Local/Regional Organizations: Frequently Asked Data Questions

Why are two different types of files (account-related data and transaction-related data) required?

We ask for data broken out into two files because the account-related file should be organized by donor (i.e., one record per donor), and the transaction file should be organized by gift (i.e., one record for each gift). The files need to be organized as described in order to be compatible with the tools Target Analytics uses to analyze data.

What should the layout of these files be like?

Your file's layout will vary based on the database systems you use and the products you order. Our support department can help you with specific questions.

A sample account-related data file layout looks like this:

Donor ID	Name	Address	City	State	Zip	Status	Donor Type	Suppression
01234	John Doe	56 Main St.	Anywhere	MA	12345	A (active)	I (individual)	NM (no mail)
56789	Jane Doe	57 Main St.	Anywhere	CA	78910	L (lapsed)	I (individual)	no suppression

A sample transaction file layout looks like this:

Donor ID	Payment Date	Payment Amount	Source Type	Source Codes
01234	01/01/2005	123.00	M (mail)	(specific fundraiser code)
01234	01/01/2000	56.00	T (telemarketing)	(specific fundraiser code)

Why are the following fields required?

Account ID: Allows us to distinguish between individual accounts (if there is more than one "John Smith" on your file) and enables us to link donor records with giving history. It is critical that the account ID appear in both files.

Donor Status: Lapsed, inactive & deceased donors need to be differentiated from active donors in order for TAG to determine certain statistics, like renewal/reactivation & attrition. If you don't flag inactive/lapsed donors on your system, please let us know what your organization's criteria for defining a lapsed donor is (e.g. no gifts in the last 3 years) and we can extrapolate the donor’s status from activity in the gift file.

Source Codes: many of our products require that we are able to differentiate between different "motivators" for giving. This could be as simple as identifying gifts that came in through direct mail, telemarketing, events, and other broad sources or “buckets,” or it can be as detailed as a code that indicates a specific mailing & package.

Why do we need to include inactive, lapsed and deceased donors?

These donors and their giving history provide valuable detail for our models, if you are ordering acquisition lists or Target Tags from us. Also important for acquisition lists is the fact that we remove the names that appear in your file from the lists we ultimately deliver to you. We can't remove names we don't know are on your file, and as a result you may get names you already own in the acquisition list if you don't send us a complete file. If you are ordering donorCentrics reports or other program analysis, the historical information is necessary for accurate stats on areas like attrition and renewal/reactivation.

Are different types of data required for lists, tags, DonorCentrics reports, and other products?

It's true that some products have specific requirements. Our data request form reflects an "ideal" data set that could be used for almost any product Target Analytics offers. For list orders in particular, it may be possible to provide less detail. If you have questions about what you should include for your order, please contact our support line at (617) 583-8576, or email ftpsupport@targetanalysis.com.

How far back in our organization's history should files go?

Your files should both go back as far as you have computerized records. The more detail and history you provide, the more information we have to include in analysis or in a list model. For donorCentrics reports and other program analysis the historical records inform statistics in the years on which we report-- for example, if you only send 5 years worth of data, all donors in the first year of data you send look like brand-new donors! We understand that due to things like database conversions and staff or program changes, your data may not be totally consistent from the earliest records to the most recent. We still ask that you provide whatever records you have, and our analysts will work with you to determine how to handle records for which information may be incomplete.

Can we break large data files up into smaller segments before sending them to Target?

Absolutely! If sending all names or gifts in one file creates a file that is too large to export easily, you can break files up into as many segments are necessary to create files of a convenient size. You do, however, need to be careful that you aren't creating duplicates by pulling records into more than one segment. We recommend breaking up the account-related file alphabetically by last name (e.g. account file #1 is A-M and account file #2 is N-Z), and the transaction-related file by gift date (e.g. transaction file #1 is 1987-1995 and transaction file #2 is 1996-present).

What should we do if our organization doesn't capture some of the information Target requests?

Our data request is meant to include a wide range of data and fundraising practices, so it's not unusual for clients to tell us they don't capture some of the information on our list. If your organization doesn't have a pledge program, for example, just skip over the pledge-related fields in the request. It's also common for organizations to track the information we want, but not exactly the way it appears in the data request. Say you don't have a single "source code" field, but you do have fields for campaign & appeal information. In place of the single source code field, include the appeal and campaign fields.

Our organization tracks information that Target hasn't requested. Should we include extra fields?

In most cases, you don't need to include information not specified in the form. Occasionally, we may work on special projects that have additional requirements--we try to provide custom data specs for organizations participating in those projects. If you have any questions about what to include in your file, please follow up with a Target Support Specialist via e-mail at ftpsupport@targetanalysis.com, or call (617) 583-8576.

Who do we contact with specific questions about data requirements?

You may be referred to a specific Support Specialist with expertise in your type of organization or the product you have ordered, in which case you can address questions to that person directly. If you don't have a specific contact, please email us at ftpsupport@targetanalysis.com or call (617) 583-8576 with any data-related questions.