Informational Guide:

Data Consolidation, Cleaning and Enhancing

Prepared by the Nonprofit Professionals of Quantivpro, Inc

William Welch
CEO
(310) 882-0172
William@quantivpro.com

Jannetta Lamourt
Director of Communications
(505)382-5253
Jannetta@quantivpro.com

Debra Owens
Director of Data Management
(864) 688-9315
Debra@quantivpro.com

Kevin Shin
Principle
(562) 248-6371
Kevin@quantivpro.com

Introduction

Nonprofits face incredible hurdles: pandemics, protests, adverse changes in tax laws, and more. There are opportunities, as well: foundations are waking up and reducing application times and making processes faster and simpler for nonprofits. Similarly, many donors don't want to allow the demise of their favorite nonprofits and are being generous now rather than "someday."

On the expense side, you can cut costs, some of which are very painful-staff or programs, for instance. You can also **cut expenses that are not painful**, for example, by being more efficient and effective as well as by outsourcing for expertise where it makes sense. One source of costs to consider is the incredible inefficiency of bad data.

IBM estimated that the yearly cost of bad data is $3.1 trillion in the US alone (Source: HBR).

There are many types of data that are a cost burden: duplicates, wrong addresses, nonprioritized donor prospects, for example. Consolidating, cleaning, enhancing, and effectively using data can dramatically reduce costs and increase revenue.

Common sense says: "Don't waste money on bad data and prospects and past donors who can't or won't help you again." Instead, **streamlined, up-to-date, prioritized data** focus development and operations staff on prospects and donors with the highest likelihood of supporting you.

This white paper is designed by nonprofit professionals to lead you to consolidated, clean, and useful information about your contacts, prospects, and donors. From board members to newsletter readers, you can know who they are and how they can best support you. They appreciate their name spelled correctly and asked for donations that are appropriate for their situation. Your operations staff enjoy not wasting precious mailing dollars on wrong addresses and those unlikely to respond. Your development staff appreciates not spending time sifting through multiple sources to find suitable major donors and other prospects. You enjoy reducing expenses and increasing donations.

This document presents a good outline of how to attain this. Your staff can do everything in this document. A cheaper, faster solution may be to outsource it; if so, we are here to help…it's what we do.

Sincerely,

William A. Welch

William A. Welch, CEO

310-882-0172

Table of Contents

Why bother?!

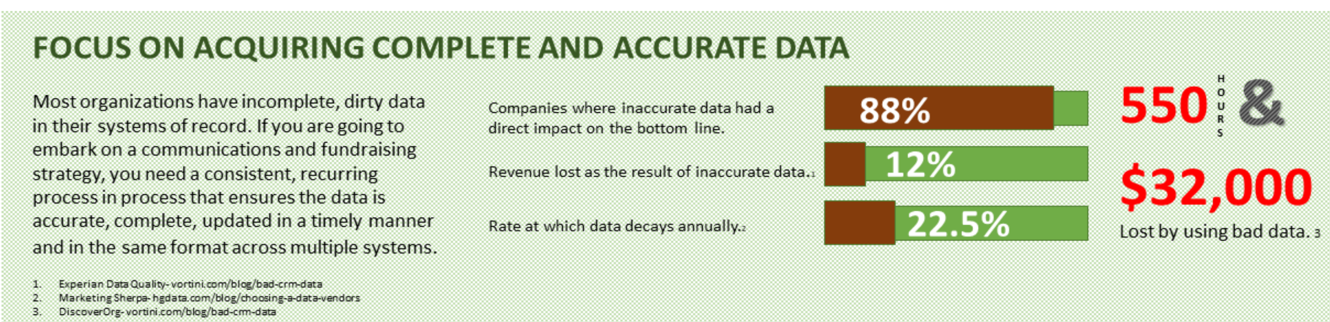
Nonprofit missions are all about relationships. Your database is your link to everyone who cares about your vision of the future. Reducing costs and increasing stakeholder participation is essential to survival and growth.

