

Release Notes: October 2017 (4.98)

Before you begin to use Target Analytics **ResearchPoint**, take a moment to review the following notes. It is important to share this information with all **ResearchPoint** users in your organization.

New Target Analytics Affluence Dashboard

The new Target Analytics Affluence dashboard provides a visual summary of the Wealth Segmentation model score distribution among all constituents in your database. The dashboard enables you to drill into different wealth segments without having to create multiple queries. Detailed information about the selected affluence group type — including a general description, donation attributes, demographics, and wealth attributes — displays below the data.

To access the dashboard, navigate to *Analysis* and select **Target Analytics Affluence dashboard**.

The dashboard displays a table of donor groups and their segments. Below the table, a detailed view for the 'Philanthropists' group is shown, including a general description, demographic and donation attributes, and a table of wealth attributes.

Group	Philanthropists			Humanitarians			Casual Donors				Enigmas	The Masses	
Total Count	3632			9339			36553				8469	29100	
Segment	A1	A2	A3	B1	B2	B3	C1	C2	C3	C4	D1	E1	E2
Description	High Net Worth	Financially Secure	Upwardly Mobile	Steady	Devoted	Faithful	Middle Class	Working Class	Marginal	Sporadic	Affluent	Blue Collar	Non-starter
Count	1050	1384	1198	2660	2462	4217	10505	6774	3131	16143	8469	12815	16285

A. Philanthropists Explained 8% of US population

General Description & Attitudes Toward Giving
Stable donors with ample means, they're educated, environmentally conscious, tech savvy and loyal. They want to spread success to the world. Optimists, they respond to positive-potential messaging. They seek mass scale improvements rather than on single cases.

Demographic Attributes
College Grad: 61%
Social: Facebook 48%, Twitter 37%
Responsiveness: Email 3.8/5, DM 2.2/5

Donation Attributes
Annual Donations: \$4,000+
Donation Frequency: 1 to 3+ per year
Donation Amount: \$250+
LTV per org: \$1,500+

Characteristics
Success, Wisdom, Power, Intelligence, Loyalty

Wealth Attributes	% of US pop	Annual Income	Net Worth	Invested Assets	Discretionary Spending
All Philanthropists	8%	\$210k	\$2.1 million	\$1.7 million	\$15.8k
A1. High Net Worth	0.5%	\$368k	\$7.2 million	\$6.1 million	\$24.0k
A2. Financially Secure	0.8%	\$284k	\$3.9 million	\$3.3 million	\$20.0k
A3. Upwardly Mobile	7.0%	\$190k	\$1.5 million	\$1.1 million	\$14.8k

The dashboard shows the total count of donors in each donor group (Philanthropists, Humanitarians, Casual Donors, Enigmas, and The Masses) and in each group's segment.

When you click any of the count numbers, the corresponding wealth segmentation research list displays.

ResearchPoint™

Home | Prospects | Analysis | Administration

Research Lists

C3 - Marginal Casual Donors - Research List

Description: People returned from the Target Analytics Wealth Segmentation as Category C3 - Marginal Casual Donors

Owner: Allow others to access: Yes

Category: Allow others to edit: No

List members: 3,131 | List can be refreshed: Yes | Auto refresh nightly: Yes

WealthPoint

Subscription: Professional with Social

Group screens remaining: 799,047

Screen list | Request more screens

Members (3,131) + Add member | Edit | Refresh | Research list report | Delete list | More

Search | Columns | Clear all filters

Name	Primary city	Primary state	Primary ZIP	Total confirmed assets	Total ide
A C. FELLMAN	WEST BLOOMFIELD	MI	48323-2538	\$653,278.00	
A E. COOK	VANCOUVER	WA	98665-7559	\$243,808.00	
A E. DEST	HARTFORD	CT	06109-1234	\$201,310.00	
A P. NICOLE	HENRICO	VA	23233	\$360,413.00	
A W. DILLIIGI	TAKOMA PARK	MD	20912-7071	\$488,421.00	
A. M. Blackwelder	Bardstown	KY	40004-2520	\$270,734.00	
Aaron D. Thomas	Louisville	KY	40299-4138	\$372,393.00	
AARON I. ENGEL	WEST BLOOMFIELD	MI	48322-2021	\$235,913.00	
Aaron J. Smith	Wichita	KS	67212-4207	\$132,248.00	

Affluence Scores Split Out on Model Score Tab

We've added a new Target Analytics Affluence section on the Model Scores tab on the wealth and ratings record. This gives the Target Analytics Affluence model scores a first-class section on the record and breaks out these scores from the other model scores you may have in your database.

