



PROSPECTING FOR GOLD LTD.
Wealth Intelligence Services™

INFORMATION PACK



THE LEGACY PROSPECT DATABASE™ 2008
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RESEARCH SERVICES

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INTRODUCTION

The Legacy Prospect Database is a new database developed specifically for legacy marketing and planned giving fundraising.

The Legacy Prospect Database is the first database in the UK to combine factual information about people's property wealth and life-stage information as well as their other liquid assets.

The Legacy Prospect Database contains over 300,000 records of individuals over 56 years of age who own houses above £500,000 in value and have lived in the house for at least 10 years. In total the database contains up-to 30 attributes. The attributes include

Length of Residency

Head of Household Age Band

Property Value Band/House Price Index computed from actual house sale transaction data from The Land Registry

Council Tax Band

Property Type

Region /Postal Area/Postal District

Household with/without children living at home

Wealth-band

Donor/trustee/Director/Shareholder



PRICES FOR RESEARCH SERVICES

- **Set up fee** per client data file **£500.00+£100 per column**
- **LPD Tag Report** **£2.50** per name
- **LPD Snapshot Report** **£5.00** per name
- **LPD Snapshot Report (with WID attributes)** **£10.00** per name
- **Standard Profile** from name identified by client **£50.00** per profile
- **Full Profile** (showing relationships and networks) **£250.00** per profile

CONSULTANCY

- **Strategic Planning Session** (using Faststats) **£500.00 for ½ day**
- **Research Consultancy** **£500.00 per day**

VAT to be added to all above prices



DATA FILE SET UP OPTIONS

Prospecting for Gold offers its clients' the following option.

• **Upload fee and Matching** **£500.00**

This sophisticated data analysis software tool enables us to analyse large databases and produce very detailed segmentation results.

If you wish to increase the segmentation results the data file can be loaded with additional columns. The most relevant additional information being:

- your supporter I.D. or Ref No.
- committed giver or cash donor
- male/female
- level of gift/recency of gift

Each additional column is **£100.00**

VAT to be added to all above prices



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Sample [LPD Tag Report](#)

Comment [AT1]: James, the sample here could benefit from a screenshot or something more attractive than a simple list of attributes., especially if resellers are going to incorporate it into their documents

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This report contains the following information:

Title
Name
Suffix
Address
Match Type – Household match or Individual match
Supporter I.D.

Please view an example here

<http://www.prospectingforgold.co.uk/index.php?pg=55>

Sample [LPD Snapshot Reports](#)

The sample Snapshot reports contains details of all the attributes held for each record. This is presented as a spreadsheet.

Further information can then be added to the report including:

- personal details
- match type
- supporter I.D.
- supporter type

Please view example of the three types of snapshot reports here

<http://www.prospectingforgold.co.uk/index.php?pg=56>

Comment [AT2]: James, should we add a LPD Snapshot report with WID

DATA SECURITY CONTRACT

Prospecting for Gold Ltd ([PFG](#)) is registered with the Data Protection Registrar, Reg. No Z7945617

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Copyright and Data Protection

1. Copyright on any data supplied by the client remains at all times with the client.
2. The copyright in all art work, copy and any other work capable of being subject to copyright produced or created by [PFG](#) at the specific request of the client shall vest in the client.
3. [PFG](#) is licensed by the client to analyse, edit and add to the data supplied by the client where this is relevant to the project. Information will be obtained and processed fairly and lawfully in compliance with the Data Protection Act.
4. [PFG](#) undertakes to abide at all times by the Data Protection Act and all other relevant legislation and regulations in relation to the discharge by it of its obligations under this Agreement.

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Security and Confidentiality

1. [PFG](#) may not use data supplied by the client to add to or enhance information held for any other purpose. Information obtained by [PFG](#) from any other sources during the course of the research may be used for other purposes.
2. [PFG](#) agrees to keep any information it receives from the client in trust and to take all reasonable steps to safeguard the confidentiality of such information and to prevent, at any time either during or after termination of this Agreement, any unauthorised disclosure by employees.
3. [PFG](#) is licensed by the client to make up to three paper copies of data supplied by the client and one copy on an electronic system such as a computer. The data may not be duplicated or reproduced in any way.
4. [PFG](#) will destroy the original and any paper copies of data and destroy any copy on a closed electronic system within 14 days of the end of the project or termination of the contract. [PFG](#) reserves the right to keep the specific client data on all matched records required to carry out data analysis and produce any tag or snapshot reports ordered. [PFG](#) undertakes that it shall not deal in, exploit or use the Data (in whatever form) in any manner whether during the currency of this Agreement or after its termination.
5. The client will at all times have access to information on [PFG](#)'s research methods and progress with the projects.

