



The Big List

2010 Participation Confirmation Form

(form deadline: November 16, 2009, name submission deadline: November 24, 2009)

The Bay Area Big List is a marketing project of Theatre Bay Area sponsored by the Wallace Foundation through the San Francisco Foundation and Grants for the Arts/SF Hotel Tax Fund. Its goals are to identify a targeted, qualified and focused group of arts consumers; examine consumer behavior through comparative market analysis; and to simplify cultural list exchanges between participating Bay Area-based, non-profit arts organizations – all of which should improve the effectiveness of direct mail marketing campaigns.

On behalf of my organization, I agree to abide by all rules and regulations set forth in this agreement.

- ✓ As a participant, I agree to submit my Participant Confirmation Form by November 16, 2009, and to submit names and mailing addresses of all patrons as specified below from my organization to the Bay Area Big List by no later than 4:00pm on November 24, 2009. I understand that names from the database can be accessed by all participants in the Big List for the duration of the 2010 calendar year. I understand that my organization may not permanently retain a copy of mailing list data from other organizations. The number of names I submit will be consistent with the good faith estimate provided on the List Submission Worksheet.
- ✓ I agree not to use these names for fundraising purposes; however, I understand that these names may be used for “member solicitation” if my organization offers an existing, on-going membership program.
- ✓ I agree not to use these names for any telemarketing or email marketing campaigns. I agree and understand that I am not allowed to telephone append or to email append data from the Big List.
- ✓ I agree to assume all costs associated with list extraction excluding the annual setup fee, which will be covered by the Wallace Foundation. Costs I assume include, but are not limited to: extraction fees for all lists pulled from the Bay Area Big List, printing, postage and mail house costs. List extraction fees will be set by Enertex Marketing (official vendor for the Bay Area Big List); however, I will be provided a list of all fees prior to each extraction. These fees will vary depending on the size and complexity of each extraction however will be consistent with pricing outlined by the vendor.
- ✓ I understand that details regarding the formatting of the list I will provide to the Big List can be found in the List Submission Worksheet and Guidelines for List Submission that came with this agreement and can also be found at www.theatrebayarea.org/biglist. It is understood that best practice industry standards will be followed when formatting and segmenting my list. I understand that my if my organization is joining for the first time, it is required to provide three years worth of data, including the current season/calendar year. I understand that if my organization is already a member, it is required to provide any data that has changed since the last submission in November 2008. In terms of list segmentation: should my company have the ability to segment lists, I understand that performing arts organizations will supply list segments of current subscribers/members, lapsed subscribers/members, current single ticket buyers, former single ticket buyers, and individual productions. General inquiry names are not to be provided. For a membership based institution, I will supply current season/year members, one year/season lapsed members, and two year/season lapsed members. Participants should NOT supply names coded as “Donors,” “Do Not Mail/Do Not Trade,” “VIPs,” and the like.
- ✓ Should my organization fail to abide by the rules and regulations of the Bay Area Big List, I understand that my organization’s list extraction rights will be revoked for the duration of the calendar year; however, all names submitted by my organization will remain open to all participants in good standing. In addition, my organization may be held liable to any other participant should this misuse result in any legal ramifications. I also understand that notification of any potential infractions will be forwarded to the San Francisco Arts Council, East Bay Community Foundation, San Jose Office of Cultural Affairs, and Grants for the Arts/SF Hotel Tax Fund.

ORGANIZATION: _____	
STREET ADDRESS: _____	
CITY: _____	STATE: _____ ZIP: _____
CONTACT NAME: _____	
PHONE: _____	EMAIL: _____
SECONDARY CONTACT: _____	SECONDARY EMAIL: _____
SIGNATURE: _____	DATE: _____

PLEASE FAX THIS FORM AND THE LIST SUBMISSION WORKSHEET TO 415.430.1145 BY 11/16/2009.

By signing I agree to hold harmless and waive any potential claims, suits or judgments against Theatre Bay Area; its project co-sponsor the Wallace Foundation; and its partner organizations the San Francisco Foundation and Grants for the Arts/SF Hotel Tax Fund that might result from my participation in this program. My signature represents evidence that I am empowered by the organization listed to act on its behalf in this matter.



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List Submission Worksheet

Please fill out all fields to the best of your ability

The Bay Area Big List encourages you to submit as many names as you are able. There are three groups, however, that we ask you to exclude from your submissions. Below is a simple worksheet to let us know how many of each type of exclusion group you have, and how many names you will ultimately be submitting. While this is not a binding worksheet, these numbers will be referenced if we have any questions about the size or contents of the lists you submitted.

The Bay Area Big List is a communal enterprise that functions only if all participants participate in a fair, honest, and equal way. Participants are expected to provide all of the names that they can, given the criteria laid out in the List Submission Worksheet and the Guidelines for List Submission. If a Big List company is found to have submitted substantially fewer names than are appropriate given that criteria, that company may be subject to suspension from accessing the Big List.

