

LA STAGE ARTS CENSUS

Let's build an audience.

Welcome! Your participation in the LA STAGE Arts Census community database will provide you with tools that will save you time and money. These tools will help you effectively execute targeted marketing campaigns whether you're looking to broaden your audience or your donor base. This guide will walk you through the process of organizing, preparing, and submitting your data to the Census.

First-time Census participants

If your organization has never before uploaded data, you have the opportunity to join the community database at any time. Your data will go live in eMerge approximately 2 weeks after you successfully upload your data.

Current or former Census participants

If your organization currently has data in eMerge, or has uploaded data in previous years which is no longer active, you have the opportunity to refresh your data free of charge once per year. In 2014, the data refresh time frame is **July 1st-July 31st**.

This guide is meant to help First-Time Census participants. If you are a current or former Census participant and wish to upload data, please contact Mark Doerr.

For questions regarding any step of the Data Submission Process or the eMerge online tool, please contact:

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For the most in-depth support, email: help@trgarts.com

Gather Your Data

First you have to find it. So think about all the places you may keep information on who attends your shows, donates to your company or is somehow engaged with your organization.

This information could be anywhere:

- Ticketing systems
- Donor or fundraising systems
- Financial software
- Email marketing programs
- Class/workshop attendee lists
- Staff, member or artist lists
- Volunteer lists
- The Guest List you put out at every performance
- Napkins or Matchbooks (Don't laugh. We all have some of these floating around, right?)

The goal is to gather all the data from every possible hiding place and dump it into one spreadsheet. BUT...hold on...you want to put some thought into the next step...



Any data you provide can be hidden within eMerge so only your organization can see it.

Segment Your Data

You'll need to organize your data into discrete lists, each list being called a "Segment." To understand a segment, ask yourself, "Who do I contact and why do I contact them?"

Do you ever have to break up your list, sending just to your VIPs or Donors? Would you like to be able to target just those people who bought tickets 2 years ago but not this past year? These are all accomplished through segmentation.

Target Resource Group (TRG) requires three fields to determine segmentation:

- **Buyer Type**
 - This defines the interaction a patron had with your organization.
- **Year**
 - This defines the year or season in which an event took place.
- **Description**
 - This defines the event or transaction that took place.



Follow the template exactly and build your spreadsheet by segment. Use a separate worksheet for each segment then combine them into one final worksheet that will be the only one uploaded

Segmentation Style Guide

We have created a set of segmentation standards to ensure consistency and ease-of-use. It is strongly suggested that you follow this standard when naming your lists.

The full Segment List appears at the end of this Guide but here are the most commonly used segments:

Buyer Type	Definition	Event Description Example
STB	Single Ticket Buyer	<i>12-13 STB: As You Like It</i>
SUB	Subscribers	<i>12-13 SUB: Flex OR 12-13 SUB: Full Dance</i>
DON	Donors	<i>12-13 DON: \$250-\$500</i>
DNT	DO NOT TRADE	<i>2013 DNT: Private Fundraising Dinner</i>
VOL	Volunteers	<i>2012 VOL: Concert Under the Stars volunteers</i>
EDU	Educational	<i>2013 EDU: Family Improv Workshop</i>
CMP	Complimentary	<i>2012 CMP: LA Traviata</i>
MEM	Member	<i>2012 MEM: Gold Level Members</i>



The DESCRIPTION field is limited to 50 characters so be brief!

