The Raiser's Edge™

Target Analytics Guide

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Target Analytics services helps you put your constituent data to work. Using your ***Raiser's Edge*** data, the service identifies your best charitable giving prospects, helping you maximize your gift revenue. The services analyze historic and current data, as well as behavioral trends. You learn which individuals are your best annual, major, and planned giving prospects now and in the future.

Target Analytics services understands each client is unique. It builds a custom model of your donors by combining your data with outside sources of demographic and wealth information. With these additional sources of information, Target Analytics services can build models that best distinguish donors from non-donors and major giving prospects from planned-giving prospects or annual giving prospects.

In addition to providing you with analytical services, Target also provides you with a utility to move information back and forth between Target Analytics services and your ***Raiser's Edge*** database. The **Target Analytics** link takes you step-by-step through the process of creating an export file with all the necessary information, sending the file to Target Analytics services, downloading the updated file from the Custom Modeling Services back into your system, and finally updating constituent records.

The updated constituent records house the research results in the form of scores and demographic data. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and charitable request/trust likelihood. Scores also include an asset estimator, estimating the constituent's wealth range. The demographics information Target Analytics services can provide includes household income estimates, giving history, and information based on age and gender groups.

Once you update your records with the score and demographic data provided by Target Analytics services statisticians, you can view the new information on the constituent records.

The location of score information on the constituent record depends on whether you have the optional module *Prospect Research Management*. If you have *Prospect Research Management*, all score information appears on the Prospect tab in the **Ratings** category. If you do not have *Prospect Research Management*, the program detects this during the update process and maps the scores to constituent attributes. You can then view score information on the Attributes tab of the constituent record.

All demographic information appears on the Attributes tab, regardless of whether you have *Prospect Research Management* or not. Scores also include an asset estimator, estimating constituent wealth range and income range. The demographic information provided, includes summarized giving histories, age and gender.

Frequently Used Terms

This section defines words and phrases you need to know as you work with Target Analytics services and **Target Analytics**. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Exceptions. An exception is a record the program failed to process. For example, when you create the export file to send to Target Analytics services, any ***Raiser's Edge*** constituent record the program failed to include in the export is an exception.

Demographics. Demographic information offers a statistical overview of general characteristics of a group (age, income, region). The demographic information Target Analytics services provides includes household income estimates, giving history, and information based on age and gender groups.

FTP. FTP stands for File Transfer Protocol. A standard Internet protocol, FTP is the simplest way to exchange files between computers on the Internet. FTP commonly transfers Web page files from their creator to a computer acting as the files server for everyone on the Internet.

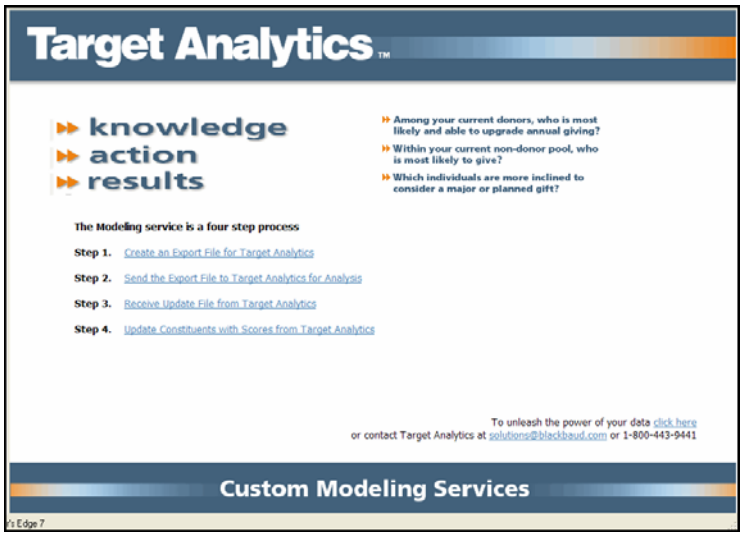
Prospect. The prospect is the source from whom your organization is cultivating a gift. For example, if you discover Dr. Robert C. Hernadez has inherited $1,000,000 and your organization decides to pursue him for a donation, Dr. Hernadez is a prospect.

Scores. Scores are detailed analyses of gift and constituent prospects. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and charitable request/trust likelihood. Scores also include an asset estimator, estimating the constituent's wealth and income range.

Accessing Target Analytics

Target Analytics is accessed by clicking **Admin** on the Raiser's Edge bar.

- **Opening Target Analytics**
  1. On the Raiser's Edge bar, click **Admin**.
  2. Click **Target Analytics**. The Target Analytics page appears.



  3. From the Target Analytics page, you can create an export file, send the file to Target Analytics services, download the updated file from Target Analytics services, and update your constituent records with the new information.

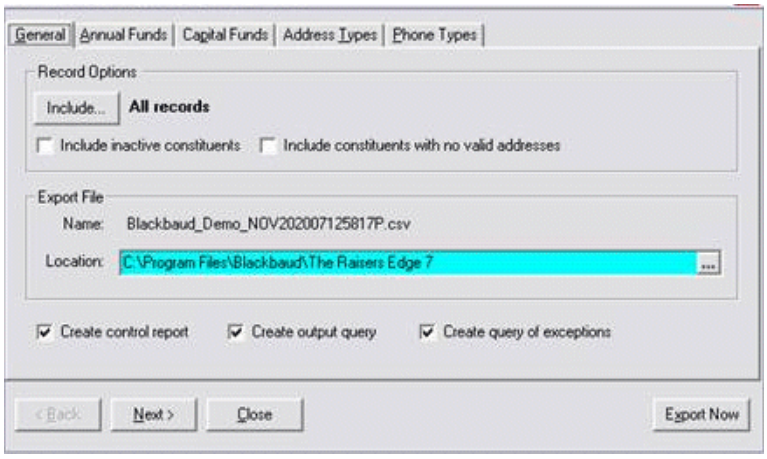
Creating an Export File for Target Analytics Custom Modeling Services

The Target Analytics Export Wizard, accessed through the Target Analytics page, simplifies the process of extracting important analytical data from your ***Raiser's Edge*** database. Arranged around four tabs — General, Annual Funds, Capital Funds, and Address Types — the wizard tells you exactly what information is needed to provide you with the best results.

- **Creating an export file**

Note: For information about accessing the Target Analytics screen, see "Opening Target Analytics" on page 3.

1. From the Target Analytics screen, click **Create an Export File for Target Analytics**. The Target Analytics Export Wizard screen appears, displaying the General tab.



2. To select the records you want to include in your export file, click the **Include** button. From the menu that appears, you can choose to include **All Records** or **Selected Records** from your database that satisfy the export criteria.

   If you choose **All Records** all records in your ***Raiser's Edge*** database that satisfy your export criteria are included. If you choose **Selected Records**, the Open Query screen appears, so you can choose a query of records to include in your export file.

   - In the **Find Queries that meet these criteria** frame, you can enter criteria information to limit the queries appearing in the grid
   - Click **Find Now**. All constituent queries satisfying the criteria you entered appear.

