

Legacy Prospect Database
Information Pack

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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 392,000 records of properties in the UK in the top three Council Tax Bands (F, G & H) and owned by individuals aged over 55 with information about their age, gender, years of residency as well as many other attributes of relevance to legacy fundraising. The Legacy Prospect Database contains the following attributes:

- Household Identifier
- Address Details
- Length of Residency
- Head of Household Age Band
- Council Tax Band
- Region /Postal Area/Postal District
- Household composition – single or multi-occupancy
- Directorships at address



PRICE INFORMATION

Prices for Research Services

- **Free Data Summary** **£ Free**

Notes:

1. One Free Summary per client, further Summaries priced on application.
2. After receiving the Free Data Summary, the client can either move to the Preliminary Match Report below, or directly to purchase of a Legacy Tag Report, where a minimum purchase order charge of £500 applies.

- **Preliminary Match Report** **£500.00**

A detailed segmentation analysis of client records found in the Legacy Prospect Database, enabling the recipient to accurately select the records of greatest interest for purchase of further information. This report can also include other variables if supplied with your data file; typically 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

- **Legacy Tag Report** **£3.00 per name**

Consultancy

- **Strategic Planning Session** **£500.00 for ½ day**
- **Research Consultancy** **£500.00 per day**

VAT will be added to all above prices on this page



REPORTS

Free Data Summary

A Free Data Summary can be provided which gives an indication of likely matches to the Legacy Prospect Database.

The summary contains counts of:

- A summary of address quality (UK addresses only)
- Any properties that may be excluded from the match process
- Likely matches, which are then in turn split by
 - Council Tax Band
 - Age Band (Head of Household)
 - Household Composition
 - Directorships

A sample Free Data Summary appears in Appendix 1

Preliminary Match Report

This report provides a count of property matches by Council Tax Band and

- Age Band (Head of Household)
- Geography (Region)
- Household Composition
- Directorships

A sample Preliminary Match Report appears in Appendix 2

Legacy Tag Report

The Legacy Tag Report contains details of all the attributes held for each record, namely:

- Household ID
- Address Details
- Supporter ID
- Council Tax Band
- Age Band
- Household Composition
- Directorships

Further information can then be added to the report including:

- Personal details
- Supporter type

A sample Legacy Profile Report appears in Appendix 3

Please note that the precise contents of any report can be varied at the discretion of Prospecting For Gold Ltd without notice.



Appendix 1 – Free Data Summary

Free Data Summary Report

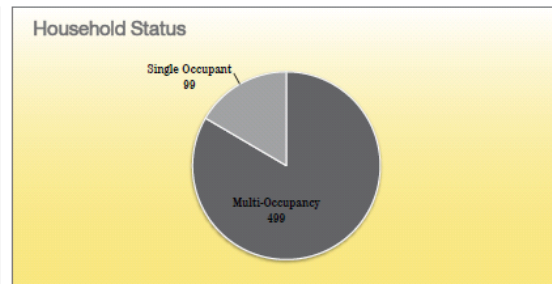
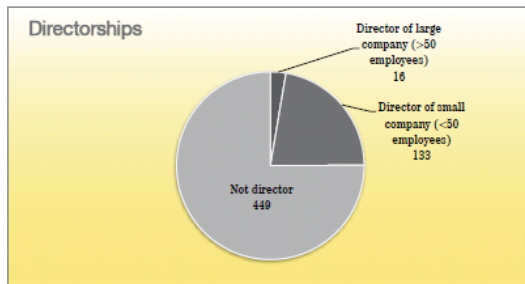
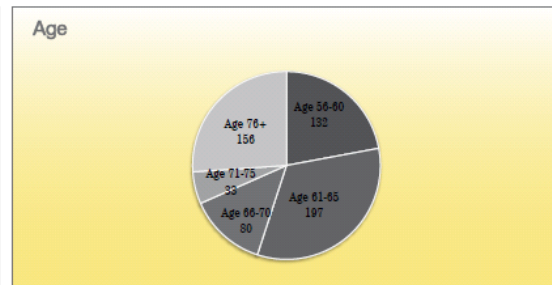
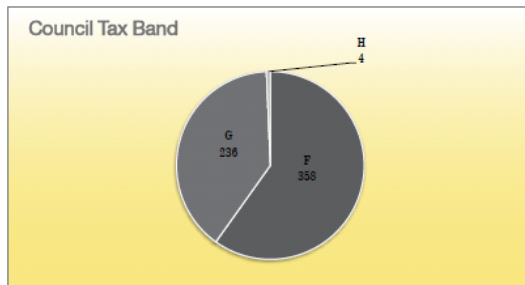
Date	18/06/2011
Organisation Name	Example
Number of Supplied Records	31,437
Number of Records which can be validated to Post Office Address File	30,323 96.5%
Remaining Records (includes overseas)	1,114 3.5%
Total Records Available for matching process	31,437 100.0%
Unique Properties represented by records	21,106
Number of matched properties	508
% of Matched Records to Legacy Prospect Database	3%