Naming conventions:

- 1) Single Ticket Events (whether paid or free events)
 - a) Event Year (split or full), buyer type, colon, show/event/etc.
EXAMPLE: 12-13 STB: Nutcracker
- 2) Subscriptions should be segmented by your package types
 - a) Full, 6-Pack, Flex, CYO (Choose Your Own), etc.
EXAMPLE: 12-13 SUB: Full Dance, 2013 SUB: Flex

Donors will predominately be used by the organization supplying the information and not shared within the community; however, there are still a few segmentation standards to consider:

- 1) By giving level
 - a) This is the preferred recommendation as it allows organizations the most visibility and use in the system.
EXAMPLE: 2012 DON: \$250-\$1000
- 2) By year
EXAMPLE: 2012 Donor
- 3) By campaign
EXAMPLE: 2012 DON: Annual Fund

Collate Your Data

Once you have a sense of the data available to you, pull and compile it in one spreadsheet. An Excel spreadsheet with worksheets containing the Template and a Sample are available for download on the website but the file should look like this:

BUYER TYPE	YEAR	DESCRIPTION	NAME	LAST	FULL NAME	COMPANY	EMAIL	ADDRESS 1	CITY	STATE	ZIP	BAR/ROW ID
578	2009	08-09 578	Causta Quarter	Shirley	Clifton	Ms. Dale Clifton		3183 Silver Staggs Trail	Missouri City	TX	77459	24743
578	2009	08-09 578	Causta Quarter	Shirley	Bakely		jean@tmail.com	1014 Woodbrook Cove Lane	Austin	TX	78729	24793
578	2009	08-09 578	Causta Quarter	Bryan	Clark			4706 Neches Trail Lane	Houston	TX	77031	24796
578	2009	08-09 578	Causta Quarter	Anna	Tucker			2803 South Boulevard, Suite 202	Houston	TX	77001	24800
578	2009	08-09 578	Causta Quarter	Karen	Hernandez			1527 Harold St	Houston	TX	77006	24806
578	2009	08-09 578	Causta Quarter	Karen	White			11518 early forest lane	Austin	TX	78765	24857
578	2009	08-09 578	Classical	Cynthia	Carroll			2204 Timmons Ln. #160	Houston	TX	77269-1391	24858
578	2009	08-09 578	Classical	William	Riley			12048 Cainsborough	Sugar Land	TX	77479	24858
578	2009	08-09 578	Classical	Dale	Clifton	Ms. Dale Clifton		3183 Silver Staggs Trail	Missouri City	TX	77459	24743
578	2009	08-09 578	Classical	Shirley	Bakely			1014 Woodbrook Cove Lane	Austin	TX	78729	24793
578	2009	08-09 578	Classical	Bryan	Clark			4706 Neches Trail Lane	Houston	TX	77031	24796
578	2009	08-09 578	Classical	Anna	Tucker			2803 South Boulevard, Suite 202	Houston	TX	77001	24800
578	2009	08-09 578	Classical	Karen	Hernandez			718 Belvue St.	Houston	TX	77006	24806
578	2009	08-09 578	Classical	Karen	White	Ms. Karen White		5910 Pebble Bank Ln.	Austin	TX	78765	24857
578	2009	08-09 578	Classical	Shirley	Karnes		123@tmail.com	7819 Pine Gap Dr.	Sugar Land	TX	77478	24901
578	2009	08-09 578	Classical	Connie	Beahan			1503 Peach # 12	Houston	TX	77066	24906
578	2009	08-09 578	Classical	Sirk	Fulleton			279 Wood Loop St.	Houston	TX	77027	24908
578	2009	08-09 578	Classical	John	Hornet	Mr. John Hornet		10711 Kirkvale Dr.	Houston	TX	77031	24910
578	2009	08-09 578	Classical	Shameeka	Hornet	Ms. Shameeka Hornet		1407 Jett Lake Dr.	Houston	TX	77073	24916
578	2009	08-09 578	Classical	Jan	Bibby	Ms. Jan Bibby		7906 Log Hollow Drive	Katy	TX	77484	24922
578	2009	08-09 578	Classical	Alberta	Ayuda	Ms. Alberta Ayuda		9929 Kirby Dr. #103	Spring	TX	77188	24922
578	2009	08-09 578	Songs of the Earth	Anne	Hudson Jones	Dr. Anne Hudson Jones	anneh2@tmail.com	1710 Bush St. Apt. 2	Kearney	TX	77365	11173
578	2009	08-09 578	Songs of the Earth	Karl	Loos			5119 Dunham	Houston	TX	77079	25143
578	2009	08-09 578	Songs of the Earth	Angela	Coastal			PO Box 691 881	Houston	TX	77006	25146
578	2009	08-09 578	Songs of the Earth	Cubarella	Pekerman			16231 Greasy Creek Drive	Houston	TX	77004	3043
578	2009	08-09 578	Songs of the Earth	Charles	Cotelle	Mr. Charles Cotelle		3027 Thorne Creek Lane	Houston	TX	77054	3742
578	2009	08-09 578	Songs of the Earth	Barbara	Reid			1885 El Paseo St. #122	Houston	TX	77049	4218
578	2009	08-09 578	Songs of the Earth	Shirley	Bakely			6507 Canyon Point Lane	Houston	TX	77024	4409