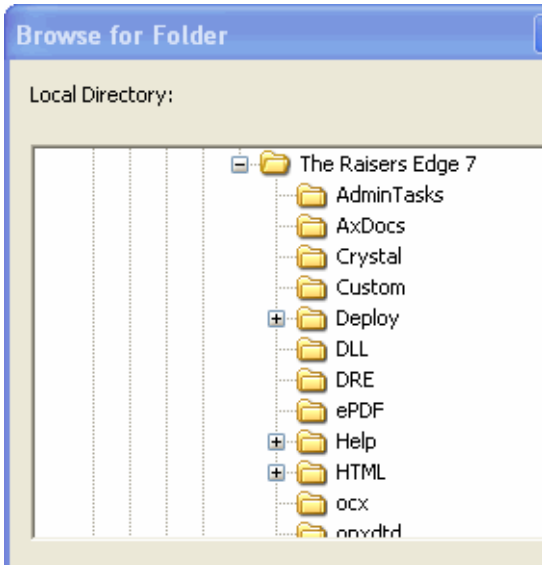
Note: For information about creating a query, see the Query chapter of the *Query & Export Guide*.

   - Select a query and click **Open**, or to create a new query, click **Add New**

   After you select the records you want to include, you return to the Target Analytics Export Wizard screen. The query name appears next to the **Include** button.

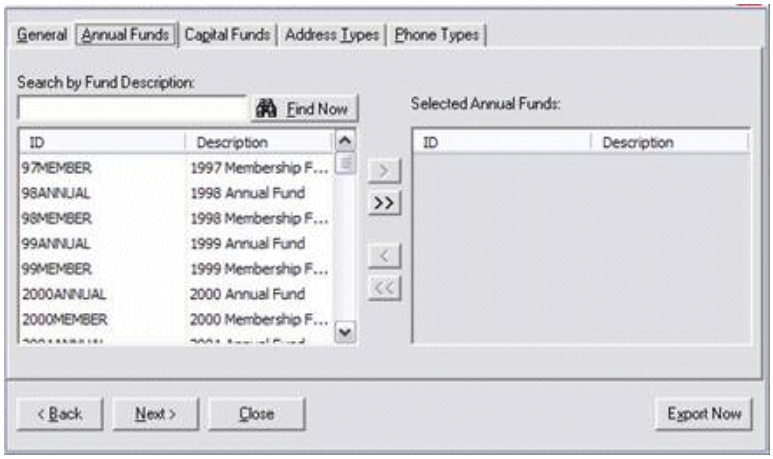
3. To include records of inactive constituents in your export file, mark the **Include inactive constituents** checkbox.
4. To include constituent records in your export file even if the record has no valid address, mark the **Include constituents with no valid address** checkbox.
5. In the **Export File** frame, a **Name** for the export file you are creating defaults. You should not change this name. The default name is consistent with the Target Analytics services format and allows statisticians to easily locate and identify your export file.

6. In the **Location** field, enter where in your system you want the export file saved. Click the ellipsis to access the Browse for Folder screen and map to a location.



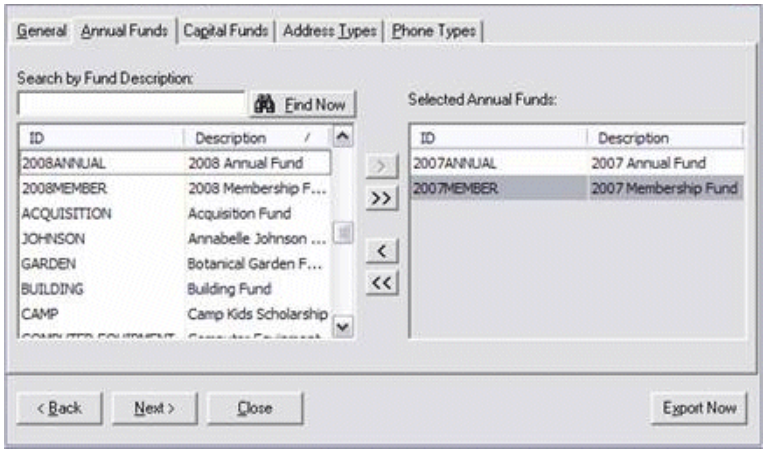
From the Browse for Folder screen, click **OK** to return to the Target Analytics Export Wizard screen.

7. To create a report detailing the criteria used to generate the export file and explaining any exceptions encountered during processing, mark the **Create control report** checkbox.
8. To create a query of all records included in the export, mark the **Create output query** checkbox.
9. To create a query of exceptions, mark the **Create query of exceptions** checkbox. We recommend marking this checkbox. The query may prove useful in identifying and correcting records the program could not include in the export file.
10. To move to the Annual Funds tab, click **Next**.



On this tab you select the annual funds you want to include in the analysis. Gifts given to the selected funds are exported.

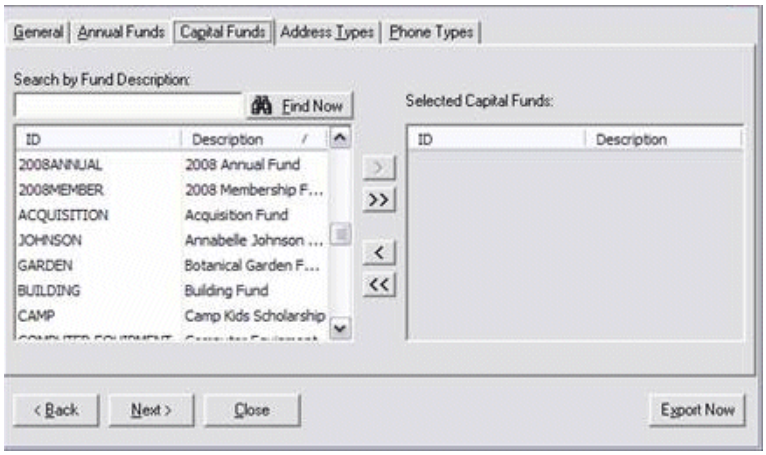
11. To select a fund, highlight the fund in the box on the left side of your screen and click the single right arrow. The fund appears in the **Selected Annual Funds** box on the right side of your screen.



If you do not want to scroll down the list of funds, you can enter search information in the **Search by Fund Description** field and click **Find Now**. For example, if you want only funds for the year 2003, enter "2003" in the **Search by Fund Description** field and click **Find Now**. The funds list then displays only funds with "2003" in the title.

To include all annual funds in your export file, click the double right arrows. To remove a fund from the **Selected Annual Funds** box, highlight the fund and click the single left arrow. To remove all funds from the **Selected Annual Funds** box, click the double left arrows.

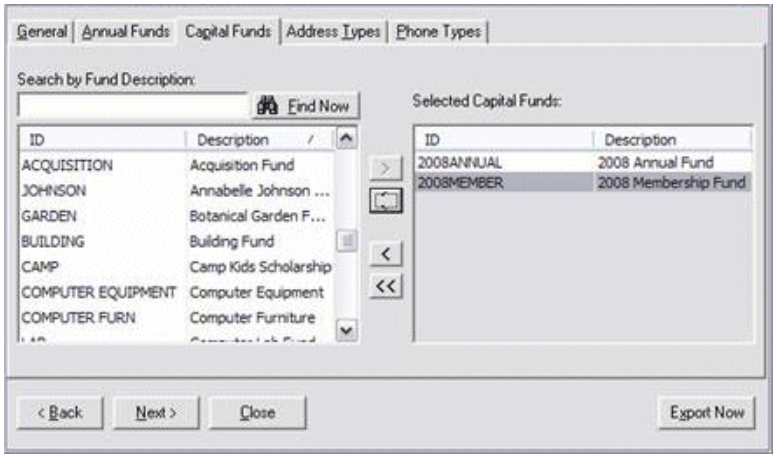
12. To move to the Capital Funds tab, click **Next**.



