2016 Data Quality/Data Enhancement Practices Survey Results

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Introduction

Survey

In the summer of 2016, The Data Quality team of the Office of Advancement at the Smithsonian Institution, in conjunction with the Smithsonian' Advancement Academy, launched an initiative to benchmark data quality and data enhancement processes conducted by fundraising and membership organizations, in the form of a survey about those practices.

There were three sections to the survey.

The first section consisted of a list of data quality and data enhancement processes that might be conducted by an organization to improve or enhance the data in the database that supports fund-raising and membership activities: NCOALINK processing, email address append, birth date append, and so on. In each case, the same questions were asked (with a few topic-specific additions), including how often the organization conducts the process (if at all), how the data is obtained, how the results are reviewed and applied, and how happy the organization is with the results. There was no expectation that all organizations will do all (or even many) of these processes; identifying the processes that organizations prioritize was one of the goals of the survey.

The second section of the survey included questions about general factors that influence data quality and data enhancement initiatives.

Finally, the third section of the survey included profile questions about the responding organization, with the hope that would allow for comparison among similarly-situated organizations.

Response

The survey was opened to a test population on July 28th, 2016, and offered to the Advancement Services community at large via the FUNDSVCS mailing list on August 8th, 2016. The last response was received on December 12th, 2016.

The survey was opened by 112 respondents. The largest number of responses to a given question was 91, and 61 respondents identified their segment in the non-profit community, near the end of the report.

The majority of respondents that identified their non-profit segment were in education, but there were respondents from a cross-section of the non-profit community:
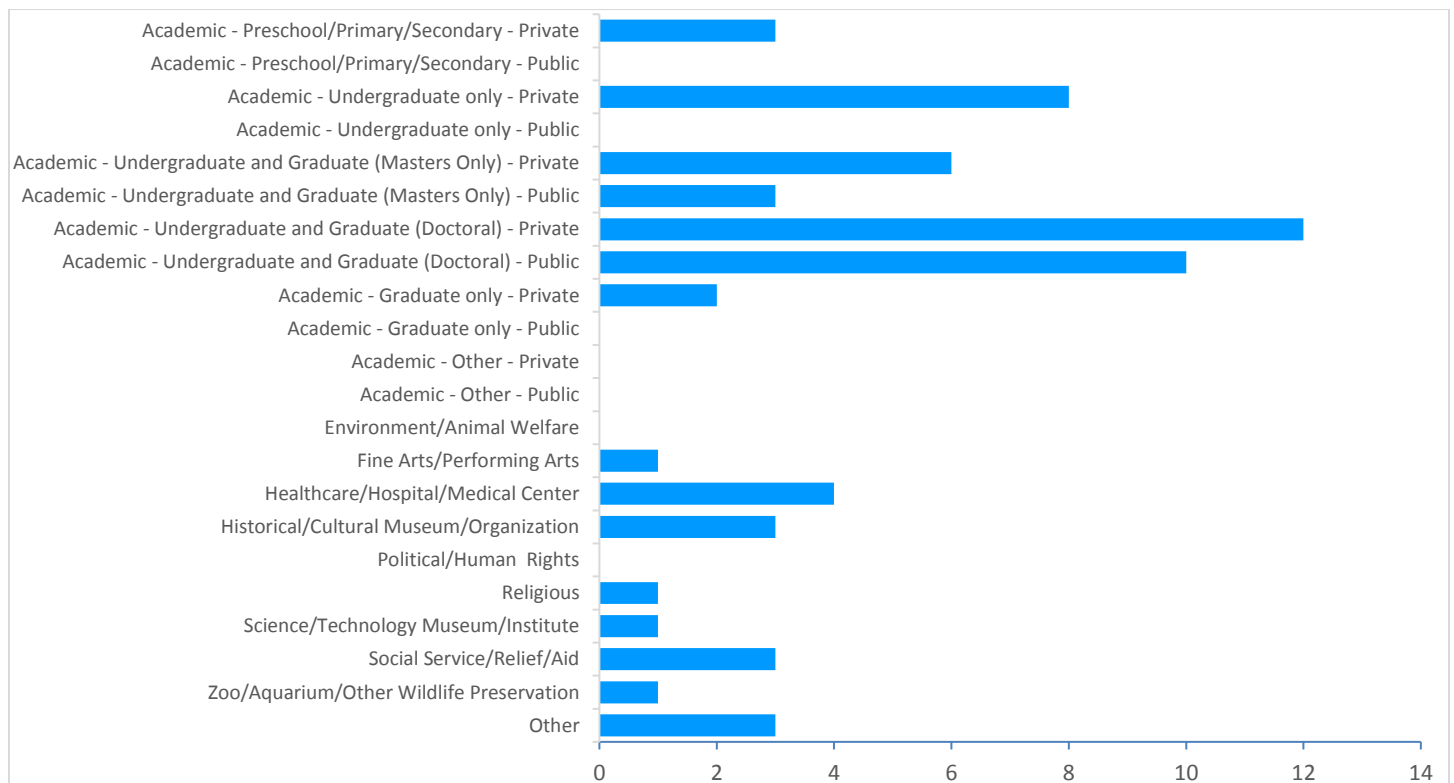
There was a reasonable distribution by size of organization, as measured by the number of active records in the fundraising database:

Size of organization	Count
Fewer than 25,000	8
Between 25,000 and 100,000	10
Between 50,000 and 100,000	13
Between 100,000 and 250,000	10
Between 250,000 and 500,000	10
Between 500,000 and 750,000	6
Between 740,000 and 1,000,000	3
More than 1,000,000	1
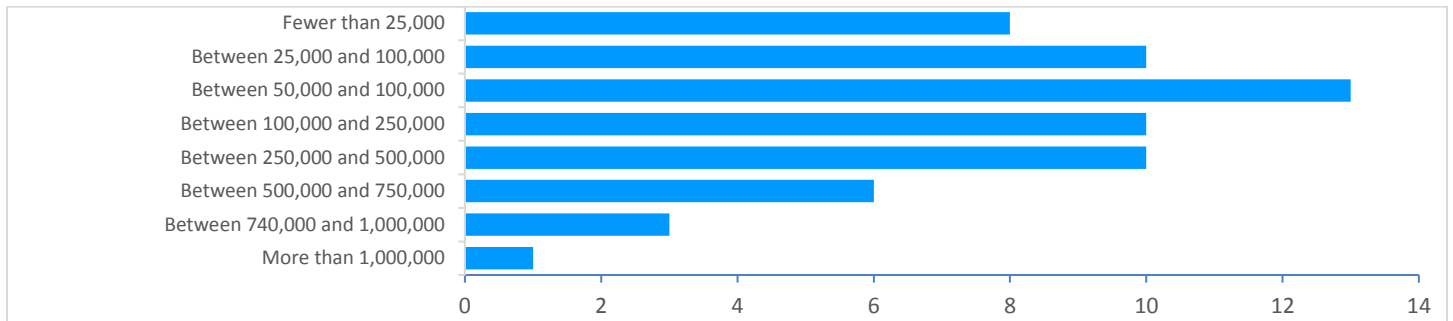
There was also a cross-section of institutions by size as measured by the number of Advancement staff:

Number of Advancement staff	Count
Fewer than 5	4
Between 5 and 10	9
Between 10 and 20	10
Between 20 and 50	22
Between 50 and 100	5
Between 100 and 250	10
250 or more	0
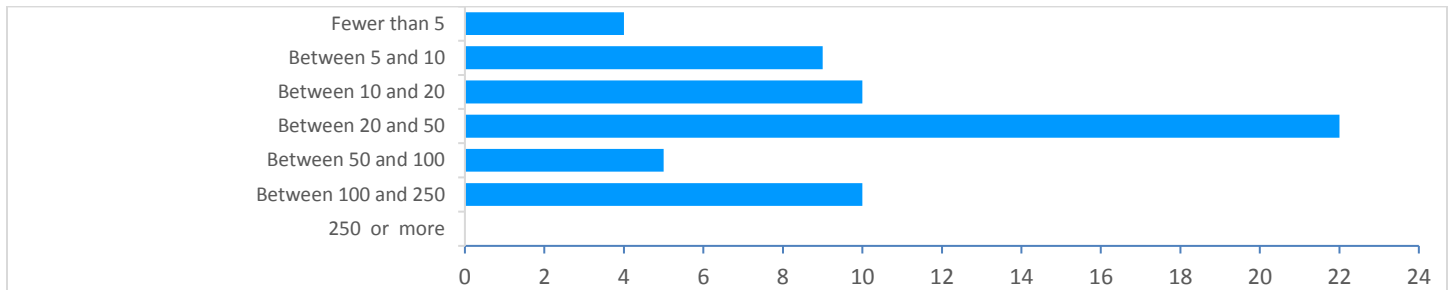
Reflections

Processes Being Performed

NCOA[LINK] address updates were performed by more organizations than any other process, followed by identification of duplicates, modelling of wealth/gift likelihood, phone appends, lost constituent searches, identification of deceased constituents, wealth/asset appends, email appends, and surveys of constituent attitudes toward the organization.

Respondents Performing Specified Processes
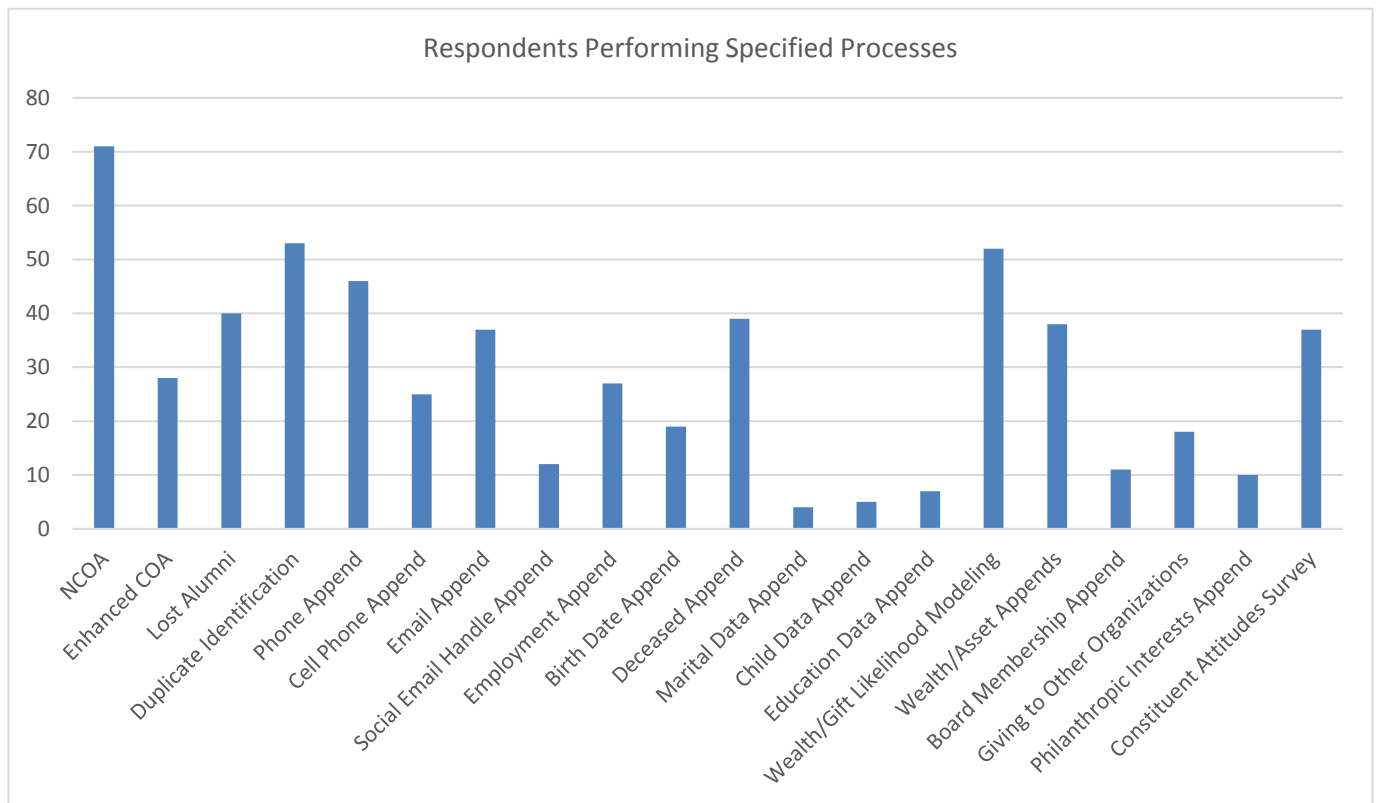
Frequency of Processes

NCOA^{LINK} processes were, as might be expected, most commonly performed quarterly.

Processes performed annually by a significant number of respondents included lost constituent searches, phone appends, email appends, and identification of deceased constituents, and to a lesser extent duplicate identification, wealth/gift likelihood modelling, and wealth/asset appends.

Wealth/gift likelihood modelling, wealth/asset appends, and surveys of constituent attitudes toward the organization were the most likely to be identified as occurring every 3 years or less frequently.

Identification of duplicates and of deceased constituents were the most likely to be identified as performed continuously.

A significant proportion of all processes were reported as performed on a schedule that is difficult to characterize.
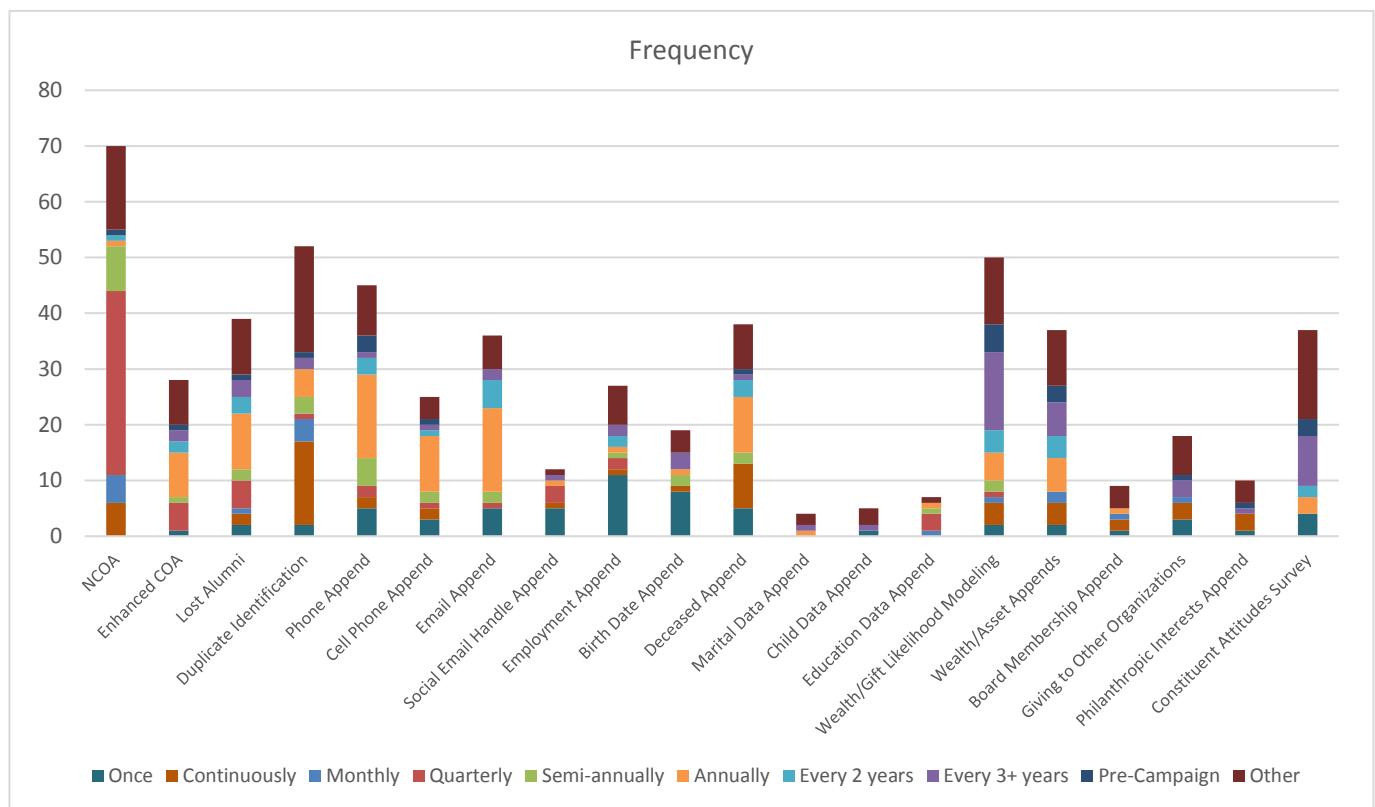
Data Sources

Most data processes relied on data returned from a vendor. Significant exceptions were identification of duplicate records and surveying of constituent attitudes toward the organization, overwhelmingly conducted in-house.

Searches for lost constituents, deceased appends, wealth/asset appends, and identification of giving to other organizations had significant percentages done by in-house research.
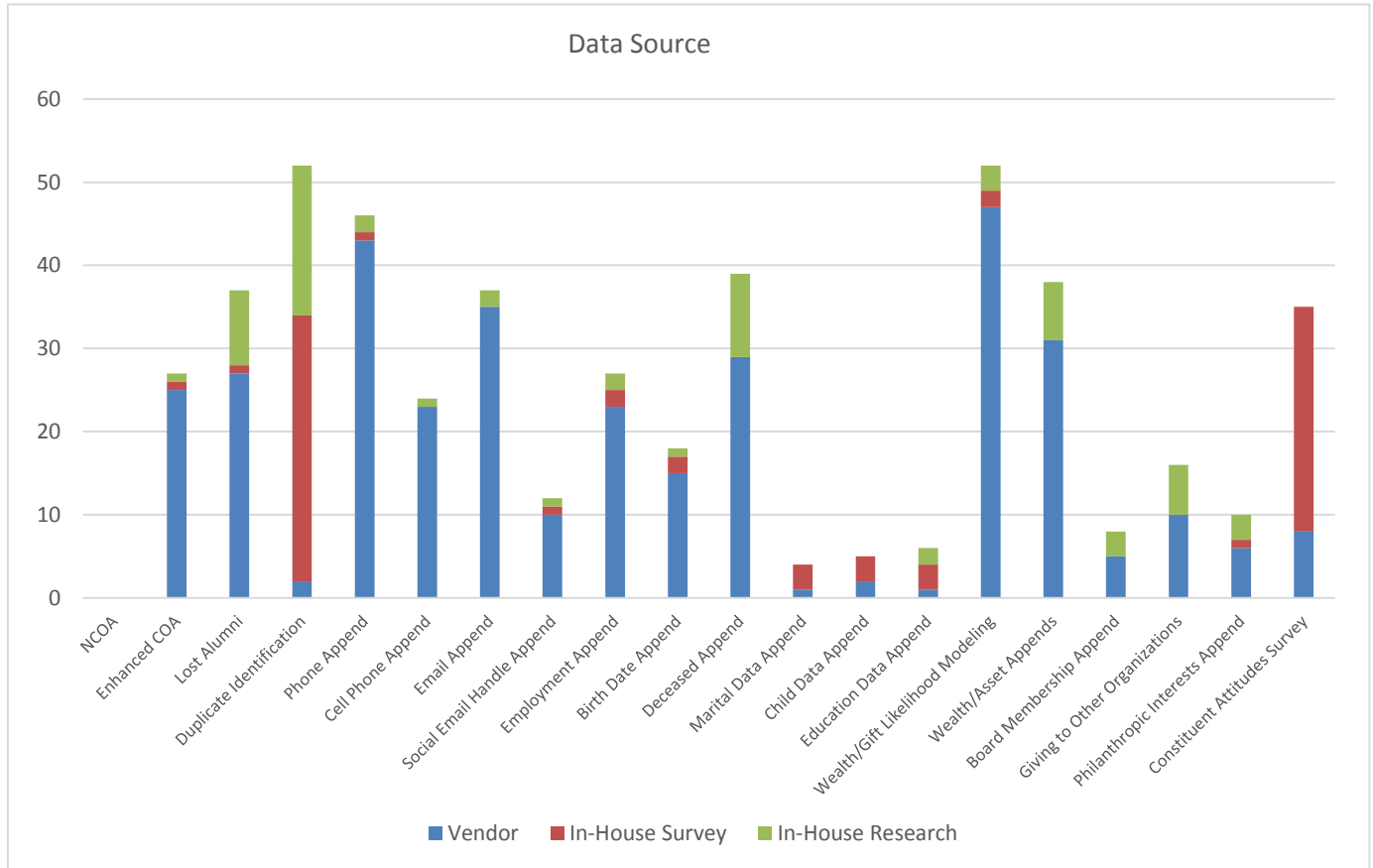
Review of Results

Data from most processes received limited review, including review of exceptions, either before or after applying the results to the fundraising system.

Identification of duplicate records, identification of deceased constituents, and, to a lesser extent, wealth/asset appends were notable in receiving record-by-record verification before changes were made to the fundraising system.
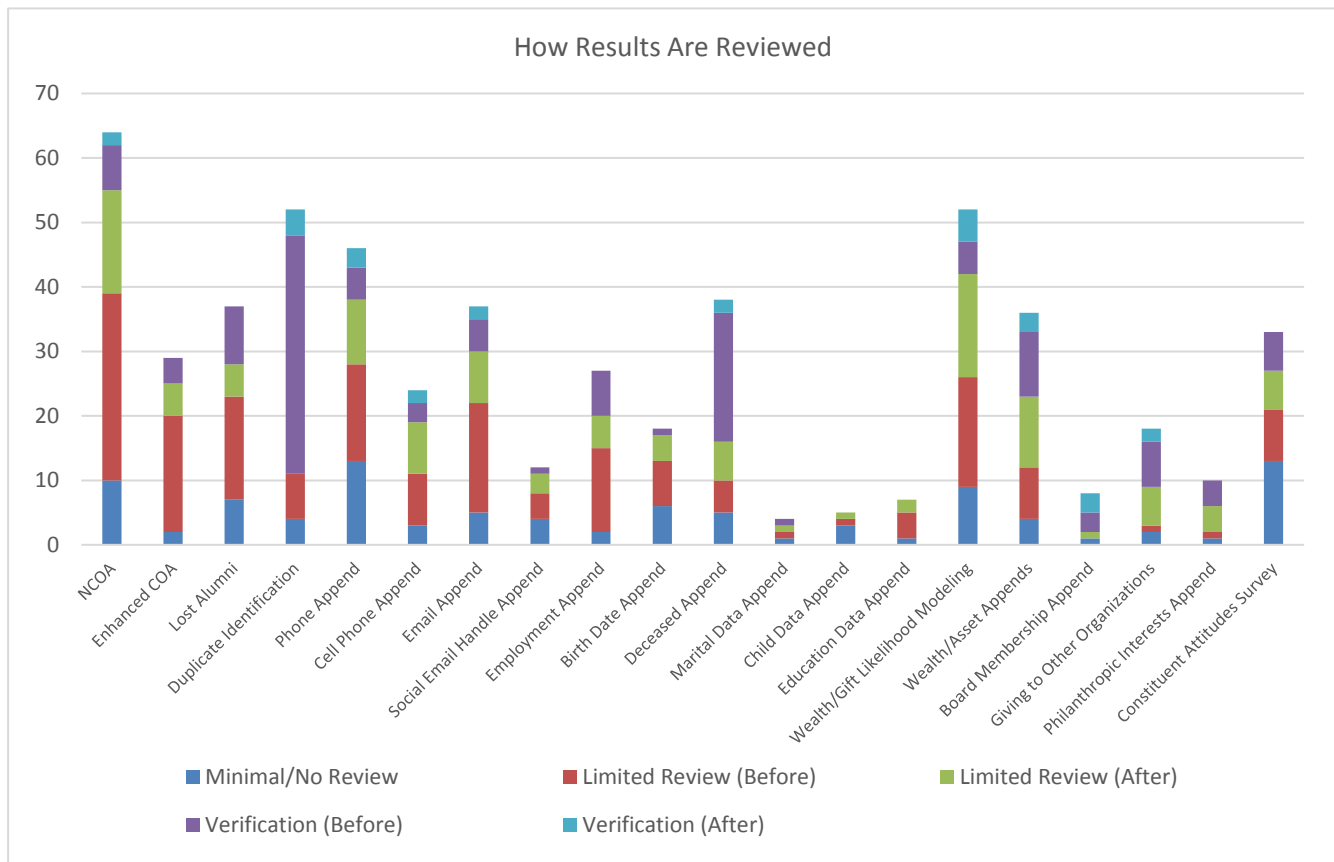
Application of Results (Tools)

Change of address appends, phone appends, email appends, birth data appends, identification of deceased constituents, results of wealth/gift likelihood modeling, and wealth/asset appends were the data processes with a significant proportions applied using software vendor tools.

Change of address appends, identification of lost constituents, phone appends, email appends, employment appends, results of wealth/gift likelihood modeling, and wealth/asset appends were the data processes with a significant proportions applied using internally-developed tools.

Applying the results of the identification of duplicate constituent records and of deceased constituents, updates to the records of lost constituents, wealth/asset appends, applying results of surveys of constituent attitudes, and, perhaps surprisingly, changes of address and of phone numbers were the data processes with significant proportions applied manually, especially applying the results of the identification of duplicate constituent records and of deceased constituents.
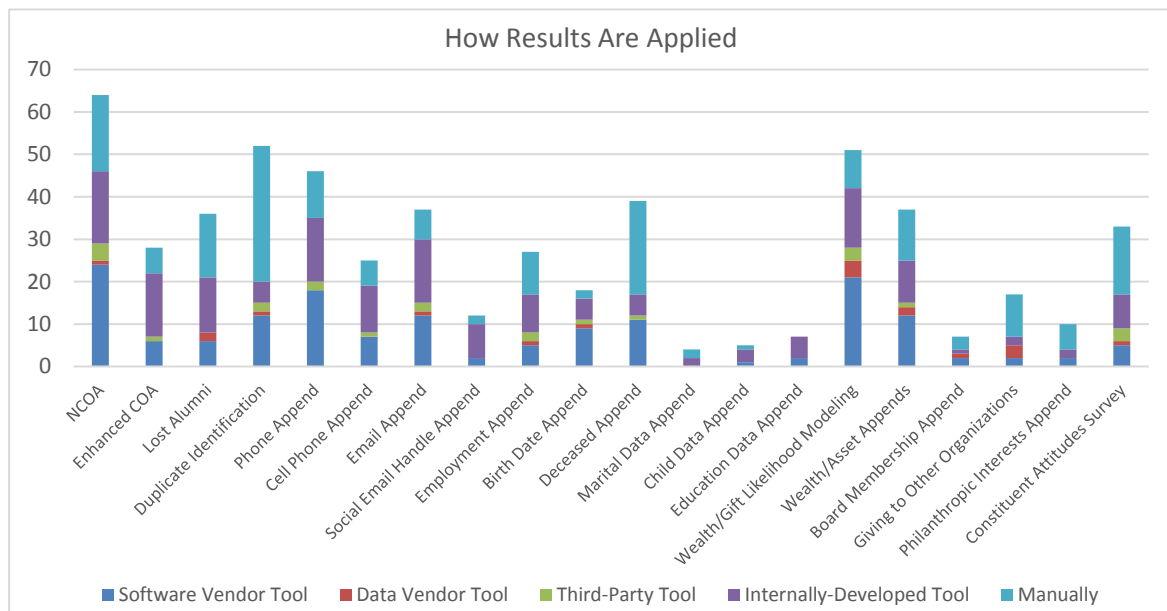
Looking at NCOALINK appends in particular, manual application of results was associated primarily with databases of fewer than 100,000 active records, and tools provided by software vendors were widely used with databases of up to 500,000 records, while internally-developed tools were the primary method for databases of more than 500,000 active records.
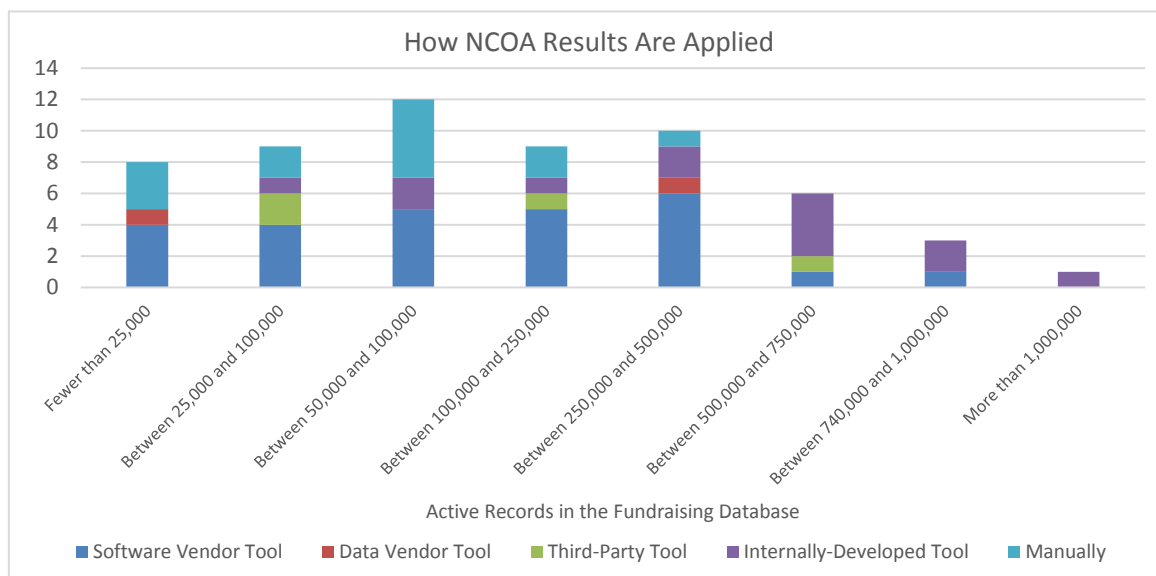
Application of Results (Responsibility)

The results of virtually all of the surveyed data processes were applied by Advancement Services staff, with the Prospect team involved in wealth-related modelling and appends, and a small proportion across-the-board by central IT.

Who Applies Results

Legend: Vendor, Central IT, Advancement Services, Prospect Team, School/Unit, Contractor, Student/intern, Other
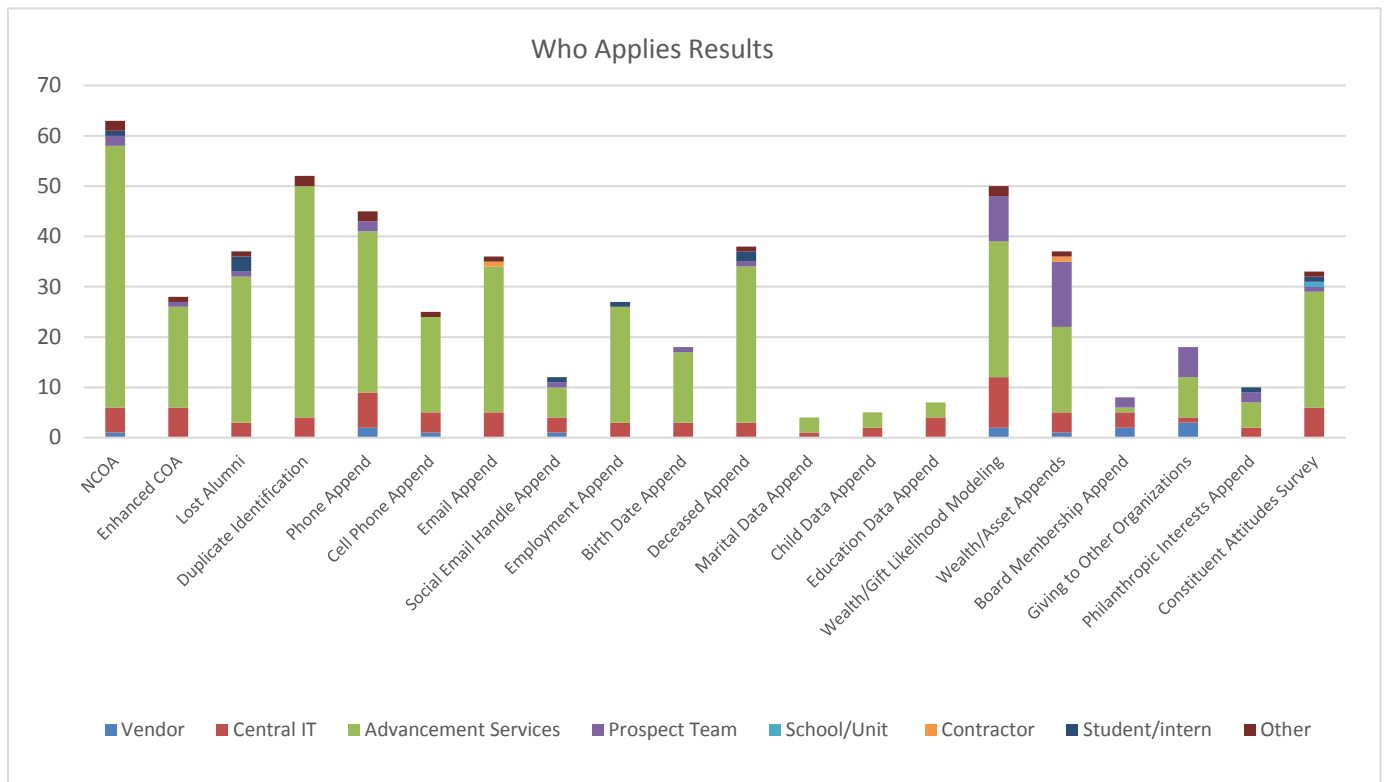
Use of Vendors

A large majority of respondents use one NCOA^LINK vendor. This is perhaps unsurprising, given the standardization of the NCOA^LINK process by the U.S. Postal Service.

At the other end of the scale, wealth/gift likelihood modeling and wealth/asset appends are most likely to be varied among a number of vendors. Email appends, phone appends, lost constituent processes, enhanced change of address, and employment appends were also likely to be varied among a number of vendors.

