



Alliance for Audience

To: Alliance for Audience Member Organizations
From: Matt Lehrman, Executive Director
Subject: Meeting Notes of “List Collaborative” Presentation
Date: June 24, 2010

As promised, these are the meeting notes from the June 24th discussion with Will Lester, Vice President of TRG. His slides are available for download [HERE](#).

For anyone who missed the meeting but is interested in learning more about participating in the creation of an Arizona List Collaborative, **please write to me at MLEhrman@allianceforaudience.org by August 5** and I'll gladly arrange for you to participate in an on-line demonstration that will quickly bring you up to speed.

1. **Introductions**

Representatives of more than 25 organizations participated in this discussion. The invitation to participate remains open to ALL Alliance for Audience member organizations statewide; No firm timeline to participate has yet been set although the participating organizations indicated a desire to get this program operational as quickly as possible – as soon as the next 60-90 days.

2. **Consulting Services**

Will introduced his firm, Target Resource Group (TRG) which he described as “Consultants that happen to do data.” The majority of TRG’s work is focused on how to teach, train and coach their clients. Will noted that TRG serves community list collaborations in these cities:

- Denver
- Philadelphia – at 150, this is the largest collaborative by the # of participating companies.
- Houston
- Los Angeles – what they call an “arts census” is the largest list with information about 2½ million arts & cultural patrons
- Seattle
- New Jersey – a statewide endeavor
- Chicago
- Washington, D.C.
- Southwest Florida



3. What is a “Community Database”?

Will describes a “community database” as a pool of data from a variety of sources that has been collected into a central repository. That data generally originates from 4 sources:

1. performing arts institutions,
2. visual arts & cultural destinations,
3. commercial entertainment, and
4. civic entities.

Will advised that the Community Database works best when it functions at the high-level “Census” altitude like that of Los Angeles – where the data provides a view to the full range of public participation and support of the arts & cultural community.

This was a flashpoint of important discussion: Some participants thought that the only function of the community database is to exchange mailing lists (and stated that they’d never upload information about such high-value relationships as series subscribers or donors.) Will acknowledged that concern – and explained that there is MUCH MORE IMPORTANT ANALYSIS AND RESEARCH going on here than just the basic function of mailing list exchanges. He emphasized that the decision of whether/when to share information is completely and always at the discretion of the participating organization. (More on this at #8.) He advised the greatest opportunity of the Community Database is to gain a thorough and high-level of understanding of ALL the participants and supporters of the arts and cultural community.

4. What is the Data?

Will described a 3-step process for looking at consumer data:

- Consumer information (name and address information – as routinely collected by arts and cultural organizations.
- Behaviors – gleaning insights from analyses of the aggregate of information about audience choices, frequency and patterns of participation.
- Demographics – information from commercial services that can be ‘appended’ to arts and cultural organization’s audience data records – which provides detailed analysis about how YOUR audience compares to the community in general and to the rest of the arts and cultural sector.



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5. **Program Goals**

Will explained a variety of program goals:

- **Tactical** – For partners that engage in direct mail and exchange mailing lists, there are cost savings & efficiencies to being engaged with this service.
- **Marketing Analysis & Tools** – Member organizations to receive confidential analyses of their buyer/donor databases which can help them “model” their “best patrons,” reveal how that organization compares to the WHOLE of the sector and measure campaign effectiveness.
- **Sector Benchmarking** – Aggregate reports address such audience-focused questions as “what cross-over rate between organizations can be measured over time;” “what percent participation of households in the market;” “what frequency of participation” and much more.
- **Advocacy** – Such an “information asset” has proven extremely useful when communities research, design and execute advocacy efforts.

6. **Reason to Participate: Cost Savings on List Cleaning**

The group discussed how organizations exchange mailing lists presently – focusing on such weak-links in the process as security, laborious efforts, mail-house expenses, NCOA (National Change of Address) duplicative efforts and more.

7. **Hi-Tech/High Touch**

Will demonstrated how TRG’s on-line “eMerge” platform functions. (Sorry, there’s no way to do that demonstration justice in these notes... We’ll schedule a webinar in the near-future to provide that demonstration again. Suffice it to say: the demo was “pretty cool.”

8. **Data Security & System Design**

Will explained how sensitive data is stored on a secure data server; and how representatives of arts and cultural organizations have direct access only to a separate “application server” that is solely able to request and count “macro-level” information – which is good for analysis, but is incapable of revealing any confidential records.



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9. **Data Security & “Permission System”**

Will emphasizes that exchanging information is a “perk” and not an obligation. No organization is required to ever share any portion of its mailing lists.

However, for those organizations that choose to share lists, Will outlined a system in which participants may create inquiries – and send a permission REQUEST to the “owner” of that list. Approval is ALWAYS at the discretion of the list’s owner.

Further, Will explained TRG’s procedures to assure that when exchanged, that list data is provided to an independent mail-house for one-time use – with safeguards against the actual data being used for other purposes.

10. **“Do Not Trade” Lists**

Will demonstrated how either specific households (a grumpy audience member) or entire lists (donors or series subscribers) can be designated “Do Not Trade” – so that organizations can perform analysis on their own database, but not risk having that information accessed by other organizations.

11. **Custom List Creation**

Will demonstrated how arts and cultural organizations can use TRG’s eMerge platform to create custom lists. (Again, there’s just no substitute for seeing this happen in front of your own eyes.) Additional slides demonstrated how lists can be compiled based on an organizations:

- Geography
- Behaviors: Patron type, organization name, fiscal year, event name
- Demographic enhancement

12. **Reporting & Data Mining**

Will shared sample zip-code analysis, crossover reports and demographic profiles – and how the eMerge platform automatically tracks the “trade balance” between organizations that choose to exchange mailing lists.



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13. Costs & Standard Program Components

The final slide shows that nearly all of TRG's basic list collaborative services are provided FREE OF CHARGE.

Will explained that TRG provides these community-level services at no charge with the hope and expectation that it will serve as a gateway for some organizations to subsequently seek TRG's services.

Will was careful to note that the community collaborative may also wish to exceed the level of TRG's "basic" services (for example, enabling participating organizations to upload audience data more frequently than once per year) which would involve some expense.

Finally, Will noted that local services for on-going training and management of the program would be carried out via a contract with Alliance for Audience in Arizona – and that AFA may incur costs associated with supporting this effort.

Finally, let me repeat that the invitation to participate in this initiative is WIDE OPEN. Anyone who missed the meeting but is interested in learning more about participating in the creation of an Arizona List Collaborative, is asked to **please write to me at MLEhrman@allianceforaudience.org by August 5** so that I can arrange for you to participate in an on-line demonstration that will quickly bring you up to speed.

As always, thank you for the opportunity to be of service. Please let me know if I may provide any additional information or assistance.

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