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# DQA / Data Quality Assessment

**Client**

ABC Charity

**Project**

CRM Migration

**Prepared By**

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**About the DQA:**

This report assesses the quality of your consumer data and provides high level analysis.

The DQA is an important first step in the process of understanding your customers, strengthening engagements, and planning for greater outreach and success.

**Notes:**

Active records form the basis of the remainder of the DQ Snapshot.

Inactive records are noted but not analyzed.

**Summary of Findings**

This report was prepared in conjunction with a data migration project.

**Data Quality Snapshot:** Your data appears free of corrupt records or data fields. A high percentage of records are complete – meaning they do meet a minimum standard of name, address, and phone OR email. Emails are available for 52% of contacts. “Thank you” responses are indicated on only 26% of records. More detailed donor information is needed to enable targeted, meaningful appeals, better response rates, and improved donor relations through donor segmentation.

**Agging Snapshot:** Most records are not being updated frequently with new information, per the data history field in the database.

**Giving Snapshot:** Your data suggests a heavy reliance on existing donor records with limited outreach to cultivate new donors. A high percentage of donors are one-time givers. There are no matching gifts in the system.

**Potential next steps:**

- Increase the effort to identify your Prospective Donors.
- Add data collection fields to your database (see Notable Fields Absent at the end of this report), and expand consumer profile enrichment efforts.
- Expand outreach activities to grow the database through social media and other forms of communication.
- Target lapsed donors.
- Establish a matching gift effort.
- De-duplicate records.

**Total Record Snapshot**

Category	Indiv #	%	Org #	%
Total Records Received	17870	90.20	1920	9.80
Inactive records	3201	17.91	99	5.15

Category	Indiv #	%	Org #	%
Corrupted (invalid for purposes of this report)				
Net active, valid records	14669	82.08	1821	94.84

**Notes:**

The DQ Snapshot provides the broadest view of quality and quantity metrics about your data.

**Data Quality Snapshot – Active Records**

Category	Indiv #	%	Org #	%
<b>Active, valid records</b>	14669	82.08	1821	94.84
<b>Duplicate potential</b>				
By name	432	2.42	39	2.00
By address	388	2.17	7	0.36
By email	120	0.67	8	0.41
By phone	25	0.01	9	0.46
<b>Contact information</b>				
Spouse	3707	20.74		
Salutation field	16400	91.77		
Mailing address (complete)	14490	81.08	1770	91.19
Mailing address invalid (missing city, st. or zip)	2006	11.22	168	8.62
No mailing address	1374	7.69	127	6.52
Phone number (at least one)	9780	54.72	1302	66.84
Email	9400	52.60	987	50.67
Email – more than one	990	5.54	137	7.03
Preferred method of contact indicated	0	%		%
Donation ‘thank you’ indicated	4,720	26.41		%
<b>Consumer/Constituent type</b>				

Constituent type not broken out by individual or organization.

Category	Indiv #	%	Org #	%
Total number of types	12			
Donor	7590	42.47		
Prospective donor	877	4.91		
Volunteer	473	2.38		
Newsletter subscriber	8600	48.12		
Board member / trustee	48	0.26		
Staff	50	0.27		
Event attendee	4488	25.11		
Records with no type	916	5.12		
Records with 2 or more types	6220	34.80		
Records with 3 or more types	3002	16.80		
<b>Profile building</b>				
Gender	102	0.57		%
Date of birth	56	0.31		%
Age	159	0.89		%
Employer / retired	780	4.36		%
Income indicator (ex. income number, home value)	0	%		%
Family status	0	%		%
Alma mater / university	0	%		%
Interests / activities	0	%		%
Event attendance	4488	25.11		%
Other	0	%		%

Profile building fields represent the ability to create groupings of consumers in ways to better understand and market to them.

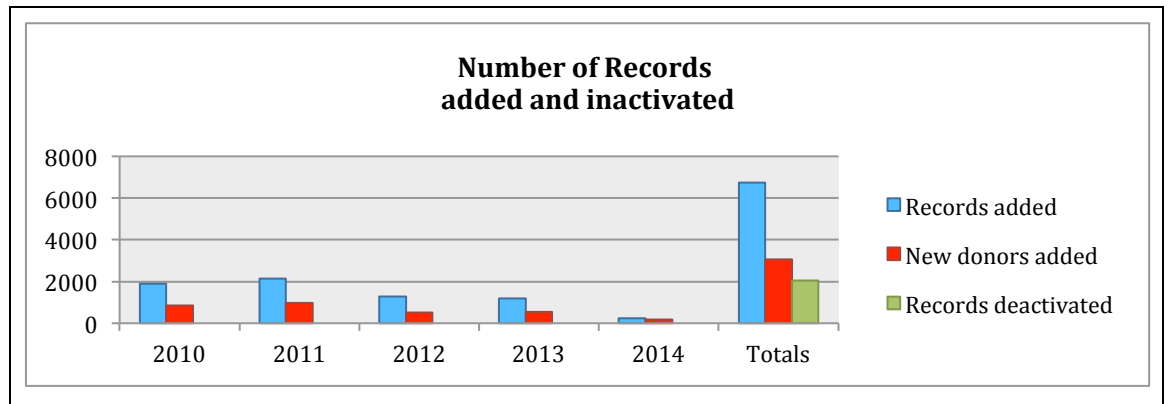
Complete contact =  
Complete mailing + phone  
OR email