Identification of deceased constituents was split roughly evenly between using one vendor and varying among a number of vendors.
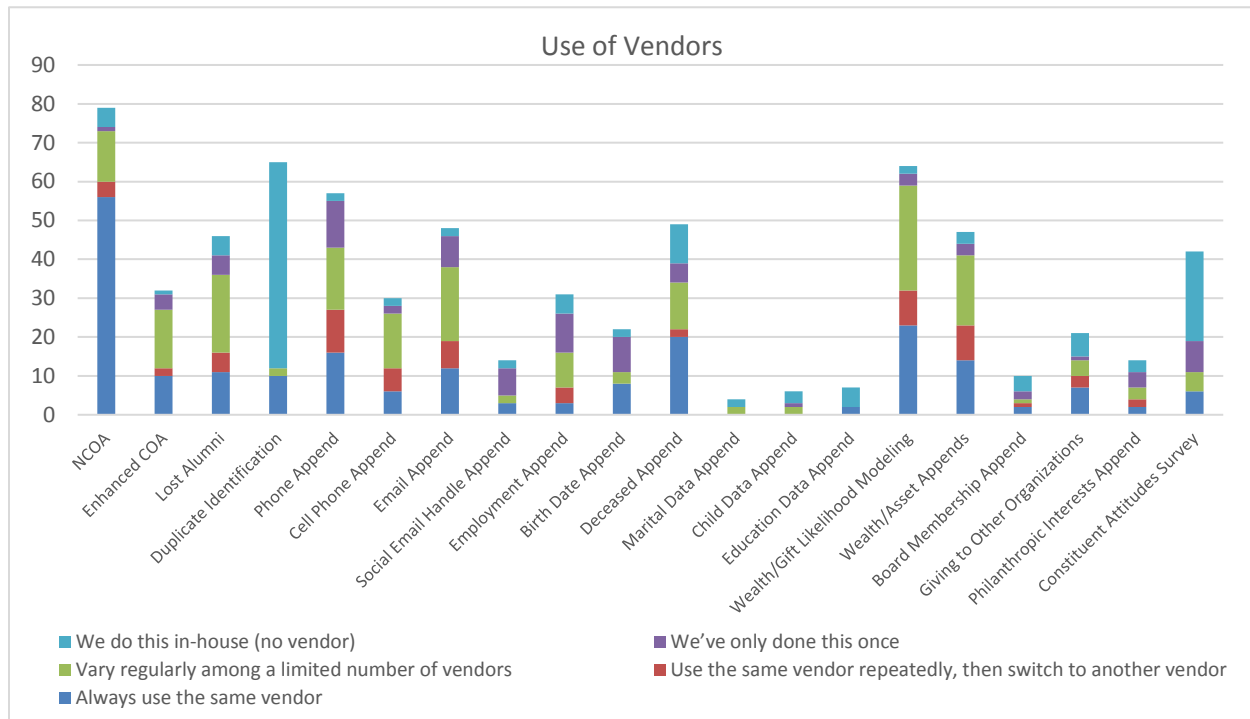
Looking only at respondents that use a vendor to perform a process and normalizing the responses to percentages, there are a number of processes for which a significant proportion of institutions have not (yet) varied vendors, and a number of processes for which a significant proportion of institutions vary vendors.
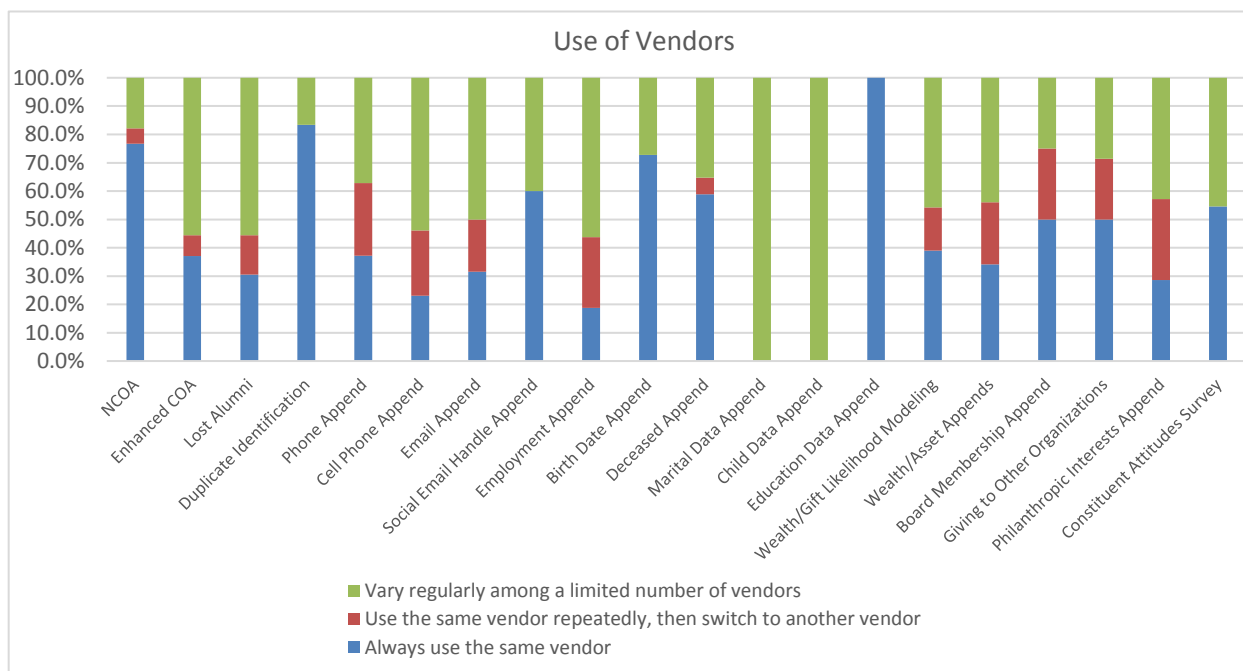
Satisfaction with Results

Processes with the highest satisfaction scores include NCOALINK updates, identification of duplicates, identification of deceased constituents, wealth/gift likelihood appends, and wealth/asset appends, followed by phone appends, identification of lost constituents, and surveys of alumni attitudes toward the organization. Low satisfaction scores occurred most frequently for email appends, followed by phone appends, employment appends, identification of duplicate records, and updates of lost constituent records.
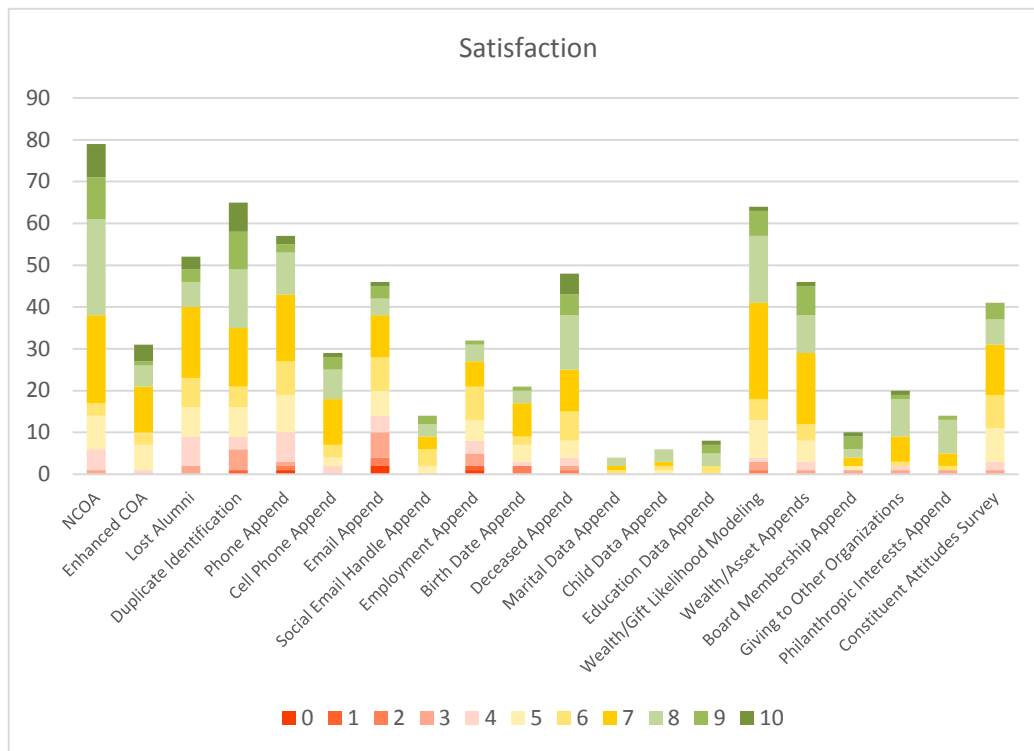
Normalizing the satisfaction scores to percentages, it appears that satisfaction with marital data appends, child data appends, education data appends, and board membership appends is relatively high among the organizations that conduct them, with the caveat that the sample sizes are small.
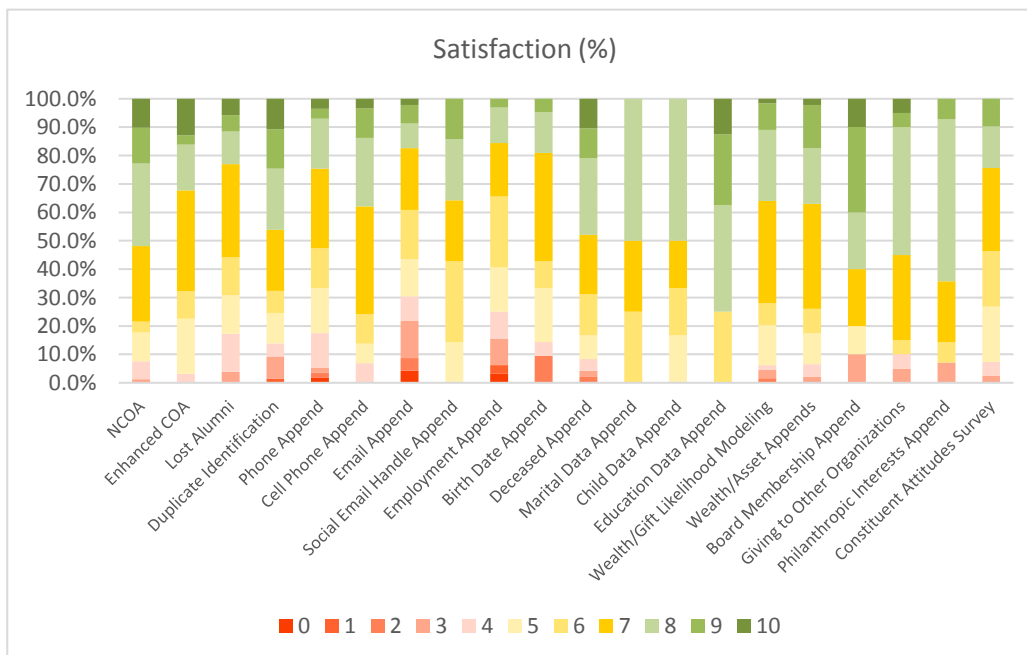
Survey Results

Section 1: Specific Data Practices

Q1.1 NCOA Address Update

NCOALINK is a standardized process performed by a vendor authorized by the U.S. Postal Service (USPS). Names and addresses are matched against a file of names and addresses provided by people and business that file a change-of-address (COA) request with the USPS so that mail can be forwarded when they move. Standard processing matches against a database of COA requests made in the past 18 months, but processing can optionally match against a larger database of COA requests made in the past 48 months.

Q1.1.1 - How often do you do an NCOA Address Update (NCOA[LINK])?
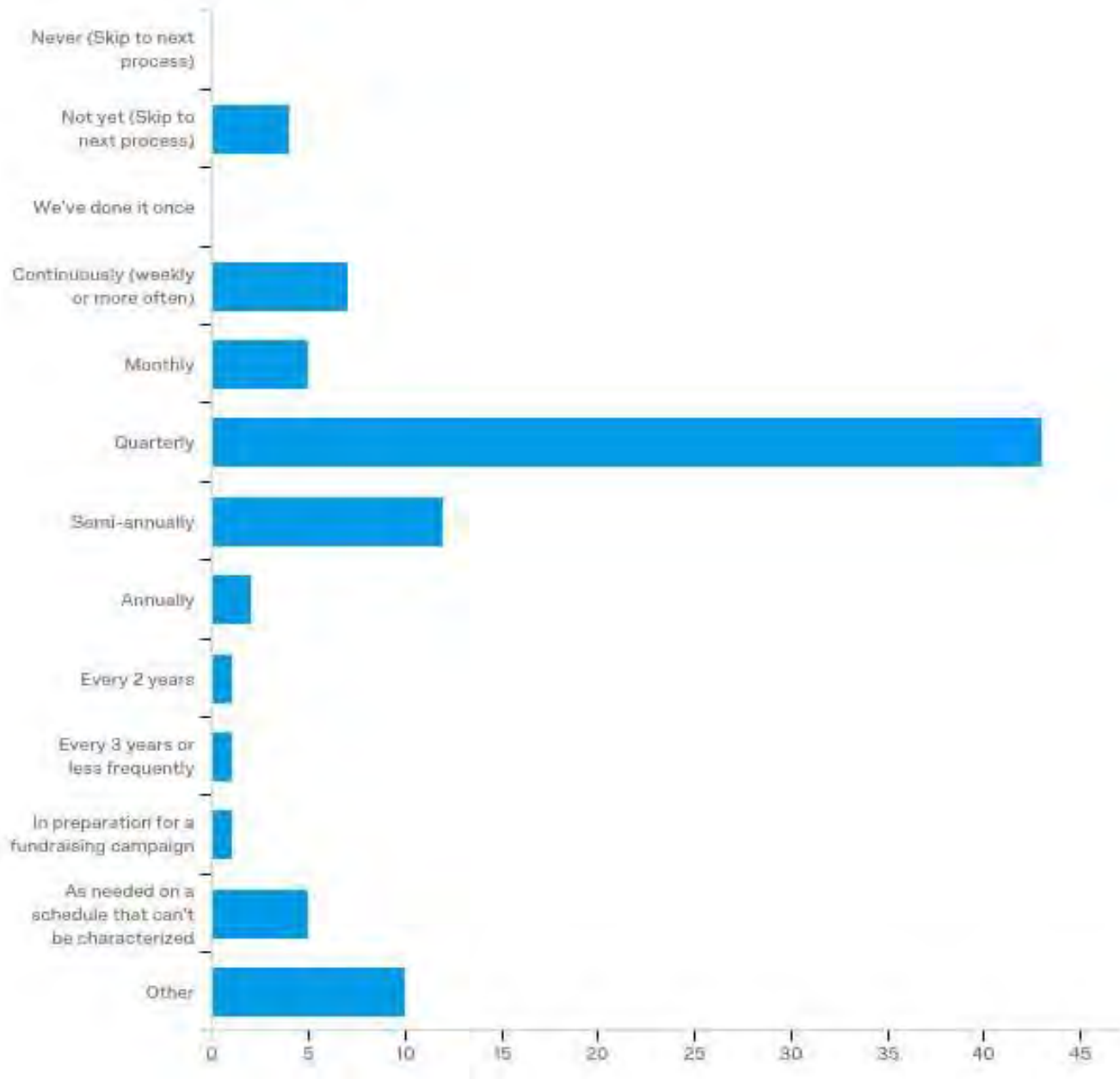
#	Answer	%	Count
1	Never (Skip to next process)	0.00%	0
2	Not yet (Skip to next process)	4.40%	4
3	We've done it once	0.00%	0
4	Continuously (weekly or more often)	7.69%	7
5	Monthly	5.49%	5
6	Quarterly	47.25%	43
7	Semi-annually	13.19%	12
8	Annually	2.20%	2
9	Every 2 years	1.10%	1
10	Every 3 years or less frequently	1.10%	1
11	In preparation for a fundraising campaign	1.10%	1
12	As needed on a schedule that can't be characterized	5.49%	5
13	Other	10.99%	10
	Total	100%	91

Other
We do this for each annual fund mailing, as well as semi-annually against the full database
Every time we send out a mass mailing through an outside mailhouse, they are required to run the list through NCOA first and then send us the updates.
Every time a mailing is done. Then only on the ones receiving the mailing
Every 90 days
Every other month
quarterly for membership, currently implementing the process for development
Every mailing.
3 times a year. They're scheduled to facilitate large mailings.

Q1.1.2 - Which NCOA data file do you use?
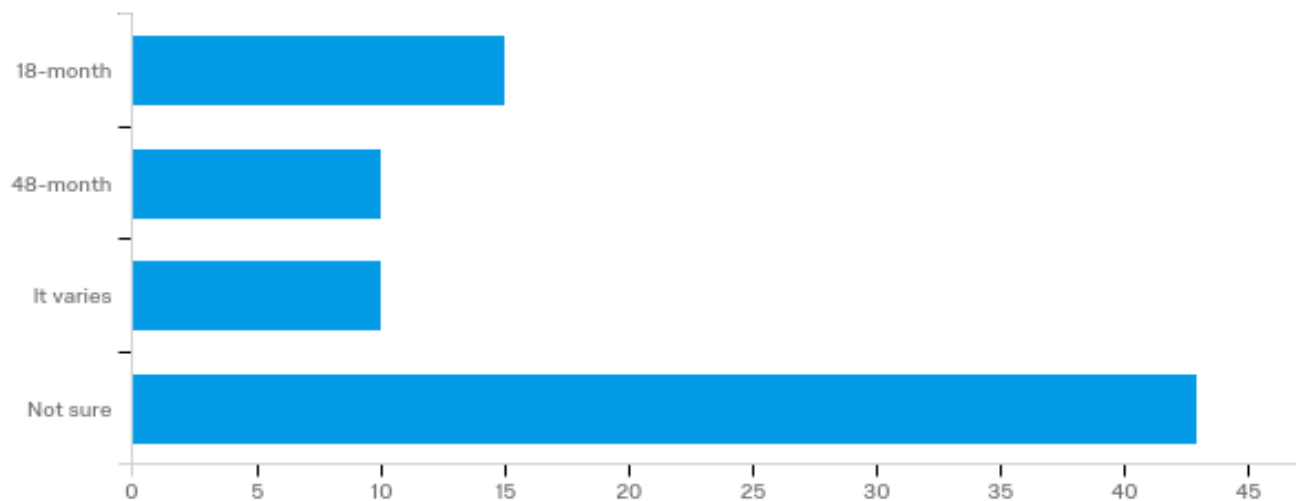
#	%	Answer	Count
1	19.23%	18-month	15
2	12.82%	48-month	10
3	12.82%	It varies	10
4	55.13%	Not sure	43
	100%	Total	78

Q1.1.3 - How do you apply the results?
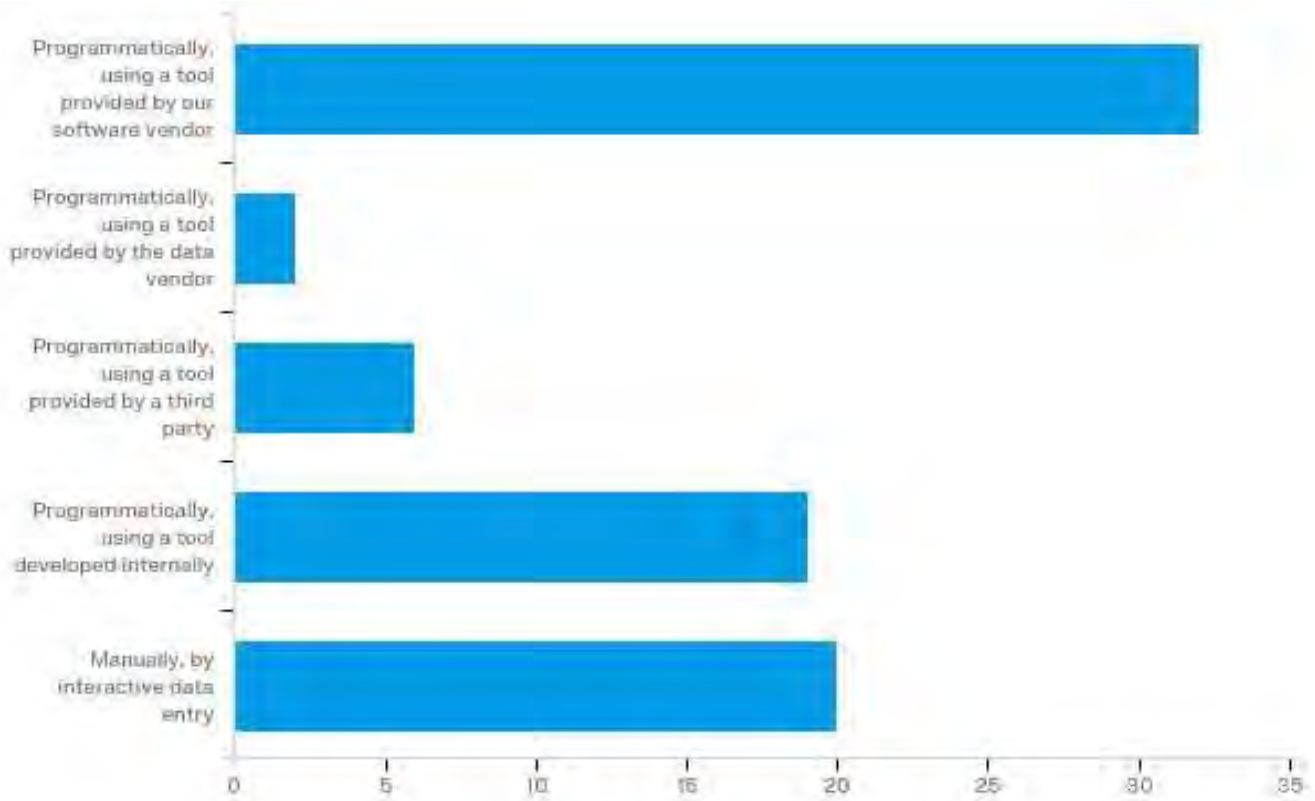
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	40.51%	32
2	Programmatically, using a tool provided by the data vendor	2.53%	2
3	Programmatically, using a tool provided by a third party	7.59%	6
4	Programmatically, using a tool developed internally	24.05%	19
5	Manually, by interactive data entry	25.32%	20
	Total	100%	79

Q1.1.4 - Who applies the results?
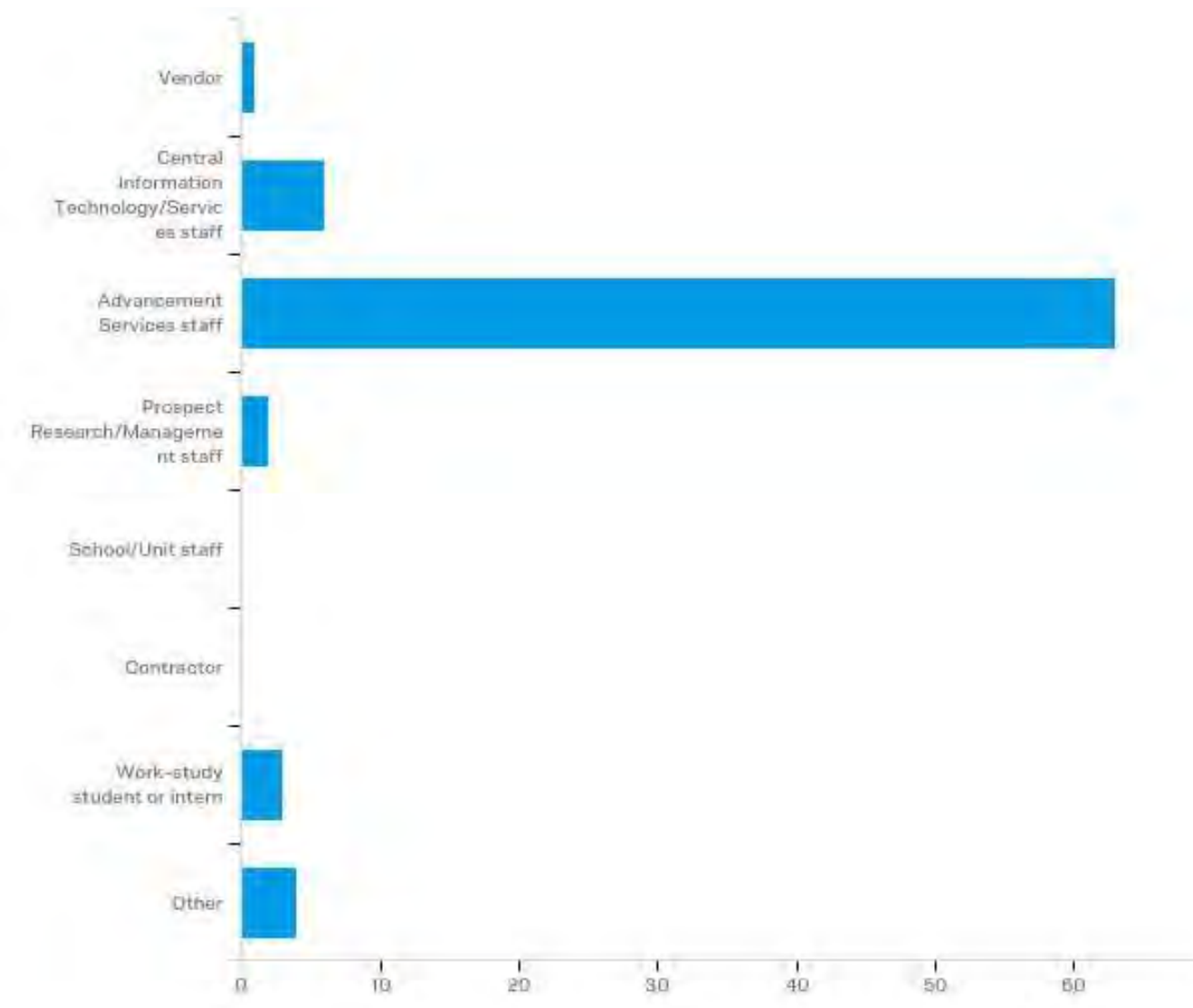
#	Answer	%	Count
	Vendor	1.27%	1
	Central Information Technology/Services staff	7.59%	6
	Advancement Services staff	79.75%	63
	Prospect Research/Management staff	2.53%	2
	School/Unit staff	0.00%	0
	Contractor	0.00%	0
	Work-study student or intern	3.80%	3
	Other	5.06%	4
	Total	100%	79

Other
Records Management Staff
Gift Management Staff
IT staff as they are the only ones who have SQL access
We have our own programming team in Adv Svcs

Q1.1.5 - How do you review/evaluate/verify the results?
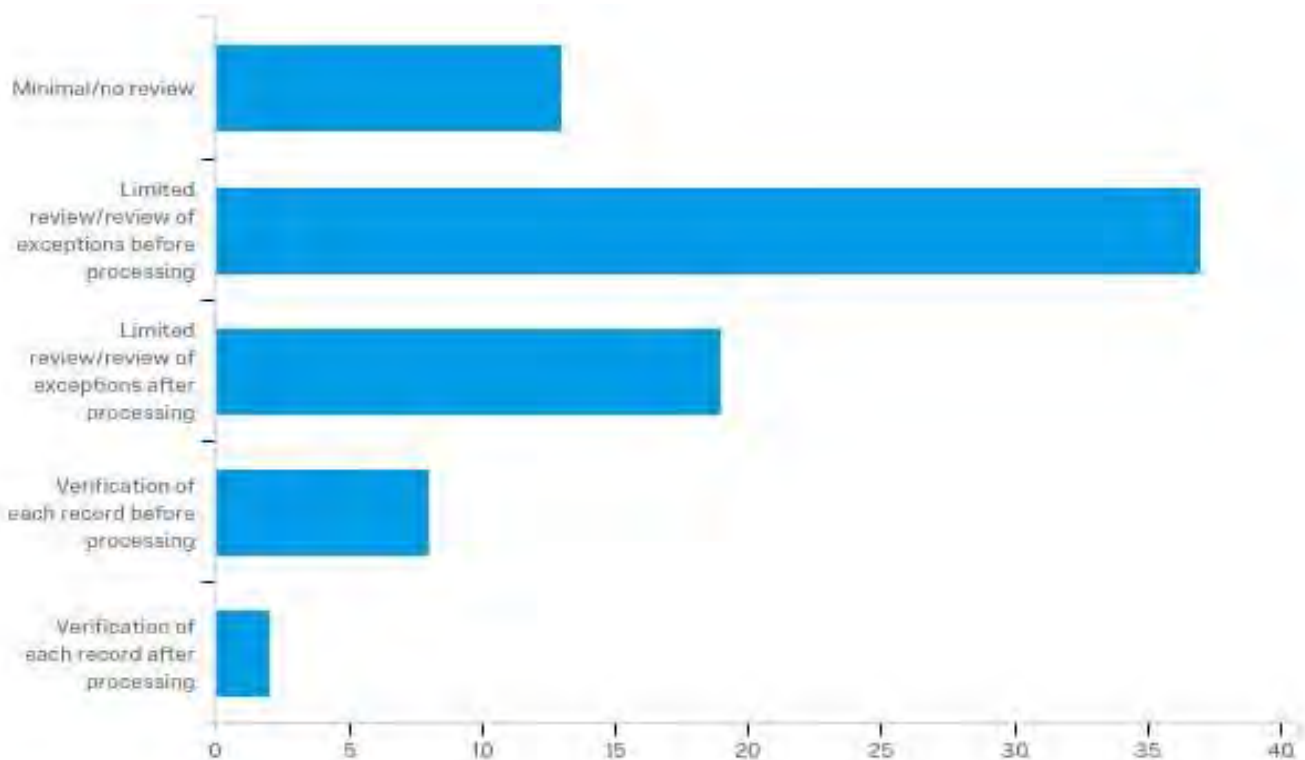
#	Answer	%	Count
1	Minimal/no review	16.46%	13
2	Limited review/review of exceptions before processing	46.84%	37
3	Limited review/review of exceptions after processing	24.05%	19
4	Verification of each record before processing	10.13%	8
5	Verification of each record after processing	2.53%	2
	Total	100%	79

Q1.1.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
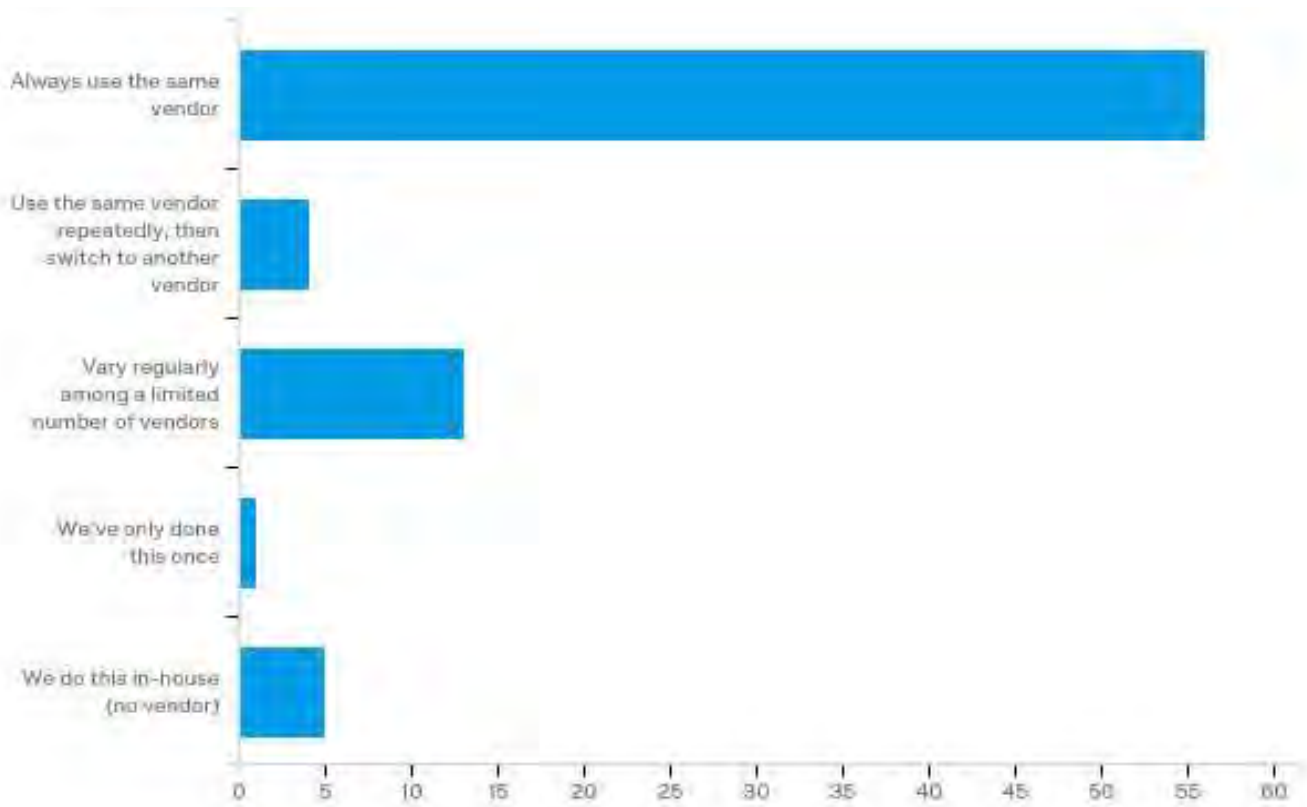
#	Answer	%	Count
1	Always use the same vendor	70.89%	56
2	Use the same vendor repeatedly, then switch to another vendor	5.06%	4
3	Vary regularly among a limited number of vendors	16.46%	13
4	We've only done this once	1.27%	1
5	We do this in-house (no vendor)	6.33%	5
	Total	100%	79

Q1.1.7 - On a scale of 0-10, over time, how happy are you with the results of your Change of Address (NCOA) processing?

Q1.1.8 - Comments/Additional Information

We also use ACS Processing on our largest mailings. This has greatly helped our data quality!
We have subscribed to the USPS ACS process that provides weekly COA, bad addresses and deceased information from our magazine that mails 3 times a year. Additionally, we annually contract with a vendor to search for lost addresses, phones and email addresses of graduates.
-We screen all NCOA forwarding addresses against all addresses in our database, active and inactive, and then act accordingly -NCOA has acknowledged seasonal addresses appear as new forwarding address are treated like a permanent home address change -Recently we've seen a substantial increase in the number of false undeliverables, which we continue to work through -We mail first-class the undeliverables, as recommended by our NCOA vendor, since the piece may be delivered successfully -For 90% of new forwarding addresses, we've never had a problem
We have a lot of records with those who are seasonal so we have to be extremely careful not to enter the data as a move and not a seasonal address.
I prefer making updates to addresses in groups through an import rather than individually with returned mail.
It's difficult to trust our results so we are always weary of just loading them into the database.
Per question 1.1.5, we do some review before and have some general validity checks that we run after.
Database load options/functionality are limited so partial manual attention still needed. Have to be careful with people who forward mail back and forth from seasonal homes.
Our mail vendor NCOAs our file every time we mail and returns updated addresses to us, which we apply to our database manually.
Recent College grads rarely submit a Change of Address form to USPS; so it might be a few years before we catch up with them again.
Our mail services runs every mailing list through NCOA processing and returns the results to us. We push these into our database.
We keep a history of address changes, and compare past addresses against NCOA changes to see if we have already determined that the address is bad. We catch many bad NCOA address changes that are older than addresses we know are correct.
NCOA is not always right, we notice old addresses and wrong addresses at times. However regular use of NCOA has greatly improved our contactable rates overall. To me, it is worth the risk of a few bad addresses. Also, with assigned prospects we process them only after the Development Officer has had an opportunity to see the proposed updates. We rarely get any feedback so we end up posting almost all of them.
Our level of evaluation of results follows a constituency hierarchy. For example, if a prospect is managed, the result is sent to the relationship manager to verify. If someone recently volunteered or attended an event, they are sent to research to verify. If they are a recent donor or of particular interest for some other reason, they processed but included in a group that will be verified after the fact time permitting.
We use Blackbaud services for this. Very little staff here to do any extra verification. We take what we get and run with it. Seems to work ok.
NCOA doesn't solve our bounce issue or update information for the majority of our donors. We only do it for the nonprofit mailing discount.
NCOA is tricky; if it's a student that moved, NCOA often returns mail meant for the parents. If a family splits up, the same thing. Hard to verify who they meant to move.

The NCOA database can be very inaccurate. You will want to train your staff to suss out bad data. For example, one time the NCOA database had one of our trustees moving to Kentucky from Massachusetts. We noticed, and found that very odd because he never told any of us he was moving. Later we figured out there is another person with the exact same FMIL as the trustee and the NCOA mistakenly thought it was our trustee. He still shows up on our NCOA appends erroneously to this day.

In most cases the NCOA is fine but data entry staff or whomever is responsible for reviewing the data before uploading should review everyone first.

We use the data enhancement tools within Blackbaud CRM.

Would be nice if it updated counties in the NCOA process. County updates require an entirely separate process.

We use Experian quarterly for address and phone appends. It should include more than just NCOA resources. We get some deceased through the process as well. When the file is returned, we have a web based application that shows the 2 prior/existing addresses from Advance and compares it to the new address. Then the operator approves, declines, or modifies the new address.

Q1.2 Enhanced Change of Address (MCOA, PCOA)

Enhanced Change of Address processing compares name and addresses against a larger database that includes not only the USPS change-of-address (COA) data but also names and addresses from other sources. Such services may be known as Multisource Change of Address (MCOA) or Proprietary Change of Address (PCOA). The sources, processing, and name of the service tend to be vendor-specific rather than standardized, and may include addresses from sources such as magazine publishers, credit card companies, and utilities. Enhanced COA services may provide updated addresses for people and organizations that do not file forwarding addresses with the U.S. Postal Service and for addresses that changed more than 48 months in the past.