Reducing Costs

One of the easiest ways to reduce your costs is by not wasting money on out-of-date or wrong data and low-priority prospects. Bad data wastes staff time to find, use, and repeatedly fix the same mistakes.

> It is estimated to cost **ten** times as much to complete a piece of work when the input data are defective as when they are perfect, or as close to perfect as you can get (Source: HBR).

Development staff and mailings are expensive. Having the right data that identifies your best prospects saves labor, mailing, system, and other direct costs. Make 50 targeted major donor calls to the right people instead of a thousand to random people. Send out 1,000 mailings to those most likely to respond rather than 10,000 to anyone with an address.



Happier Staff and Stakeholders

Your donors, volunteers, and prospects appreciate having their names spelled correctly and that you request support in a manner that is appropriate to their situation. For example, targeted, segmented mailings means that you are respecting the recipient's role in your nonprofit.

Your operations staff enjoy not wasting precious mailing dollars on wrong addresses and those unlikely to respond. Your development staff appreciates not spending time sifting through multiple sources to find suitable major donors and other prospects. You appreciate reducing expenses and increasing donations.

Data Sources

The first step is consolidating every contact point with your organization – specifically, every opportunity for a prospect to engage with your mission. Your data can include past, current, and potential:

- Board, Staff, Interns, and Fellows
- Clients
- Event participants
- Donors
- Prospects (potential donors)
- Vendors and Consultants
- Partners
- Volunteers

Your data should also include those who ask for no contact. That way, you don't mistakenly re-add someone and contact them when their wishes are clear. Knowing and abiding by the rules people set for themselves is perhaps not a penny earned, but it is a penny saved. No wasted emails. No blacklisting for spam. No useless phone calls.

Centralizing your data will significantly streamline the time you spend searching for and updating information. Consolidation of the many sources of data means you only have to clean and update it once, and you can find it easily. Examples of data sources dispersed around your organization may include:

- ✓ Spreadsheets
- ✓ Event sign-up sheets
- ✓ Volunteer sign-in sheets
- ✓ Business cards
- ✓ Return mailings
- ✓ Social media and LinkedIn contacts
- ✓ Email contact downloads
- ✓ Client Relationship Management system (CRM)
- ✓ Publication and website scrapes*
- ✓ Purchased prospect lists*

*Note that Quantivpro does not advocate the use of these means but, since they are common, we include them here.

Tracking Opportunities

Tracking campaigns and other contacts save time and money: fewer duplicate contacts, quicker identification of non-responders, clarity of communications with prospects and donors, etc.

- Event attendees, e.g., meetings, conferences, lunches
- Emails and newsletter recipients
- Mailing recipients
- Donation solicitation history
- Vendors, interns, fellows, consultants, and employee contacts

Of particular importance is to track “asks” and the result of the asks. That is the heart of the tracking process.

Data Cleaning Checks

The result of all the work below is that the people reflected in your database can efficiently:

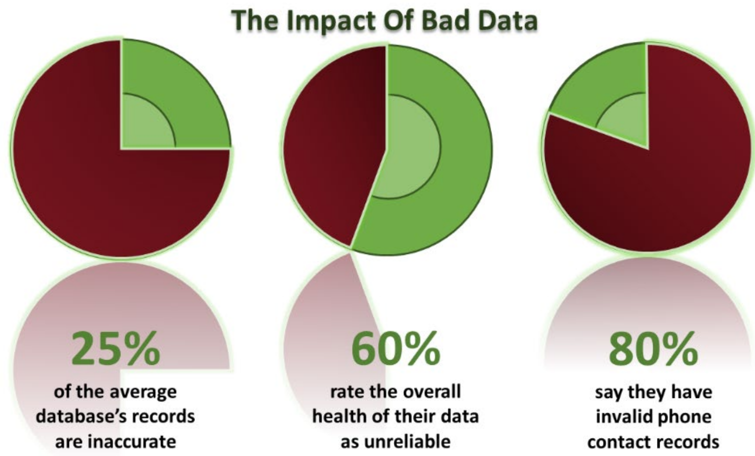
- ✓ View something
- ✓ Sign up
- ✓ Advocate
- ✓ Participate
- ✓ Volunteer
- ✓ Get involved
- ✓ Share
- ✓ GIVE!!!