On this tab you select the capital funds you want to include in the analysis. Gifts given to the selected funds are exported.

Note: Although Capital Fund information is not required to create a custom model of your prospective donors, we recommend you include this information in your export file. The more information you provide Target Analytics services, the better the prospect information you receive.

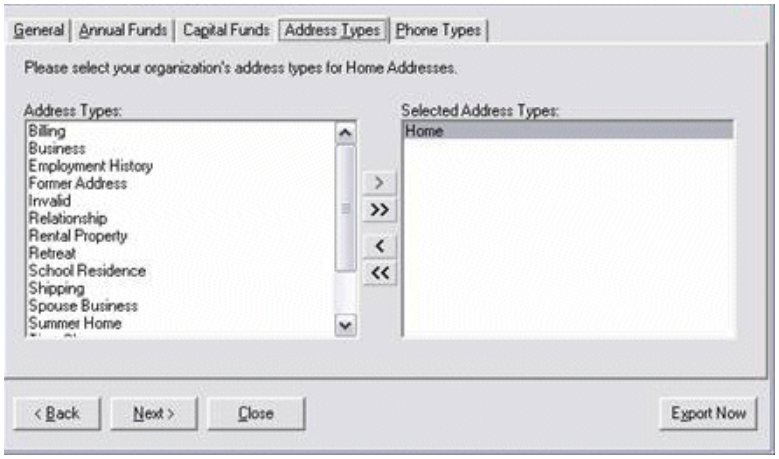
13. To select a fund, highlight the fund in the box on the left side of your screen and click the single right arrow. The fund appears in the **Selected Capital Funds** box on the right side of your screen.



If you do not want to scroll down the list of funds, you can enter search information in the **Search by Fund Description** field and click **Find Now**. For example, if you want only funds for the year 2003, enter "2003" in the **Search by Fund Description** field and click **Find Now**. The funds list then displays only funds with "2003" in the title.

To select all capital funds, click the double right arrows. To remove a fund from the **Selected Capital Funds** box, highlight the fund and click the single left arrow. To remove all funds from the **Selected Capital Funds** box, click the double left arrows.

14. To move to the Address Types tab, click **Next**.

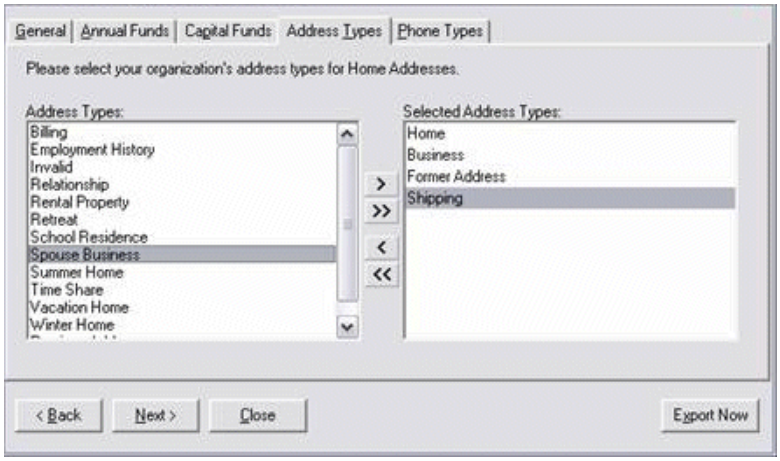


On this tab you select the address types acceptable for analysis. The program exports only one valid address, but to improve the chances of the program locating a valid address, you can include as many address types as you like in the **Selected Address Types** box.

The program stops searching for a constituent address after it finds one valid address to export. For example, you can include "Summer Home", "Winter Home", and "Former Address" in the **Selected Address Types** box. During the export process, the program first searches for a "Summer Home" address. If a valid "Summer Home" address is found, the program includes that address in the export file and stops searching. If no "Summer Home" address exists on the constituent record, the program continues searching for a "Winter Home" address.

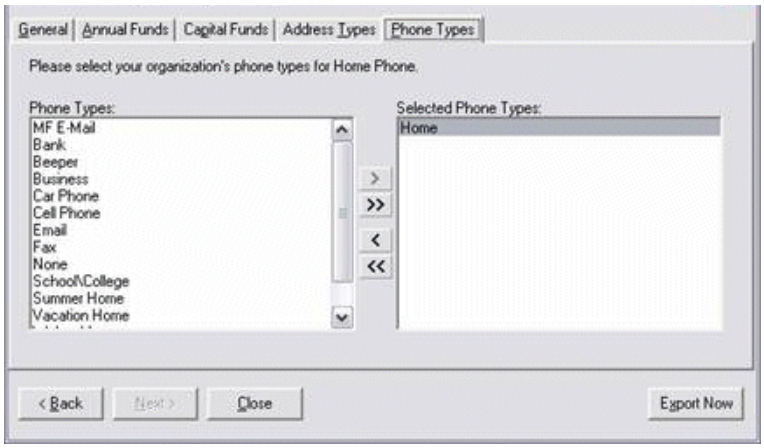
Warning: Only U.S. address information can be exported. The program does not accept international or Canadian addresses.

15. To select an address type, highlight the address type in the **Address Types** box on the left side of your screen and click the single right arrow. The address type appears in the **Selected Address Types** box on the right side of your screen.



To select all **Address Types**, click the double right arrows. To remove an address type from the **Selected Address Types** box, highlight the address type and click the single left arrow. To remove all address types from the **Selected Address Types** box, click the double left arrows.

16. To move to the Phone Types tab, click **Next**.



17. On this tab you select the phone types acceptable for analysis. The program exports only one valid phone, but you can include as many phone types as you like in the **Selected Phone Types** box. The program stops searching for a constituent phone after it finds one valid phone to export.

    To select all **Phone Types**, click the double right arrows. To remove a phone type from the **Selected Phone Types** box, highlight the phone type and click the single left arrow. To remove all phone types from the **Selected Phone Types** box, click the double left arrows.

18. After you complete all Target Analytics Export Wizard tabs, click **Export Now** to create an export file in the location you entered on the **Location** field on the General tab.

19. If on the General tab you marked the **Create query of exceptions** checkbox, the Save static query screen appears.

Note: If you did not mark the **Create control report** checkbox on the General tab of the Target Analytics Export Wizard screen, the **Preview Report** button does not appear on the Data Export Complete screen.

Enter a **Query name** and a **Description** that will help you identify the records included in the query. The **Query format** field defaults to "Static" and cannot be changed. You can also allow others to execute or modify the query file.

20. Click **Save**. The program processes the export file.
21. When the processing is complete, the Data Export Complete screen appears. This screen displays the number of records processed and exported. It also displays the number of exceptions, if any.
22. To open the Control Report and view reasons for any exceptions, along with export results and criteria, click **Preview Report**.

Note: If you created an output query of exceptions when you generated your export file, you can use the query to fix records listed as exceptions in the Control Report.

23. To close the report and return to the Target Analytics Export Wizard screen, click the "X" in the upper right corner.
24. To exit the Target Analytics Export Wizard, click **Close**.