Q1.2.1 - How often do you do an Enhanced Change of Address (MCOA, PCOA) Process?
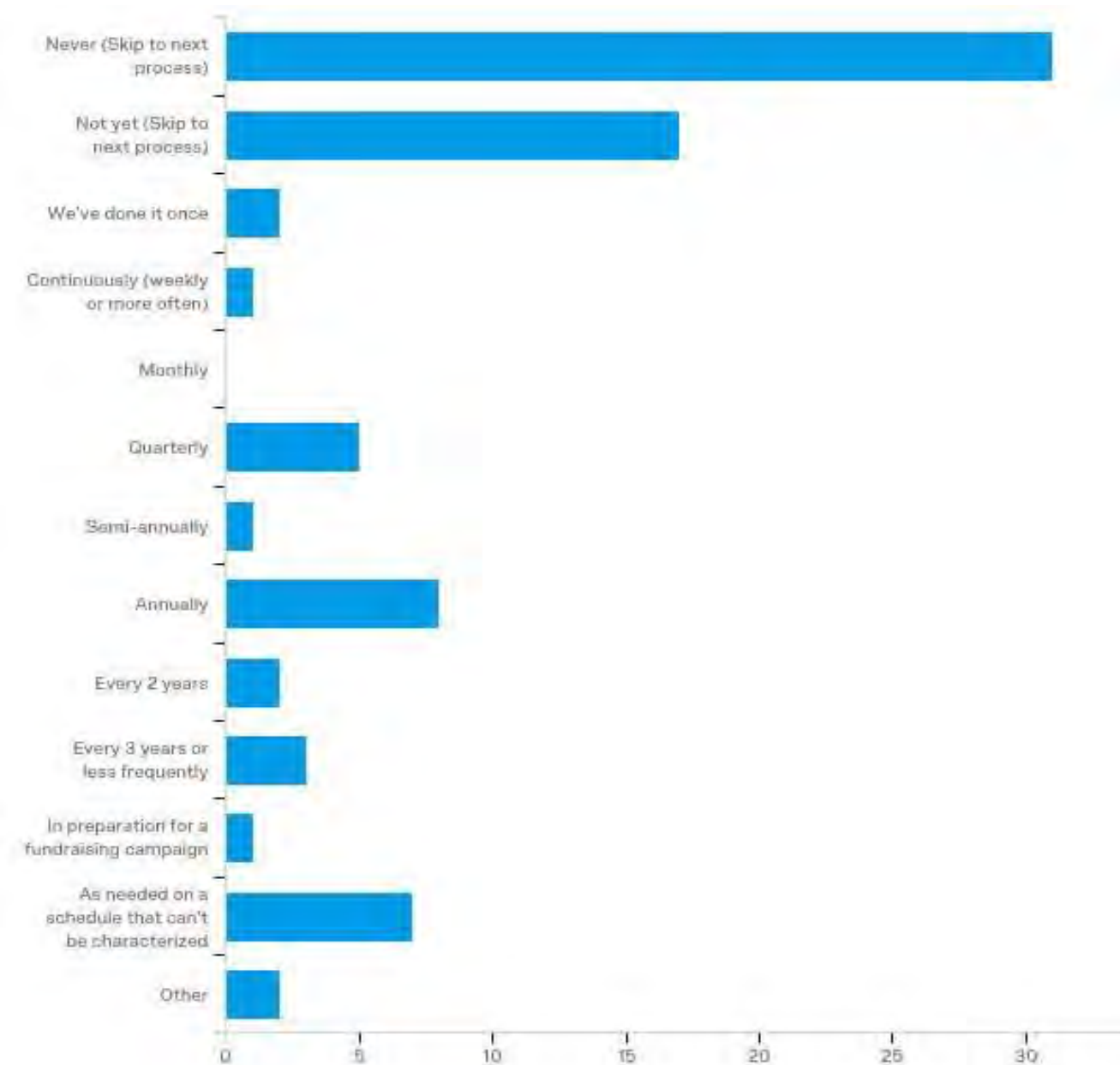
#	Answer	%	Count
1	Never (Skip to next process)	38.75%	31
2	Not yet (Skip to next process)	21.25%	17
3	We've done it once	2.50%	2
4	Continuously (weekly or more often)	1.25%	1
5	Monthly	0.00%	0
6	Quarterly	6.25%	5
7	Semi-annually	1.25%	1
8	Annually	10.00%	8
9	Every 2 years	2.50%	2
10	Every 3 years or less frequently	3.75%	3
11	In preparation for a fundraising campaign	1.25%	1
12	As needed on a schedule that can't be characterized	8.75%	7
13	Other	2.50%	2
	Total	100%	80

Other
First time this year
I'm not sure if this is included in the software our mail services uses

Q1.2.2 - How do you conduct this sort of enhancement?
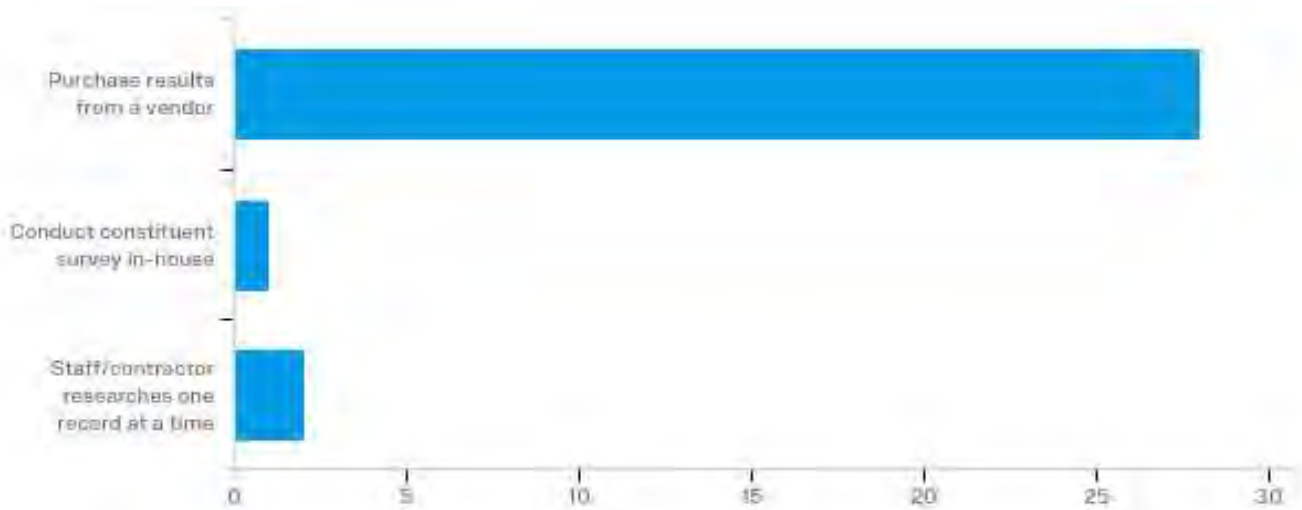
#	Answer	%	Count
1	Purchase results from a vendor	90.32%	28
2	Conduct constituent survey in-house	3.23%	1
3	Staff/contractor researches one record at a time	6.45%	2
	Total	100%	31

Q1.2.3 - How do you apply the results?
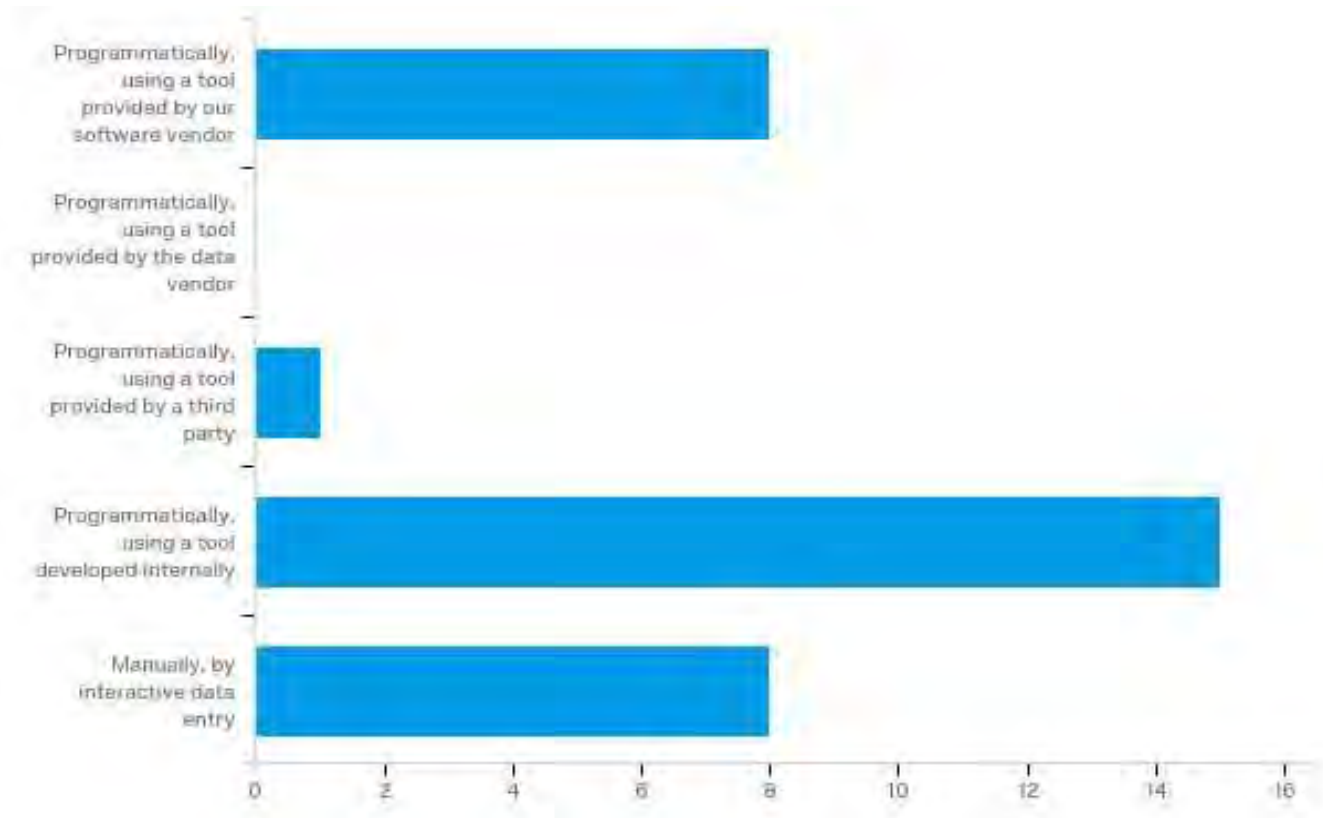
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	25.00%	8
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	3.13%	1
4	Programmatically, using a tool developed internally	46.88%	15
5	Manually, by interactive data entry	25.00%	8
	Total	100%	32

Q1.2.4 - Who applies the results?
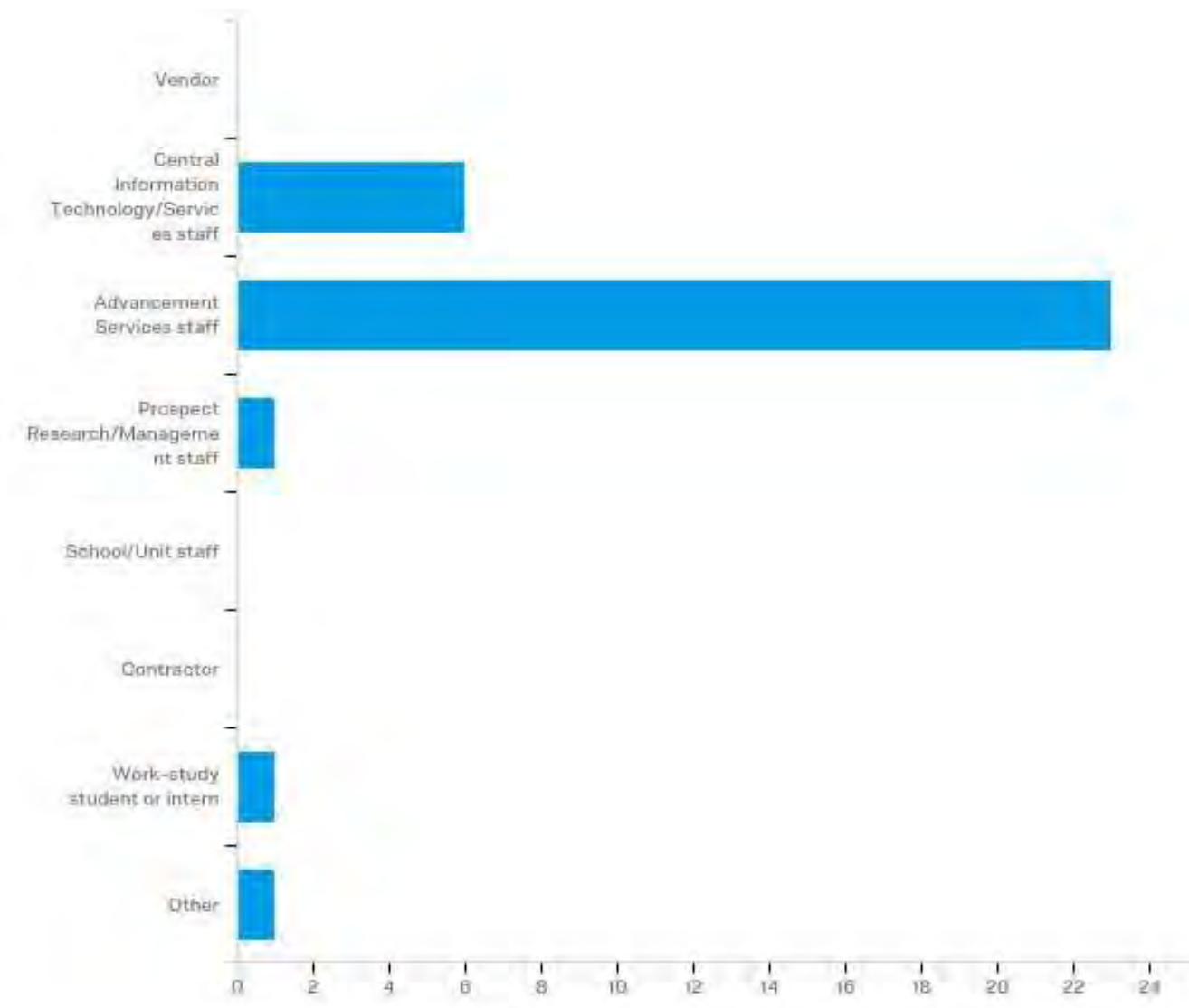
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	18.75%	6
3	Advancement Services staff	71.88%	23
4	Prospect Research/Management staff	3.13%	1
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	3.13%	1
8	Other	3.13%	1
	Total	100%	32

Other
Programming Team in Adv Svcs

Q1.2.5 - How do you review/evaluate/verify the results?
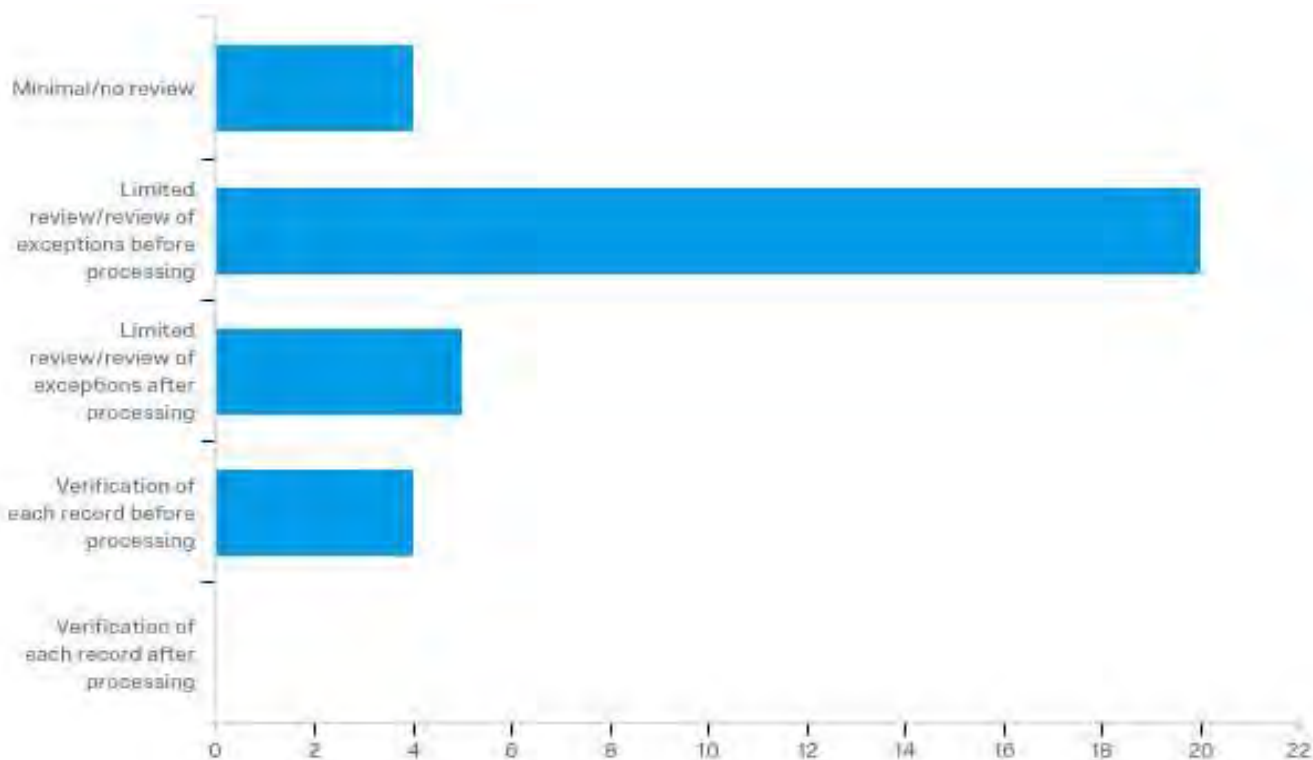
#	Answer	%	Count
1	Minimal/no review	12.12%	4
2	Limited review/review of exceptions before processing	60.61%	20
3	Limited review/review of exceptions after processing	15.15%	5
4	Verification of each record before processing	12.12%	4
5	Verification of each record after processing	0.00%	0
	Total	100%	33

Q1.2.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
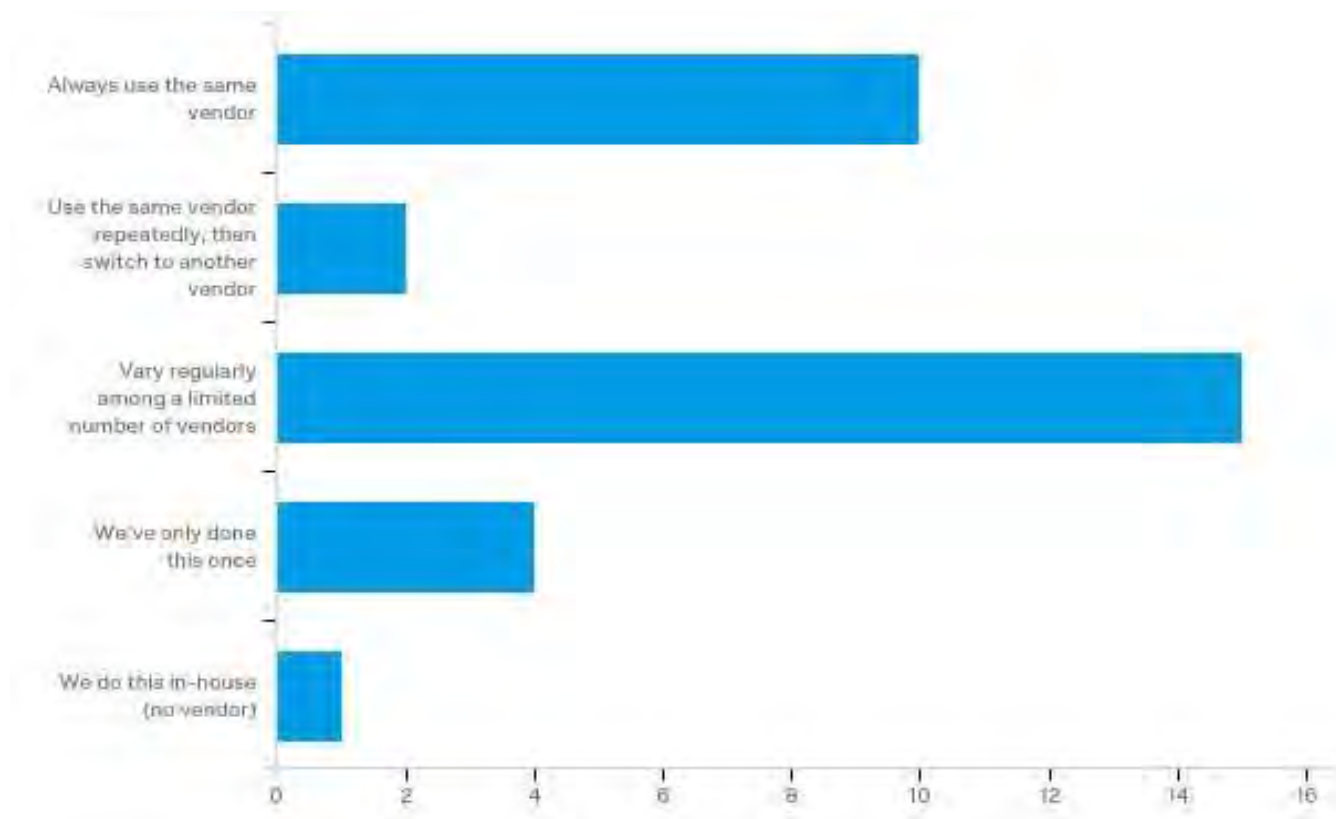
#	Answer	%	Count
1	Always use the same vendor	31.25%	10
2	Use the same vendor repeatedly, then switch to another vendor	6.25%	2
3	Vary regularly among a limited number of vendors	46.88%	15
4	We've only done this once	12.50%	4
5	We do this in-house (no vendor)	3.13%	1
	Total	100%	32

Q1.2.7 - On a scale of 0-10, over time, how happy are you with the results of enhanced Change of Address processing?
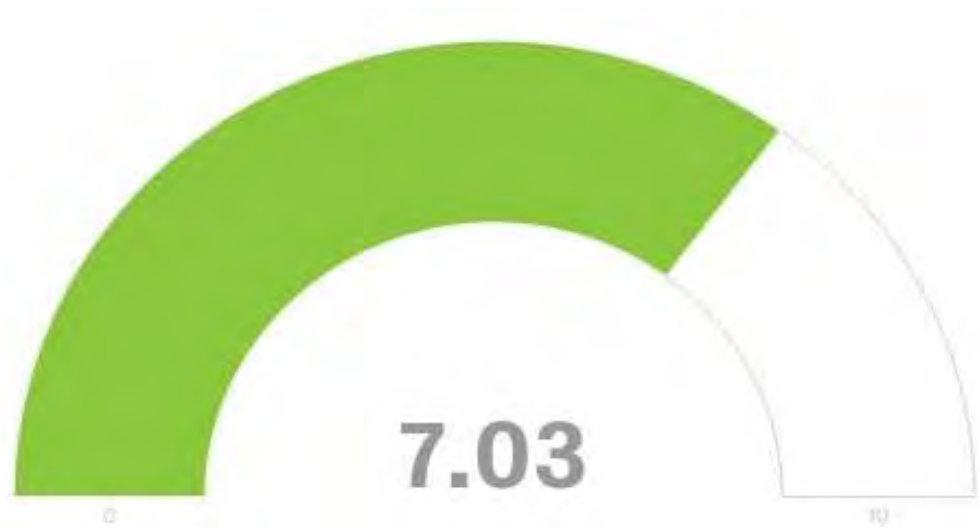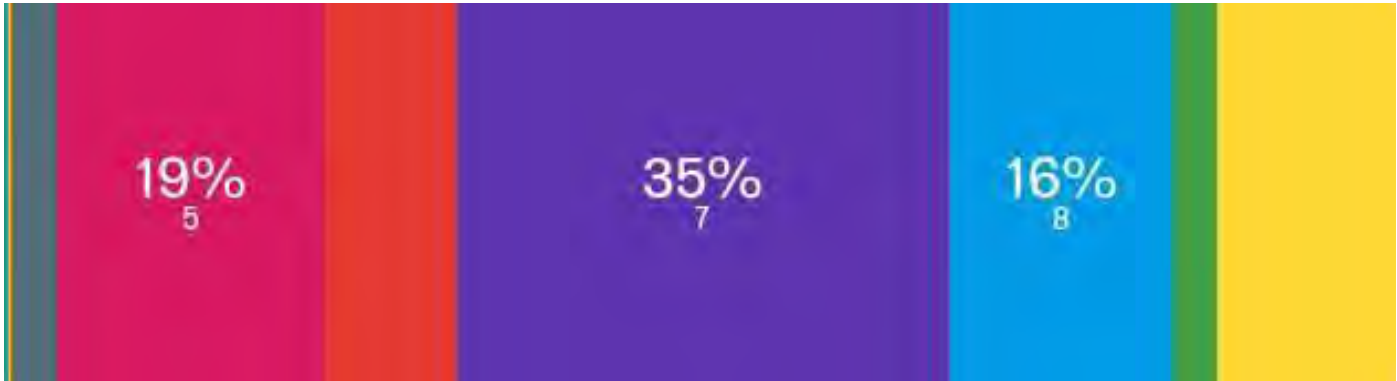
Q1.2.8 - Comments/Additional Information

Happier since we had fewer undeliverables but makes us question how NCOA why NCOA provides the addresses it provides
Most vendors do a data dump; so you get current and previous addresses and sometimes completely incorrect info when there's a common name.
I'm not sure if this is included in the software that our Mail Services staff uses.
Not thrilled with low match rates (40% range) and the quality of the data is questionable.
Keep rotating vendors. We've found that all reputable vendors (Melissa, Alumni Finder, AlumniSync, Brian Lacy, etc. etc.) are all pretty much equal in their data quality and turnaround times. They will offer discounts and bonuses if you keep rotating.
Phone data was terrible.

Q1.3 Lost Alumni/Lost Constituent Search/Service

Lost alumni/lost constituent searches attempt to provide current contact data for an individual for whom the school or other fundraising/membership organization does not have current contact information. It typically includes Change of Address processing, but may take into account other demographic information such as phone number, email address, social media handle, date of birth, education, and so on in order to identify the alum/constituent in order to return updated information.

Q1.3.1 - How often do you do a Lost Alumni/Lost Constituent Search/Service?
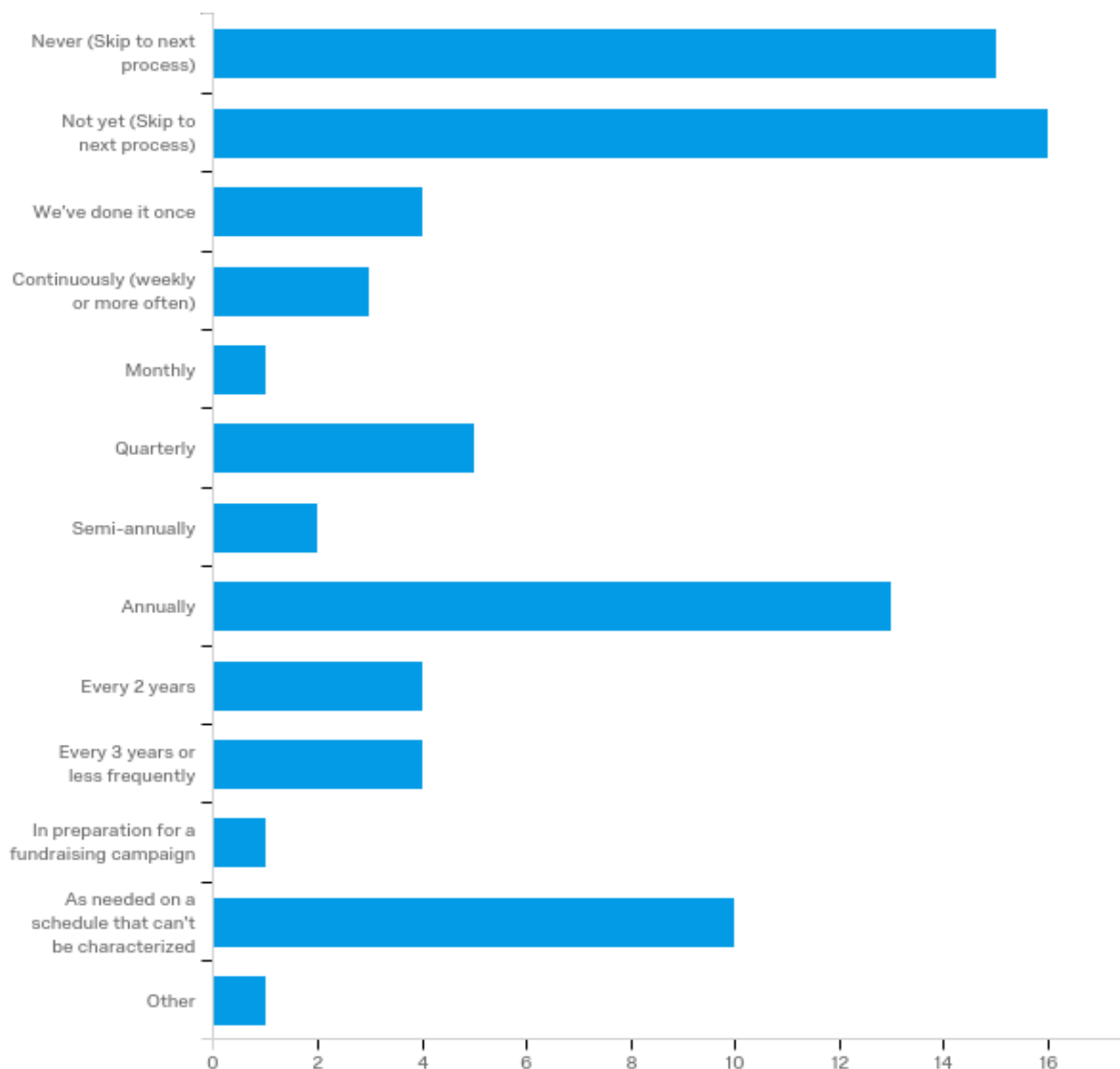
#	Answer	%	Count
1	Never (Skip to next process)	18.99%	15
2	Not yet (Skip to next process)	20.25%	16
3	We've done it once	5.06%	4
4	Continuously (weekly or more often)	3.80%	3
5	Monthly	1.27%	1
6	Quarterly	6.33%	5
7	Semi-annually	2.53%	2
8	Annually	16.46%	13
9	Every 2 years	5.06%	4
10	Every 3 years or less frequently	5.06%	4
11	In preparation for a fundraising campaign	1.27%	1
12	As needed on a schedule that can't be characterized	12.66%	10
13	Other	1.27%	1
	Total	100%	79

Other
This is handled on an individual basis as needed.

