

EveryAction Data Structures

In addition to the fundamental core of Committees, Contacts, Contributions, and Events, EveryAction also has a variety of structures for organizing the complex activities and interactions of your supporters. This document lists them all, and explains when and for what Audubon uses them (or doesn't).

Source Codes

Source codes are about representing Audubon's general ledger funding, grant reporting, and tracking lead generation efforts.

- **Contributions and Ticketed Event Forms**
 - What should this transaction fund - To associate a specific donation with a GL code
 - How was this money raised - To associate a specific donation with a marketing effort
- **Events, Online Advocacy Actions, Online Volunteer Signups, Online Email List Signups**
 - To associate with a grant or department that paid for that event, action, or signup

If actions listed above or a contact upload generate new people, Source Codes become that new record's *Origin Source Code*. This serves two main purposes:

- **Who and what effort brought a person in:** helps to assign credit for acquisition efforts.
- **Measuring return on investment (ROI):** by calculating revenue + value of other actions, we can see the value of a lead over time.

Activist Codes

Activist Codes are about flagging and labelling behavior, interests, and preferences of our supporters.

- Represent behavior not otherwise represented in a native EveryAction structure (e.g. make a signup form to take in bird count data, and use an Activist Code to represent that it's application represents a submission of bird count data)
- Track attributes of a supporter that cross-cut all strategic priorities and department activities (e.g. "program participant" or "vegetarian") but do not rise to the level of a target audience ("BLE" should be a target)
- Log preferences of a user that apply across many campaigns and events (e.g. "do not solicit", "chapter leader communications only")

Activist codes are most useful for creating *audiences* for either segmenting emails or activity reports.

Targets

Targets are about defining strategically important Audubon target audiences in a consistent way for all EveryAction users.

Targets are *calculated*: they use saved searches that can encapsulate complex criteria into concise and distinct subgroups. These searches are run every night to assign these targets to contacts.

Audubon has limited bandwidth for these target calculations, so candidates for targets should be considered carefully.

Engagement Types

Engagement Types are about summarizing and normalizing value of supporter engagement that are important to Audubon.

They are also a way of defining a type of engagement type not otherwise captured in native EveryAction data structures or defining an engagement type that could be represent in multiple ways.

Tags

No universal use currently exists for tags.

However, if you have a need for another dimension of supporter categorization or segmentation not covered by any of the person-level structures listed here, consider using tags to fill that need in whatever way you wish.

Survey Questions

Represent the results of a conversation that we had with a member or volunteer at a point in time.

Saved Lists

Saved Lists are about putting supporters together in discrete groups for use in later segmentation or reporting.

Saved Searches

Saved Searches are about defining specific segments of supporters for reporting or communication using all the criteria available in EveryAction.