*The Legacy Prospect Database contains around 1.7% of UK Properties
All Subsequent Figures Relate to Matched Properties Only*

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

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

The Legacy Prospect Database contains 390,000 records of properties in the top three Council Tax bands with information about the homeowner's age, gender, years of residency as well as many other attributes of relevance to legacy fundraising



Appendix 2 – Preliminary Match Report

The following are **example extracts** from a sample Preliminary Match Report.

The Legacy Prospect Database (LPD) is a database of 392,000 UK properties where the owner(s) are of the correct age and profile, and the property of sufficient status, to consider legacy donation. All figures quoted in this report are **either a count of your supporters, or a count of matched properties (households)**; your supplied donor file may contain one or more individuals recorded at each property.

Records supplied	14,987
Unique Properties Represented Where your address can be matched to current Post Office address records	13,534
Properties Matched	399
Match Rate The Legacy Prospect Database has approximately 1.7% of all UK Properties	2.9%

The following pages set out some preliminary results and analysis of the data mining. This has been conducted in order to identify the next steps with regard to obtaining more details about the properties that have been matched. We are happy to arrange a meeting to run through the analysis and possible next steps in more detail.

PART ONE – NATIONAL SUMMARIES

This section details counts of your matched properties for the whole of the UK. Depending upon your legacy strategy, this may be sufficient to identify those records which are of particular interest to you. Subsequent sections give regionalised breakdowns, subsets of interesting properties, and analyses of any variables that were supplied in the source data.

Council Tax Band

The following table shows a count of individuals at matched properties in your supplied data file, according to the Council Tax Bands.

Row Labels	Supporters	Households
F	256	237
G	172	160
H	2	2
Grand Total	430	399

Household by Status

This table shows the counts for each age group and property tax band, and shows those households where the occupant is single.

Supporters	Age 56-60	Age 61-65	Age 66-70	Age 71-75	Age 76+	Grand Total
Multiple Occupancy	75	143	51	18	98	385
F	48	81	25	8	57	219
G	27	61	26	10	40	164
H		1			1	2
Single Occupancy	6	14	3	2	20	45
F	5	10	3	1	18	37
G	1	4		1	2	8
Grand Total	81	157	54	20	118	430

Households	Age 56-60	Age 61-65	Age 66-70	Age 71-75	Age 76+	Grand Total
Multiple Occupancy	70	130	48	17	89	354
F	43	76	23	8	50	200
G	27	53	25	9	38	152
H		1			1	2
Single Occupancy	6	14	3	2	20	45
F	5	10	3	1	18	37
G	1	4		1	2	8
Grand Total	76	144	51	19	109	399

PART FOUR – SUBSETS BY CLIENT CRITERIA

Here are some counts of matched properties with data provided from your our database which help to further describe the true nature of each household. Note that the following counts are for numbers of **supporters**.