Q1.3.2 - How do you conduct this sort of enhancement?
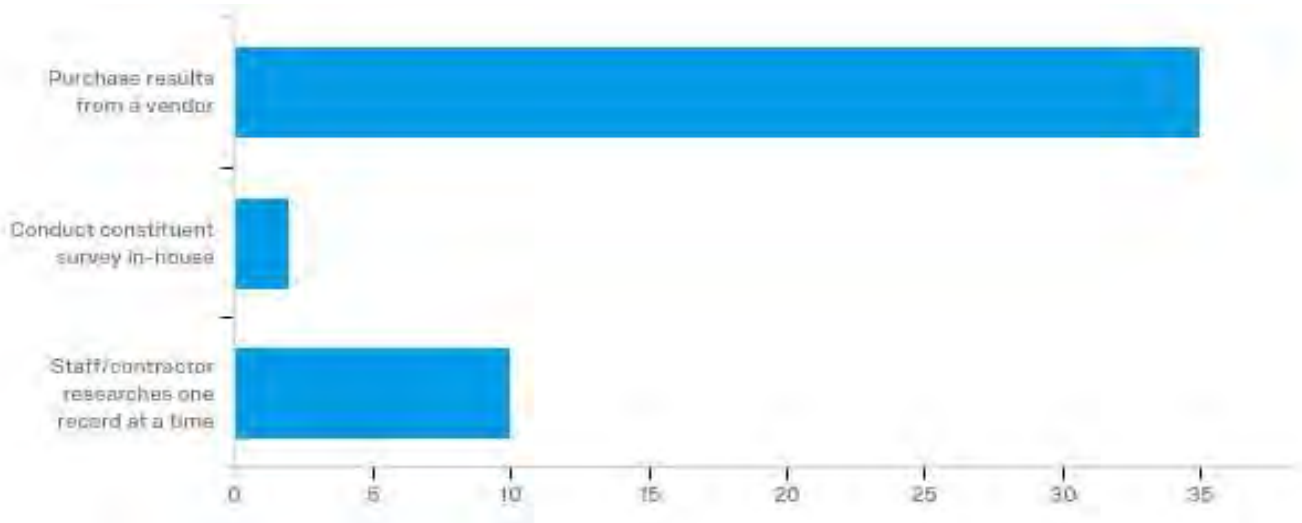
#	Answer	%	Count
1	Purchase results from a vendor	74.47%	35
2	Conduct constituent survey in-house	4.26%	2
3	Staff/contractor researches one record at a time	21.28%	10
	Total	100%	47

Q1.3.3 - How do you apply the results?
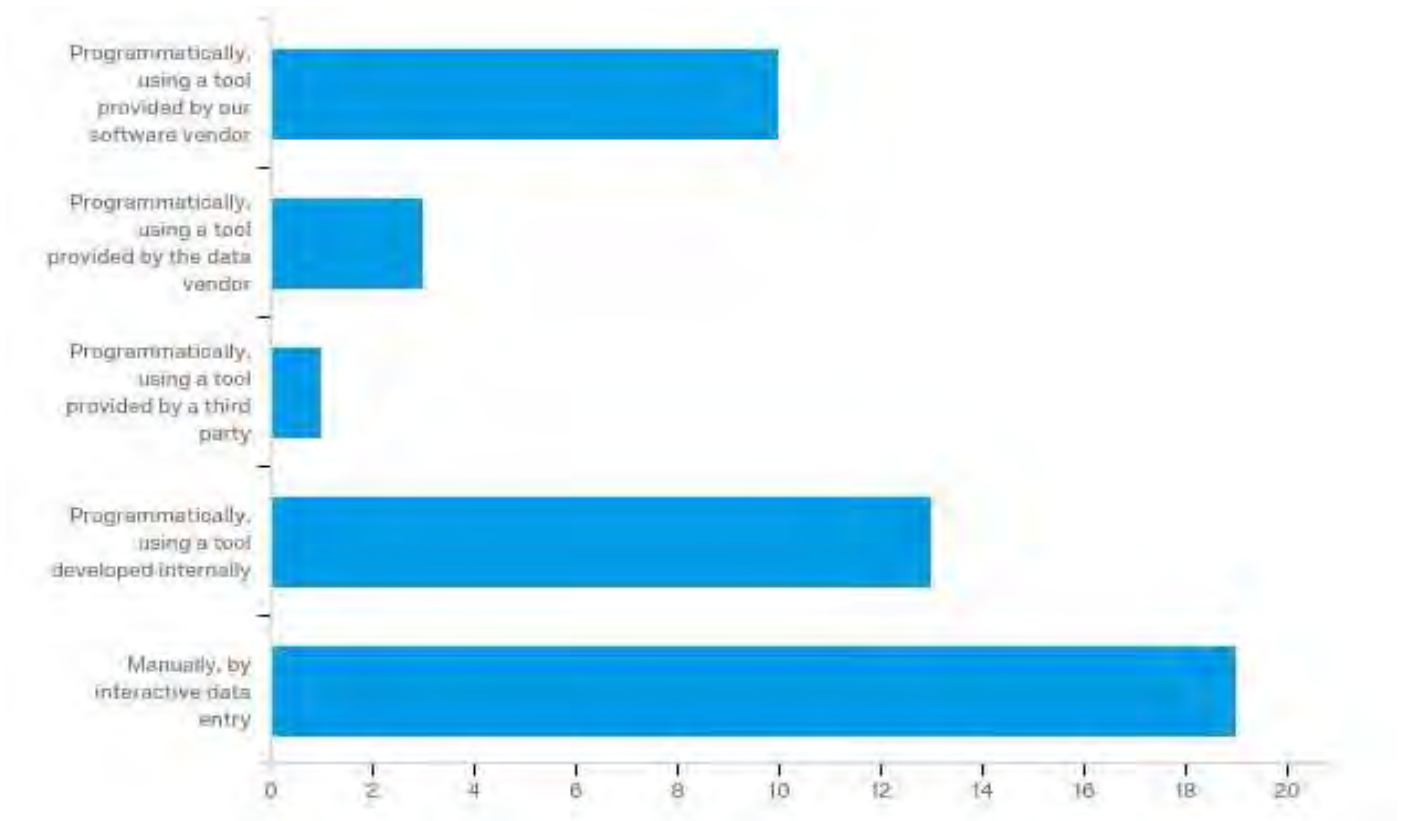
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	21.74%	10
2	Programmatically, using a tool provided by the data vendor	6.52%	3
3	Programmatically, using a tool provided by a third party	2.17%	1
4	Programmatically, using a tool developed internally	28.26%	13
5	Manually, by interactive data entry	41.30%	19
	Total	100%	46

Q1.3.4 - Who applies the results?
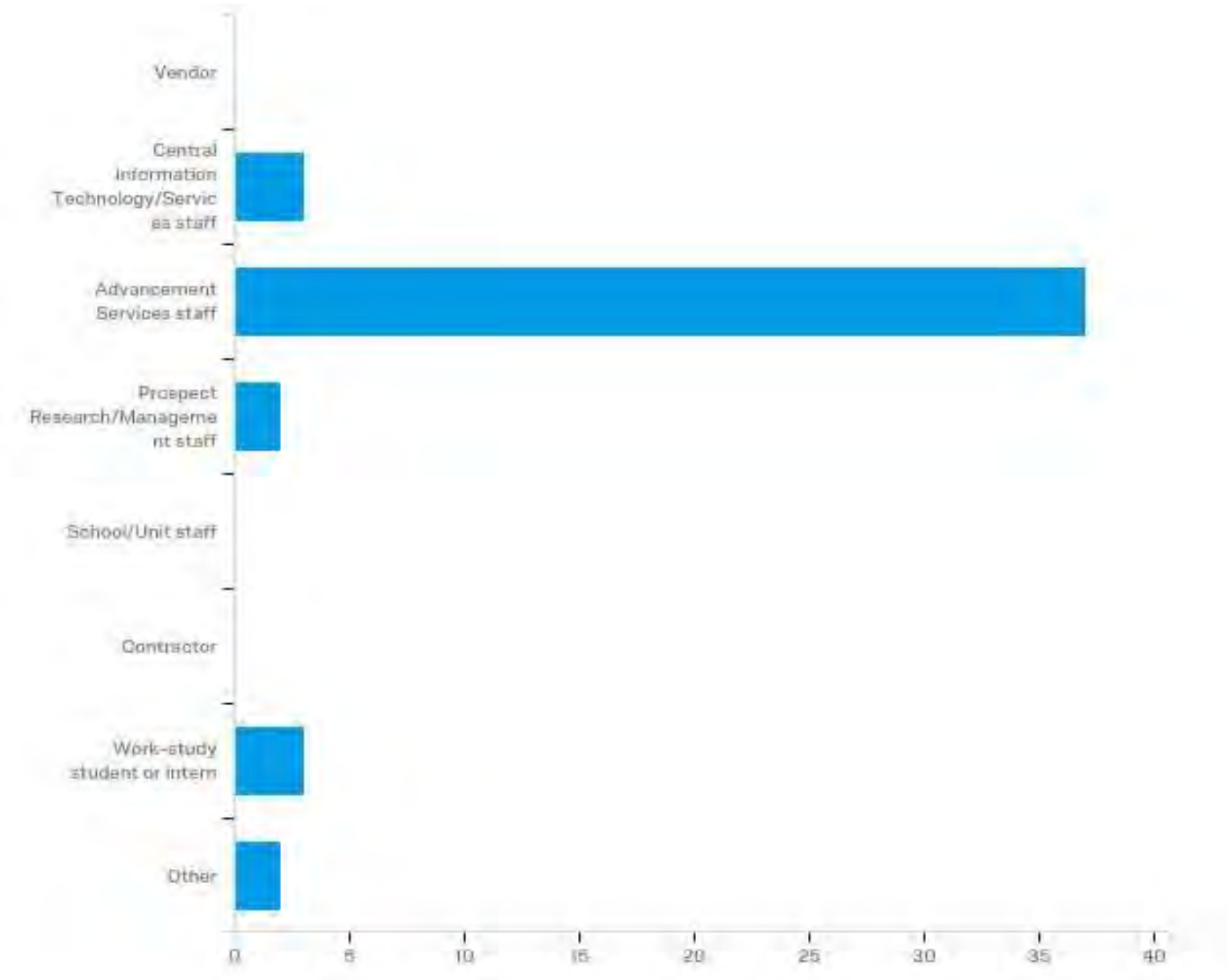
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	6.38%	3
3	Advancement Services staff	78.72%	37
4	Prospect Research/Management staff	4.26%	2
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	6.38%	3
8	Other	4.26%	2
	Total	100%	47

| Other |
| Records Management Staff |
| Programming Team in Adv Svcs |

Q1.3.5 - How do you review/evaluate/verify the results?
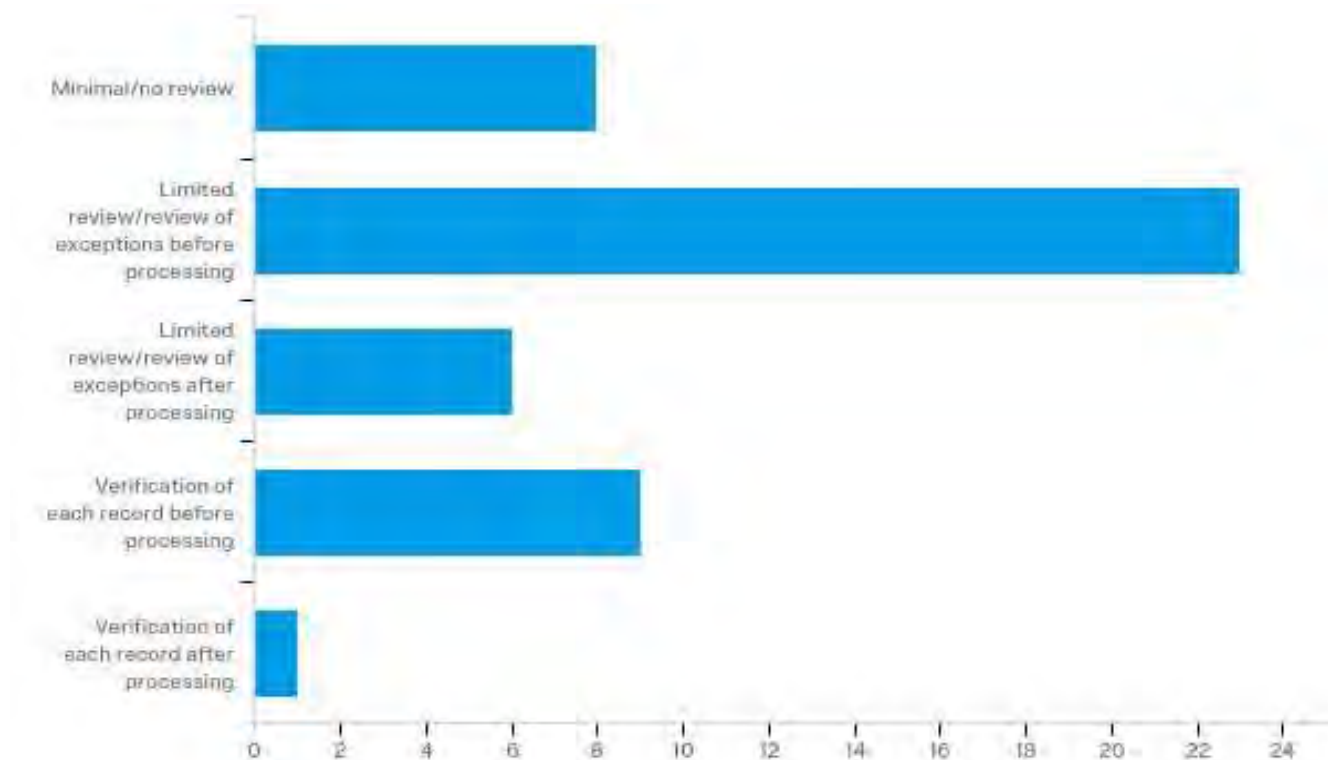
#	Answer	%	Count
1	Minimal/no review	17.02%	8
2	Limited review/review of exceptions before processing	48.94%	23
3	Limited review/review of exceptions after processing	12.77%	6
4	Verification of each record before processing	19.15%	9
5	Verification of each record after processing	2.13%	1
	Total	100%	47

Q1.3.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
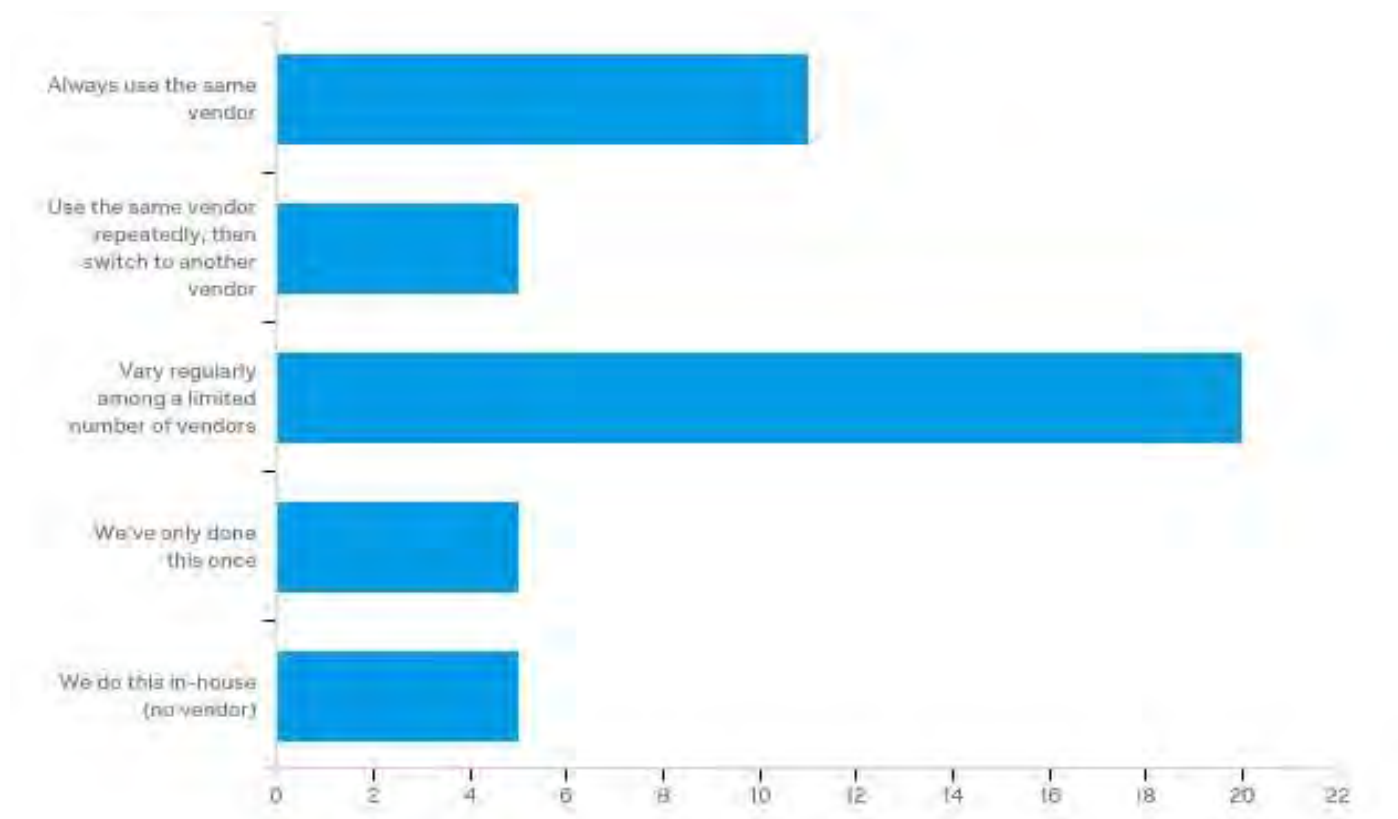
#	Answer	%	Count
1	Always use the same vendor	23.91%	11
2	Use the same vendor repeatedly, then switch to another vendor	10.87%	5
3	Vary regularly among a limited number of vendors	43.48%	20
4	We've only done this once	10.87%	5
5	We do this in-house (no vendor)	10.87%	5
	Total	100%	46

Q1.3.7 - On a scale of 0-10, over time, how happy are you with the results of lost alumni/lost constituent search?

36%
7

6.79
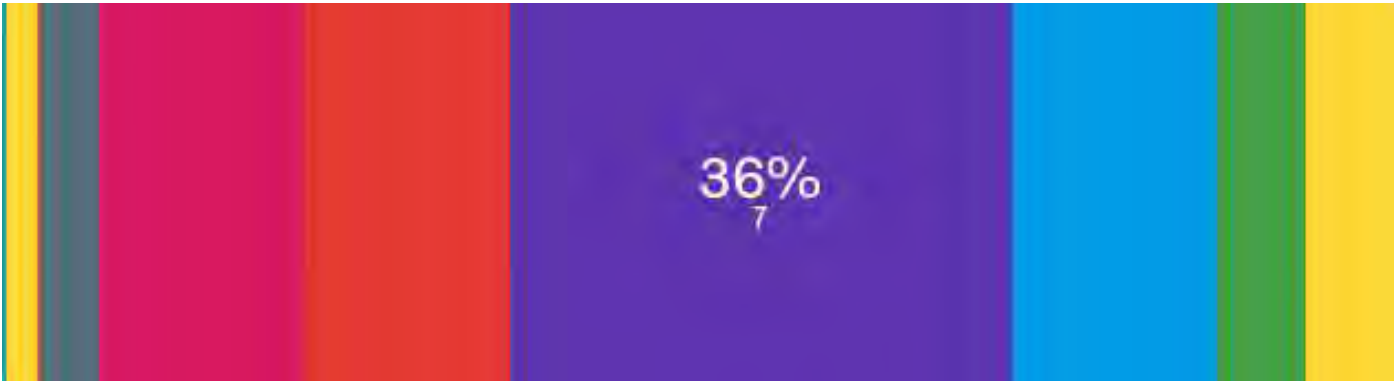
Q1.3.8 - Comments/Additional Information

Can be labor intensive
We've been using AlumniFinder regularly because the cost is within budget and we're pleased with the results. We also do other collections and will try to contact those that we can via e-mail, and also offer an on-line community
Again, we get data dumps and misinformation on common names.
Most recently used the directory company. We do run lists of donors who are lost and manually search and we search each piece of mail that comes back undeliverable on a manual basis
Not sure how to answer this section. We have done a few batch appends looking for lost individuals using vendors and then using the same address review process for NCOA. We also subscribe to Accurint and do a search when a graduate is lost in an attempt to find them on a daily basis before we inactivate a record.

Q1.4 Identification of Duplicate Records

Identification of duplicate records attempts to identify instances in which the same person or organization has more than one record in the fundraising/membership database, without the organization intending to have multiple records for the constituent, typically because business process that create records did not identify the existing record when a new record is created. Processing to identify duplicate records may involve comparing database records for records that have data in common. Comparisons may be based on various shared data points, including name and address, name and email address, and student ID number.

Q1.4.1 - How often do you do a focused identification of duplicate records?
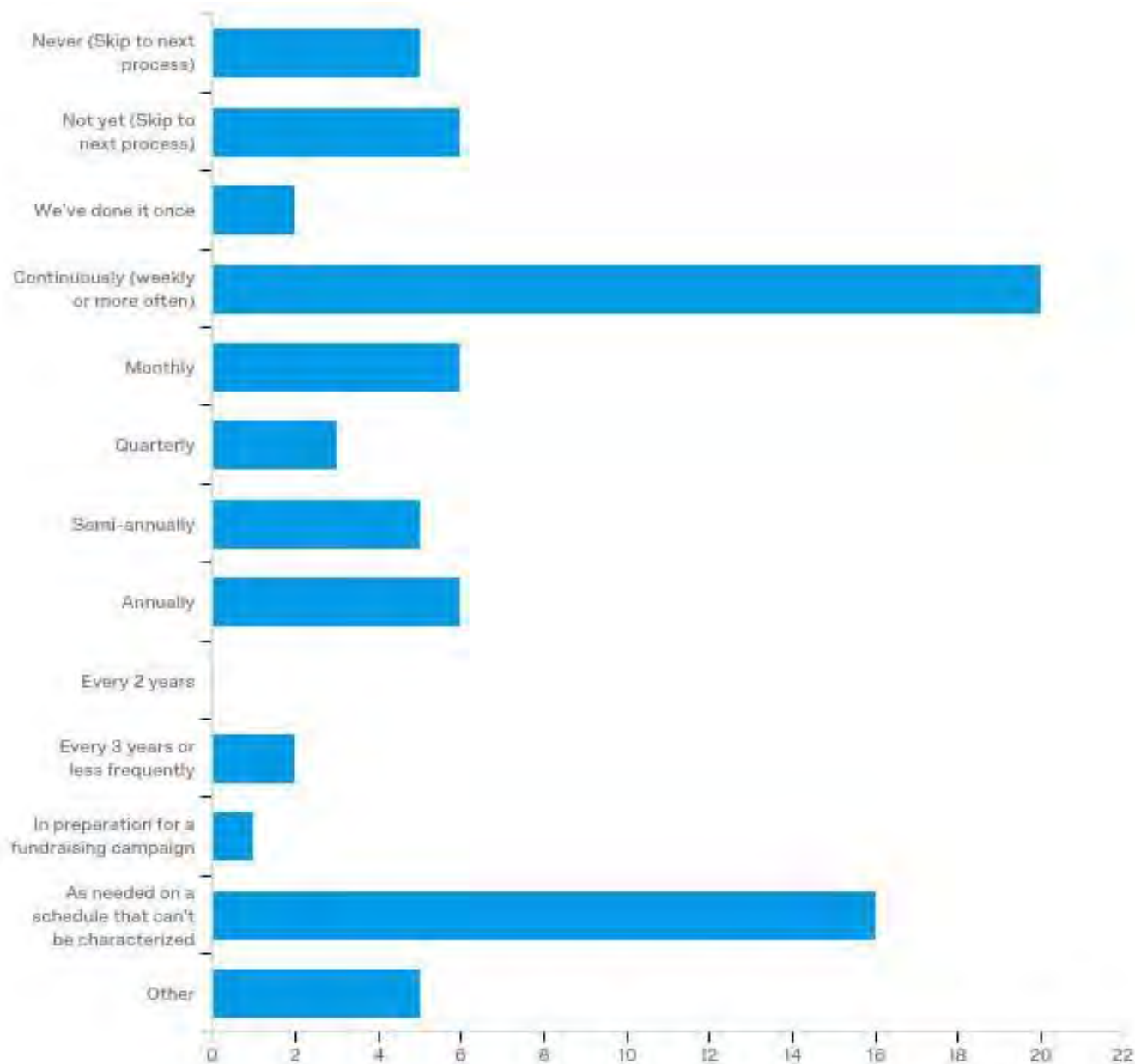
#	Answer	%	Count
1	Never (Skip to next process)	6.49%	5
2	Not yet (Skip to next process)	7.79%	6
3	We've done it once	2.60%	2
4	Continuously (weekly or more often)	25.97%	20
5	Monthly	7.79%	6
6	Quarterly	3.90%	3
7	Semi-annually	6.49%	5
8	Annually	7.79%	6
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	2.60%	2
11	In preparation for a fundraising campaign	1.30%	1
12	As needed on a schedule that can't be characterized	20.78%	16
13	Other	6.49%	5
	Total	100%	77

Other
This is ongoing with daily and weekly integrations with other databases
As they are found manually in our system
No set schedule. Though we are always on the lookout for them.
On-Going
Duplicate records are identified and manually fixed on an as-needed business. it has not been a large enough problem to warrant using the duplicate searches, which tend to be too broad to be useful

Q1.4.2 - How do you conduct this cleanup process?
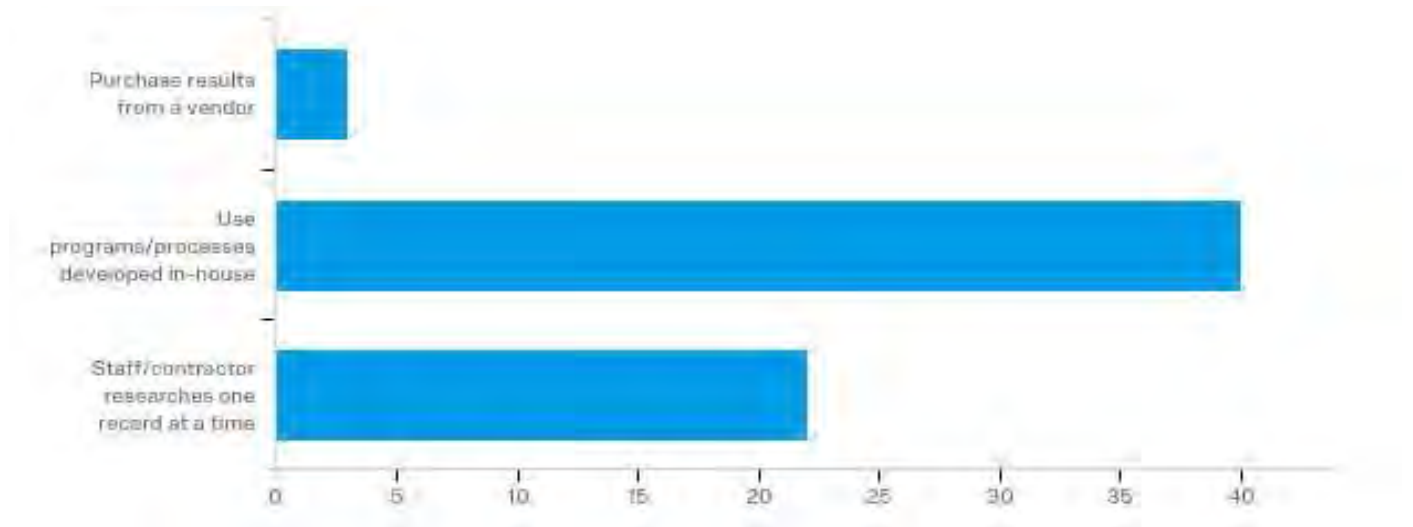
#	Answer	%	Count
1	Purchase results from a vendor	4.62%	3
2	Use programs/processes developed in-house	61.54%	40
3	Staff/contractor researches one record at a time	33.85%	22
	Total	100%	65

Q1.4.3 - How do you apply the results?
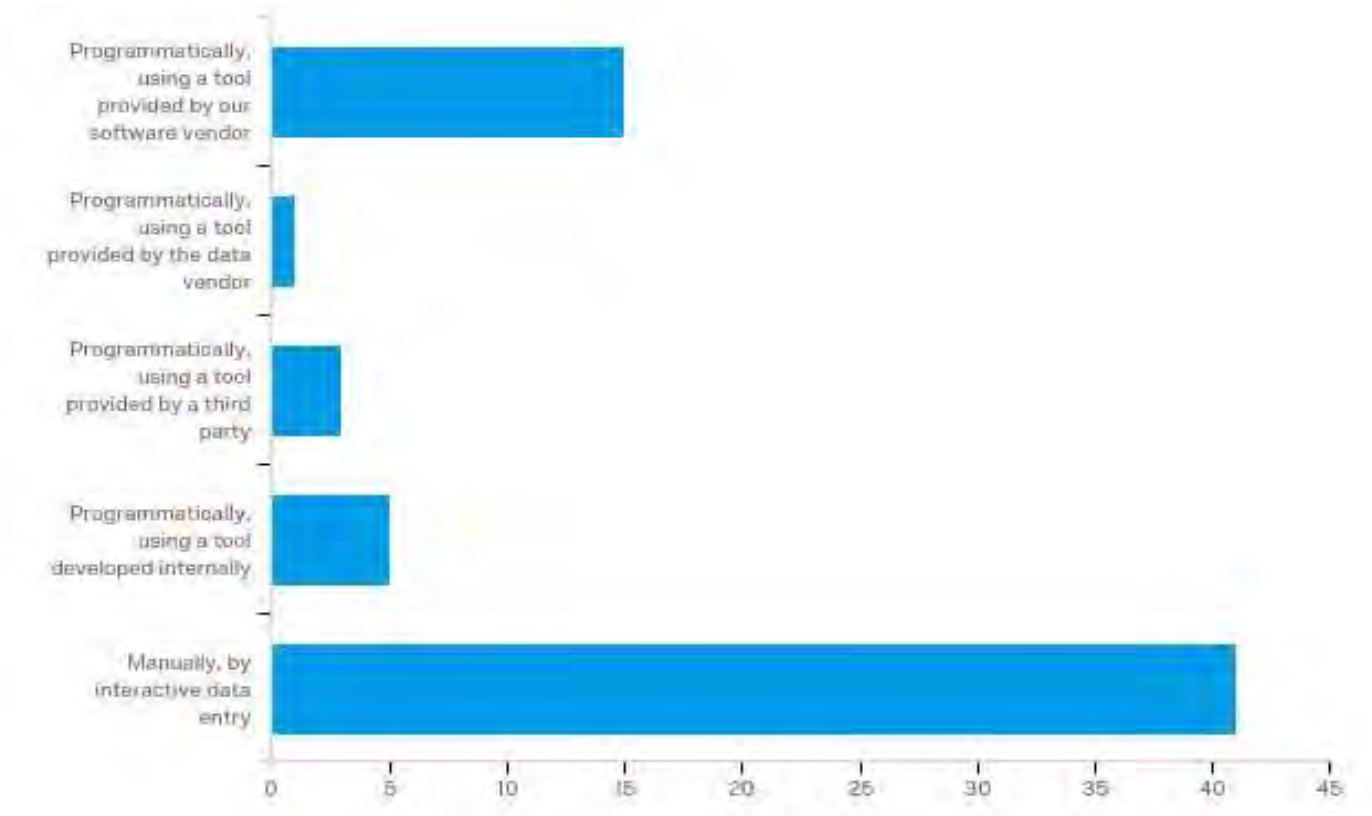
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	23.08%	15
2	Programmatically, using a tool provided by the data vendor	1.54%	1
3	Programmatically, using a tool provided by a third party	4.62%	3
4	Programmatically, using a tool developed internally	7.69%	5
5	Manually, by interactive data entry	63.08%	41
	Total	100%	65

Q1.4.4 - Who applies the results?
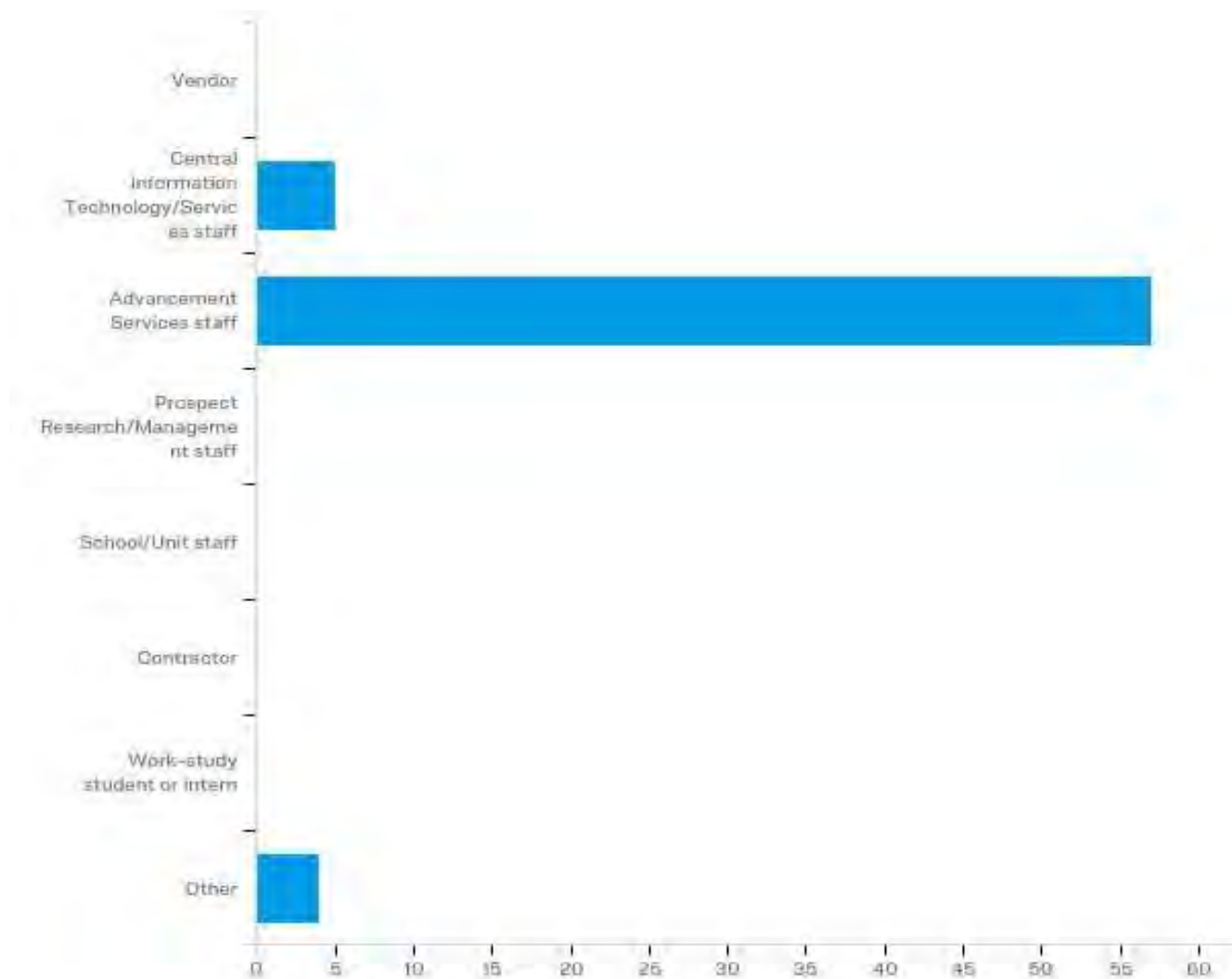
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	7.58%	5
3	Advancement Services staff	86.36%	57
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	6.06%	4
	Total	100%	66

Other
Records Management staff
Gift Management Staff
Both IT and Advancement Services based on what data needs to be merged
Programming Team in Adv Svcs

Q1.4.5 - How do you review/evaluate/verify the results?
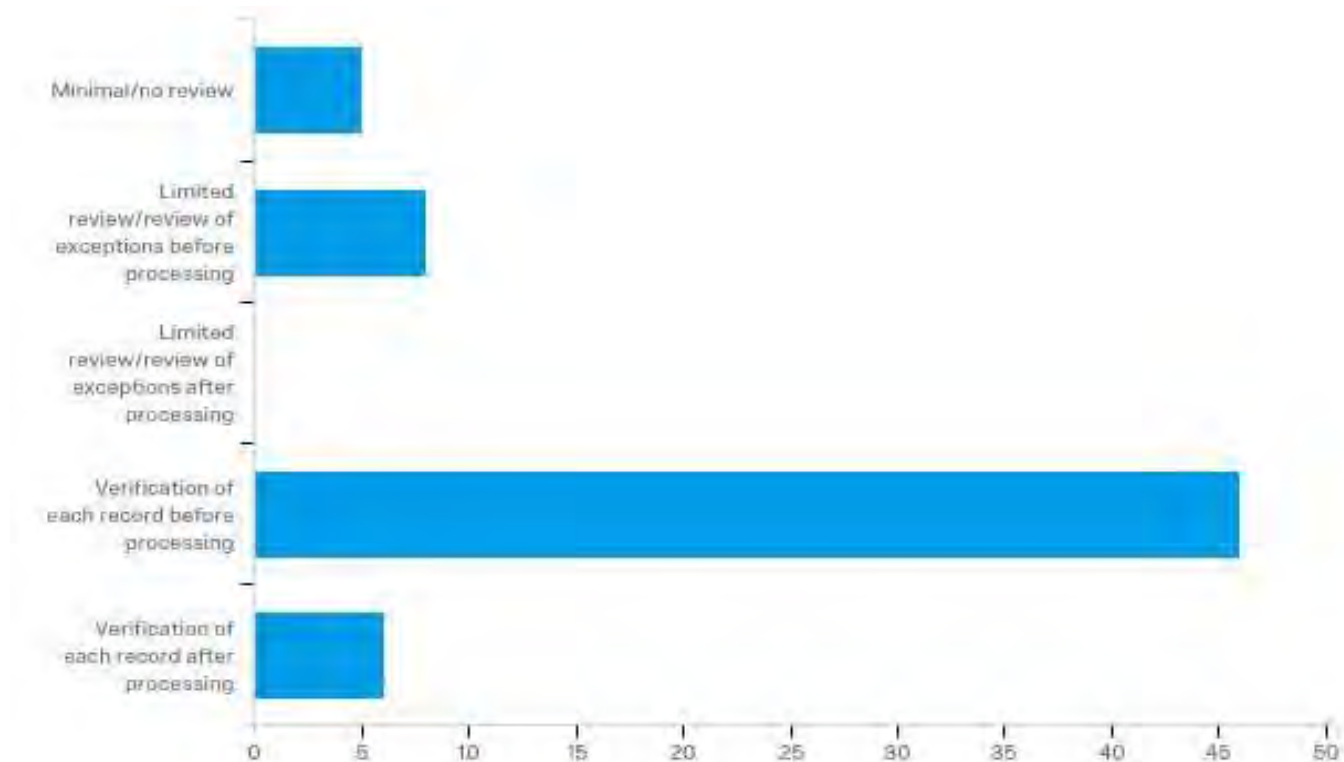
#	Answer	%	Count
1	Minimal/no review	7.69%	5
2	Limited review/review of exceptions before processing	12.31%	8
3	Limited review/review of exceptions after processing	0.00%	0
4	Verification of each record before processing	70.77%	46
5	Verification of each record after processing	9.23%	6
	Total	100%	65

Q1.4.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
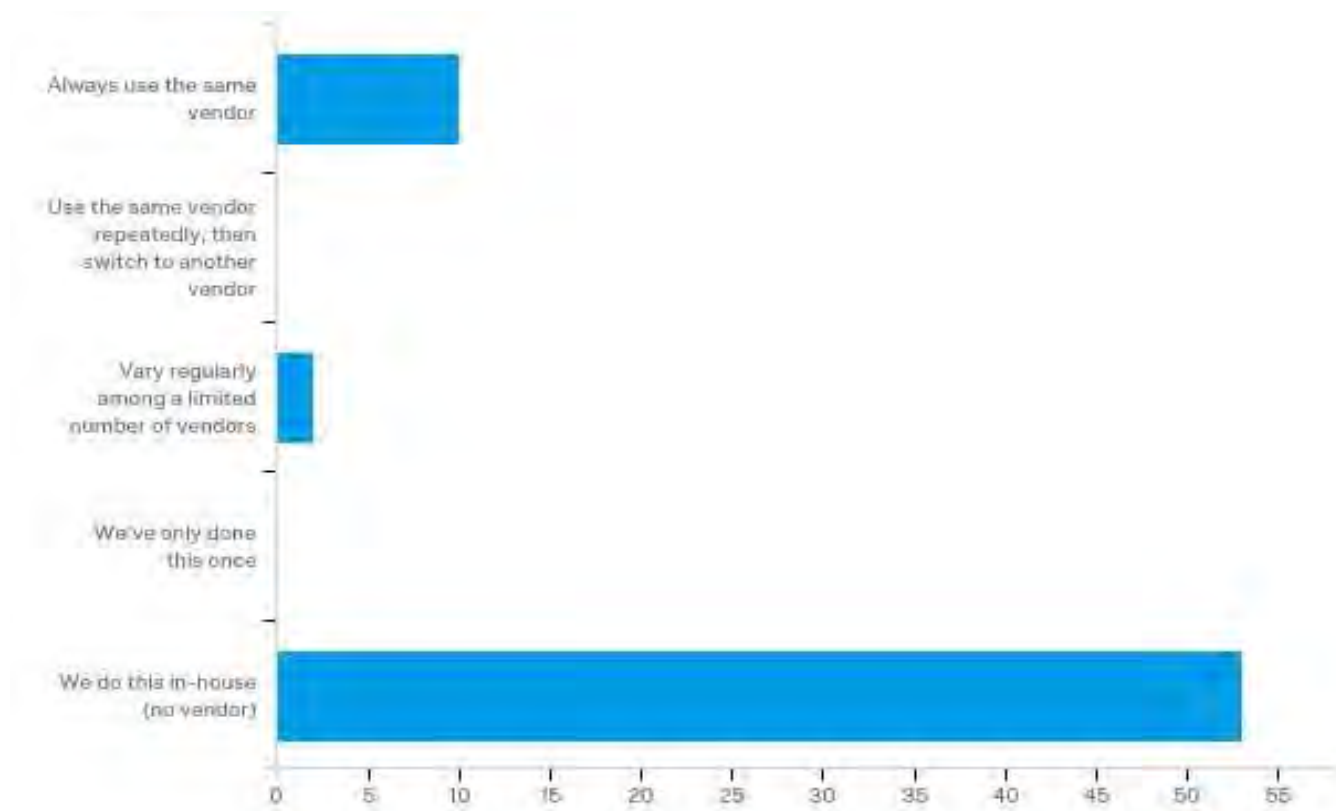
#	Answer	%	Count
1	Always use the same vendor	15.38%	10
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	3.08%	2
4	We've only done this once	0.00%	0
5	We do this in-house (no vendor)	81.54%	53
	Total	100%	65

Q1.4.7 - On a scale of 0-10, over time, how happy are you with the results of your identification of duplicate records?