Wealth Summary | **Model Scores** | Assets | Giving | Affiliations | Biographical Information | Social Summary

Model scores and ratings (7) + Add | More

Name	Score	Maximum score	Updated on	Origin
Major Giving Likelihood	408	1000	6/22/2012	Blackbaud
Mid-Level Gift Likelihood	411		6/20/2012	Custom
Past Giver Type	Non-Donor		6/20/2012	Custom
Target Gift Range	\$51-\$100	\$3,000,002 and up	6/22/2012	Blackbaud
Velocity Rating	NA		6/20/2012	Custom

Target Analytics Affluence (5) | More

Name	Score	Updated on	Origin
Target Analytics Discretionary Spend	\$125,000.00	2/28/2017	Blackbaud
Target Analytics Income	\$16,575,000.00	2/28/2017	Blackbaud
Target Analytics Investments	\$20,000,000.00	2/28/2017	Blackbaud
Target Analytics Net Worth	\$50,000,000.00	2/28/2017	Blackbaud
Target Analytics Wealth Segmentation	A1 - High Net Worth Philanthropists	2/28/2017	Blackbaud

Target Analytics Affluence Processed through API

With this release — and when you purchase a Target Analytics Affluence subscription — ResearchPoint processes your records and automatically appends the Affluence fields. This will occur when activated, on records as they are added, and refreshed on every record annually. This integration removes the exporting and importing previously required to get this data into ResearchPoint.

Open Data (ODATA) Protocol Change

The ODATA Query feature has been updated to default to the JSON format. For technical details and FAQs, check out this [blog post](#).

System Readiness for Transport Layer Security (TLS) Support

The connection to your **ResearchPoint** site is encrypted and authenticated using the default protocol Transport Layer Security (TLS). Starting March 15, 2018, TLS v1.0 protocol will be deprecated. At that time, all customers connecting to a hosted **ResearchPoint** site will be required to use an operating system and browser that's compatible with TLS v1.1 or higher.

For more detailed information, including a list of compatible operating systems and browsers, refer to the [Action: Upgrade for PCI Compliance](#) site.

Target Analytics Data Updates

Since our 4.97 release, we have refreshed the data for NOZA, GuideStar, Experian, Larkspur, Federal Elections Commission (FEC), and Thomson Reuters Business Intelligence (TRBI) in our Target Analytics database.

Now, when you perform WealthPoint screenings on a prospect's wealth and ratings record, or when you perform a screening on your research lists, you'll have the latest philanthropic gifts, nonprofit and foundation affiliations, self-reported biographical data, comprehensive wealth information, political donations, and income records.

Scrolling Issues with Chrome Browser

We resolved an issue that occurred with the Chrome browser when scrolling through tiles on constituent records. Previously, when using Chrome version 60.0.3112.90 or later, scrolling through information in the tiles — such as Personal Information, Contact Information, and Addresses — would cause the tiles to stop displaying. With this fix, the tiles continue to display normally when you scroll through the information.

ResearchPoint Feedback

Do you want to influence the direction of the product? You can in the [Target Analytics Community](#). We're there with you in the community and we're listening for which features you want added or which existing functionality needs to be improved.

You can add a new idea, vote for ideas you want to see implemented, or respond to an existing idea with comments about what you need specifically. The more you tell us, the better we can prioritize and design the product around your organization's needs.

How do ideas get implemented? Ideas with the most likes are more heavily favored when we consider what we should put on our roadmap for **ResearchPoint**. To see all the current user-posted ideas, from the Target Analytics Community home page, in the **Navigation Menu**, click **Ideas**. We look forward to hearing from you on how you need **ResearchPoint** improved!