

Data Requirements for Colleges and Universities

The first step in producing your **donorCentrics**[™] reports is for you to deliver the required data to Target Analytics. We hope to be working with your organization for many years, so we will help you devise a standard data delivery process that can be reused every time you use our services. Our goal is to simplify this process for you and to efficiently interpret and analyze your data.

If you have any questions, please contact ftpsupport@targetanalysis.com or 617-583-8576.

I. WHAT YOU NEED TO SEND

In order for Target Analytics to provide you with an Overall Program Assessment, we need the following files and documentation from your institution:

Alumni and Donor Information Download. Records of all alumni (degreed and non-degreed, donors and non-donors) and all non-alumni donors. Please check with Annual Giving office if you have questions regarding sending the names and addresses of alumni.

Gift Transaction History Download. Giving records for all alumni and non-alumni donors. This file should contain one record per individual gift transaction.

File layouts of the Gift and Alumni/Donor files.

Code translations for each column included in the download files. If possible, please send code translations in a spreadsheet, ASCII text file, or in a Word document table.

The completed **Data Download Information Form.**

Although we prefer the following file layouts, if you do not have fields that correspond directly to the fields listed below, you may choose to send other fields which provide the same information.

1. Donor/Alumni Information Download File

Requirements:

The file should contain records for:

- o all alumni (whether donors or not); and
- o all non-alumni donors (e.g. friends, parents, spouses, corporations)

The file should contain **one record per alum/donor.**

For the degree, class year, and school fields, we only need information relating to your institution.

If you are uncertain whether to include a particular field from your system, please include it anyway.

Field	Description
Account ID	
Account Type	codes distinguishing alumni, parents, friends, alumni organizations, corporations, foundations, etc.
Full Name	e.g., Joseph K. Jones, or, if applicable, Mr. Joseph K. Jones and Mrs. Janet Jones

Address	e.g., 100 Target Avenue N., Apt. 2. Use HOME address whenever possible.
City	
State	
Zip Plus 4	
Home Phone	include area code
Email Address	
Alumni Association Member Status (if applicable)	
Alumni type	codes distinguishing undergraduate and graduate alumni. On some systems, this information may be apparent through the use of Degree and School fields.
Undergraduate Degree 1	BA, BS, etc.
Undergraduate Class Year 1	graduation year
Preferred Class Year	Class year to be used for analysis
Undergraduate College/School 1	universities: Biology, Liberal Arts, Business, etc.
Undergraduate Degree 2	
Undergraduate Class Year 2	
Undergraduate College/School 2	
Advanced Degree 1	universities: MA, MS, PhD, MBA, etc.
Advanced Degree Class Year 1	
Advanced Degree College/School 1	universities: Law, Medicine, Business, Philosophy, etc.
Advanced Degree 2	
Advanced Degree Class Year 2	
Advanced Degree College/School 2	
Gender	
Donor Status	Active, inactive, lost , or deceased status.
Deceased Date	
Solicitation Restrictions	do-not-solicit, do-not-mail, do-not-phone, do-not-exchange, etc. Include “lost” and “bad address” if not included in donor status field above.
Married to alum	
Spouse ID	
Campus	If your school has different campuses
Affinity	Alumni association, student government, athletics, yearbook, Greek, etc.
Planned Giving Interest	Identify individuals who have made or promised planned gifts, and individuals who have requested information about planned giving to your school.

Anonymous Donors	A flag marking anonymous donors
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2. Gift Transaction History Download File

Requirements:

The file should contain all gift transaction records for all donors as many years back as you have good data on your system.

This file should contain **one record per individual gift transaction.**

Note to Raiser's Edge users: When preparing the export file for the transaction-related data, please use the 'Gift export' option rather than the 'Constituent export' on Raiser's Edge. The Gift export option will create the appropriate text file for our system.

Field	Description
Account ID (of the Donor)	
Gift ID	unique identifier for each gift.
Payment Date	date field with year in YYYY format. Please exclude timestamps.
Payment Amount	Please use format without \$ and commas.
Transaction Type	codes distinguishing between pledges, pledge payments and outright gifts. On some systems, may also indicate matching gifts, matching gift credits, etc.
Payment Method	credit card, check, EFT, payroll deduction
Pledge ID/Installment ID	id field linking pledge payments made on a particular pledge or installment series. Optional if already indicated by pledge id or other field.
Installment Indicator	indicates a payment made as part of a pledge or installment series. Optional if already indicated by pledge id or other field.
Soft Credit Indicator	indicates whether payment amount is a hard or soft credit. Optional if already indicated by Transaction Type, Credit Type or other field.
Soft Credit Amount	on some systems, soft credits are indicated by a memo credit or associated credit field in the same record as the legal credit. Please include all credit amount fields if applicable.
Relationship Code/ID	code or id field linking hard- and soft-credited gifts, gifts from spouses, matching gifts.
Spouse ID	indicates ID of alumni spouse sharing a credit for a gift. Optional if already indicated in the Relationship Code field or other field.
Matching ID	links matching gift record with the record of the matching gift. Optional if already indicated in Relationship Code field or other field.
On-Behalf-of Gift ID	links hard credit of donor to record individual on whose behalf the gift was made. Optional if already indicated by Relationship Code or other field. An on-behalf-of gift is a gift given by a corporation or family trust on behalf of the alum.
Source Code	how gift was motivated - mail, volunteer phone call, paid phone call, event, publication, etc. (e.g. Annual Fund, Physical Plant, Athletics, Specific School).
Designation or Fund Code	the designated use for the money - restricted, unrestricted, particular campaign, etc.
School Allocation Code	indicates destination of gift within institution, e.g., Law School, Undergrad Biology program, Graduate Biology program, Liberal Arts, Business, etc. For some schools, this may be the same as the Designation Code.

NEW for 2006!
Athletic Gift

Include for any athletic giving on your file. Please distinguish between gifts to athletic scholarships and all other types of giving to your athletic program. Optional if this information is included in the fund code or allocation code field.

4. File Layouts

Please make sure your file layouts contain the following information:

Fixed-width (positional) files:

field name (your system)
field name (requested by Target Analytics)
starting position
ending position
length
datatype (alpha, numeric, date)
description (if not apparent from field name)

e.g.:

Field	TAG field	start	end	length	datatype	description
Donor ID	Account ID	1	10	10	alphanumeric	donor or alumni ID

Delimited files:

field name (your system)
field name (requested by Target Analytics)
type of delimiter, including optional delimiters

5. Code Translation File

Please send a file with codes and translations for any codes in your file (e.g. source codes, fund codes, allocation codes, degree codes). Include the following fields in this file:

Field name (your system)
code values
description or translation of code value

e.g.:

Field	Code Value	Description
gftpaytyp	PP	pledge payment
gfytyp	PG	pledge amount

gftpaytyp	GF	gift
gftfund	AF	annual fund
gftfund	BC	building funds or campaigns
gftfund	CC	capital campaigns

II. THE FORMAT WE NEED

Fixed-length ASCII records(.txt files) are preferred, although variable-length-delimited records are also acceptable (.csv files).

Please use a 4-digit year format for all date fields (e.g., DD-MM-YYYY, YYYY/MM/DD, etc.)

Please do not send \$ and commas in any currency field.

Please be sure that all records end with a carriage return and a linefeed.

Include **all** of your history (gifts, donors, and non-donor alumni information) up to the present date. This is essential to the long-term trend analysis that we perform.