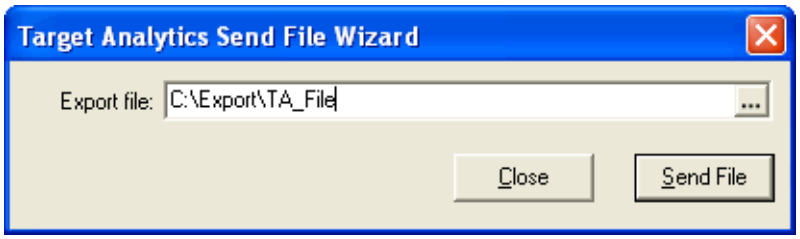
    You are now ready to send the export file to Target Analytics services.

Sending an Export File to Target Analytics Custom Modeling Services

After you create an export file using the Target Analytics Export Wizard, you send the file to the Target FTP server. From there, statisticians download your data for analysis. To send the export file to the FTP server, use the **Send the Export File to Target Analytics for Analysis** link provided on the Target Analytics screen in ***The Raiser's Edge***. The program automatically creates a Zip file of your data, places it in the proper folder on the Target FTP server, and sends an email to Target Analytics services, telling the statisticians your file is available.

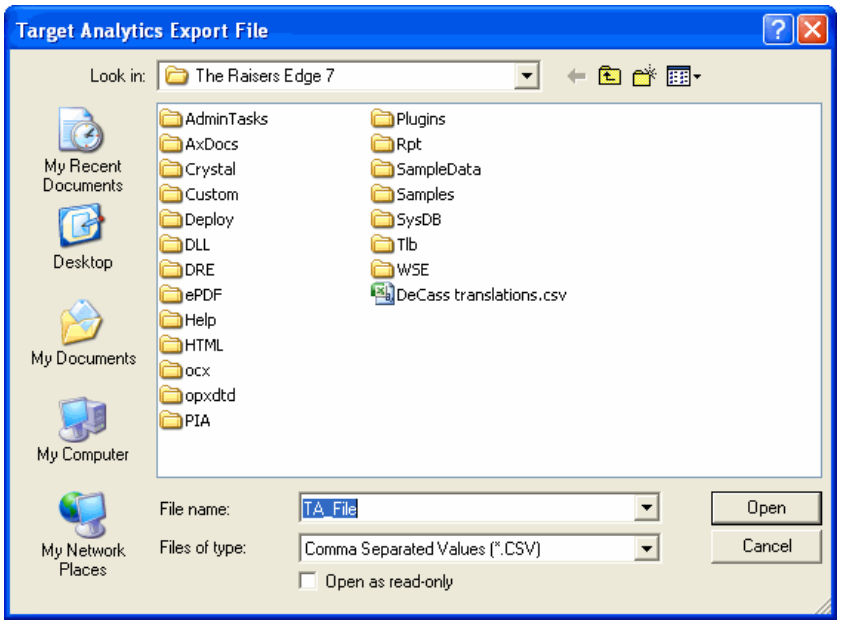
- **Sending an export file**

1. From the Target Analytics screen, click **Send the Export File to Target Analytics for Analysis**. The Target Analytics Send File Wizard screen appears.



2. In the **Export file** field, the most recent export file you created appears. For more information about creating export files, see "Creating an Export File for Target Analytics Custom Modeling Services" on page 3.

3. To search for a different file, click the ellipsis to access the Export File screen.



4. On this screen, you can map to a different export file and click **Save** to return to the Target Analytics Send File Wizard screen. In the **Export file** field, the export file you selected appears.
5. After you complete the Target Analytics Send File Wizard screen, click **Send File**. The export file is copied to the proper folder on the Target FTP server. A confirmation message appears, telling you when the procedure is complete.
6. To return to the Target Analytics Send File Wizard screen, click **OK**.
7. To return to the Target Analytics page, click **Close**.

   Target will contact you via email and tell you when your analyzed file is ready. You can then use the **Receive Update File from Target Analytics** link on the Target Analytics screen to download the new information.

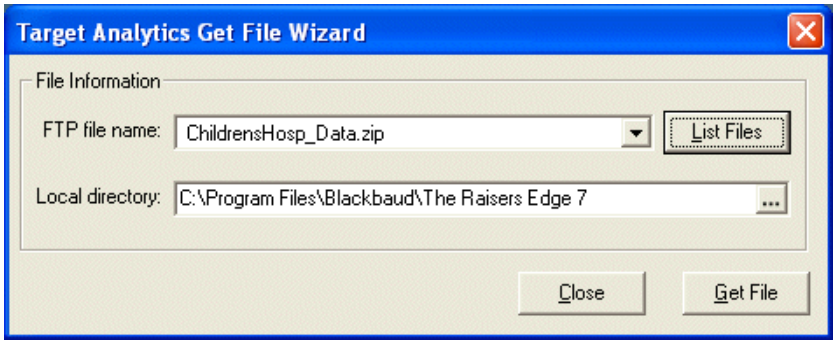
Receiving Update Files from Target Analytics Custom Modeling Services

After Target Analytics services creates your models and presents your results, the service sends you an email message, announcing your scores and demographic information are ready to import into ***The Raiser's Edge***. You can use the **Receive Update File from Target Analytics** link on the Target Analytics screen to download the new file into your system. This does not update your ***Raiser's Edge*** records; it just places the file back in your system, from where you can later update your records.

- **Downloading updated files from the Target FTP server**

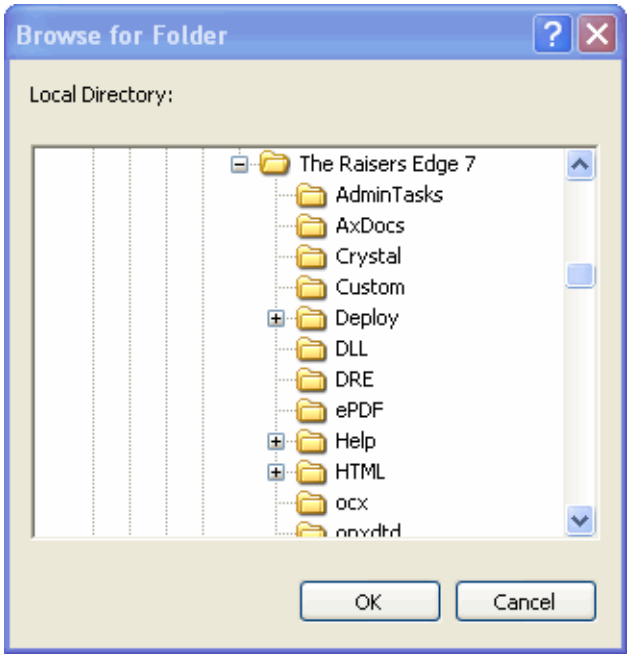
1. From the Target Analytics screen, click **Receive Update File from Target Analytics**. The Target Analytics Get File Wizard screen appears.

2. In the **File Information** frame, click the **List Files** button. Any Target Analytics files available in your pick up folder on the FTP server appear in the **FTP file name** field.



3. In the **FTP file name** field, select the file you want to import back into ***The Raiser's Edge***.
4. In the **Local directory** field, enter a path to the location in your system where you want the FTP file downloaded.

   You can click the ellipsis to access the Browse for Folder screen and map to the directory and folder.



   To return to the Target Analytics Send File Wizard screen, click **OK**.

   The path you selected appears in the **Local directory** field.
5. After you complete the Target Analytics Get File Wizard screen, click **Get File**. The program downloads the file to the selected directory. A confirmation screen appears when the process is finished.
6. If you want to update your constituent records now with the new information, click **Yes**. The Target Analytics Update Records Wizard screen appears. For detailed instructions about updating records, see "Updating Constituents with Scores from Target Analytics" on page 12.
7. If you want to wait, and maybe view the update file in *Microsoft Excel* or another spreadsheet program, click **No**. You return to the Target Analytics Send File Wizard screen.
8. To return to the Target Analytics page, click **Close**.