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Comment [AT3]: Data warehousing

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A Word of Caution

- 1. Please be aware that if you have sourced names from public directories, for example Debrett's and Who's Who, we may not be able to add further content. You may wish to exclude those records from the transfer file.
- 2. The results we obtain may include names which you have already identified as prospects as part of your fundraising process. We therefore recommend, if you do not wish these names to be included in the screening, that they be removed from the transfer file.

For Prospecting for Gold Ltd

Signed
Position

For the Client

Organisation
Address
.....
.....

Signed
Position
Date

FILE LAYOUT for DATABASE SCREENING DATA TRANSFER

Overview

Files can be submitted electronically (email or via the secure FTP site), or physically, via CD. If FTP access is required, Our network administration team will create a dedicated, secure folder for each client that requires strict IP constrained access and logon details. Please email ptalbot@matrix-data.co.uk for further information regarding FTP protocols. This is ideal for very large files (500,000+ records).

File Layout Detail

Our matching algorithms expect to find component parts of names and addresses in each file being compared. The less data that is provided, the more 'fuzzy' the match result becomes.

For optimal matching to occur, a header row of column names should be included at the top of a file and the following structure and in this sequence.

1	Title	Mr, Mrs etc
2	Forename and middle names (concatenated)	'John David' or 'John D' or 'J D'
3	Surname	As written
4	Address Line 1	Address data
5	↓	Address data
6	Address Line 6	Address data
7	Postcode	Address data
8	Client database system ID	Your record ID
9	Additional record Variable (optional)	For greater analysis segmentation
10	Additional record Variable (optional)	For greater analysis segmentation
11	Etc...	For greater analysis segmentation

Example data layout

This is an example of the core data we require in order to match records – please use this layout as the required minimum template

Additional columns can be appended to the end of the file if required.

Title	Firstname	Surname	Address 1	Address 2	Address 3	Address 4	Postcode	Client ID
Mrs	P	Ashcroft	72 Burns Road	Aberdeen	Scotland		AB1 6NS	248671
Mr	S	Humphries	18 Great Western Road	Aberdeen	Scotland		AB1 6PY	258663
Mrs	Dawn	Lucy Humphries	34 Salisbury Terr	Aberdeen			AB1 6QH	258664
Major	P G	Malins MBE MC	6 Deeside Park	Aberdeen	Scotland		AB1 7PQ	214096
Lt/Col.	H J T	Steers	22 Springfield Gardens	Aberdeen	Aberdeenshire	Scotland	AB1 7RX	183638
Major	Tim	O'Brien	Redmarshall	6 Kingswood Walk	Kingswells	Aberdeen	AB1 8AG	255714
Dr	J F	Lawrence	8 Ruthie Road	Aberdeen	Aberdeenshire		AB10 7HN	153038
Mr	David Adam	Allan	13 Hutchison Terrace	Aberdeen			AB10 7NN	140873
Mrs	M	Allan	70 Gordon Street	Aberdeen	Scotland		AB11 6EW	29851
Mr	Matthew G	Strachan	23 Devanha Terrace	Ferryhill	Aberdeen	Grampian	AB11 7T W	52894
Mr	M	Anderson	23 Devanha Terrace	Ferryhill	Aberdeen	Grampian	AB11 7T W	167792
Mrs	A A	Kelly	38 Brunswick Place	Aberdeen			AB11 7TF	21669

Additional Notes

File Formats

Ideal formats for us to receive are comma separated values (.csv) or Text (.txt). Excel files (.xls) are acceptable, but Excel' internal limits of 65,000 rows per work sheet will limit suitability.

File Compression

Files should be compressed before sending electronically, and if preferred, password protected. WinZip is the most common compression utility and format – WinRar is also acceptable (compresses even more).