REQUIRED DATA

The following information is required for each record submitted to the Census, to be included in your data set:

- Buyer Type
- Year
- Description
- First & Last Name OR Full Name
- Mailing Address

Email addresses are not required, and will never be traded, but we recommend you add them to records that have address information. TRG may be able to append mailing address data to email addresses for a fee. Contact them directly to inquire about this service.



Don't de-dupe your data! You'll be tempted to remove duplicate records when you're putting together your spreadsheet. Don't do it. You want a separate record of each interaction you had with a patron through the years. The eMerge tool will automatically remove duplicates from reports and mailing list trades.

Upload Your Data

Once you have your data nicely segmented and sitting in your Excel spreadsheet, you should be ready to upload your data. Make a quick count of how many records you'll be uploading and name your spreadsheet after your Organization.

- 1) Go to www.trgarts.com
- 2) Click on the "Client Login" link
- 3) Select "File Transfer" from the pull-down menu and enter the following:
 - a) **Username:** Westcoops
 - b) **Password:** addin1
- 4) Click "Login"
- 5) On the Upload section, select "New File"
- 6) Complete the upload form:
 - a) Your Name
 - b) Your Organization (the organization sending the file)
 - c) Your Title
 - d) Your Email
 - e) Your Phone Number
 - f) File Name
 - i) Step 1: Click the browse button on the right to open a "Choose File" wizard
 - ii) Step 2: Browse your hard drive, highlight the file and click "Open"
- 7) File Description: Name of the file
- 8) Record Count (How many rows of data do you have in the file?)
- 9) Confirmation E-mail: You can add additional e-mail addresses to receive a confirmation message
HINT: add mdoerr@lastagealliance.com so we get your confirmation too
- 10) Click the "Save" button and wait for the server to upload the file



If you're a current Census Participant and are adding data during your annual update window, you will use your own account login and not the Username and Password listed here.

If you've forgotten them or need one for new staff, please contact Doug Denning (ddenning@trgarts.com)

That's it, you're done! Congratulations!

If your upload was successful, you will receive an email from TRG letting you know. If you get an email detailing a problem with the upload, contact Doug Denning (TRG) or Mark Doerr (LA STAGE) for help.



If your organization is a Los Angeles Arts Commission OGP grantee keep the confirmation email you receive from TRG Arts when you upload your data. You will need to include this with your first year OGP invoice as proof of participation in the Census.

The next page include some Frequently Asked Questions.

The page after that is the Appendix, which contains the full list of Buyer Types.

The final page is a simple checklist to help you follow the steps necessary to participate in the LA STAGE Arts Census.



Including first, last **and** full name ensures that records are properly de-duplicated and appended with demographic data. The combination of last name and street address is used for both processes. The full name field will never be altered in any way. The system generates first and last names from the full name field when left blank. Think of the full name field as the salutation field, Mr. and Mrs. Robert Jones, Jane Graham and Michael Smith. If you do not designate a primary first and last name, you will have Jane Smith rather than Jane Graham.

Frequently Asked Questions

Won't everyone see my mailing list?

No. Reports are based on households not individuals. Trades you approve go directly to a mailing house, not the organization, so they never gain control of your list. Plus you can hide any list you upload so others won't even know it's there.