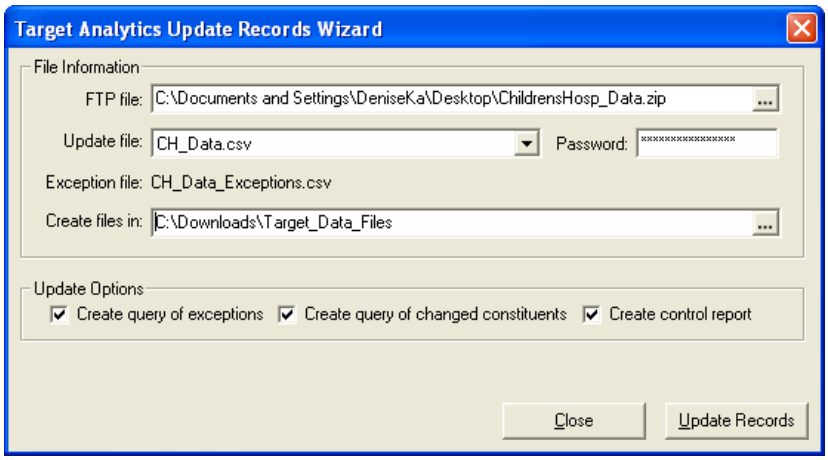
Updating Constituents with Scores from Target Analytics

After you download the Target Analytics services file, you can use the **Update Constituents with Scores from Target Analytics** link on the Target Analytics screen to update your ***Raiser's Edge*** constituent records. This process adds the research information provided by Target Analytics services to your constituent records.

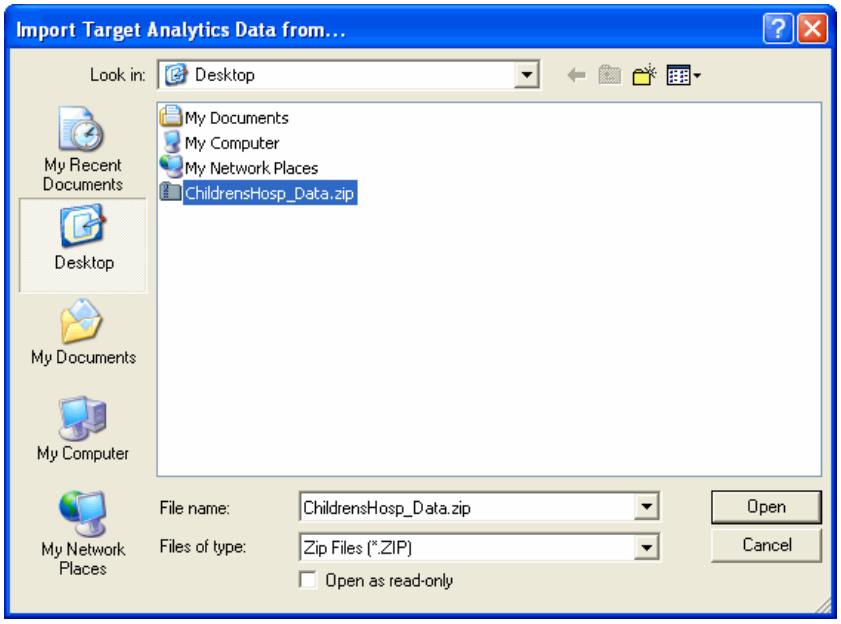
Warning: We strongly recommend you have a recent tape backup of your ***Raiser's Edge*** database before you run the updating process. This process permanently changes your constituent records. Restoring you database from a backup is the only way to reverse the process should an error occur.

- **Updating constituent records with Target Analytics data**

  1. From the Target Analytics screen, click **Update Constituents with Scores from Target Analytics**. The Target Analytics Update Records Wizard screen appears.



2. In the **FTP file** field, the document you most recently downloaded from the Target FTP server defaults. To search for a different document, click the ellipsis to access the Import Target Analytics Data from screen.

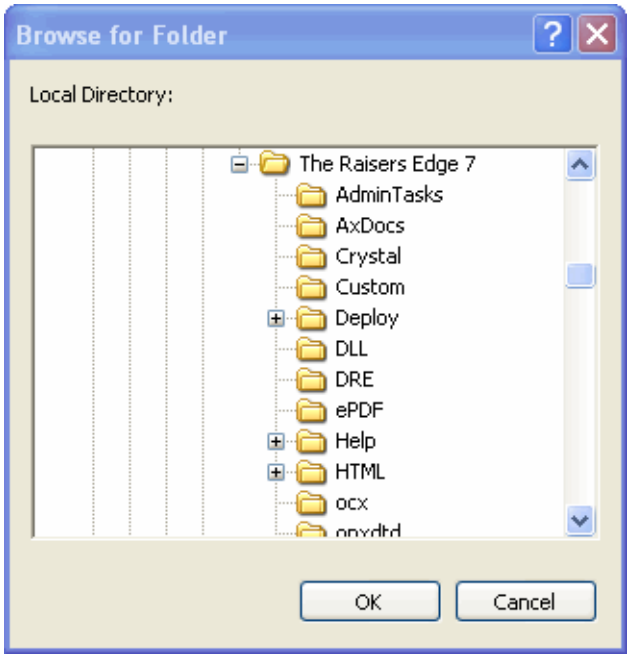


Locate the downloaded Zip file and click **Open** to return to the Target Analytics Update Records Wizard screen.

In the **Update file** field, the name of the update file you selected appears.

3. All files downloaded from Target's FTP server are password-protected. In the **Password** field, enter the password information that was included in the email message notifying you that your custom modeling file was ready to download.
4. In the **Create files in** field, enter where in your system you want the program to save the file of exceptions. Exceptions are records that for some reason, ***The Raiser's Edge*** was unable to update.

You can click the ellipsis to access the Browse for Folder screen and map to the directory and folder in which you want exceptions saved.



To return to the Target Analytics Update Records Wizard screen, click **OK**.

5. In the **Update Options** frame, choose from the following options or checkboxes:

Warning: To better track changes made to your ***Raiser's Edge*** constituent records, do not select to update both address and score information at the same time. Running the procedures separately gives you separate query files: one detailing all address information updated and the other detailing all score information added.

- **Create scores** adds scores or rating information to all constituent records included in the custom modeling file. If you have the optional module *Prospect Research Management*, this information appears on the Prospect tab of the constituent records, in the **Ratings** category. If you do not have *Prospect Research Management*, this information appears on the Attributes tab of the constituent records.
- **Update constituent address** updates all constituent address information included in the custom modeling file. For example, if the "Home" address is updated in the custom modeling file, the "Home" address on the constituent record is updated; if the "Winter Home" address is updated in the custom modeling file, the "Winter Home" address on the constituent record is updated.
- **Both** creates scores and updates constituent address information at the same time.

Warning: Because updated address information overwrites the existing information entered on the Addresses tab of the constituent record, we recommend creating a query of changed constituents. You can use the query to track constituent records affected by the update.

- **Create query of exceptions** creates a static query of all records the program could not update. The Target Analytics Custom Modeling statisticians can use this information and research why these records could not update.
- **Create query of changed constituents** creates a static query of all records the program updated.
- **Create control report** generates a report displaying the number of records processed and updated, the number of exceptions, reasons for the exceptions, and the number of addresses updated.