Q1.4.8 - Comments/Additional Information

Frequently, duplicates are created by units outside of Advancement and leave the clean up to us.
A lot of work!
We obviously have many in the system that we just haven't had the time to find.
Q1.4.6 - Clarification - The combining of accounts is done by our database software. If the question is how we are finding the duplicate records, then it is a manual process. We find them as we stumble upon them.
We have an integrated database with the rest of campus (finance, student, HR etc.) because of this we are very diligent about the creation of records taking lots of time up front to make sure duplicates are not created. When one is found it is dealt with on an individual basis
Blackbaud had made identifying duplicates very difficult.
We use Blackbaud which has its own tool. It's ok as far as it goes, but does allow me to query sub-groups looking for duplicates -- like boards.
We do not have this down to a science, nor does the organization as a whole spend enough time trying to get it 1) into the system correctly, and 2) corrected after identification.
As of now, we are using the Duplicate Management Tool in Raiser's Edge
Blackbaud keeps changing the tool/changing it from free to a purchased add-on. In general, the tool is fine.

Q1.5 Phone Append

Phone appends provide current telephone numbers for constituents, often to support phonathon/telefund programs. Identifying information, most commonly name and address, is used to match constituents to a reference database, and phone numbers from the reference database are returned.

Q1.5.1 - How often do you do a phone append?
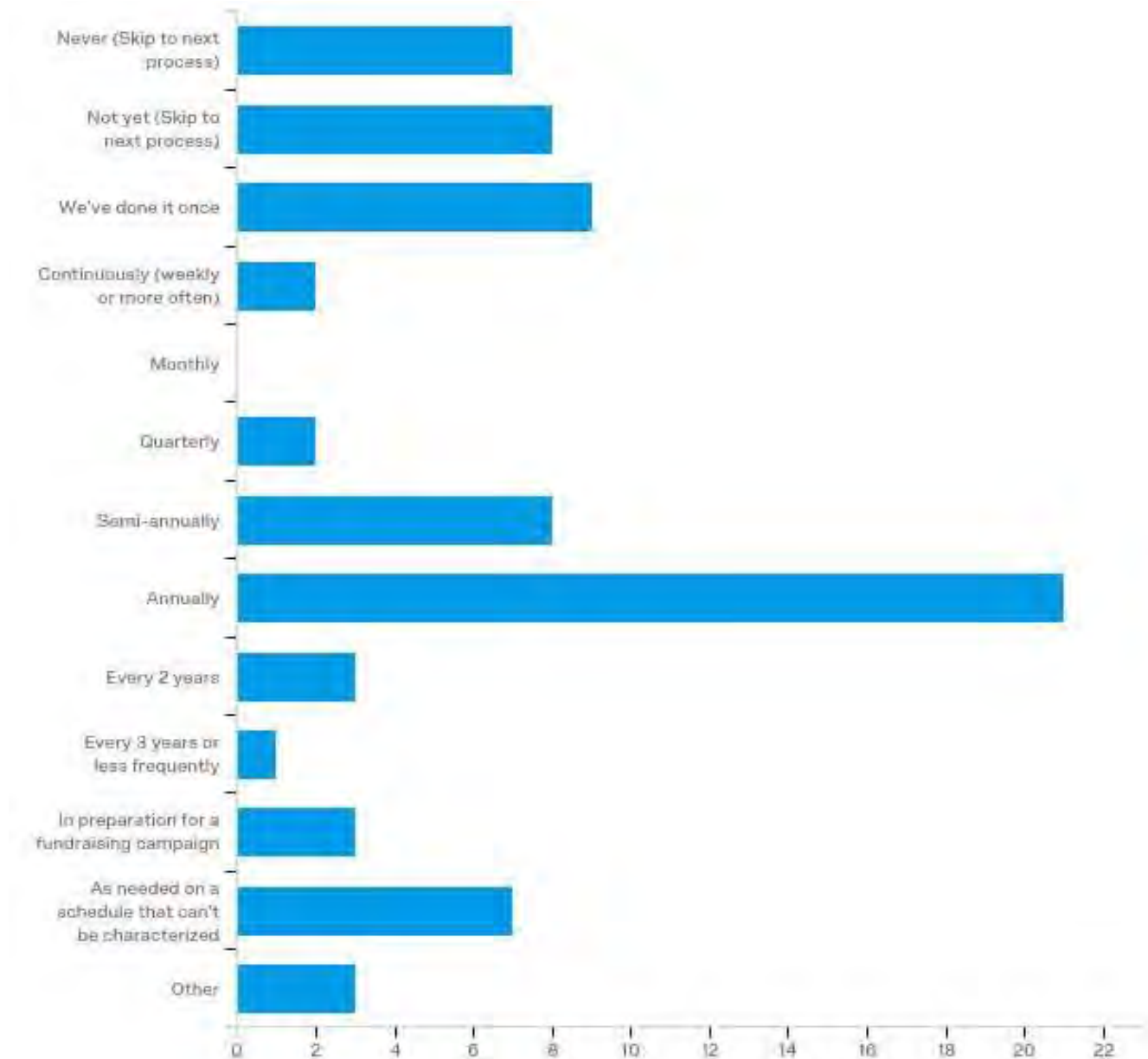
#	Answer	%	Count
1	Never (Skip to next process)	9.46%	7
2	Not yet (Skip to next process)	10.81%	8
3	We've done it once	12.16%	9
4	Continuously (weekly or more often)	2.70%	2
5	Monthly	0.00%	0
6	Quarterly	2.70%	2
7	Semi-annually	10.81%	8
8	Annually	28.38%	21
9	Every 2 years	4.05%	3
10	Every 3 years or less frequently	1.35%	1
11	In preparation for a fundraising campaign	4.05%	3
12	As needed on a schedule that can't be characterized	9.46%	7
13	Other	4.05%	3
	Total	100%	74

Other
daily from Phone Campaign demographic changes
We're about to do it for the first time.
phone append is managed by department other than development, leaving out trustees/upper level members

Q1.5.2 - How do you conduct this sort of enhancement?
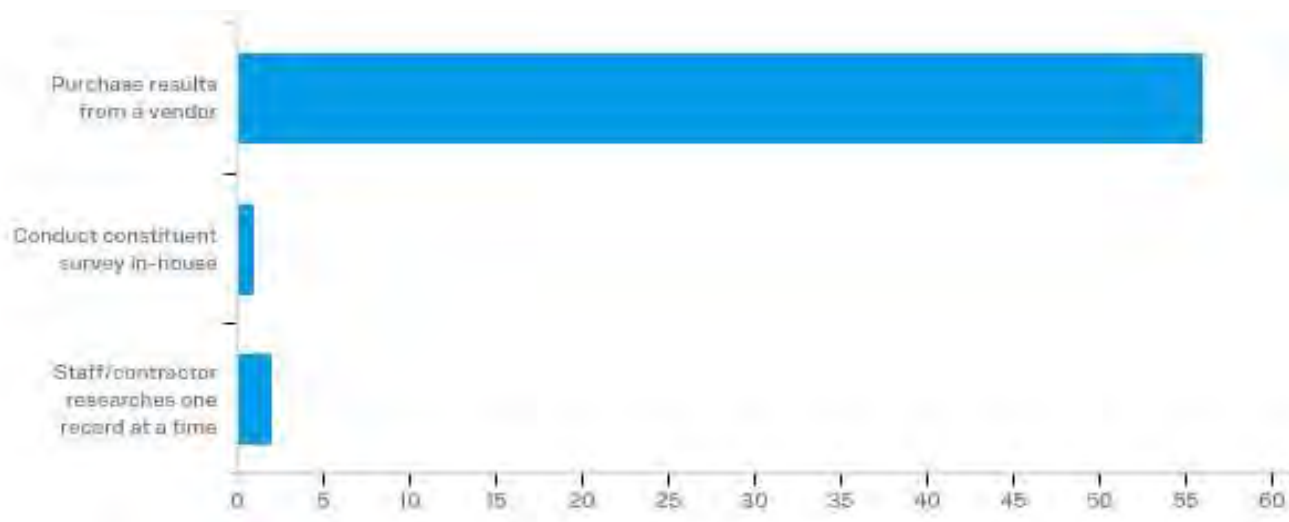
#	Answer	%	Count
1	Purchase results from a vendor	94.92%	56
2	Conduct constituent survey in-house	1.69%	1
3	Staff/contractor researches one record at a time	3.39%	2
	Total	100%	59

Q1.5.3 - How do you apply the results?
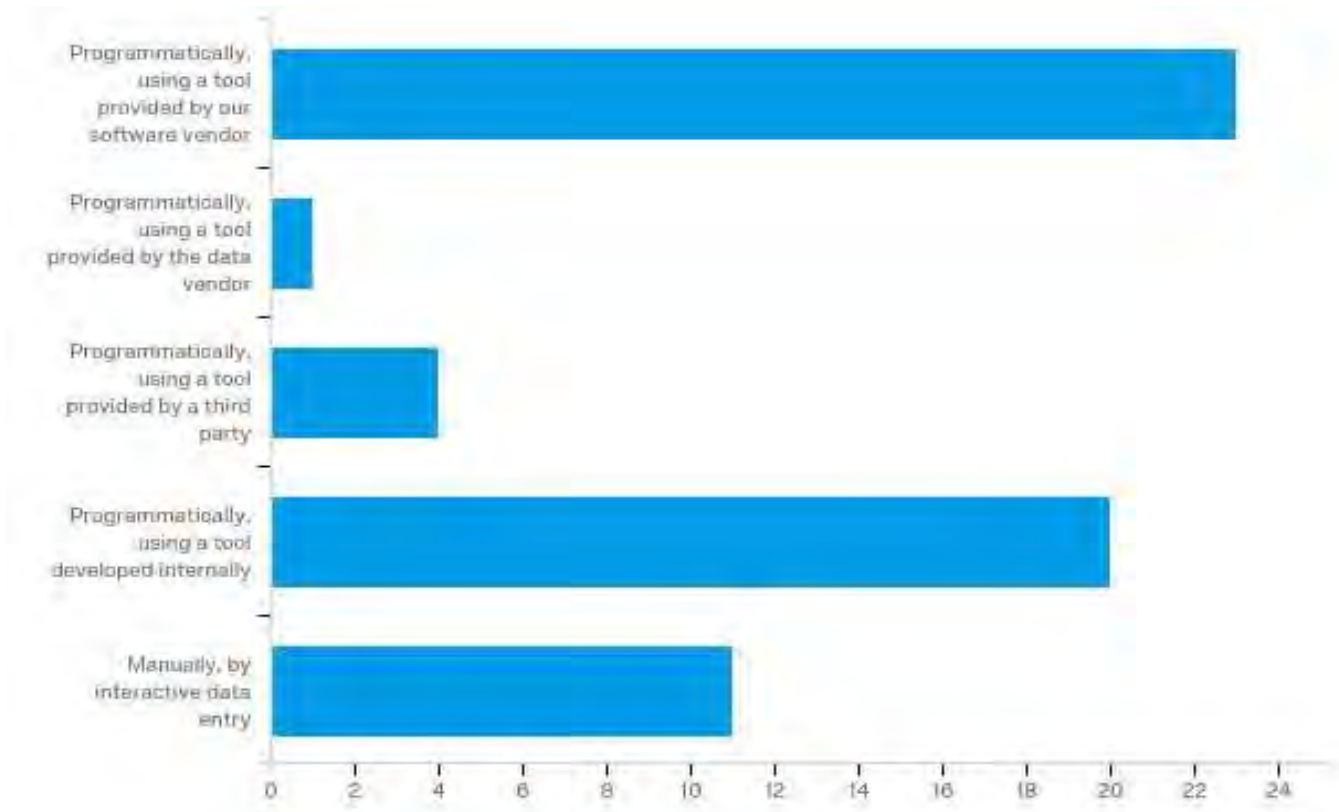
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	38.98%	23
2	Programmatically, using a tool provided by the data vendor	1.69%	1
3	Programmatically, using a tool provided by a third party	6.78%	4
4	Programmatically, using a tool developed internally	33.90%	20
5	Manually, by interactive data entry	18.64%	11
	Total	100%	59

Q1.5.4 - Who applies the results?
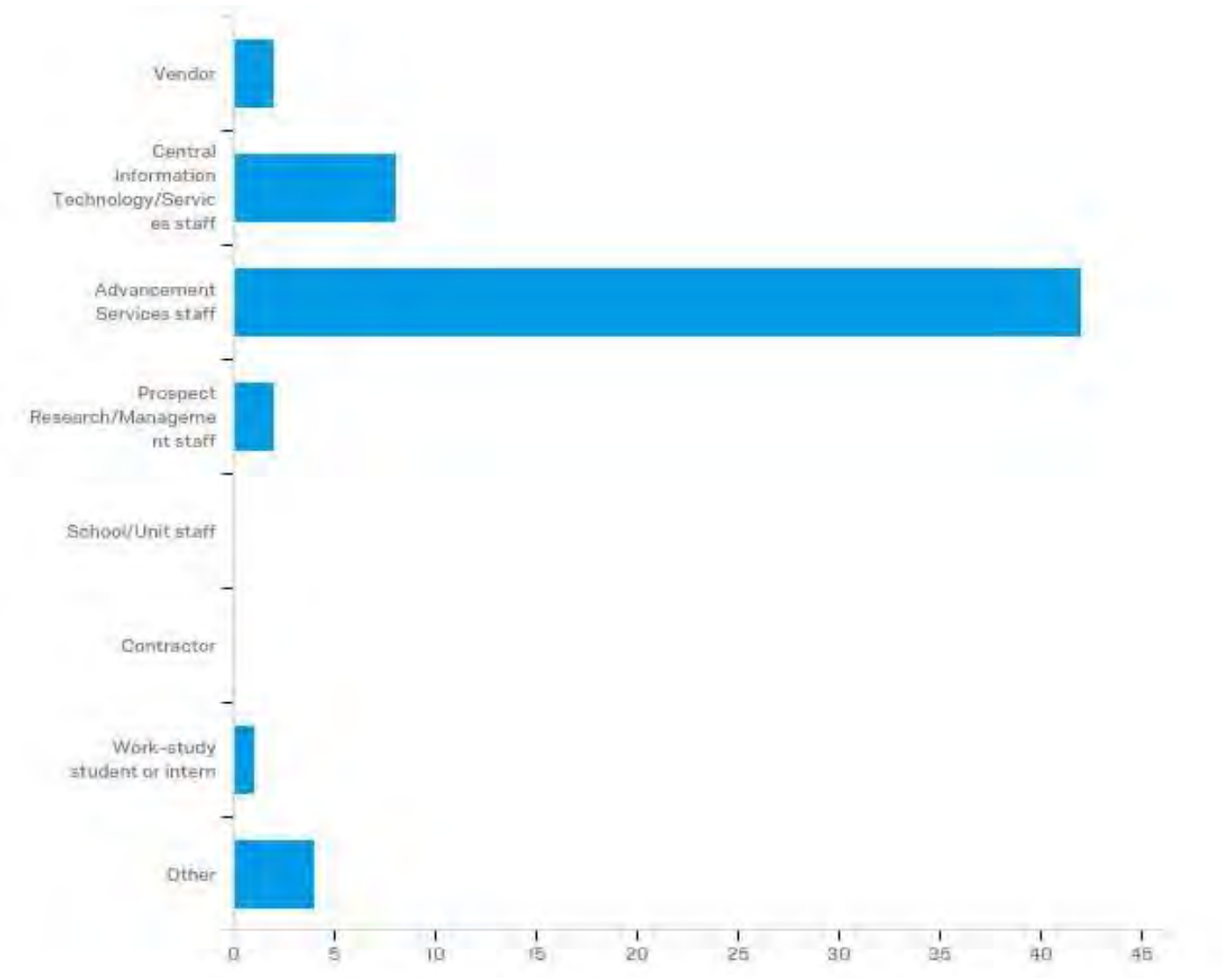
#	Answer	%	Count
1	Vendor	3.39%	2
2	Central Information Technology/Services staff	13.56%	8
3	Advancement Services staff	71.19%	42
4	Prospect Research/Management staff	3.39%	2
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	1.69%	1
8	Other	6.78%	4
	Total	100%	59

Other
Records Management Staff
Gift Management Staff
Membership department
Programming Team in Adv Svcs.

Q1.5.5 - How do you review/evaluate/verify the results?
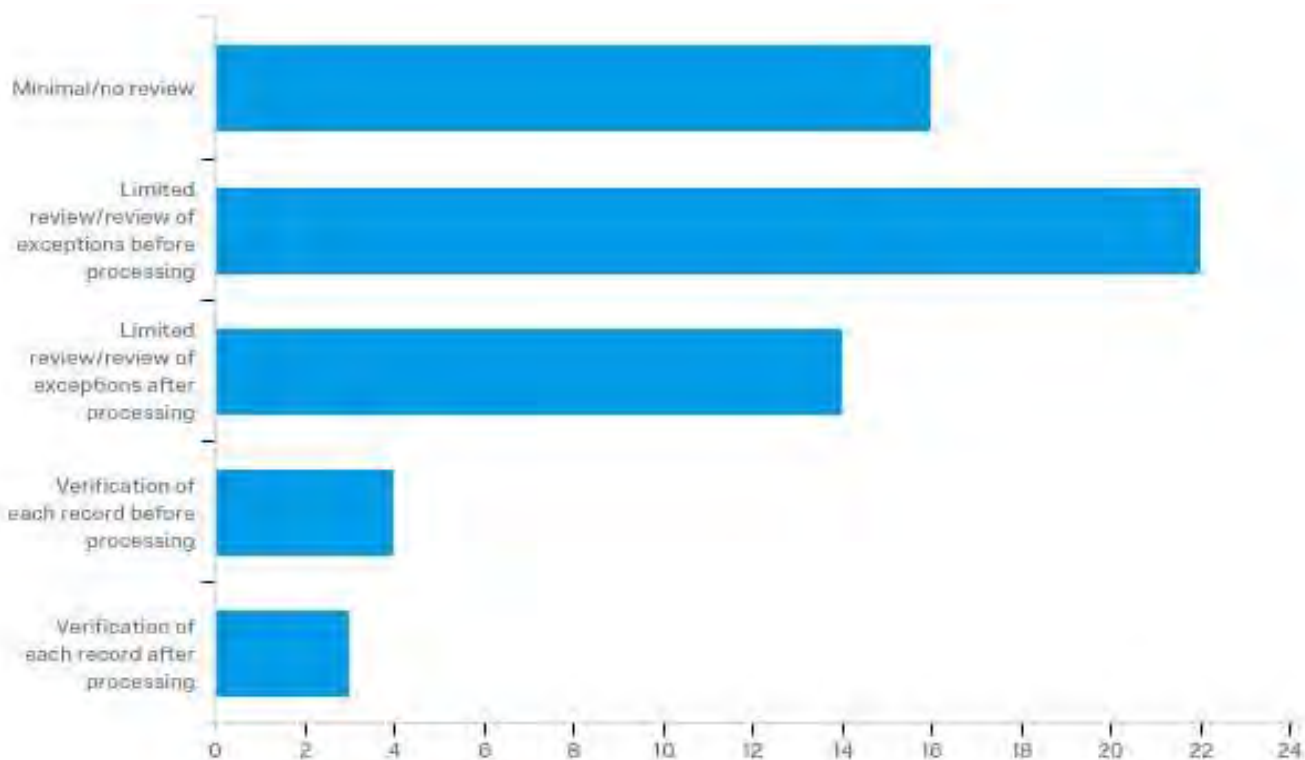
#	Answer	%	Count
1	Minimal/no review	27.12%	16
2	Limited review/review of exceptions before processing	37.29%	22
3	Limited review/review of exceptions after processing	23.73%	14
4	Verification of each record before processing	6.78%	4
5	Verification of each record after processing	5.08%	3
	Total	100%	59

Q1.5.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
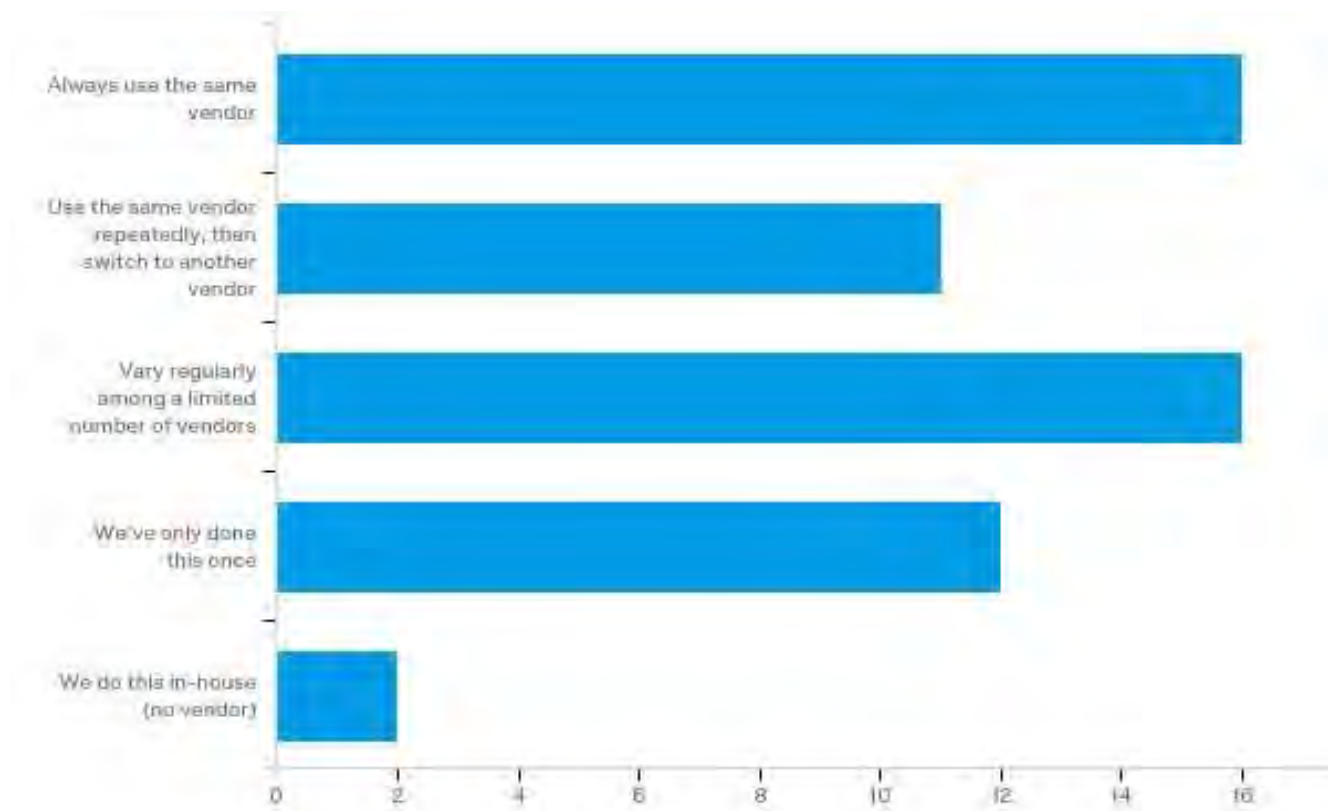
#	Answer	%	Count
1	Always use the same vendor	28.07%	16
2	Use the same vendor repeatedly, then switch to another vendor	19.30%	11
3	Vary regularly among a limited number of vendors	28.07%	16
4	We've only done this once	21.05%	12
5	We do this in-house (no vendor)	3.51%	2
	Total	100%	57

Q1.5.7 - On a scale of 0-10, over time, how happy are you with the results of phone number appends?

16%
5

28%
7

18%
8

6.25

0   10

Q1.5.8 - Comments/Additional Information

We discovered that we had more updated phone information that was self-reported by donors, and, unfortunately, this information was changed due to the append. We are now in the process of changing the information back to what we had.
We haven't had much time to find out how good the new phone data is. Our phonathon and various outreach efforts will help determine how accurate the data really is. That will probably take us at least a year (small shop with one Annual Fund fundraiser, two major gift officers and a CFR officer, as well as one person in Alumni Relations - we have an outside vendor manage and conduct the phonathon.)
Large phonathon program so phones are verified within the semester via the student calling
We are finding that Home phones are being used less and less, we are reaching the tipping point where we might move to making the Cell the preferred We also get home and cell numbers with the NCOA update from our vendor on anyone that shows a move.
Much better results now that RNL verifies each phone number.

Q1.6 Cell Phone Append

Cell Phone Append processing is the same as general phone append processing, except that only records identified as cell phone numbers in the reference data source are returned.

Q1.6.1 - How often do you do a cell phone append?
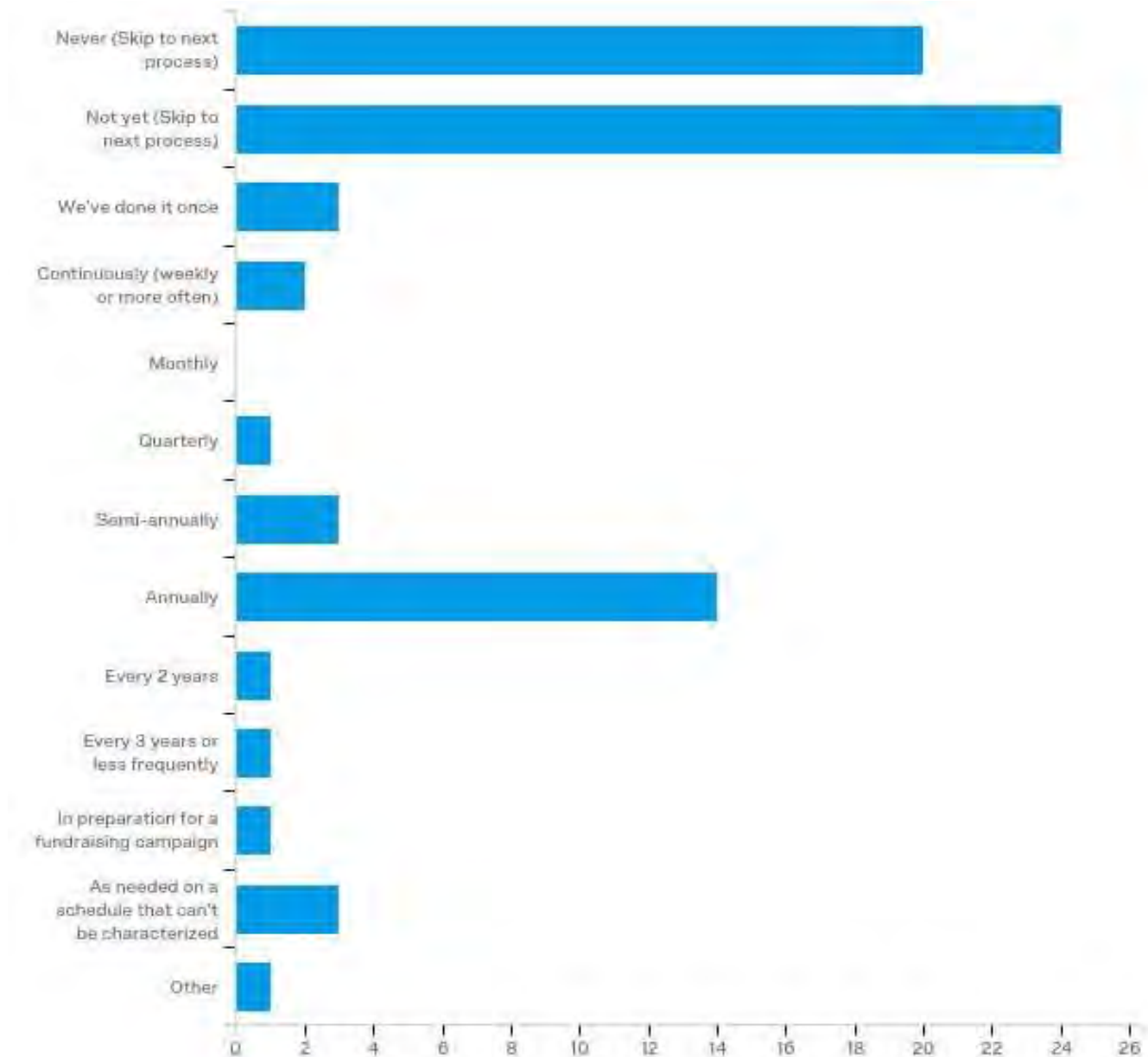
#	Answer	%	Count
1	Never (Skip to next process)	27.03%	20
2	Not yet (Skip to next process)	32.43%	24
3	We've done it once	4.05%	3
4	Continuously (weekly or more often)	2.70%	2
5	Monthly	0.00%	0
6	Quarterly	1.35%	1
7	Semi-annually	4.05%	3
8	Annually	18.92%	14
9	Every 2 years	1.35%	1
10	Every 3 years or less frequently	1.35%	1
11	In preparation for a fundraising campaign	1.35%	1
12	As needed on a schedule that can't be characterized	4.05%	3
13	Other	1.35%	1
	Total	100%	74

Other
Done through the phone campaign, don't know how often

Q1.6.2 - How do you conduct this sort of enhancement?
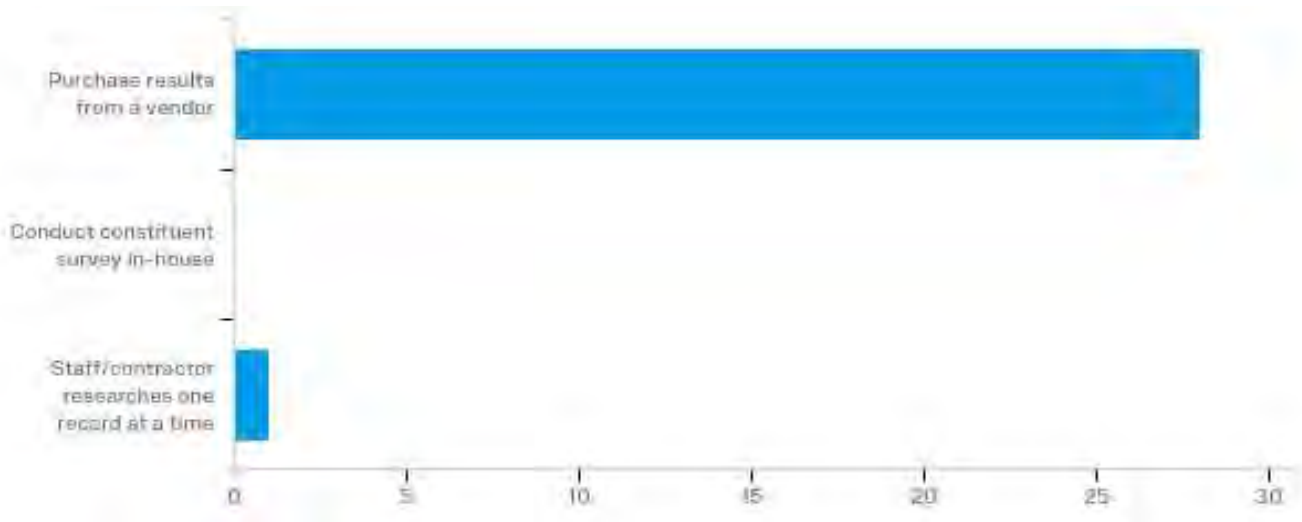
#	Answer	%	Count
1	Purchase results from a vendor	96.55%	28
2	Conduct constituent survey in-house	0.00%	0
3	Staff/contractor researches one record at a time	3.45%	1
	Total	100%	29

Q1.6.3 - How do you apply the results?
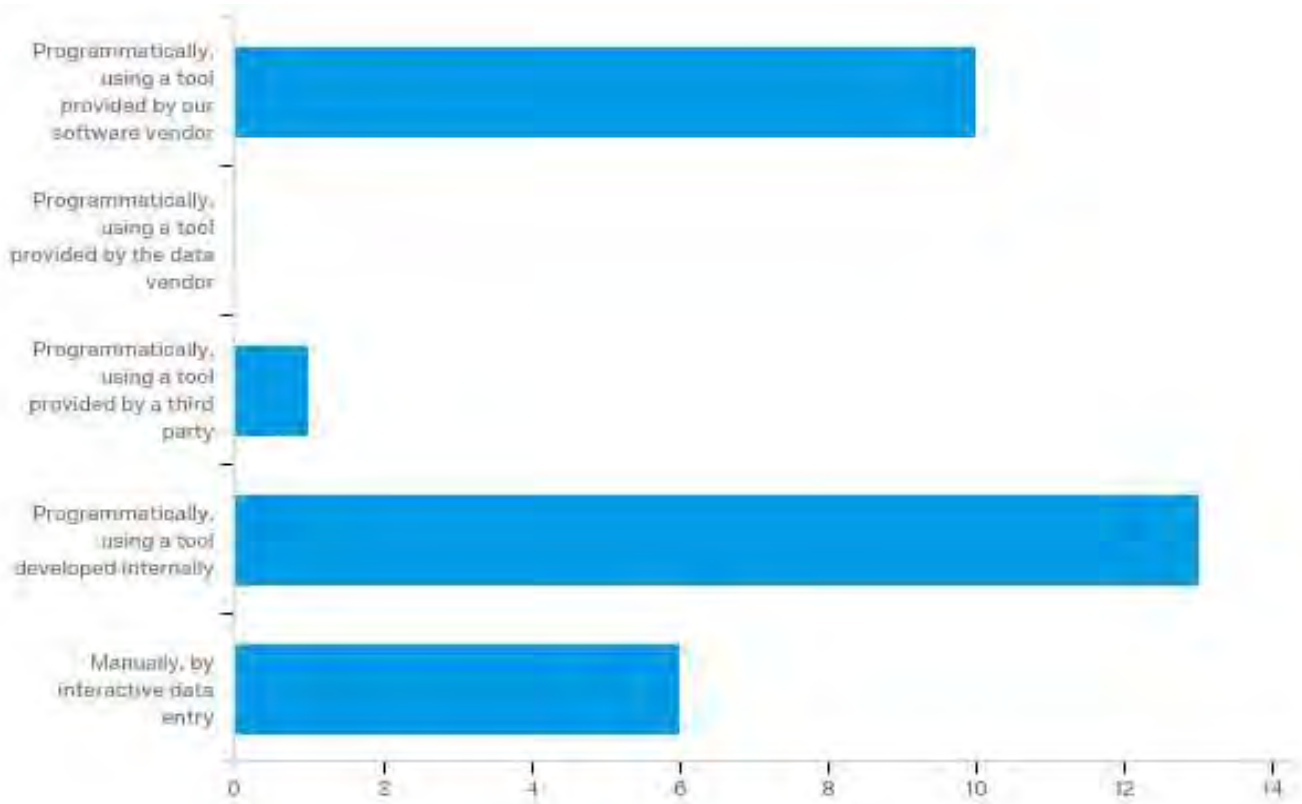
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	33.33%	10
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	3.33%	1
4	Programmatically, using a tool developed internally	43.33%	13
5	Manually, by interactive data entry	20.00%	6
	Total	100%	30