Profile capacity =  
Complete contact +  
Attribute + Constituency +  
Relationship

Record completeness				
Complete mailing info	14490	81.08	1770	91.19
Complete emailing info	9400	52.60	987	50.67
Complete contact info	12286	68.75	1364	70.02
Profile capacity	1473	8.24	215	11.04

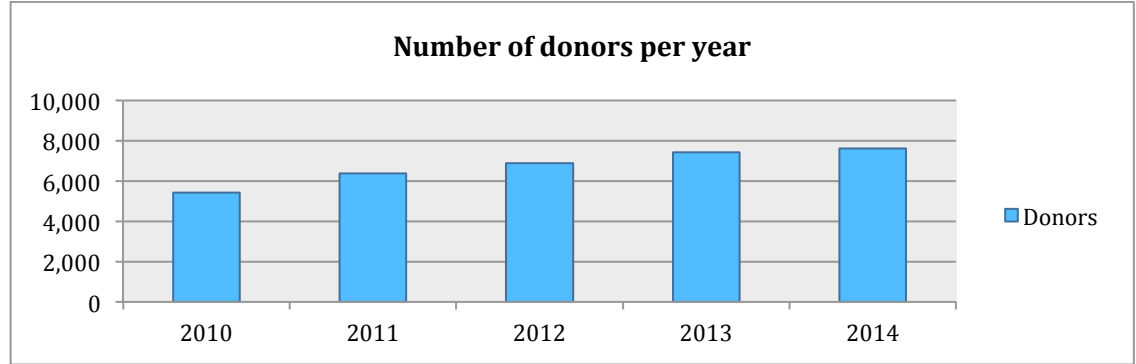
**Aging Snapshot**

**Notes:**  
The Aging Snapshot looks at how old your consumer data is and how actively it is being managed, in order to understand how old your donor relationships are. Records deactivated are the total number so flagged in the database.



Category	Indiv #	%	Org #	%
<b>Total Active Records</b>	14669	82.08	1821	94.84
Total donors	7590	42.47	893	45.84
Records not edited in last 12 months	5924	33.15	1001	51.39
Records not edited in last 24 months	2322	12.99	493	25.31
Records not edited in last 25+ months	1000	5.59	55	2.82

**Giving Snapshot**



**Notes:**  
 The Giving Snapshot looks at your donors vis-à-vis consumer codes and record completeness. It should point out where more/better data is contributing to the acquisition and retention of more donors.

Category	Indiv #	%	Org #	%
<b>Total Donors</b>	<b>7590</b>	<b>100.00</b>	<b>893</b>	<b>100.00</b>
<b>Retention</b>				
Donors giving 1 time	4047	53.32	744	83.31
Donors giving 2 times	2078	27.37	107	11.98
Donors giving 3 or more times	1465	19.30	42	4.7
<b>Involvement</b>				
Donors who are volunteers	510	6.72		
Donors who are event attendees	1144	15.07		
Donors who are subscribers	4801	63.25		
Donors with a matching gift	0	%		
<b>Data completeness - donors</b>				
Donors with complete mailing info	5750	75.75	856	95.86
Donors with complete emailing info	4620	60.87	410	45.91
Donors with complete contact info	5248	69.14	581	65.06
Donors with profile capacity	1120	14.75	0	%
<b>Data completeness - prospects</b>				

Category	Indiv #	%	Org #	%
<b>Total Prospects</b>	<b>877</b>	<b>100.00</b>		
Prospects with complete mailing info	475	54.16	0	
Prospects with complete email info	221	25.20		
Prospects with complete contact info	190	21.66		
Prospects with profile capacity	0			

#### Notable Fields Absent From or Under-utilized in Data Files Provided

1. Preferred method of contact
2. Gender
3. Date of birth
4. Income indicator (ex. Salary range, home value)
5. Employer
6. Alma mater
7. Program interests at your organization
8. Giving data to other charities
9. Social media preference (can you reach someone via Facebook, Twitter, LinkedIn, etc.?)