To do this, you must know who they are, how to contact them, and other descriptors that help you communicate effectively. Here are several key benefits that come out of the data cleaning process:

- Significant errors and inconsistencies removed
- Efficient and quicker access to data
- No delays in response time while searching for important prospect information
- Names spelled correctly
- Less frustrated employees with faster search times and less time fixing errors
- More leverage to your data, e.g., targeted email campaigns using segments of your database to focus on individual interests and not generic communications

Cleaning the Data

After consolidating your data into one system, the second step is cleaning.



Duplicate Management

Duplicate data is costly. There are several types of duplicate data.

- Contact: Two records for the same person or organization
- Inter-record: Same data in two different constituent records, e.g., email
- Intra-record: Same data more than once in a single record, e.g., the same address, email or phone number twice in one record

People are far better at detecting and correcting all three duplication errors. But automated duplicate identification can bring possible duplicates to the attention of a person who can merge, delete, correct, or ignore them.

- Is J. Smith the same person as Jane Smith?
- Do two people (e.g., spouses) share an email, or should those records be merged?
- Are similar addresses the same or different?

People decide these types of issues best.

Standardized, Clean Data

Below is a list of common contact errors that should be corrected and institutionalized to avoid inputting new errors.

Name issues

- Missing the first or last name
- Misidentified middle names
- Improper punctuation
- Incorrect suffixes
- Incorrect capitalization (e.g., all caps)
- Missing or inaccurate prefixes (e.g., Mr./Ms./Dr.)
- Hyphens
- Maiden names
- Nicknames

Titles and Salutations

There are many salutation and suffix options. Decide your organization's rules for spelling and punctuation. If unsure, check.

Miss, Ms., Mrs., Mr.
Dr. *vs.* , MD
Prof *or* Dr., *or* Ph.D.
Esq, DDS, CPA
Sr., Jr., III

Do not enter the Salutation, Title or suffix as part of the first or last name.

Demographics

Only bother to collect that which you will use.

Gender

- Decide acceptable/useful genders
- Judiciously affix missing genders based on names or other information
- Check mismatched prefix and gender

Age

- Planned Giving
- Birthday cards
- Age differentiated communications (segmentation matters!)
- Incorrectly formatted
- Impossible ages (e.g., birthdate in the future)

Company Names

Spell out company names except for Inc, LLC, LP, etc. [There are exceptions such as IBM]
Include standard corporate abbreviations in parentheses at the end

Personal Descriptors

People appreciate being addressed correctly. It is unlikely they will continue reading if you get their name and other details about them wrong.

Addresses

The primary use of addresses is for mailing. But they are also necessary to identify duplicates, consolidate households (to reduce mailing costs), identify employers for matching gifts, to name a few. Many decisions are simply a matter of taste, e.g., all caps. But consistency with USPS standards reduces mailing costs and increases your fundraising successes.

- Use the address abbreviations used by the U.S. Postal Service in the CASS system. Search processes do not recognize Street, St. and ST as the same word, so if they are entered differently on matching constituents, it impacts your ability to clean data.
- NCOA: National Change of Address is a USPS service that provides you up to date information about people who have moved.
- Avoid using “Attn:” or the “in care of” lines
- Avoid USPS unapproved punctuation
- Numeric street names are (almost always) not spelled out (7th, not seventh)
- Abbreviate directional indicators before and after street names (123 S Main St NW), without periods (e.g., S Hewitt St vs. S. Hewitt St)
- Abbreviate street suffixes (Ave, Blvd, Cir, Ct, Dr, Ln, Rd, St)
- Add the plus 4 to US zip codes
- Do not use the pound sign (#) as a secondary address unit designator, instead use standard abbreviations (Apt, Bldg., Fl, STE, Unit, Rm, Dept)
- Spell out city names (Fort Myer, not Ft. Myer)
- Set the preferred, residential, business, mailing, shipping addresses