Q1.6.4 - Who applies the results?
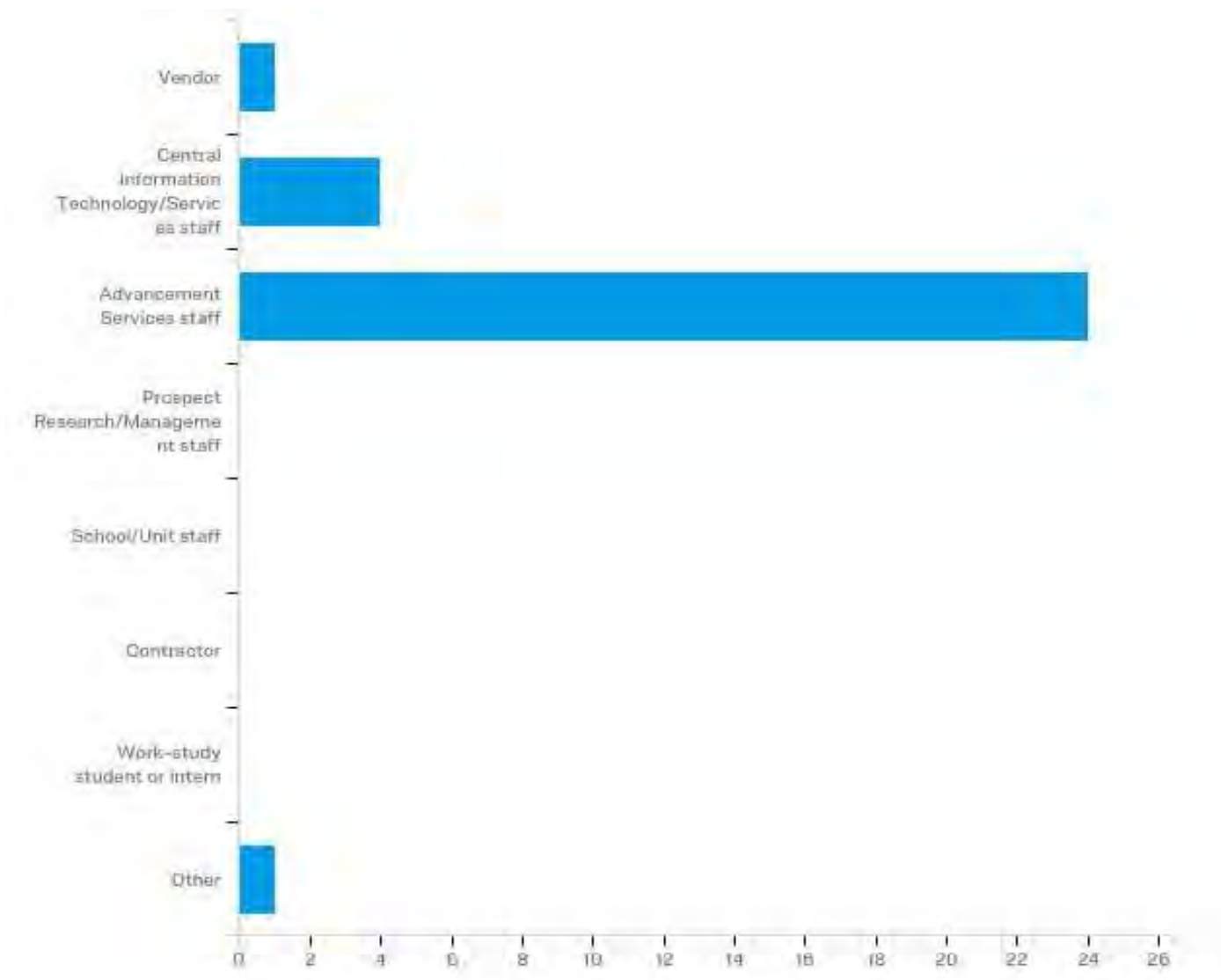
#	Answer	%	Count
1	Vendor	3.33%	1
2	Central Information Technology/Services staff	13.33%	4
3	Advancement Services staff	80.00%	24
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	3.33%	1
	Total	100%	30

Other
Programming team in Adv Svcs

Q1.6.5 - How do you review/evaluate/verify the results?
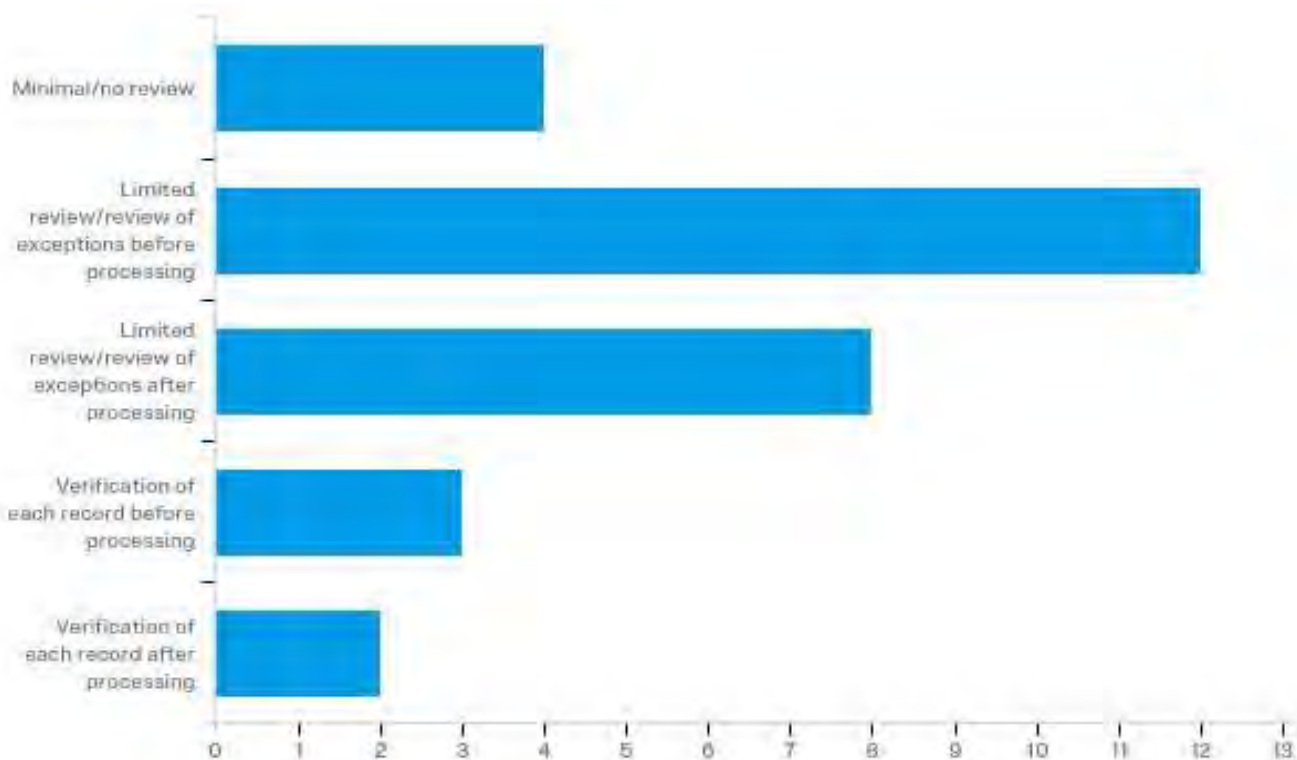
#	Answer	%	Count
1	Minimal/no review	13.79%	4
2	Limited review/review of exceptions before processing	41.38%	12
3	Limited review/review of exceptions after processing	27.59%	8
4	Verification of each record before processing	10.34%	3
5	Verification of each record after processing	6.90%	2
	Total	100%	29

Q1.6.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
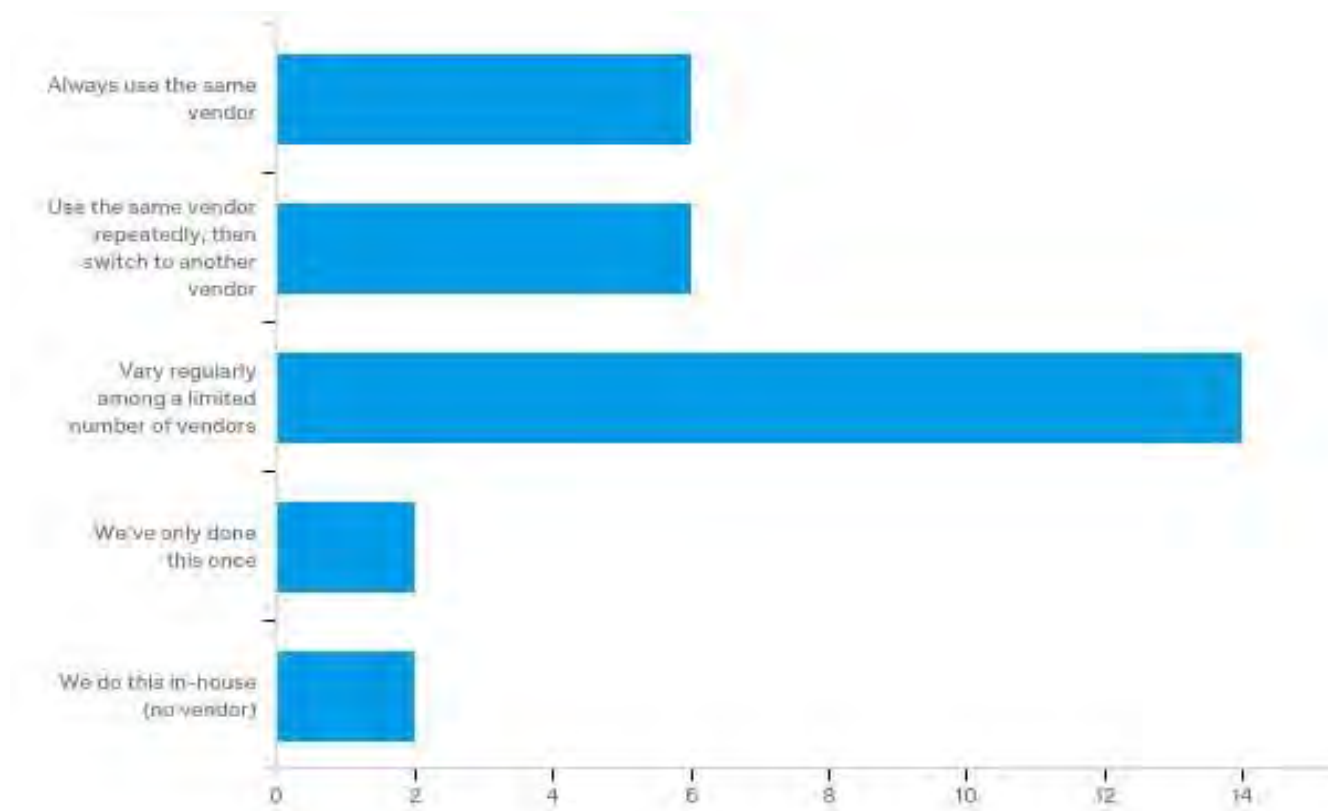
#	Answer	%	Count
1	Always use the same vendor	20.00%	6
2	Use the same vendor repeatedly, then switch to another vendor	20.00%	6
3	Vary regularly among a limited number of vendors	46.67%	14
4	We've only done this once	6.67%	2
5	We do this in-house (no vendor)	6.67%	2
	Total	100%	30

Q1.6.7 - On a scale of 0-10, over time, how happy are you with the results of cell phone appends?

38%
7

24%
8

7.1

0   10
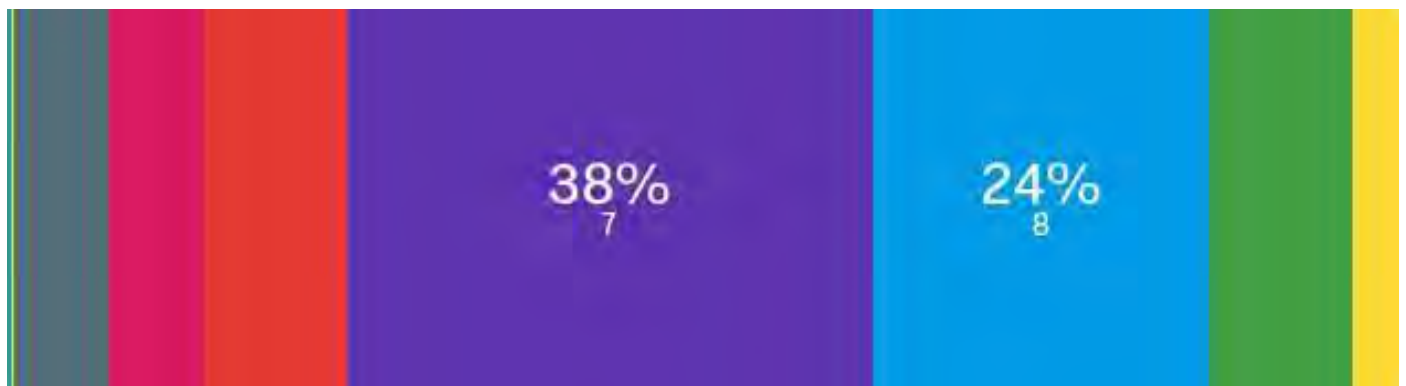
Q1.6.8 - Comments/Additional Information

treated same as landline append
Fantastic results from cell appends. We just posted a new batch of 67,000 cell phones. The last append was 3 years ago and it resulted in a 50% increase in the telethon program contact rates.

Q1.7 Email Address Append

Email address appends provide current email addresses for constituents. Identifying information, most commonly name and address, is used to match constituents to a reference database, and email addresses from the reference database are then returned. In some cases, only email addresses matched to an individual are returned; in others, email addresses identified as belonging to anyone in the household are returned.

Q1.7.1 - How often do you do an email address append?
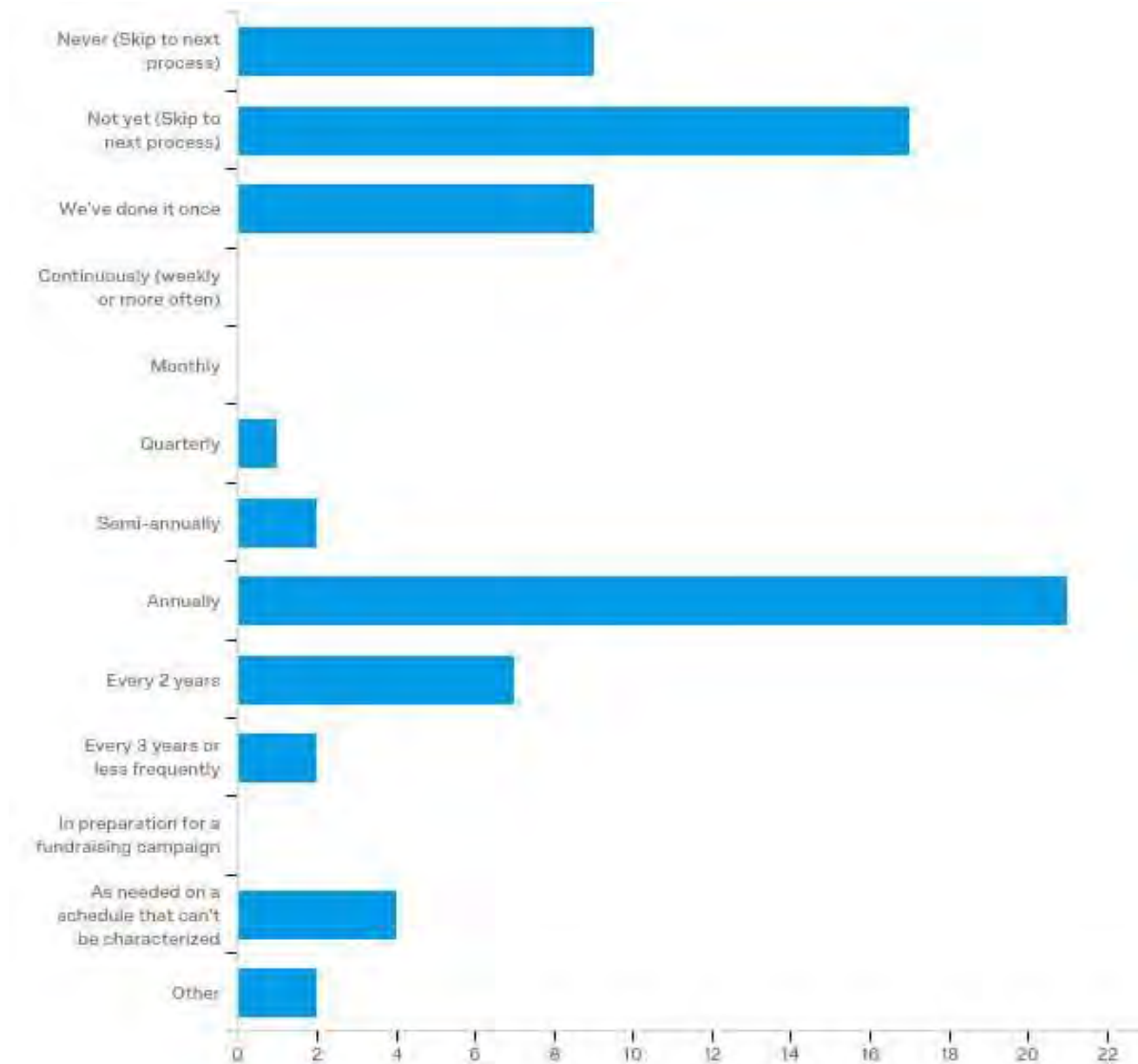
#	Answer	%	Count
1	Never (Skip to next process)	12.16%	9
2	Not yet (Skip to next process)	22.97%	17
3	We've done it once	12.16%	9
4	Continuously (weekly or more often)	0.00%	0
5	Monthly	0.00%	0
6	Quarterly	1.35%	1
7	Semi-annually	2.70%	2
8	Annually	28.38%	21
9	Every 2 years	9.46%	7
10	Every 3 years or less frequently	2.70%	2
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	5.41%	4
13	Other	2.70%	2
	Total	100%	74

Other
Also about to do this for the first time.
Have done a few times

Q1.7.2 - How do you conduct this sort of enhancement?
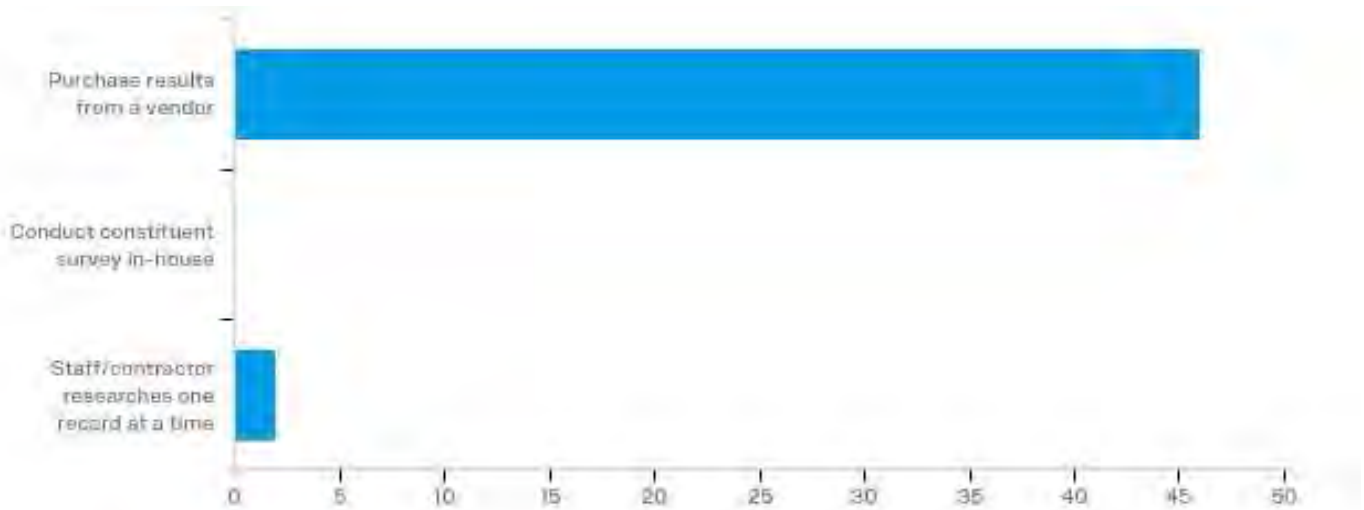
#	Answer	%	Count
1	Purchase results from a vendor	95.83%	46
2	Conduct constituent survey in-house	0.00%	0
3	Staff/contractor researches one record at a time	4.17%	2
	Total	100%	48

Q1.7.3 - How do you apply the results?
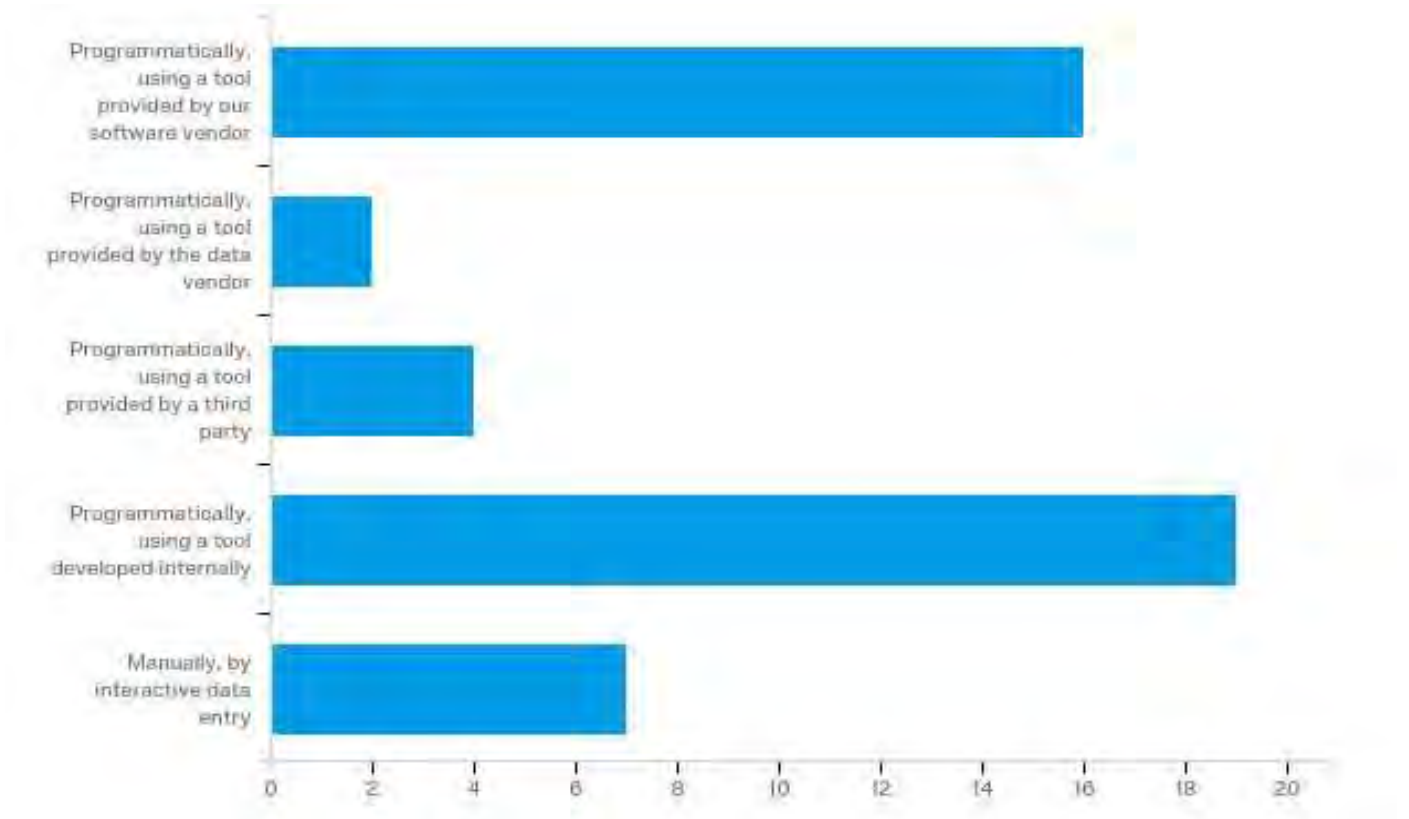
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	33.33%	16
2	Programmatically, using a tool provided by the data vendor	4.17%	2
3	Programmatically, using a tool provided by a third party	8.33%	4
4	Programmatically, using a tool developed internally	39.58%	19
5	Manually, by interactive data entry	14.58%	7
	Total	100%	48

Q1.7.4 - Who applies the results?
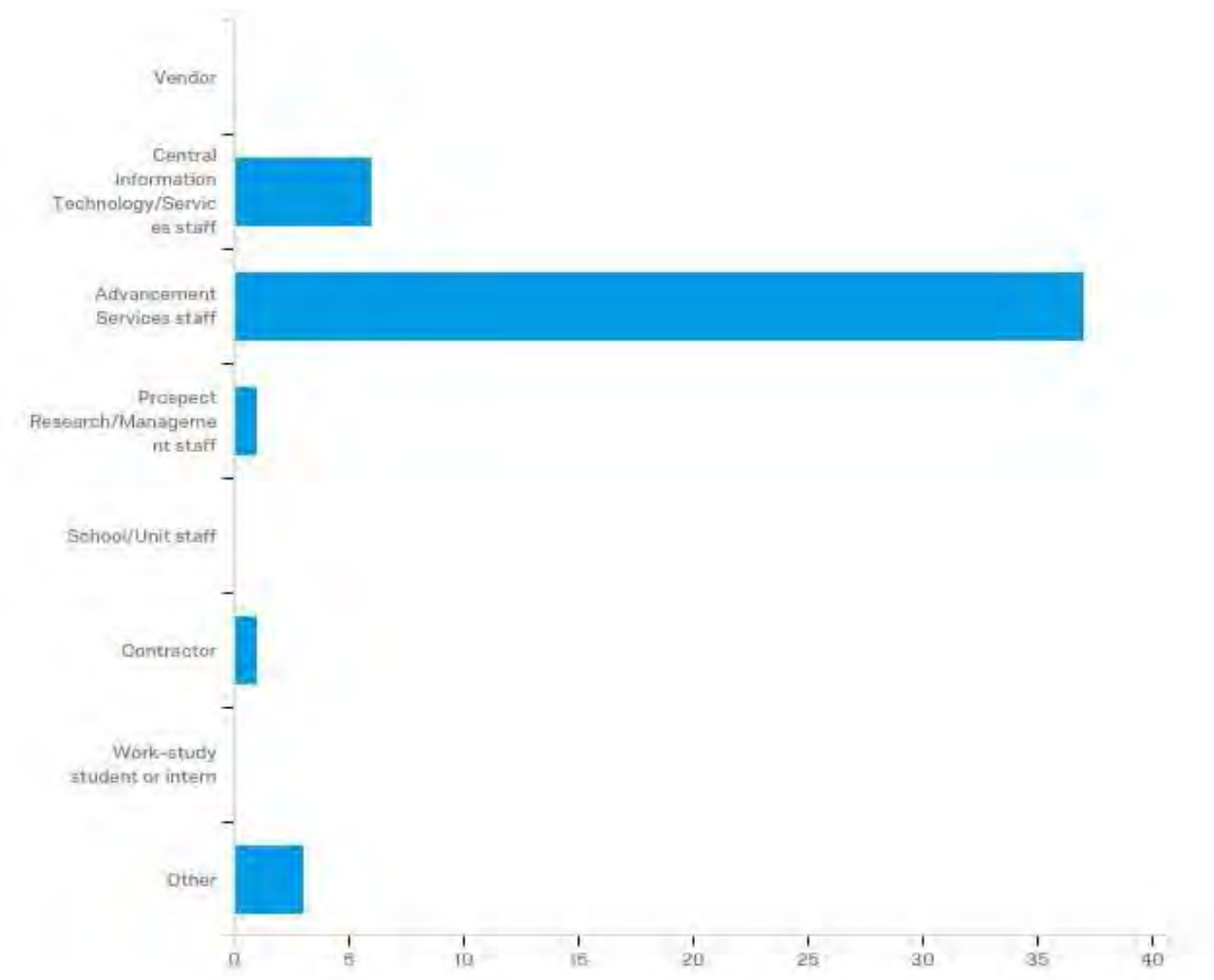
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	12.50%	6
3	Advancement Services staff	77.08%	37
4	Prospect Research/Management staff	2.08%	1
5	School/Unit staff	0.00%	0
6	Contractor	2.08%	1
7	Work-study student or intern	0.00%	0
8	Other	6.25%	3
	Total	100%	48

Other
Records Management Staff
Gift Management Staff
Programming Team in Adv Svcs

Q1.7.5 - How do you review/evaluate/verify the results?
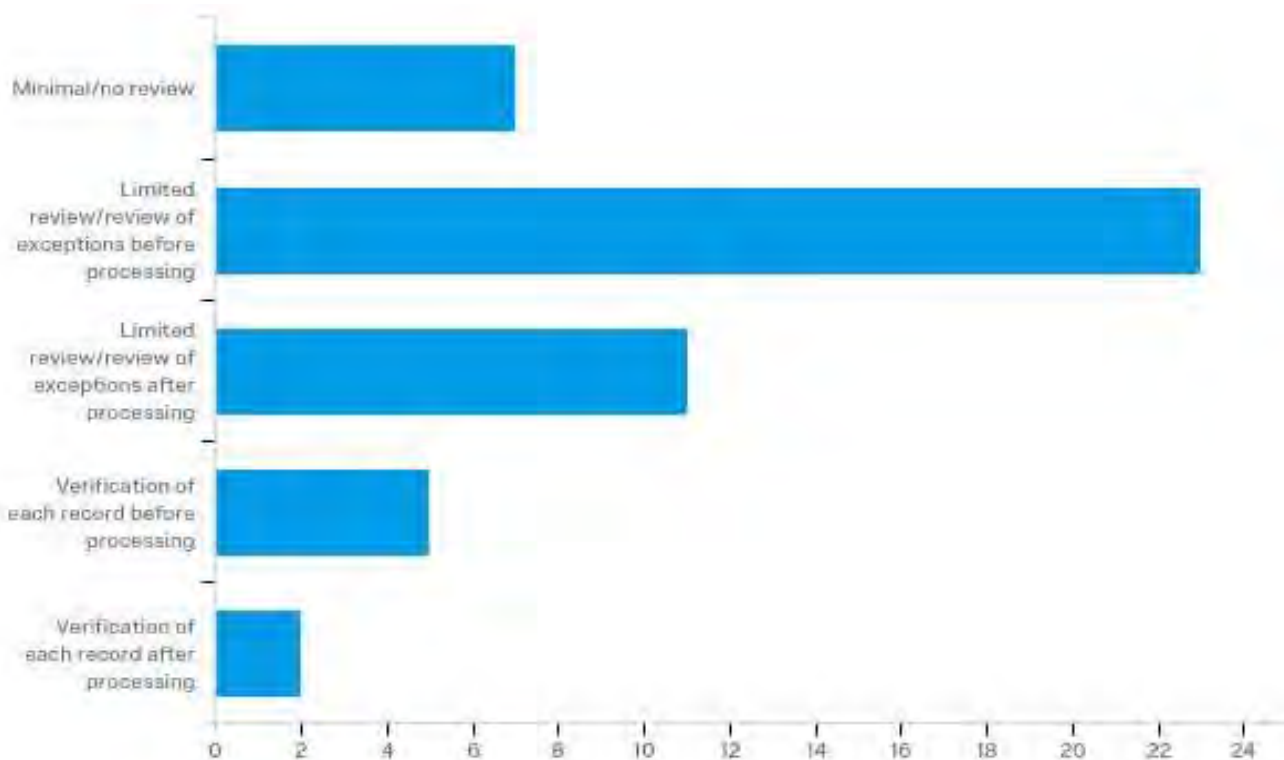
#	Answer	%	Count
1	Minimal/no review	14.58%	7
2	Limited review/review of exceptions before processing	47.92%	23
3	Limited review/review of exceptions after processing	22.92%	11
4	Verification of each record before processing	10.42%	5
5	Verification of each record after processing	4.17%	2
	Total	100%	48

Q1.7.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
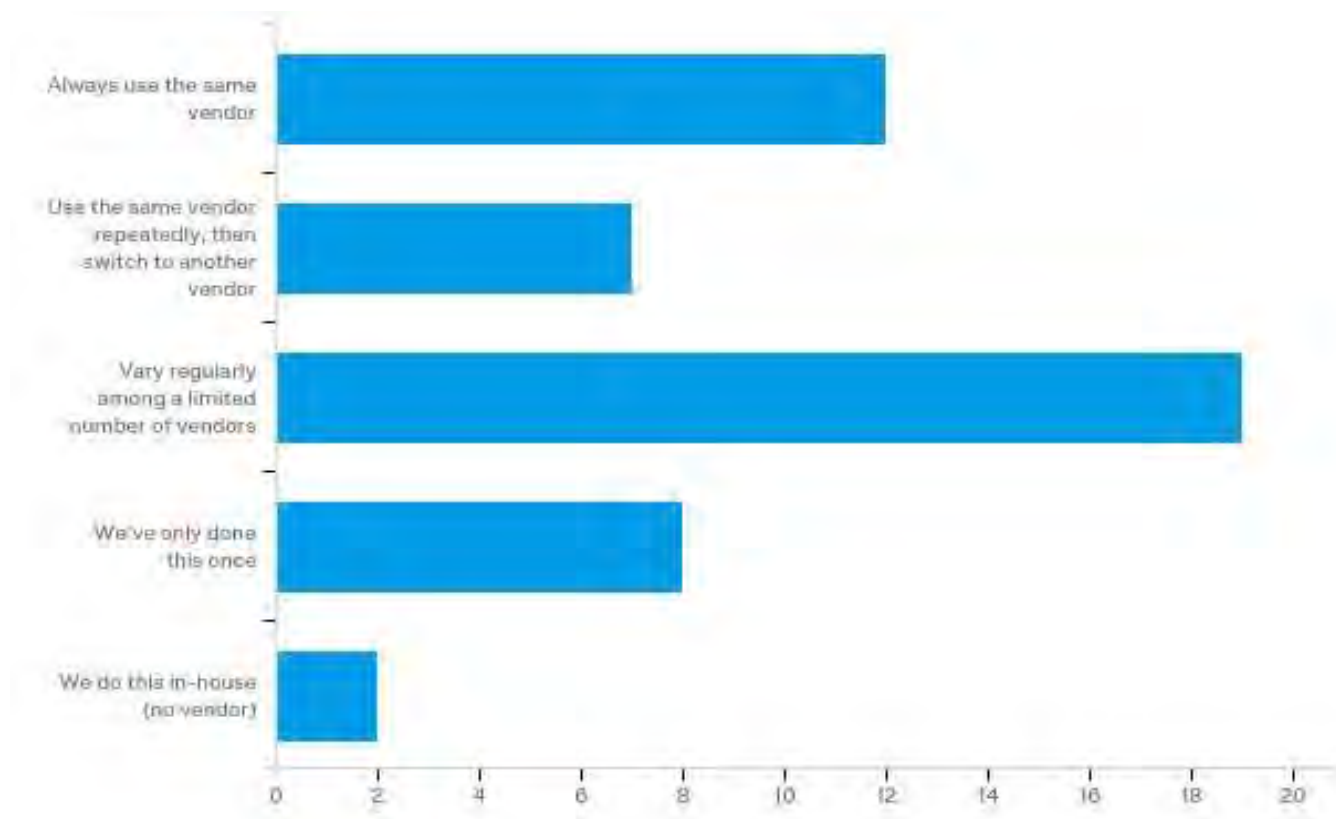
#	Answer	%	Count
1	Always use the same vendor	25.00%	12
2	Use the same vendor repeatedly, then switch to another vendor	14.58%	7
3	Vary regularly among a limited number of vendors	39.58%	19
4	We've only done this once	16.67%	8
5	We do this in-house (no vendor)	4.17%	2
	Total	100%	48

Q1.7.7 - On a scale of 0-10, over time, how happy are you with the results of email address appends?