How much of my data should I submit to the community database?

All of it. The more data you put into the community database, the more control, marketing intelligence, and savings you will get out of it. That said...going back more than 3 years for the first upload isn't really necessary.

Why do I need to segment my data?

Segmentation determines how your data appears eMerge, and provides context for the records that are within any particular list. It allows your staff and trading partners to better understand the specific interaction those patrons had with your organization. For example, you can quickly identify that the patrons within the "12-13 STB: Magic Flute" segment purchased a single ticket for "The Magic Flute" in the 2012-2013 season.

Why is it important that I send my suppression (Do Not Mail, etc) segments?

Suppression lists allow you to control who you are mailing, but more importantly who you are not mailing. Any record included in a suppression list will be automatically removed from any other house or trade list in which they appear.

Should I include Patron ID numbers in my data submission?

Organizations that rely on patron ID numbers within their own ticketing or patron tracking system often include them in their submissions. These can help when importing data back into the ticketing system. Patron IDs are not required for submission to eMerge.

Many of my patrons purchase more than one package or ticket from my organization. How do I represent their buying history accurately?

TRG views history by transaction, not by patron. Each record (row in Excel) represents an individual transaction. If a patron purchases more than once, simply include a record for each transaction. For example, if Jane Smith purchased a single ticket to Nutcracker and a single ticket to Giselle, she would have two separate records if you were segmenting by event.



We do **not** suggest using the Supression (SUP) Buyer Type. This particular Buyer Type removes records from not only mailing list requests but any internal reports you may pull, including demographics or cross-market.

Buyer Type	Definition	Event Description Example
ADM	Admission	2012 ADM: Daily Admissions
ALL	All House	2013 ALL: Magic Flute Preview
ART	Art Gallery	2012 ART: Daily Admissions
CLA	Class	2013 CLA: After School Painting
CMP	Complementary	2013 CMP: La Traviata
DEM	Demographic List Rental	
DNC	Do Not Call - available for you when creating a phone list	2013 DNC: Donors
DNE	Do Not Email - removed from email lists created	2013 DNE: Opted-Out
DNM	Do Not Mail - removed from trades, mailing lists created	2012 DNM: Do Not Mail
DNT	DO NOT TRADE- removed from all trades	2013 DNT: Board Members
DON	Donors	2012 DON: \$250-\$500
EDU	Education	2013 EDU: Family Improv Workshop
EMA	Email List	2013 EMA: Contest Entrants 2013 EMA: Newsletter
GEN	General	2013 GEN: General Mailing List
GRP	Group	2013 GRP: Hollywood Hills HS
MAG	Magazine, Catalog & Other - list rentals	2013 MAG: art ltd list rental
MAI	Mail Code	
MEM	Member	2012 MEM: Men's Chorus
PRO	Prospect	2013 PRO: Prospective Annual Fund Donors
REN	Venue Rental - list obtained through renting your venue to another organization	2013 REN: Other Theatre Company - Comedy
STB	Single Ticket Buyers	12-13 STB: As You Like It
SUB	Subscribers	12-13 SUB: Flex 12-13 SUB: Full Dance
SUP	Suppression - removed from all reports, trades, orders **WE RECOMMEND NOT USING THIS TYPE	2013 DON: \$10000+
SUR	Survey	2013 SUR: Fall Subscriber Survey
TRA	Trade	2013 TRA: General List
VOL	Volunteer	2013 Volunteers

LA STAGE ARTS CENSUS CHECKLIST

1. Submit Completed Forms to LA STAGE:

-Participant Agreement

-NCOA*

(only "List Owner" section - ignore NAICS & USPS Mailing ID fields)

**this will need to be updated annually to remain a member of the Census and have access to eMerge*

2. Collect all your data

(from mailing lists, email lists, donor databases, hand-written guest lists, address books, etc)

3. Enter data into submission template

4. Upload data to trgarts.com

5. Attend mandatory eMerge training session