6. After you complete the Target Analytics Update Records Wizard screen, click **Update Records**.

7. If you marked **Create query of exceptions** or **Create query of changed constituents** the Save Static Query screen appears (once for each checkbox marked).

   Enter a **Query name** and a **Description** that will help you identify the records included in the query. The **Query format** field defaults to "Static" and cannot be changed. You can also allow others to execute or modify the query file.

8. Click **Save**. The program processes the update request and a tracking screen appears.

   When the update is complete, a screen appears, displaying information about the update.

Note: If you did not mark the **Create control report** checkbox on the Target Analytics Update Records Wizard screen, the **Preview Report** button does not appear on the Data Update Complete screen.

9. The screen displays the number of Records Read, Records Imported, and Exceptions. It also shows the Total Time the process took and the number of records updated per second (Records/sec).
10. If you marked the **Create control report** checkbox on the Target Analytics Update Records Wizard screen, click **Preview Report** to open the report.
11. The report displays result information and details about any exceptions. Your can print a hardcopy of the report by clicking the print icon at the top of the screen. To close the report and return to the Target Analytics Update Records Wizard screen, click the "X" in the upper right corner.
12. From the Target Analytics Update Records Wizard screen, click **Close**. You return to the Target Analytics page.

Viewing Target Analytics Data in The Raiser's Edge

Target Analytics updates ***Raiser's Edge*** constituent records, adding research results provided by Target Analytics services. **Target Analytics** enters this information in the form of scores and demographic data. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and CRT likelihood. Scores also include an asset estimator, estimating the constituent's wealth and income range. The demographic information Target Analytics services provide includes summarized giving history, age, and gender. The results you receive depend on your contract with Target Analytics services and the information you provided the service.

Once you update your records with the score and demographic data provided by Target Analytics services statisticians, you can view the new information on the constituent records.

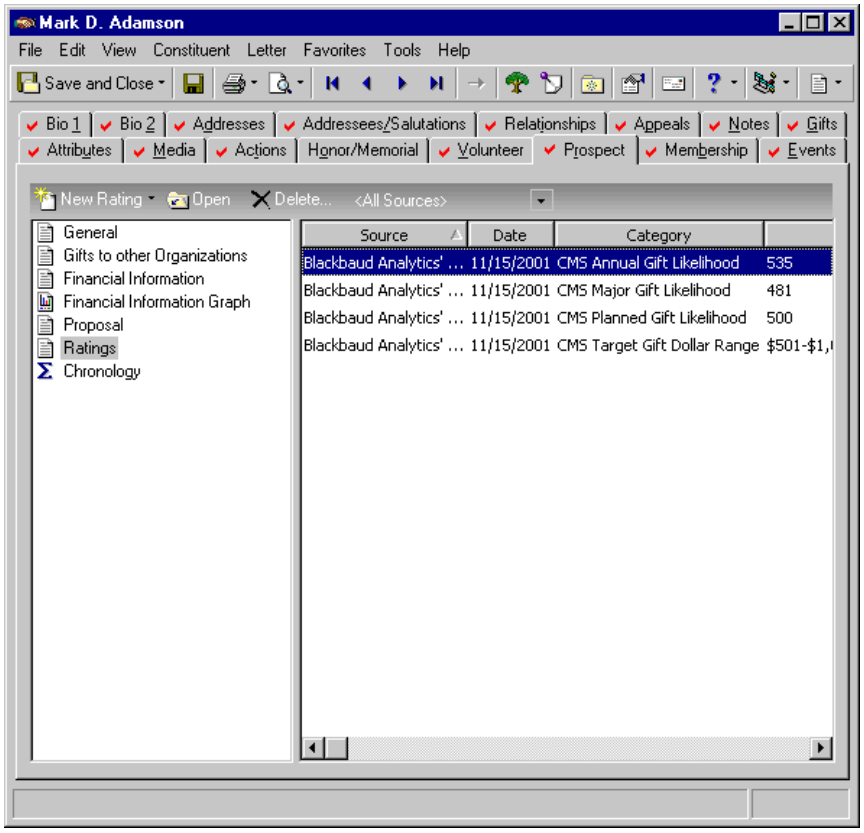
The location of score information on the constituent record depends on whether you have the optional module *Prospect Research Management*. If you have *Prospect Research Management*, all score information appears on the Prospect tab in the **Ratings** category. If you do not have *Prospect Research Management*, the program detects this during the update process and maps the scores to constituent attributes. You can then view score information on the Attributes tab of the constituent record.

All demographic information appears on the Attributes tab, regardless of whether you have *Prospect Research Management* or not. The program automatically creates all necessary ratings and attributes. You do not need to have this set up ahead of time.

- **Viewing scores in The Raiser's Edge**

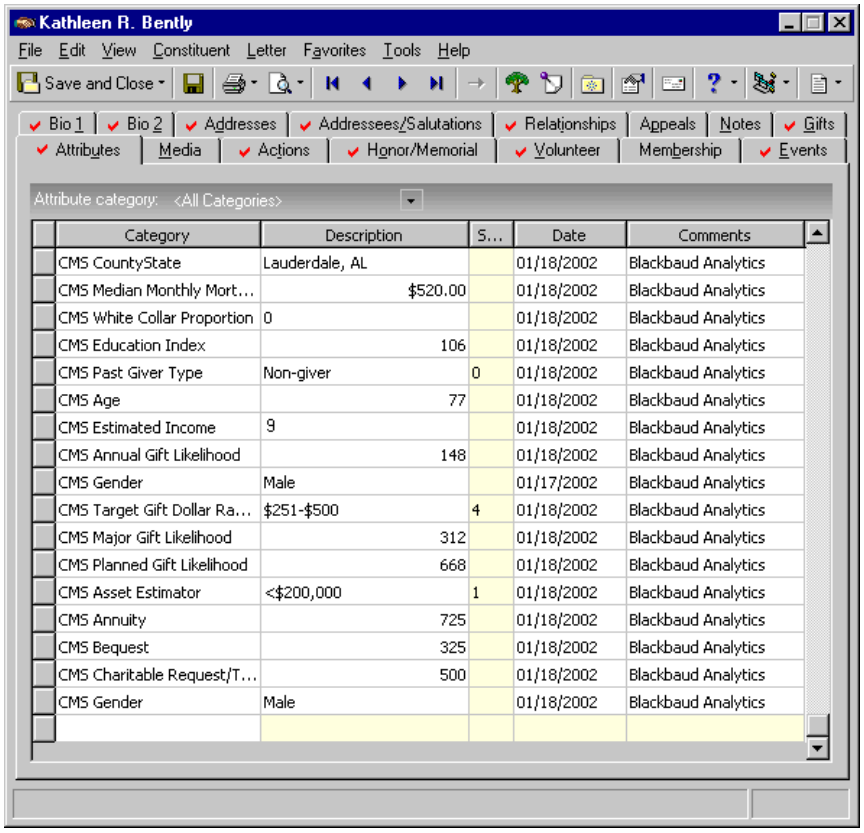
Note: For more information about working on the Prospect tab, see the *Prospect Data Entry Guide*.

1. If you have the optional module *Prospect Research Management*, from the constituent record for which you want to view score information, select the Prospect tab.



2. On the left side of the screen, select the **Ratings** category. All score information provided by Target Analytics services appears on the right side of the screen.