17%
6

22%
7

5.54

0   10
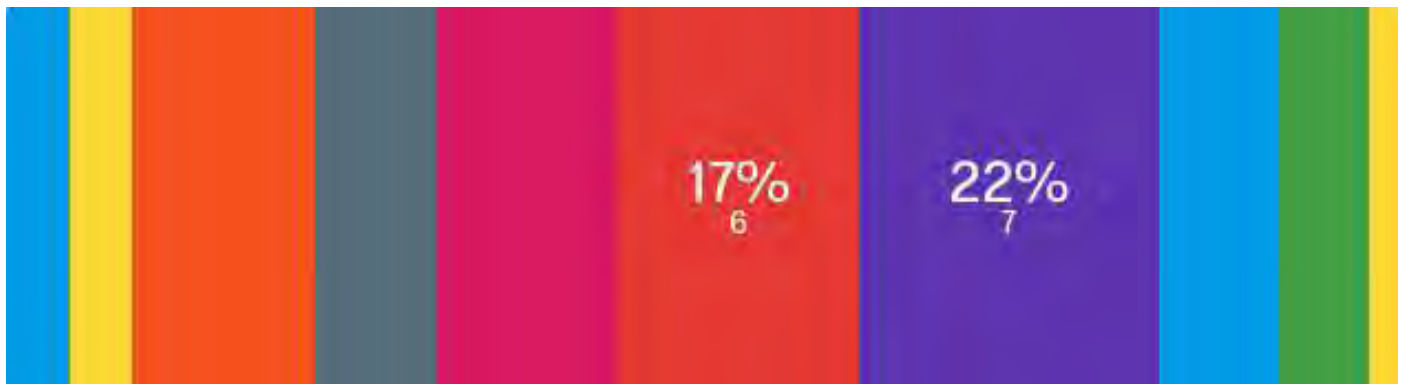
Q1.7.8 - Comments/Additional Information

Same as the phone append; we found that our information was more current than the vendor's. We are now in the process of changing the information back to what we had which was self-reported.
Exploring other vendors at this time.
We sent out an email BEFORE appending the email addresses to confirm the validity.
The match rates are always low, we appreciate the email appends for what they are.
We use our direct mail vendor who also sends an email verification/opt out opportunity. I am then provided a matchback file of new email addresses and opt outs with a constituent Import ID to update the records in our database.
The one e-mail append we tried wasn't terribly successful. The hit rate across the industry is only around 20% (if that) and a good portion of the hits they did get were not the right person, or were duplicates of inactivated addresses we already had in our database.
We have no had success with email appends. Often the data is household emails, even when individual is requested. Unfortunately, when these are wrong the person unsubscribes and we believe an alumnus has unsubscribed.

Q1.8 Social Media Handle Append

Social media handles are the public user names that identify users of social media services such as LinkedIn, Facebook, or Twitter. Social media handle appends provide the handles used by constituents on the respective social media. Identifying information, most commonly name and address, is used to match constituents to a reference database, and handles from the reference database are then returned, identified by the service on which the handle is used.

Q1.8.1 - How often do you do a social media handle append?
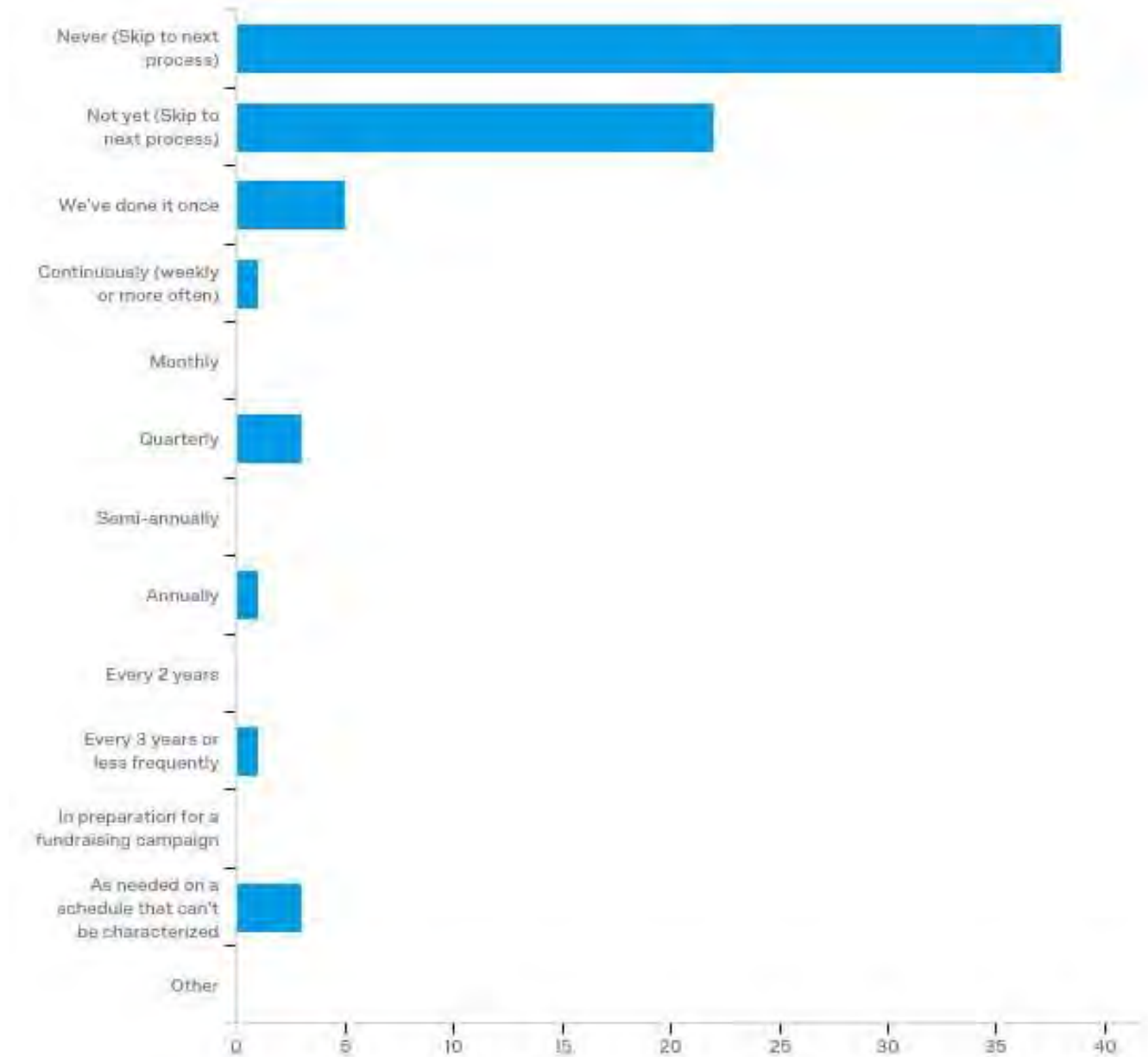
#	Answer	%	Count
1	Never (Skip to next process)	51.35%	38
2	Not yet (Skip to next process)	29.73%	22
3	We've done it once	6.76%	5
4	Continuously (weekly or more often)	1.35%	1
5	Monthly	0.00%	0
6	Quarterly	4.05%	3
7	Semi-annually	0.00%	0
8	Annually	1.35%	1
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	1.35%	1
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	4.05%	3
13	Other	0.00%	0
	Total	100%	74

Q1.8.2 - How do you conduct this sort of enhancement?
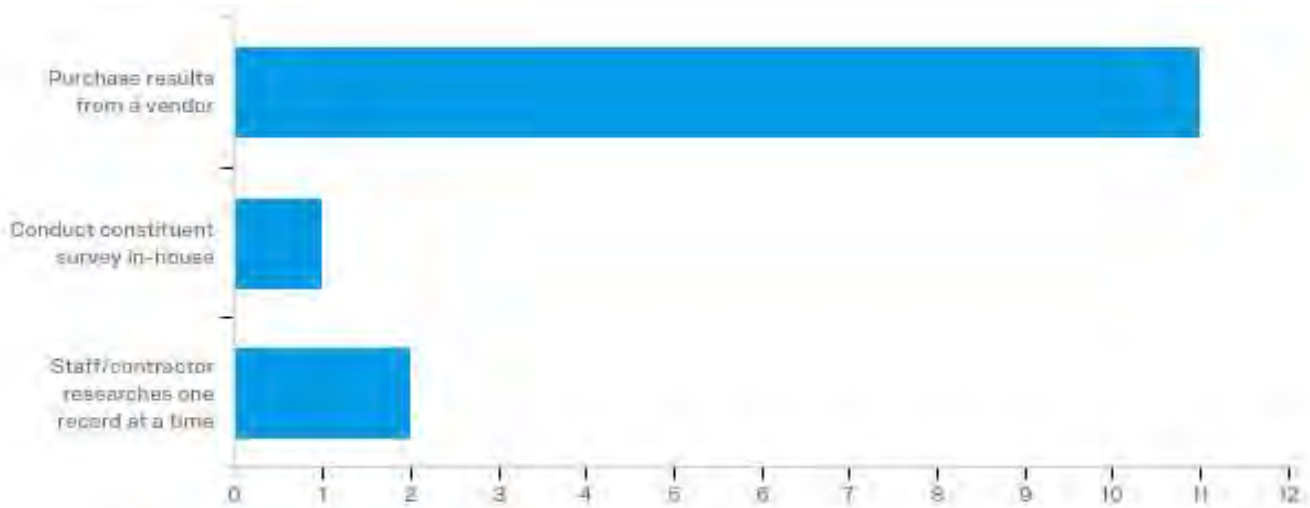
#	Answer	%	Count
1	Purchase results from a vendor	78.57%	11
2	Conduct constituent survey in-house	7.14%	1
3	Staff/contractor researches one record at a time	14.29%	2
	Total	100%	14

Q1.8.3 - How do you apply the results?
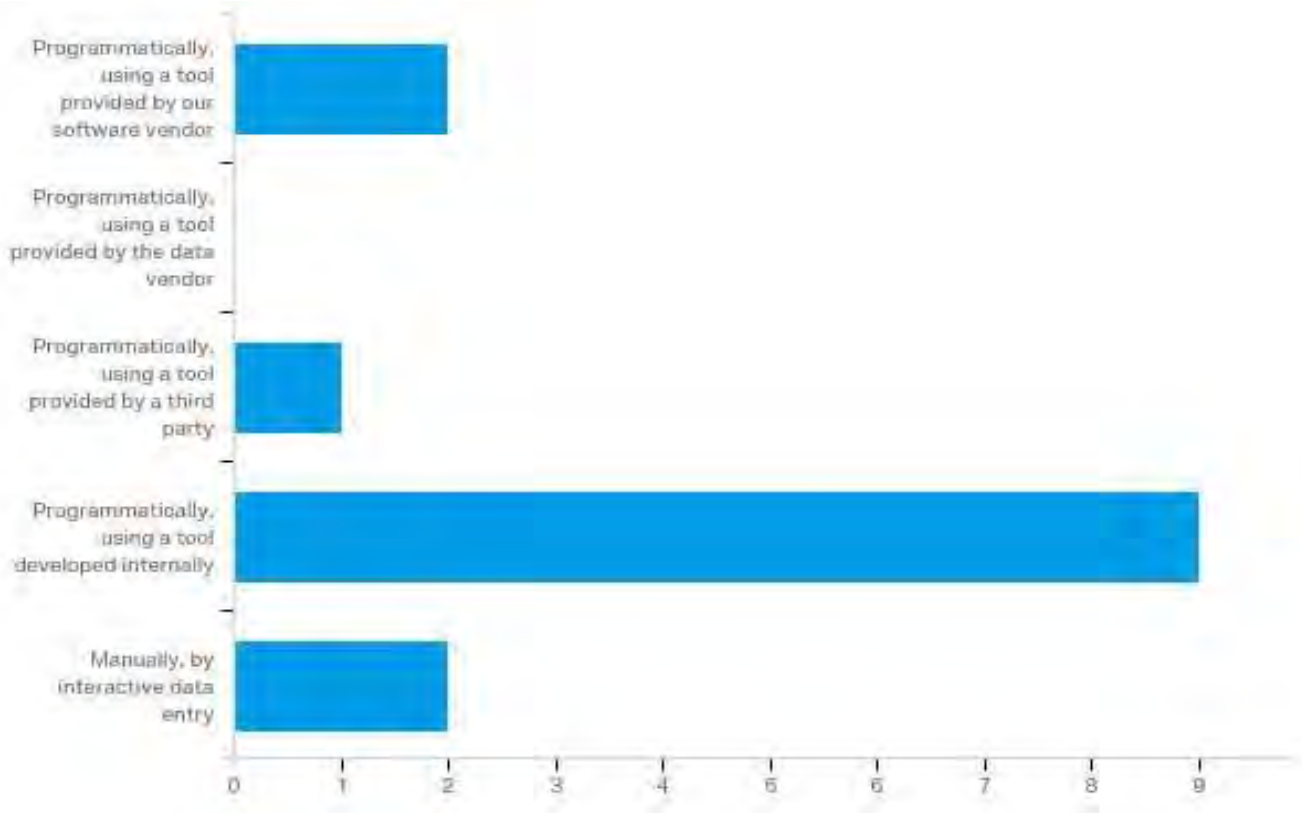
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	14.29%	2
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	7.14%	1
4	Programmatically, using a tool developed internally	64.29%	9
5	Manually, by interactive data entry	14.29%	2
	Total	100%	14

Q1.8.4 - Who applies the results?
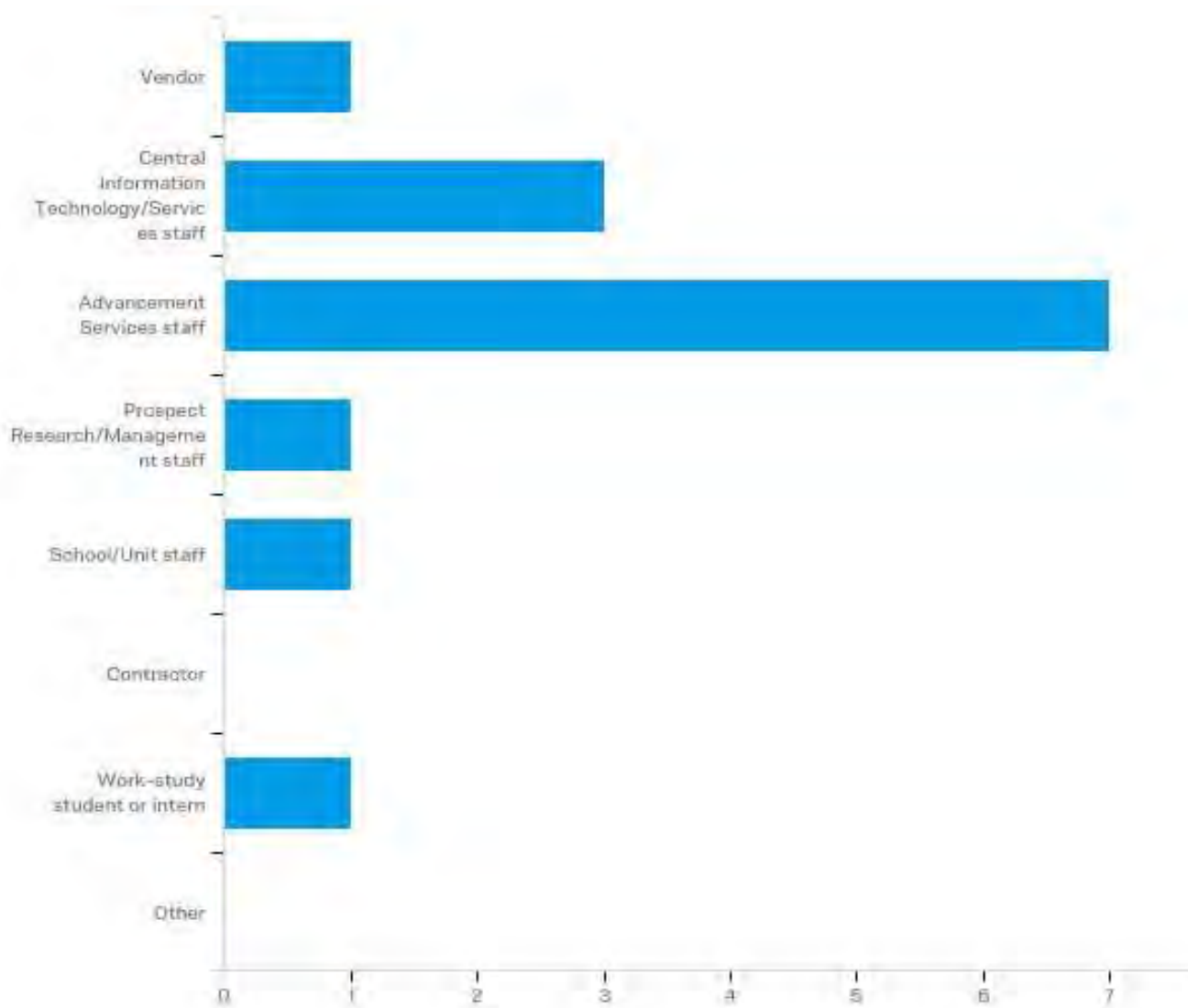
#	Answer	%	Count
1	Vendor	7.14%	1
2	Central Information Technology/Services staff	21.43%	3
3	Advancement Services staff	50.00%	7
4	Prospect Research/Management staff	7.14%	1
5	School/Unit staff	7.14%	1
6	Contractor	0.00%	0
7	Work-study student or intern	7.14%	1
8	Other	0.00%	0
	Total	100%	14

Q1.8.5 - How do you review/evaluate/verify the results?
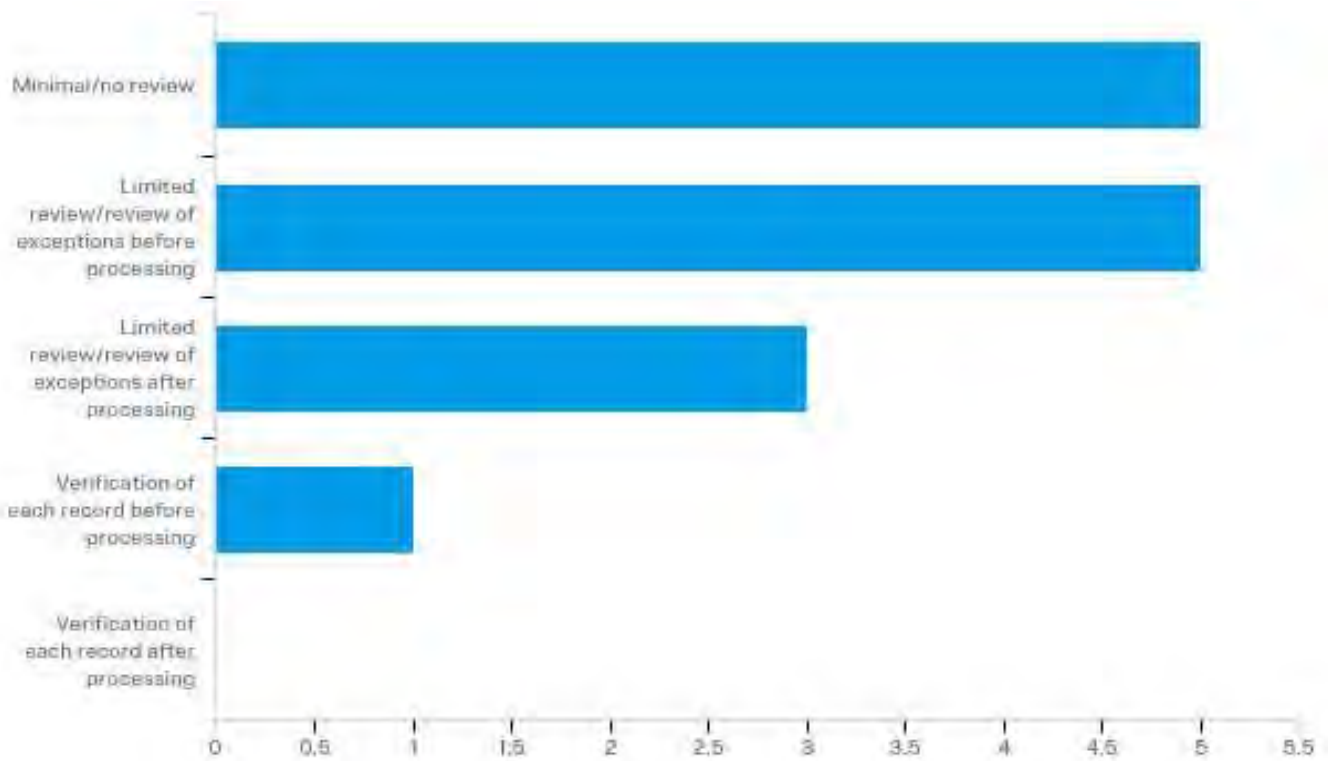
#	Answer	%	Count
1	Minimal/no review	35.71%	5
2	Limited review/review of exceptions before processing	35.71%	5
3	Limited review/review of exceptions after processing	21.43%	3
4	Verification of each record before processing	7.14%	1
5	Verification of each record after processing	0.00%	0
	Total	100%	14

Q1.8.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
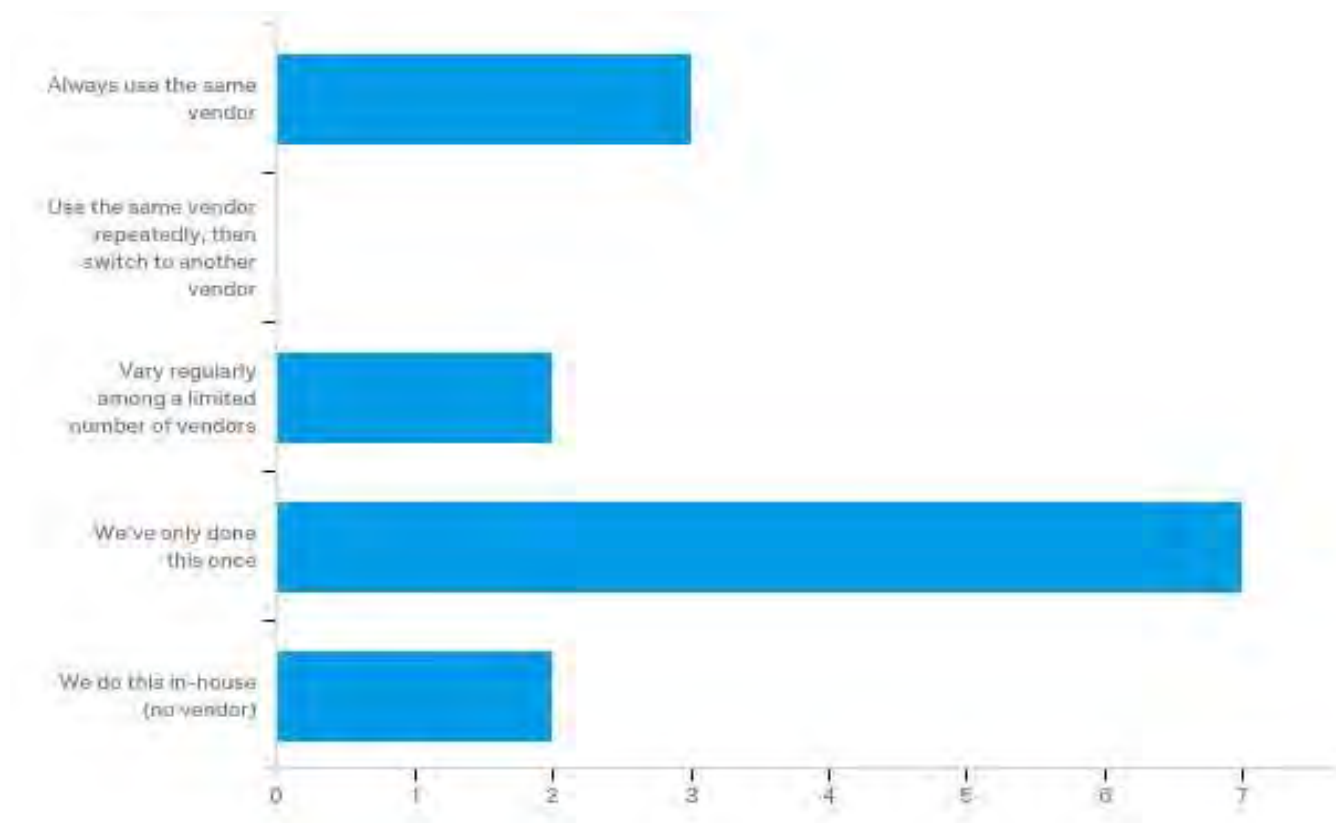
#	Answer	%	Count
1	Always use the same vendor	21.43%	3
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	14.29%	2
4	We've only done this once	50.00%	7
5	We do this in-house (no vendor)	14.29%	2
	Total	100%	14

Q1.8.7 - Which social media handles have you added?
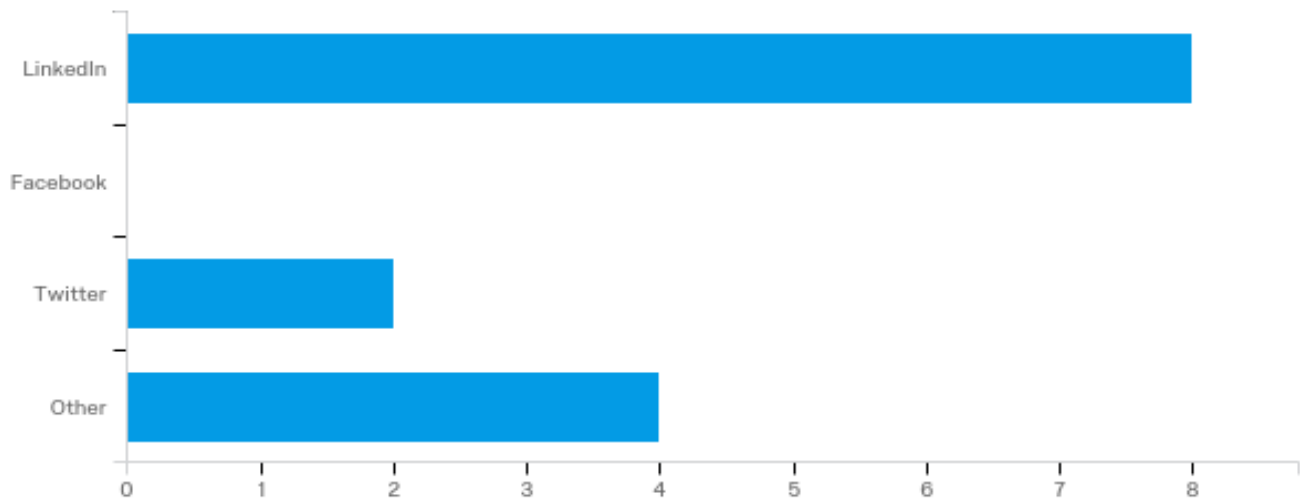
#	Answer	%	Count
1	LinkedIn	57.14%	8
2	Facebook	0.00%	0
3	Twitter	14.29%	2
4	Other	28.57%	4
	Total	100%	14

Other
all
all 3 of the above
All of the above
linked in; Facebook, Twitter, and others

Q1.8.8 - On a scale of 0-10, over time, how happy are you with the results of social media handle appends?

29%
6

21%
7

21%
8

6.93

0

10
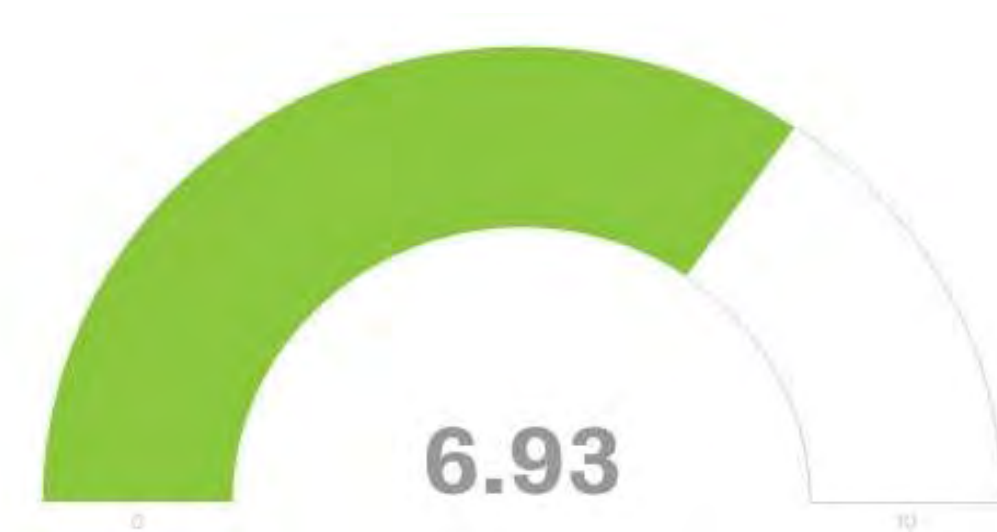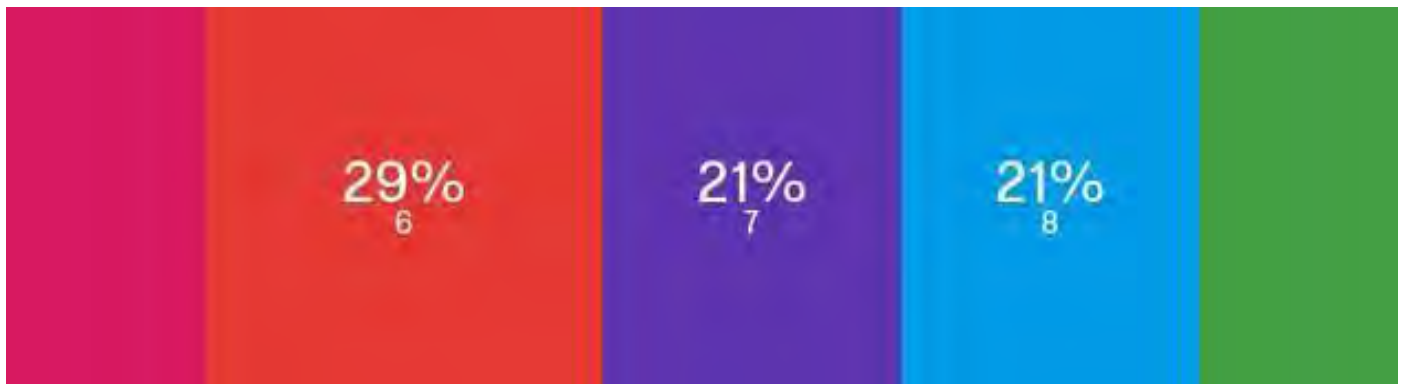
Q1.8.9 - Comments/Additional Information

Not really sure of our 'happiness' level yet. We just started adding these.
We enter these manually as we find them. Mostly LinkedIn although we have a few Facebook also

Q1.9 Employment Append

Employment appends provide current employment information for constituents, typically including employer name, job title, and employment-related contact information. Identifying information, most commonly name and address, is used to match constituents to a reference database, and employment information from the reference database are returned.