Other Common Errors

- Mis-identified contact types, e.g., noted in the system as donors but no record of their donations
- Organization relationships missing
- Mismatch of reciprocals, for example, a child listed as an employee of a family
- Emails incorrectly formatted
- Name mismatched
- Non-personal emails such as admin or info
- Phone numbers format errors
- Social media link formatting errors
- Contacts that have no contact info, for example just names
- Capitalization
  - Title Case: Use title case for most words and remove punctuation. For names, capitalize the first letter of words unless there is a reason not to. Use lowercase for all subsequent letters with some exceptions.
  - Initials: If the constituent’s name includes an initial, such as Thomas E. Smith, enter the initial in its appropriate name field (in this case, Middle) and include

a period. Do not combine the initial with another name, such as entering "Thomas E." in the First Name field.

Staff Participation

Everyone who uses the database is responsible for the database—everyone who enters data trains with your selected rules. And one person should regularly clean the data. Each person with access to your data is responsible for:

- Complete missing data
- Update changes promptly (e.g., change of address notices)
- Identify ownership if you assign contacts to different staff members
- Use the data and throw out the Rolodex
- Ask for help if unsure
- Make suggestions to improve the database
- Identify those who should never, always, or solicited only in specific ways

Each staff member should understand their role to use the data and respect those reflected in the database. In sum, see something wrong, do something about it.

✓ If you know the information, enter it.
✓ When you see incorrect information, fix it.
✓ Complete as much information as you can.
✓ If you can't or won't enter the data, ask for help.

Data Enhancements

Once the data is clean, the next step is to decide how to enhance your data. You can purchase addenda to supplement your in-house data and thus discover, for example:

- Addresses
- County and Legislative Districts
- Email address
- Social media and LinkedIn
- Employers

- Employer Matching gifts
- Demographics such as Age, Gender, Ethnicity
- Wealth and Assets
- Charitable contribution history

Since this cost can add up, it is good to know what you need to enable better decision-making and which data will provide a good return on investment.

Ranking and Distilling Data

Now you have clean, up to date, complete data about your stakeholders. The next step is to use that data to identify those most likely to be able and interested in supporting you. It's time to ask and answer questions like:

- Which contacts are most likely to respond to a mailing?
- Which contacts are most likely to be able and interested in making a significant donation?
- Who might be an excellent advocate to legislators in your area?
- Which contacts to list as "Do Not Contact"?

Reaching Out to Those Who Care

People give when they care about you, your organization, and your mission. Don't waste money on those who don't care. There are plenty of people who do care about your mission. Use the rankings and information above to identify the right people at the right time with the right ask. Targeted "asks" are essential for major donors. Asking people For $5 who can easily give you $10,000 means you don't understand your contacts. But to ask for $10,000, you must have a solid reason for them to give to your cause, and a plan to contact them.

Segmented mailings are far more effective. Generic mailings work, but less efficiently than targeted mailings, such as:

- **Small donors—**Ask for just a bit more than last time because you appreciate their support.
- **Volunteers—**Convert volunteers to donors by thanking them and acknowledging their contributions of time.
- **Demographic specific messages—**Acknowledge that you serve the contact's demographic. Depending on your message, young women may appreciate a different focus than older men.

You are Ready!

Nonprofits and charities have relied on the benevolence of the community since time immemorial. There is no reason to reinvent the wheel. Know your contacts, address them personally, ask appropriately. Then thank them profusely and record your on-going stewardship, so they never feel like one of the crowd.

We Can Help

There is much of this work that an excellent staff and the hours to complete it can do for your organization – but it is also good to have the professional expertise and resources of our team at Quantivpro. We are here for you, just a phone call away.

William Welch
The Rest of the US
(310) 882-0172
william@quantivpro.com

Jannetta Lamourt
New Mexico
(505) 382-5253
jannetta@quantivpro.com

Debra Owens
South Carolina
(864) 688-9315
debra@quantivpro.com

Kevin Shin
Los Angeles County
(562) 248-6371
kevin@quantivpro.com