3. If you do not have *Prospect Research Management*, select the Attributes tab. Score information appears on the Attributes tab along with the demographic data.



Category	Description	S...	Date	Comments
CMS CountyState	Lauderdale, AL		01/18/2002	Blackbaud Analytics
CMS Median Monthly Mort...	$520.00		01/18/2002	Blackbaud Analytics
CMS White Collar Proportion	0		01/18/2002	Blackbaud Analytics
CMS Education Index	106		01/18/2002	Blackbaud Analytics
CMS Past Giver Type	Non-giver	0	01/18/2002	Blackbaud Analytics
CMS Age	77		01/18/2002	Blackbaud Analytics
CMS Estimated Income	9		01/18/2002	Blackbaud Analytics
CMS Annual Gift Likelihood	148		01/18/2002	Blackbaud Analytics
CMS Gender	Male		01/17/2002	Blackbaud Analytics
CMS Target Gift Dollar Ra...	$251-$500	4	01/18/2002	Blackbaud Analytics
CMS Major Gift Likelihood	312		01/18/2002	Blackbaud Analytics
CMS Planned Gift Likelihood	668		01/18/2002	Blackbaud Analytics
CMS Asset Estimator	<$200,000	1	01/18/2002	Blackbaud Analytics
CMS Annuity	725		01/18/2002	Blackbaud Analytics
CMS Bequest	325		01/18/2002	Blackbaud Analytics
CMS Charitable Request/T...	500		01/18/2002	Blackbaud Analytics
CMS Gender	Male		01/18/2002	Blackbaud Analytics

On both the Prospect and Attributes tabs, score information is arranged by columns:

Note: For more information about working on the Attributes tab, see the *Constituent Data Entry Guide*.

- In the **Source** column, available on the Prospect tab, the source (Target Analytics Custom Modeling Services [Target Analytics services]) that provided the ratings information appears
- In the **Date** column, the date Target Analytics services entered the ratings data appears
- In the **Category** column, the category scored appears. Target Analytics services scores constituents for the following categories:

Note: For information about the demographic data included on the Attributes tab, see the "Viewing demographic information in The Raiser's Edge" on page 18.

Annual Gift Likelihood with scores ranging from 1-1000 (1 = least likelihood to give and 1000 = most likelihood to give)

Target Gift Dollar Range measures the capability of the prospect to make a gift in a particular dollar range

Major Gift Likelihood with scores ranging from 1-1000 (1 = least likelihood to give and 1000 = most likelihood to give)

Planned Gift Likelihood with scores ranging from 1-1000 (1 = least likelihood to give and 1000 = most likelihood to give)

Asset Estimator estimates the prospect's wealth range

Estimated Income estimates the prospect's income range

Note: The results you receive depend on your contract with Target Analytics services and the information you provided.

- The **Description** column displays Target Analytics services ratings for each **Category** and **Date**
- The **Notes** column on the Prospect tab (not shown in screen shot) and the **Comments** column on the Attributes tab, house any additional information the statistician may want to add about the score

Viewing demographic information in The Raiser's Edge

1. From the constituent record for which you want to view demographics information, select the Attributes tab.
2. All information downloaded from the Target Analytics services file begins with "Target Analytics services".

Note: If you do not have the optional module *Prospect Research Management*, score information also appears on the Attributes tab. For more information about score data, see "Viewing scores in The Raiser's Edge" on page 15.

The **Category** information available for demographic data includes the following:

- Past Giver Type displays the prospect's giving history, where 0 = non-giver, 1 = occasional giver, and 2 = consistent giver
- Age combines all possible sources of age, including client information and outside sources of age
- Gender combines all possible sources of gender information, including client information and Target Analytics services predicted gender.

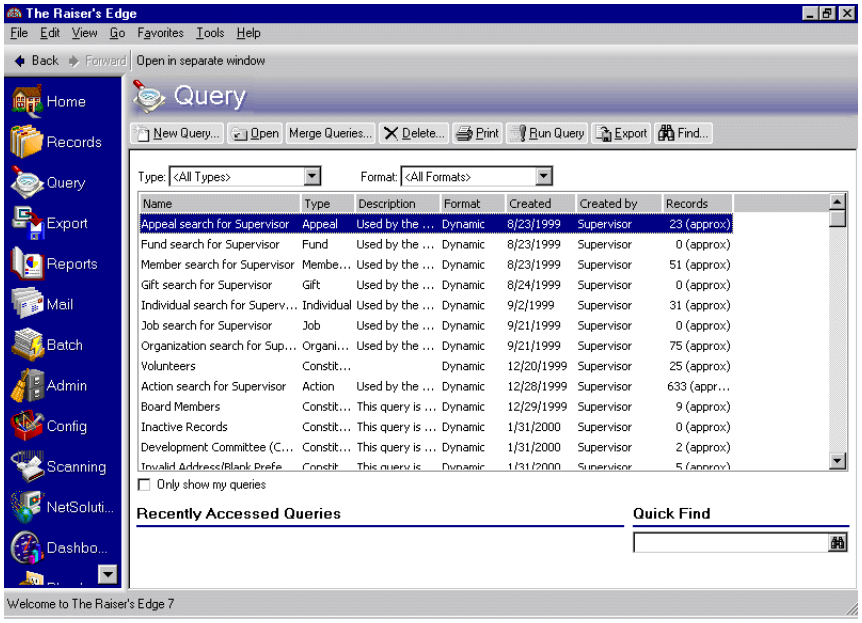
3. In the **Date** column, the date Target Analytics services entered the data appears.
4. Target Analytics services enters any notes or comments related to the data in the **Comments** column.

For more information about working on the Attributes tab, see the *Constituent Data Entry Guide*. For information about establishing attributes, see the Configuration chapter of the *Configuration & Security Guide*.

Viewing address information updated in The Raiser's Edge

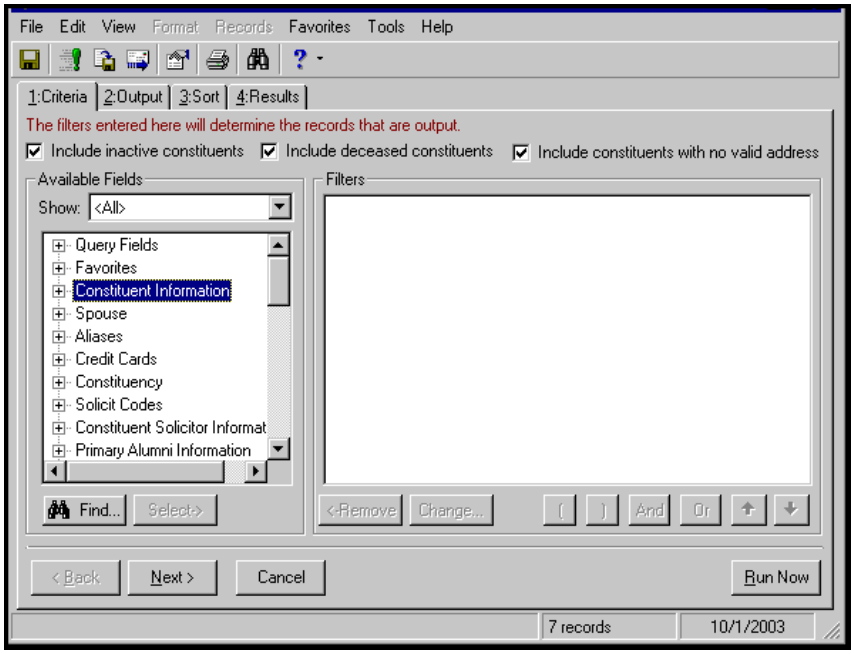
Address update information is posted directly to the Addresses tab of the constituent records. To view a list of address information changed during the update process, open the query of changed constituents created when you updated the records, using the **Update Constituents with scores from Target Analytics** link. You can then open the affected constituent records and view the new address information.

