers to help in all aspects of their fundraising. **REBECCA FUNNELL** and **CORRIE DARKER** explore the challenges facing these researchers and the skills they need to succeed

Fundraisers have always researched their prospects. After all, if they are to approach an individual, especially one with power and influence, common sense dictates that some preparation would be wise. However, the past 15 to 20 years have seen organisations move away from a reliance on *ad-hoc* information towards a more formal structure of in-house research teams with their own libraries and budgets, consciously planning the development of strategic relationships with individuals.

In the UK, dedicated research posts first started to be considered necessary around the late eighties as not-for-profits began to learn the lessons of major gift fundraising from the U.S. and started thinking in terms of nurturing relationships with potential major donors. Universities and a tiny handful of very large charities led the way.

The NSPCC was one of the first UK charities to have a researcher in post. Initially the research role was situated within the major gifts department, but as the value of research to a variety of fundraising areas became increasingly apparent, the charity established a separate information and research team. Having begun

with one researcher in the late eighties the research team is now nine people strong.

Helen Carpenter, business support manager at the NSPCC, says its researchers attend donor solicitation meetings on a regular basis and work proactively to identify and monitor progress on prospects. "NSPCC researchers are recognised as key consultants in the fundraising process, not just information providers," she says.

The University of Oxford established a dedicated prospect research department in 1987, closely followed by the University of Cambridge in 1989. Carrie Cocke, now development director of The United Learning Trust, was the first head of prospect research at Cambridge at a time when there were only two other posts in the development office – the development director and the head of the database. As this was the dawn of a much more conscious, co-ordinated approach to major gift fundraising, the initial returns were especially dramatic – and Cambridge received some startling six-figure gifts.

As this new discipline emerged, so did a need for some sort of cross-reference between organisations. Aware of being rather isolated in her prospect research role, Cocke worked with another prospect researcher, Chris Carnie, now director of Factory, to develop Researchers in Fundraising (RiF), which has since become a special interest group of the Institute of Fundraising.

As the resources available to researchers grow at an exponential rate and new types of information are published, so the value of networking and knowledge sharing increases. One of the biggest changes in the day-to-day role of the researcher has been affected by the emergence of new technologies, most particularly the internet. These days, most prospect research sources are accessed either through the internet or on CD ROM, allowing for much more flexible searching and a huge increase in the sheer volume of information available. While this is undeniably positive, it does bring challenges.

In the days when most prospect information was available in a limited, more easily defined body of sources, the main requirements of a researcher were to demonstrate meticulous attention to detail, and an ability to interpret and collate information in order to make appropriate relevance judgments.

The rise and rise



Now these skills of sifting and evaluation are more valuable than ever if the prospect researcher is to avoid drowning in the sea of information that surrounds them.

The increase in what is knowable has also raised the bar for researchers. No longer is it sufficient to rely solely on a limited checklist of research sources. Researchers also need to think laterally and creatively about ways of identifying that nugget of possibly crucial information that might give their major donor fundraiser the edge when looking to understand their prospect's motivations; or research routes that might reveal a difficult-to-find but strong prospect who is less likely to be receiving a deluge of fundraising approaches.

The rise of the internet has brought a global culture shift towards more openness not just among individuals but also for organisations, and this has exposed whole new prospect constituencies to the fundraising researcher. This demands that the researcher learns how to assess new types of information and develops specialist knowledge about a new range of professions. For example, now that law firms have started to make figures available about their profits per equity partner,

or two modules to aid fundraisers who undertake their own research, and some consultancies offer training seminars. However, the majority of prospect researchers are self-taught and have to proactively create the training they need using knowledge gleaned from peers.

This lack of formal training and career development isn't only problematic for the researcher. Charities often grasp the need for a dedicated prospect researcher, but

'It's up to researchers to professionalise their skills, develop their training and demonstrate value.'

have little guidance on the skills they should be looking for or how they can develop that person once in post, leaving prospect researchers under-utilised.

It can also be hard to justify the need for a research professional when there is little statistical evidence to demonstrate their value

that while the prime purpose of prospect research is to support the fundraising function, it is vital to recognise a researcher as separate – an information professional, different to a fundraiser with different skills, strengths and value.

There are already organisations in this country that view and use prospect researchers in this way. The Healing Foundation has developed and implemented a prospect tracking system that has allowed the organisation to focus its resources and target its cultivations in a much more structured way. This not only has the benefit of improving fundraising performance, but has produced data that allows the fundraising team to demonstrate, develop and justify their strategies to senior management and trustees.

With an increase in major donor fundraising income of 300 per cent over the past three years, according to the 2006 *Fundraising* report from the Institute of Fundraising, the return on investment in prospect research and solicitation planning is looking very healthy indeed. This means the work of prospect researchers is set to be more highly valued than ever.

of prospect research

a more detailed understanding of how lawyers are ranked within a firm is extremely valuable in helping the interpretation of these figures in ways that are meaningful within prospect research.

So how and where does a prospect researcher go to learn these skills? In our view current fundraising training packages offered by the Institute of Fundraising with the Directory of Social Change, offer little to the researcher who is not actively employed in fundraising. Conferences focusing on major donor fundraising may offer one

in reaching fundraising targets and adding value to development departments – prospect researchers have to learn how to analyse and market their successes too.

This is in direct contrast to the culture in the U.S. where the Association of Professional Researchers for Advancement (APRA) has pioneered a standards-driven approach to prospect research. The result has been significant growth in the power of the prospect researcher in the U.S. with many universities now employing research professionals at the same senior level as their development directors. The key to the U.S. approach is the awareness

However, a source of guidelines, formal training and accreditation has not appeared on the horizon. We should remember that the APRA in the States was created by researchers for researchers; it must now be up to UK researchers to professionalise their skills, develop their training, and demonstrate their value. ■



Rebecca Funnell is a director of Telos Research.



Corrie Darker is development officer for trusts and research at the Healing Foundation.