If you have questions about the criteria for list generation, or about this policy, please contact Clayton Lord at clay@theatrebayarea.org.

Please note: if you are already a participant in the Big List from 2009, you may submit only data gathered since November 2008. Should you wish (for example, if you want to re-segment), you may also submit 3 years of data.

Total number of applicable names in your database (ticket buyers, the last ___ yrs): _____
(note: this year, we are also seeking staff/cast/artist lists – please separate these into a new list segment or segments if you are providing them.)

Names excluded as **only donors** (i.e. no show attendance in the last 3 years): _____

Names excluded as **do not mails** (i.e. they're on your do not mail list): _____

Names excluded as **VIP's** (i.e. major donors, special patrons, etc.): _____

Names excluded for **other reasons** _____

Please specify reasons: _____

Total number of names being submitted to BABL 2010: _____ = _____
Note: the total number of names being submitted must be **at least 500** for the BABL 2010

By signing below, I indicate that these numbers, while non-binding, are a good approximation of the number of names in each category for my organization. I understand that I may be asked to explain any drastic changes in the numbers provided above by the administrators of BABL.

Signature

Date

Printed Name and Position

Company

PLEASE FAX THIS WORKSHEET AND THE PARTICIPATION FORM TO 415.430.1145 BY 11/16/2009.



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Guidelines for List Submission

- 1.) Submit data using one of these formats: Excel, Text Comma Delimited, Comma Separated Value. Your list should be able to open in Excel, Access, or a text editor program.
- 2.) The following fields should be provided and each item below should be kept in a consistent field/column throughout the file (i.e.: all first names in the same field/column throughout the file, all last names in the same field/column throughout the file, all cities in the same field/column throughout the file, etc):
- Patron Number/Customer ID Number, if available, not to be shared with other organizations
 - Full Name OR First Name and Last Name in separate fields/columns
 - Address Line 1
 - Address Line 2
 - City
 - State
 - Zip Code
 - Date of Most Recent Activity (if not providing separate list segments by season or year)

- 3.) Submit lists of segmented buyers from the last 3 years. The most common segmentation would be 6 lists or 3 lists:

2008-2009 Subscribers or Members
2008-2009 Individual Event Buyers
2007-2008 Subscribers or Members
2007-2008 Individual Event Buyers
2006-2007 Subscribers or Members
2006-2007 Individual Event Buyers

OR

2008-2009 Buyers
2007-2008 Buyers
2006-2007 Buyers

**If your organization presents many types of programming, please segment by season/year, type of buyer (subscriber or single ticket buyer), AND by genre. For example:

2008-2009 Family Subscribers
2008-2009 Family Single Ticket Buyers
2008-2009 Theatre Subscribers
2008-2009 Theatre Single Ticket Buyers
2008-2009 Classical Subscribers
2008-2009 Classical Single Ticket Buyers
2008-2009 Dance Subscribers
2008-2009 Dance Single Ticket Buyers

Repeat the above segments for 2007-2008 season and 2006-2007 season.

**For classical music organizations, please segment by classical, pops, and family for each season, if available. If more genres are available, feel free to provide those as well. Provide season subscribers or members separately from individual event buyers.

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**For theatres, segment by show or by plays vs. musical buyers for each season, if available. If individual show lists are small, please group into one list of single ticket buyers for each season. Provide season subscribers or members separately from individual event buyers.

**If your organization cannot provide list segments, please include the date of most recent activity for each record, where possible, to indicate the last time each person was active with your organization.

**Enertex will additionally “clean-up” mailing list data principally through use of NCOA (National Change of Address). Please note this service does not “spell check” names or addresses provided.

Most Important! Please do not provide anyone coded on your mailing list as “Do Not Trade or Share,” “Do Not Mail,” “Deceased,” etc. Remember, if you submit a person’s name and address, it will be eligible to be selected by other participants.

Data files can be e-mailed, as attachments, to Enertex Marketing, or posted to the Enertex Marketing FTP site.

For e-mail transmissions, please send data files to:

tholm@enertexmarketing.com

Please identify the name of your organization and include in the subject line:

Bay Area Big List 2010

To post data files to the Enertex FTP site, please visit our website:

enertexmarketing.com

Then, click on the “FTP Information” icon on the home page for detailed instructions.

Floppy disks, CDs, and 3480 cartridges are acceptable media as well. To provide data using one of these formats, please ship to:

**Tom Holm
Enertex Marketing
99 Madison Avenue
10th Floor
New York, NY 10016**

If you have specific questions about submitting your data, please feel free to contact Tom Holm directly at the e-mail address above or directly at 212-532-1610.

You may generate or create your mail files at any time, and should deliver them between October 1, 2008 and November 24, 2009.