1. On the Raiser's Edge bar, click **Query**.

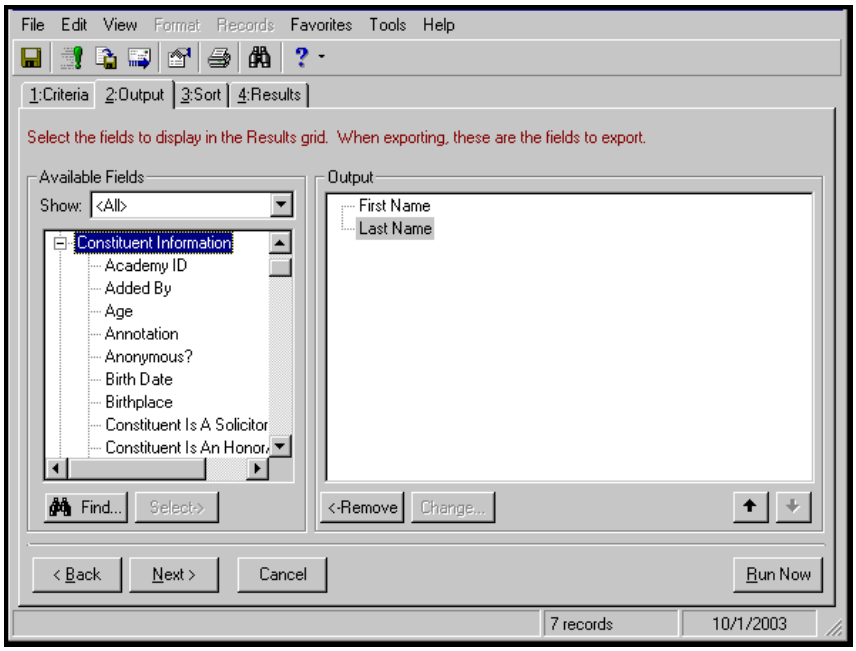


Note: For more information about working in *Query*, see the *Query & Export Guide*.

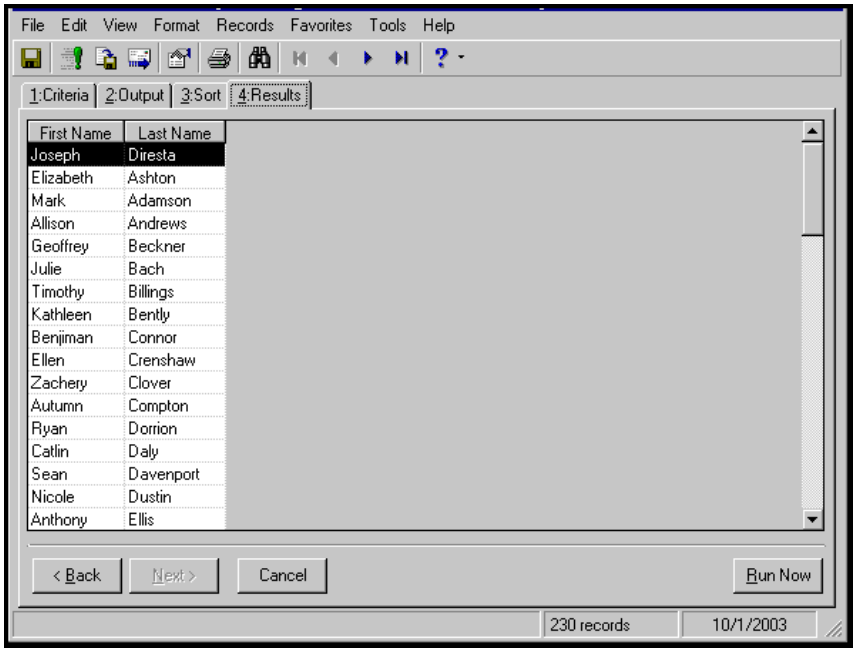
2. If you marked the **Create query of changed constituents** checkbox when you updated the records, the "BBA Query of Changed Records" appears in the grid of available queries. Select the "BBA Query of Changed Records" and click **Open**. The Records in BBA Query of Changed Records screen appears.



3. To display the list of changed records with the constituent names, select the Output tab.

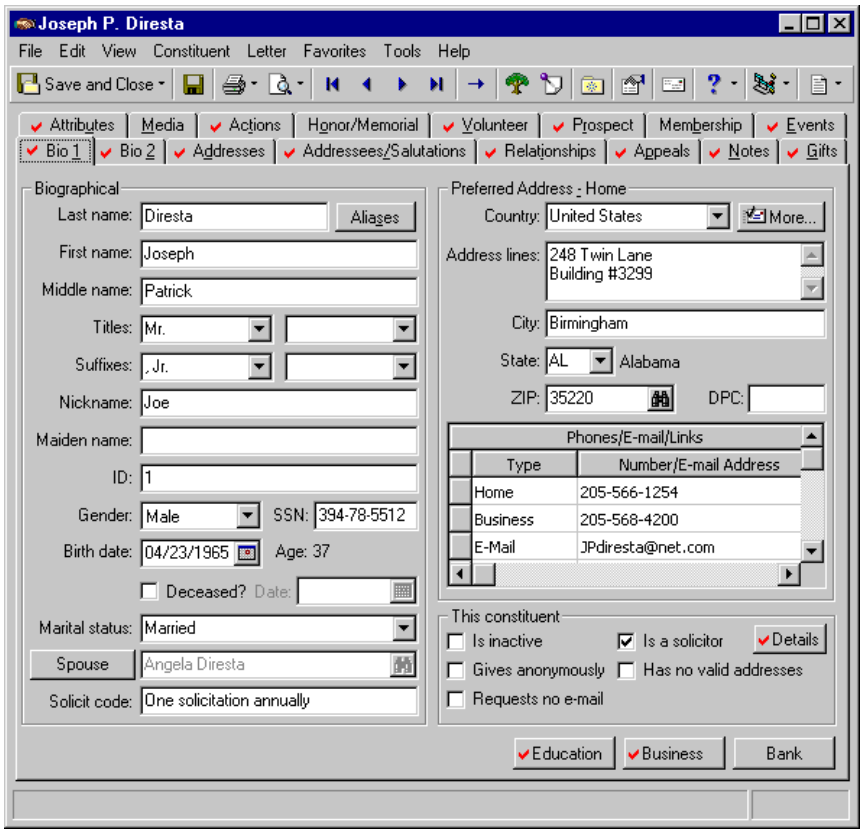


4. On the left side of the screen, in the **Available Fields** box, under the **Constituent Information** category, highlight “First Name” and click **Select**. Highlight “Last Name” and click **Select**. “First Name” and “Last Name” appear in the **Output** box.
5. Select the Results tab.



A list of all records changed in the update appear, displaying **First Name** and **Last Name**.

6. To open a constituent record, double-click the name. The constituent record appears.



You can view the new address information. For more information about working in constituent records, see the *Constituent Data Entry Guide*.

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