Last Gift	F	G	H	Grand Total
In the last 12 months	175	123	2	300
12 – 24 months	1			1
24 – 36 months	2	1		3
Over 36 months	78	48		126
Grand Total	256	172	2	430

On Legacy Mailing List	F	G	H	Grand Total
No	148	95		243
Yes	108	77	2	187
Grand Total	256	172	2	430

Appendix 3 – Legacy Tag Report

The Legacy Tag Report includes name and address details, plus details your client reference number. An example is shown below:

Household ID	Address	Postcode	Region	Council Tax Band	Donor Ref	Other Client Fields
183514886	Address will appear here on	CB11 4UN	East Anglia	G	1002345	Data supplied by client will
187479585	actual report	EH39 5HJ	Scotland	H	1002346	appear here
187870341		EX2 4LA	South West	G	1002347	
195789261		NW6 5JN	Central London	H	1002348	
196089323		OX1 5BH	South East	H	1002349	
198023976		RH9 8EH	South East	H	1002350	
200181828	Address will appear here on	SN4 0RU	South West	G	1002351	Data supplied by client will
200549061	actual report	SP5 5JN	South East	G	1002352	appear here
200693170		SS11 8AS	South East	G	1002353	
201172298		SW11 6NR	Central London	G	1002354	
202008575		TN29 0TR	South East	G	1002355	
202332442		TR4 9NR	South West	F	1002356	
202998465	Address will appear here on	W2 2NU	Central London	G	1002357	Data supplied by client will
204005214	actual report	WS15 3JP	West Midlands	H	1002358	appear here
204285086		YO13 0RP	Yorkshire & Humberside	G	1002359	

Household ID	Age Band	Length of Residency	Household Status	Directorships
182255110	Age 76+	11 + Years	Single Occupant	Director of small company (<50 employees)
186016485	Age 66-70	11 + Years	Multi Occupancy	Director of small company (<50 employees)
192151588	Age 76+	8 Years	Single Occupant	Not director
193717360	Age 56-60	11 + Years	Single Occupant	Director of small company (<50 employees)
193845653	Age 61-65	11 + Years	Multi Occupancy	Not director
195288705	Age 71-75	11 + Years	Single Occupant	Not director
195813263	Age 56-60	11 + Years	Multi Occupancy	Director of small company (<50 employees)
197205937	Age 61-65	11 + Years	Single Occupant	Not director
197817361	Age 56-60	9 Years	Multi Occupancy	Director of large company (>50 employees)
199302160	Age 56-60	11 + Years	Multi Occupancy	Director of large company (>50 employees)
201237589	Age 56-60	10 Years	Single Occupant	Not director
201267216	Age 76+	11 + Years	Multi Occupancy	Not director
201615325	Age 76+	11 + Years	Multi Occupancy	Director of small company (<50 employees)
201897254	Age 56-60	10 Years	Multi Occupancy	Not director



The table below defines the expected contents of each of these columns.

The actual reports may vary at the discretion of Prospecting for Gold Ltd

LPD Variable	Description
Household ID	Unique identifier for each address (property)
Address Lines	Address Details of the property
Postcode	
Region	Region of the UK derived from Postal Area
Council Tax Band	Council Tax Band of Property (F, G or H only)
Age Band	Sourced from lifestyle surveys or Credit reference applications where age or date of birth is disclosed. Ages are then incremented over time if the same individual(s) are known to reside at the property. Where there is a male and a female head of household*, the older of the two ages is chosen.
Length of Residency	Number of years at the same address according to publicly available records such as Electoral Roll, Shareholders Register, Directors database and Council Tax records
Household Composition / Status	Household Composition is derived by analysing the combination of genders and surnames at an address.
Directorships	Names and addresses of directors are supplied by Companies House