Q1.9.1 - How often do you do an employment append?
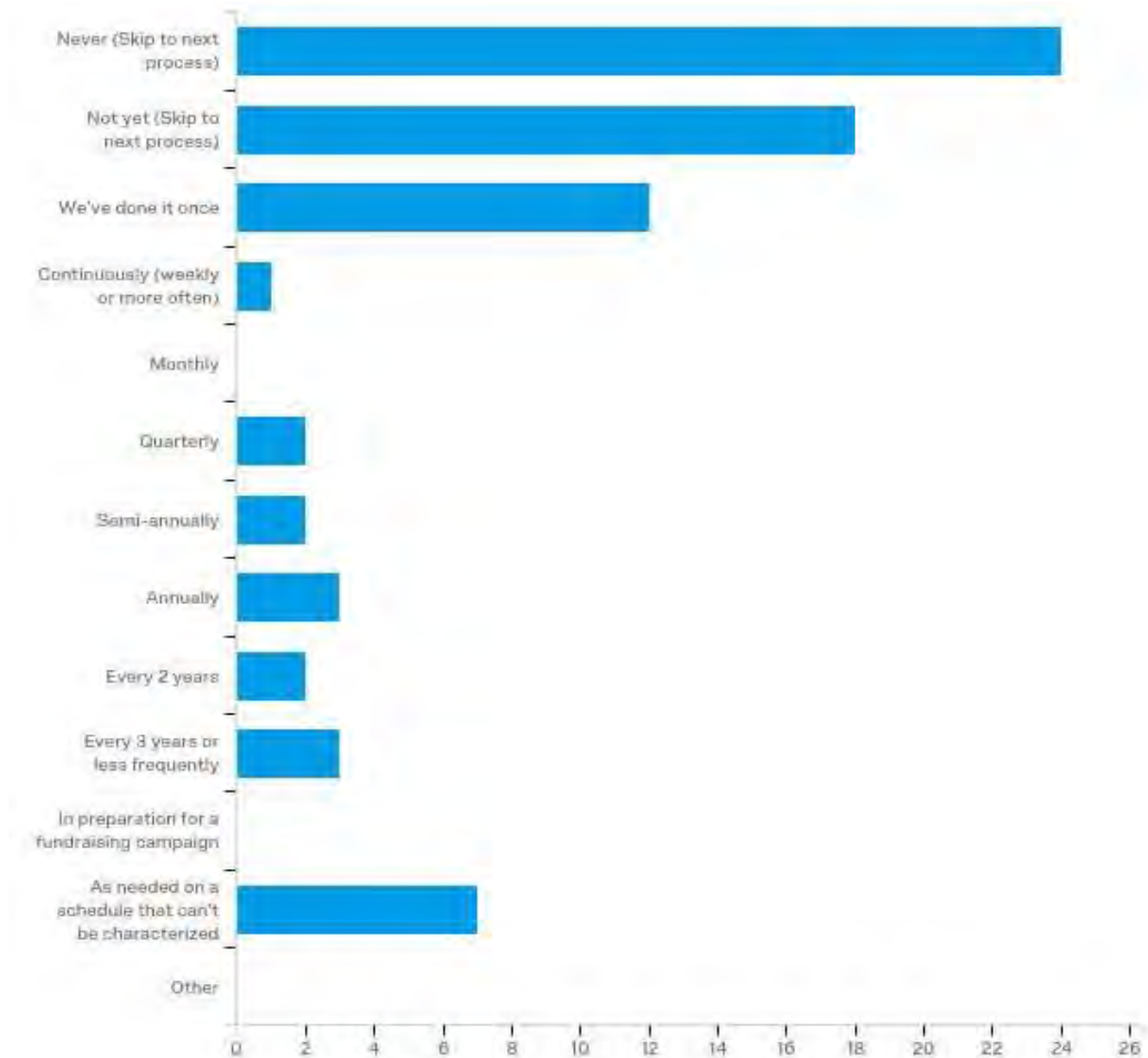
#	Answer	%	Count
1	Never (Skip to next process)	32.43%	24
2	Not yet (Skip to next process)	24.32%	18
3	We've done it once	16.22%	12
4	Continuously (weekly or more often)	1.35%	1
5	Monthly	0.00%	0
6	Quarterly	2.70%	2
7	Semi-annually	2.70%	2
8	Annually	4.05%	3
9	Every 2 years	2.70%	2
10	Every 3 years or less frequently	4.05%	3
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	9.46%	7
13	Other	0.00%	0
	Total	100%	74

Q1.9.2 - How do you conduct this sort of enhancement?
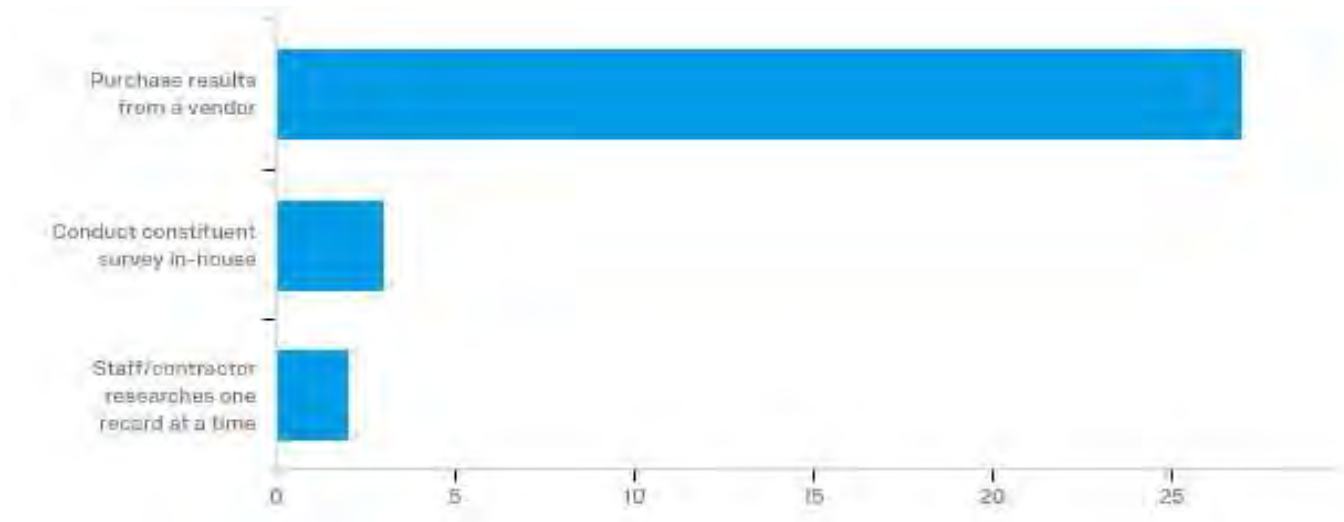
#	Answer	%	Count
1	Purchase results from a vendor	84.38%	27
2	Conduct constituent survey in-house	9.38%	3
3	Staff/contractor researches one record at a time	6.25%	2
	Total	100%	32

Q1.9.3 - How do you apply the results?
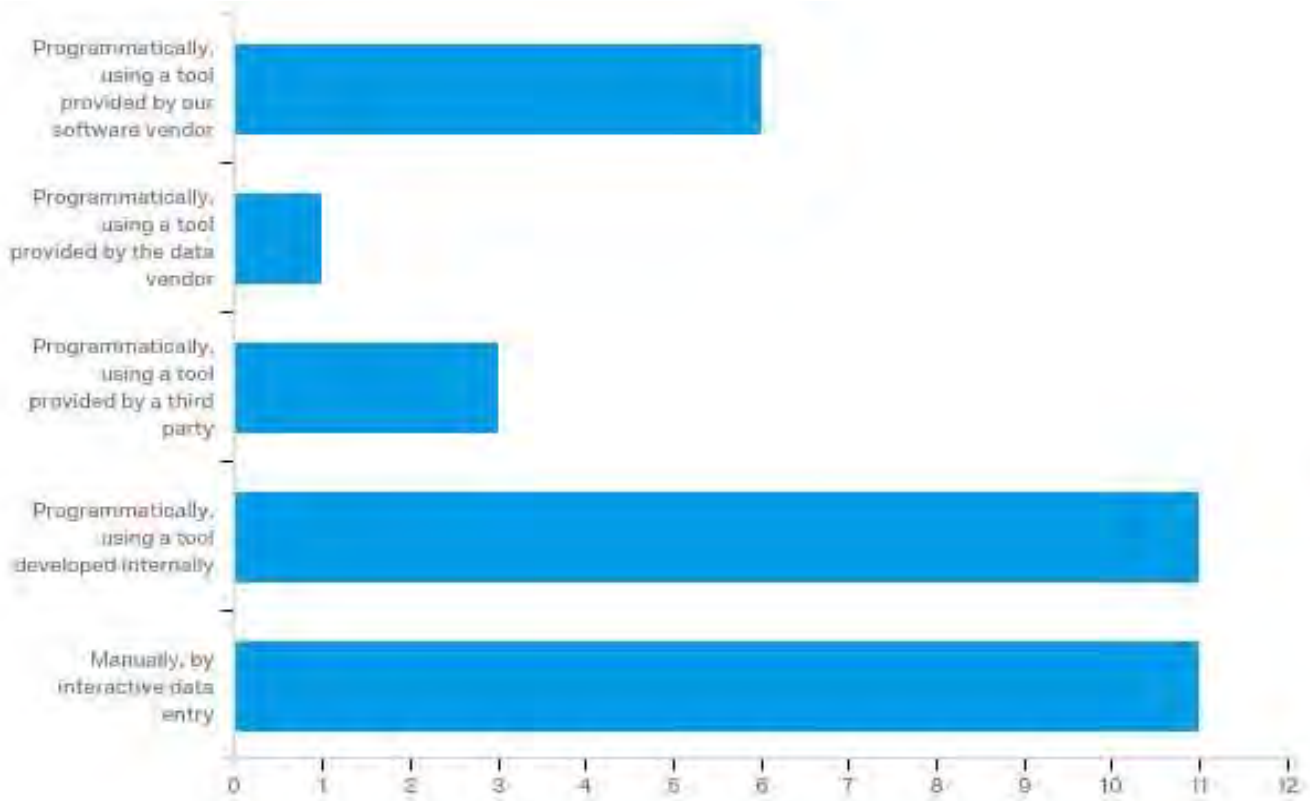
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	18.75%	6
2	Programmatically, using a tool provided by the data vendor	3.13%	1
3	Programmatically, using a tool provided by a third party	9.38%	3
4	Programmatically, using a tool developed internally	34.38%	11
5	Manually, by interactive data entry	34.38%	11
	Total	100%	32

Q1.9.4 - Who applies the results?
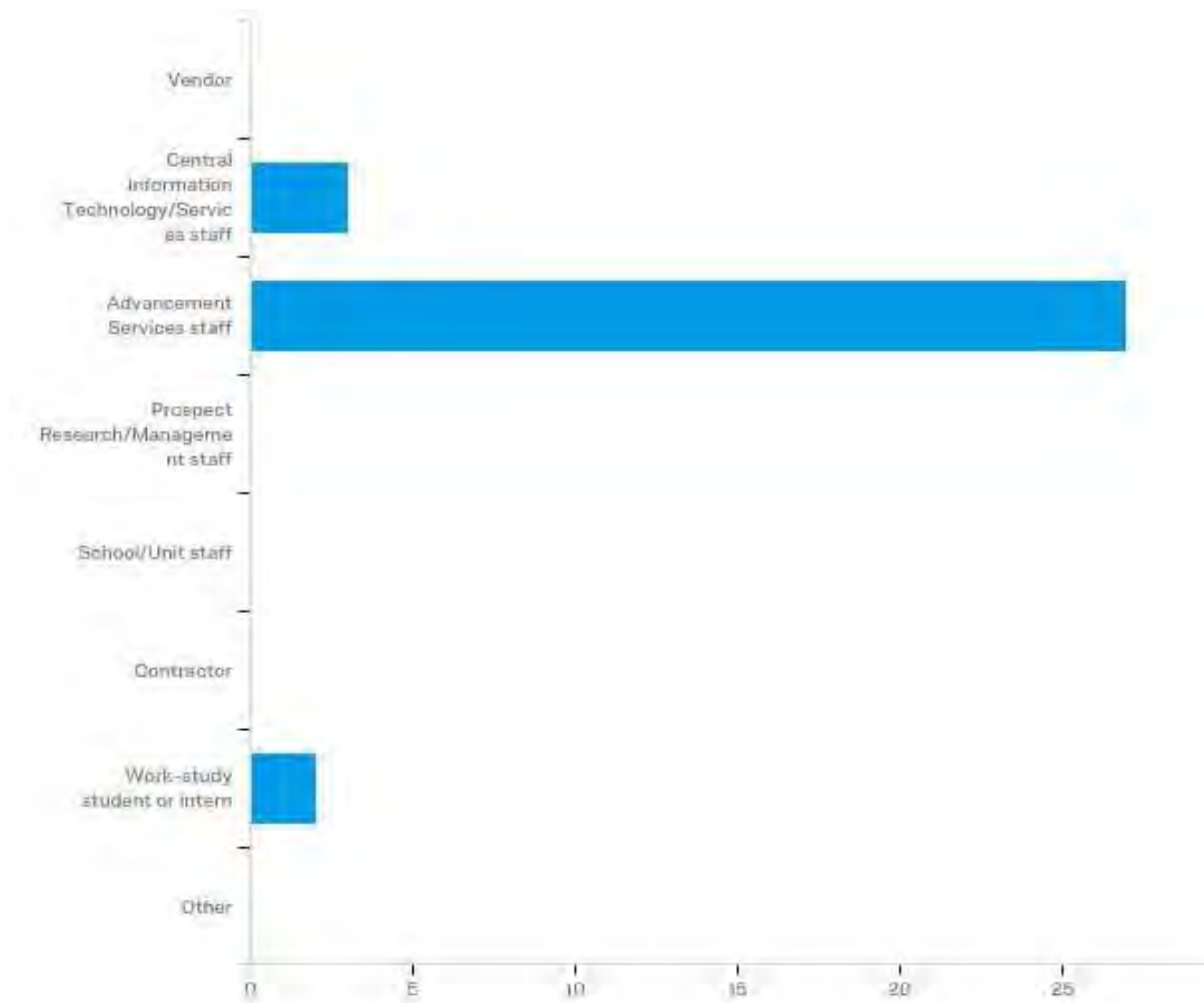
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	9.38%	3
3	Advancement Services staff	84.38%	27
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	6.25%	2
8	Other	0.00%	0
	Total	100%	32

Q1.9.5 - How do you review/evaluate/verify the results?
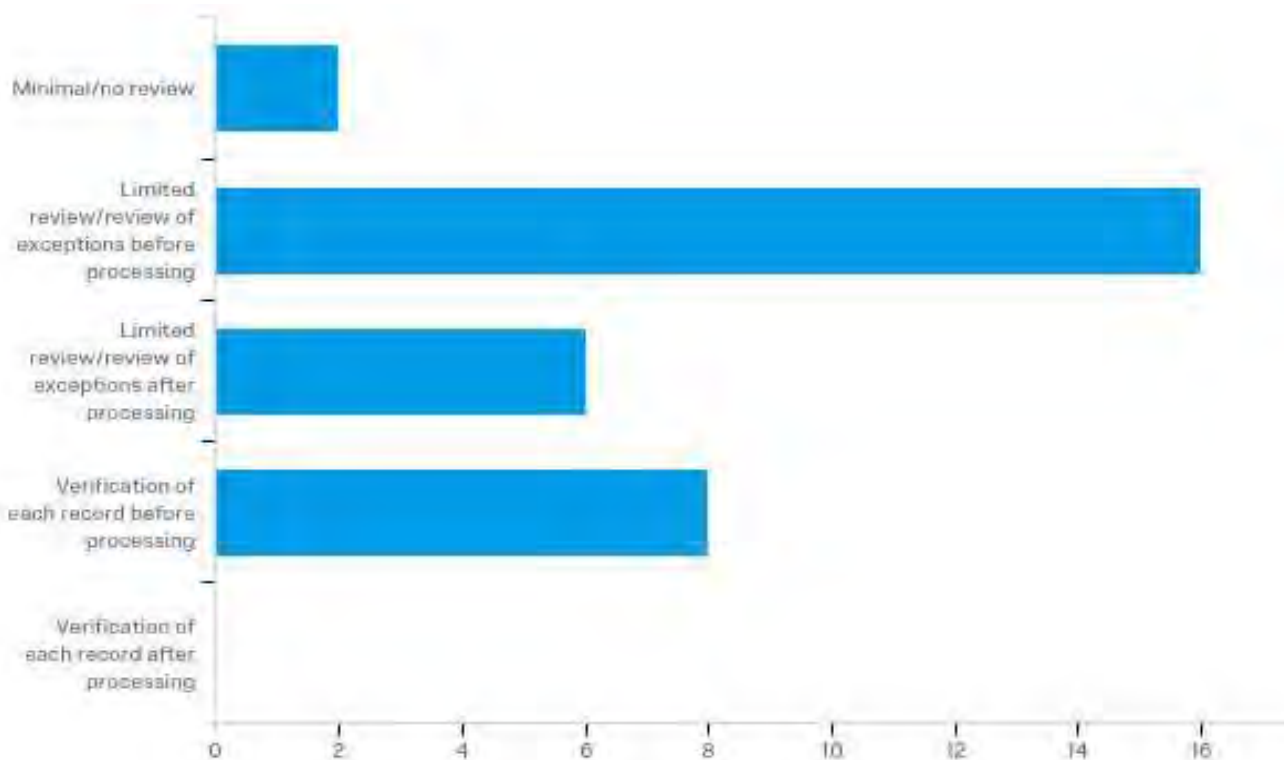
#	Answer	%	Count
1	Minimal/no review	6.25%	2
2	Limited review/review of exceptions before processing	50.00%	16
3	Limited review/review of exceptions after processing	18.75%	6
4	Verification of each record before processing	25.00%	8
5	Verification of each record after processing	0.00%	0
	Total	100%	32

Q1.9.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
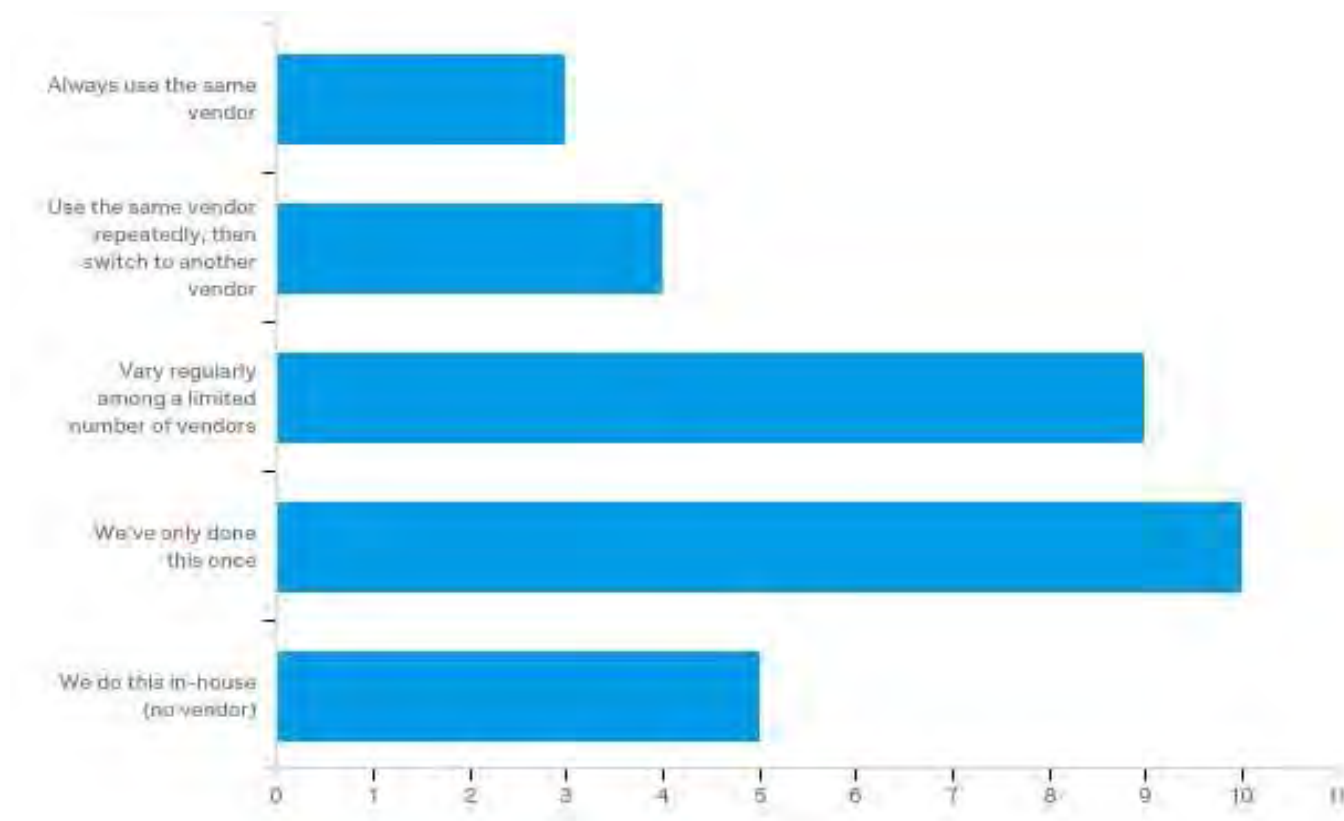
#	Answer	%	Count
1	Always use the same vendor	9.68%	3
2	Use the same vendor repeatedly, then switch to another vendor	12.90%	4
3	Vary regularly among a limited number of vendors	29.03%	9
4	We've only done this once	32.26%	10
5	We do this in-house (no vendor)	16.13%	5
	Total	100%	31

Q1.9.7 - On a scale of 0-10, over time, how happy are you with the results of employment appends?

25%
6

19%
7

5.56
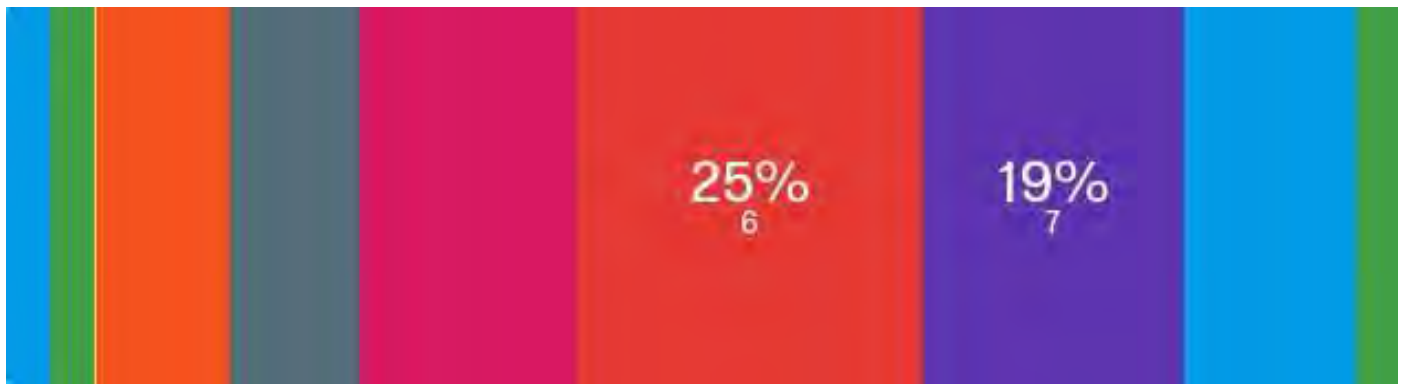
Q1.9.8 - Comments/Additional Information

As expected based on conversation with the field, data was not great but we found enough new c suite positions to consider it worth the cost & time.
This has always been a hard one. Data is inconsistent from vendors. We're trying some new products this year that allow us to use our constituent's LinkedIn account to keep their business info updated. This one's always a struggle.
Because of our business practice for linking employees to employers, the returns are mostly done manually by the staff. Tedious process
We've completed in house surveys and vendor-led directory surveys. We've found that the data needs a lot of cleaning before it can be inserted. We've only done this manually. The quality of the vendor purchased employment data is questionable.
We've used Harris Directory but were unhappy with them last time, complaints about too many calls, too pushy.
High profile project, however, nearly all of our prospect records had more accurate data. Were we to do this again we would not run our high profile prospects through the process, and we would focus on people that either had no employment data or what we had was 5 years old or older.
We did an employment append through Alumni Finder. The data that was returned was so bad we had to undo the load to the database. The data was completely out of date, flat out incorrect in many cases, inconsistent...pretty much unusable. We do not conduct business with Alumni Finder any more.
Usually this is done through a graduate survey. We are investigating using live alumni or other services to append some employment data.

Q1.10 Birth Date Append

Phone appends provide exact, or more commonly partial, birth dates for constituents. Identifying information, most commonly name and address, is used to match constituents to a reference database, and birth dates from the reference database are returned.

Q1.10.1 - How often do you do a birth date append?
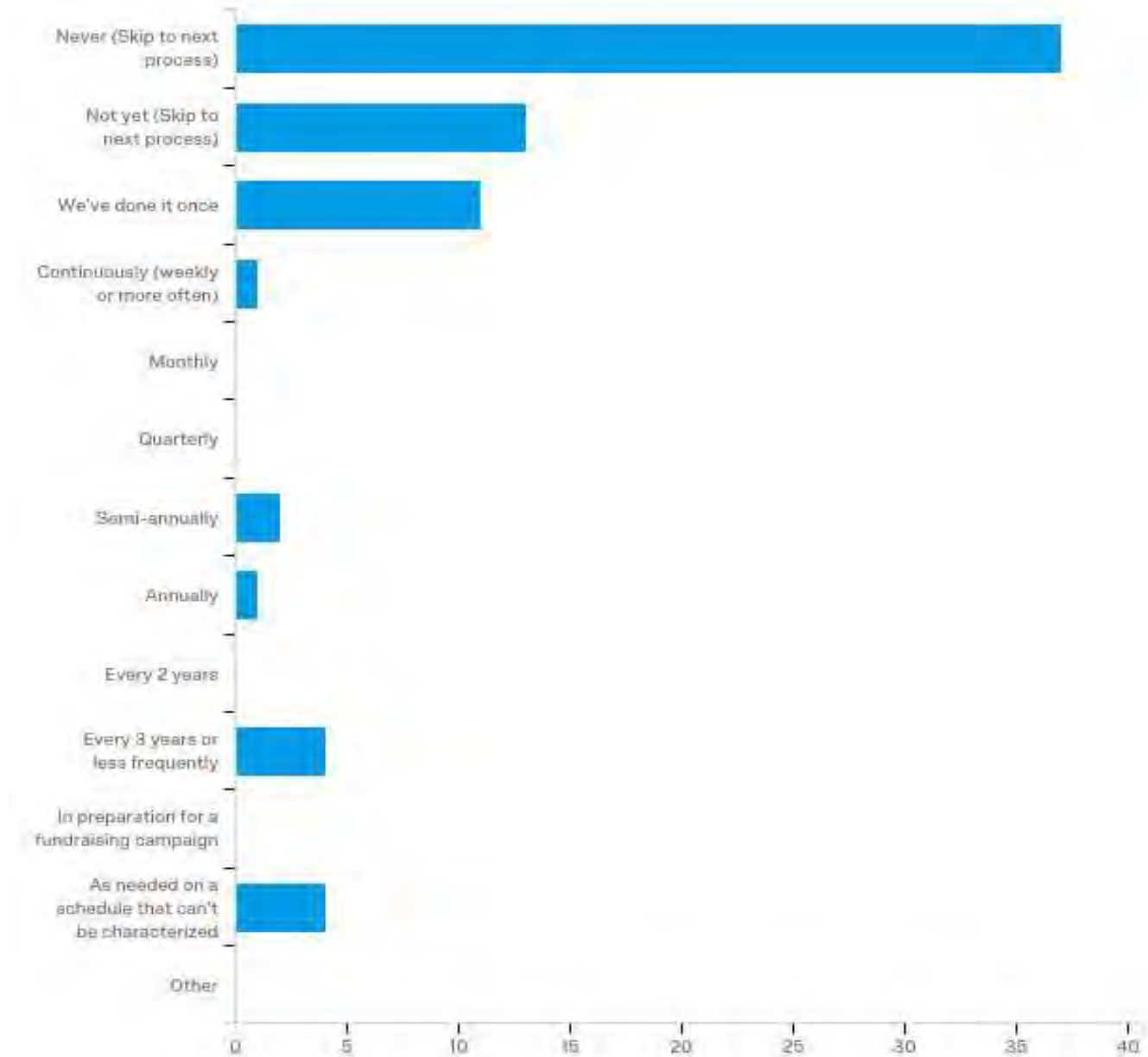
#	Answer	%	Count
1	Never (Skip to next process)	50.68%	37
2	Not yet (Skip to next process)	17.81%	13
3	We've done it once	15.07%	11
4	Continuously (weekly or more often)	1.37%	1
5	Monthly	0.00%	0
6	Quarterly	0.00%	0
7	Semi-annually	2.74%	2
8	Annually	1.37%	1
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	5.48%	4
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	5.48%	4
13	Other	0.00%	0
	Total	100%	73

Q1.10.2 - How do you conduct this sort of enhancement?
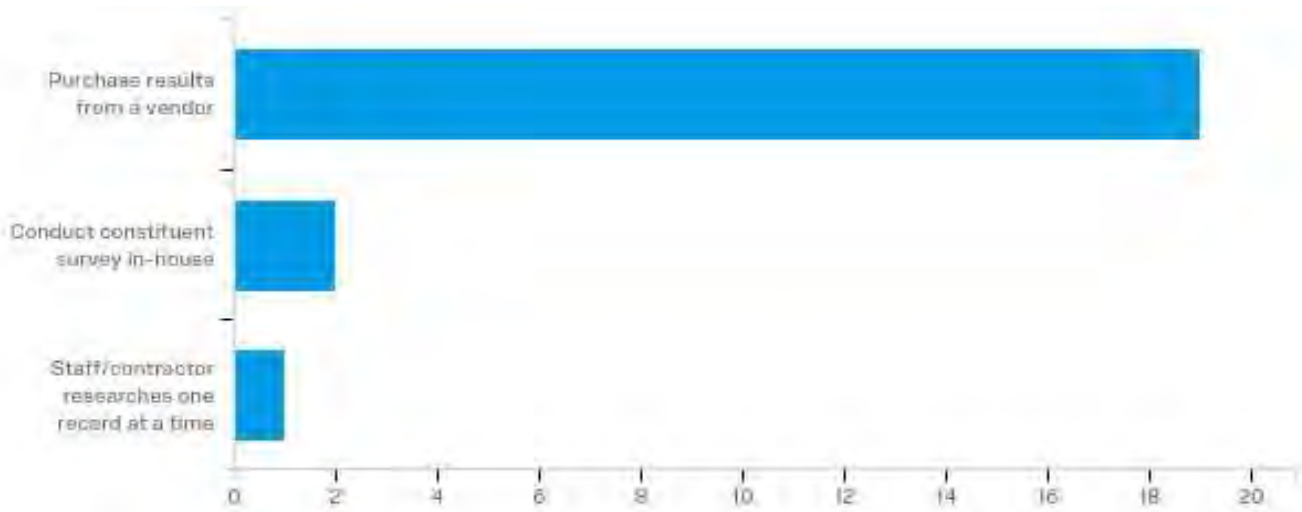
#	Answer	%	Count
1	Purchase results from a vendor	86.36%	19
2	Conduct constituent survey in-house	9.09%	2
3	Staff/contractor researches one record at a time	4.55%	1
	Total	100%	22

Q1.10.3 - How do you apply the results?
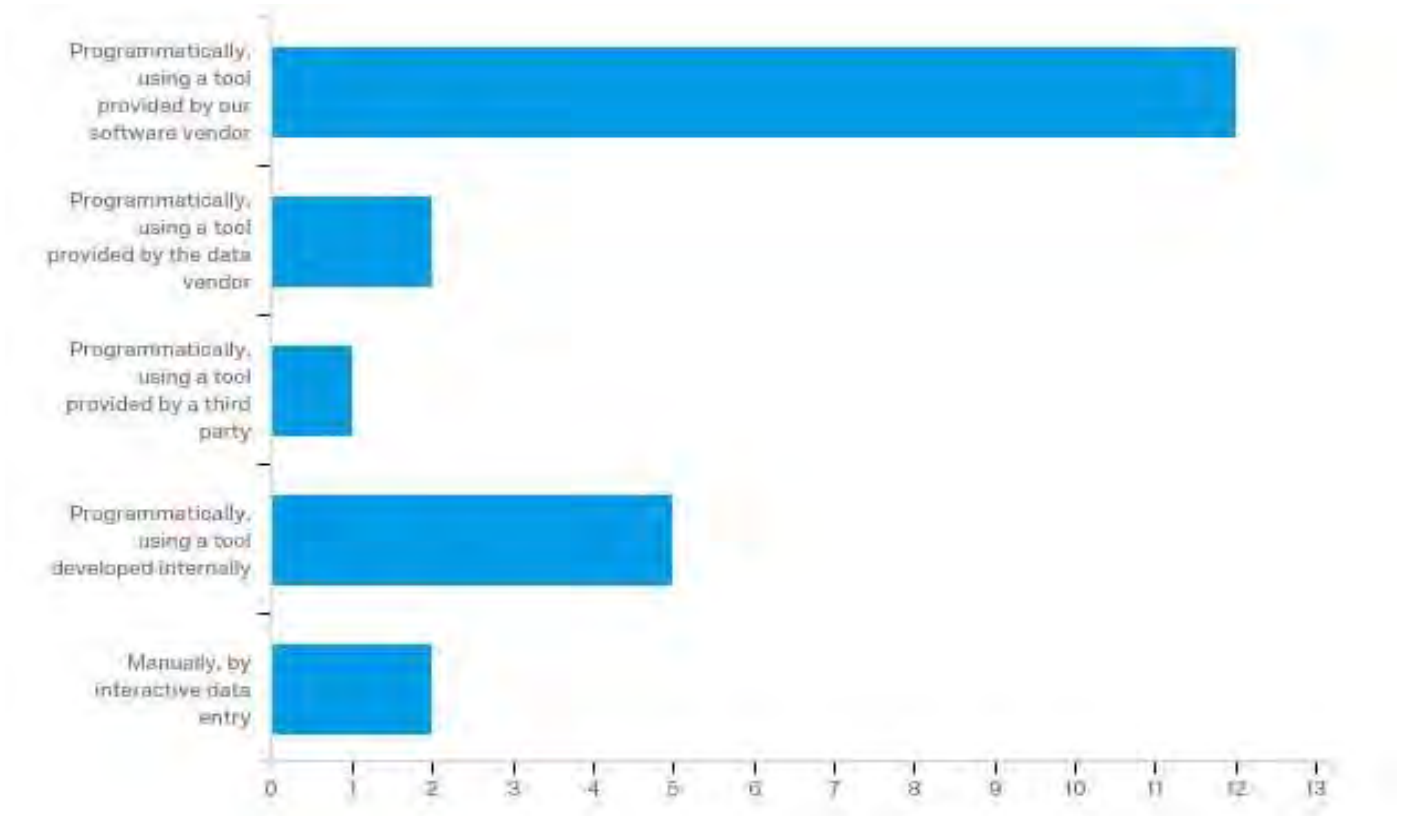
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	54.55%	12
2	Programmatically, using a tool provided by the data vendor	9.09%	2
3	Programmatically, using a tool provided by a third party	4.55%	1
4	Programmatically, using a tool developed internally	22.73%	5
5	Manually, by interactive data entry	9.09%	2
	Total	100%	22

Q1.10.4 - Who applies the results?
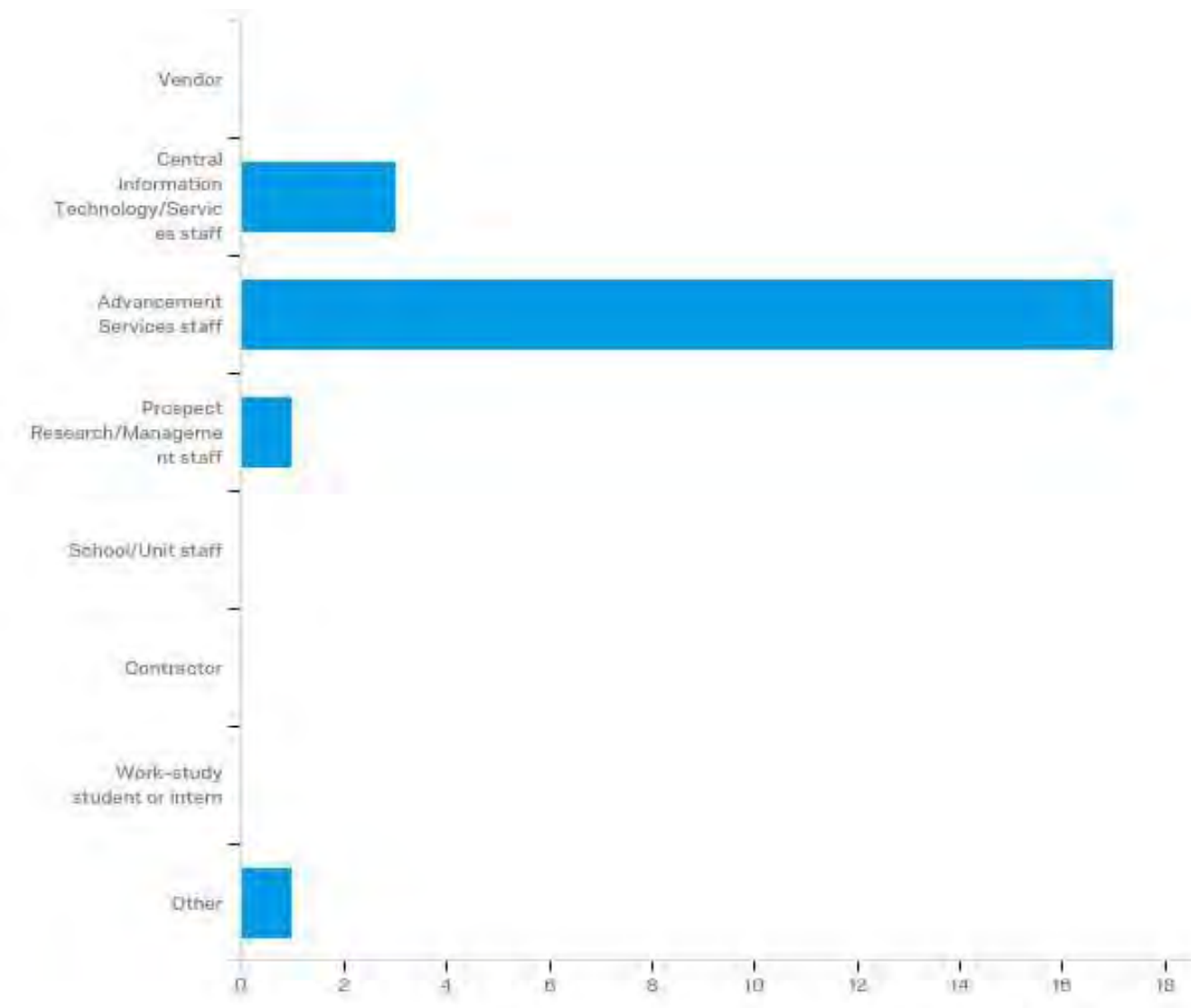
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	13.64%	3
3	Advancement Services staff	77.27%	17
4	Prospect Research/Management staff	4.55%	1
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	4.55%	1
	Total	100%	22

Other
Gif Management Staff

Q1.10.5 - How do you review/evaluate/verify the results?
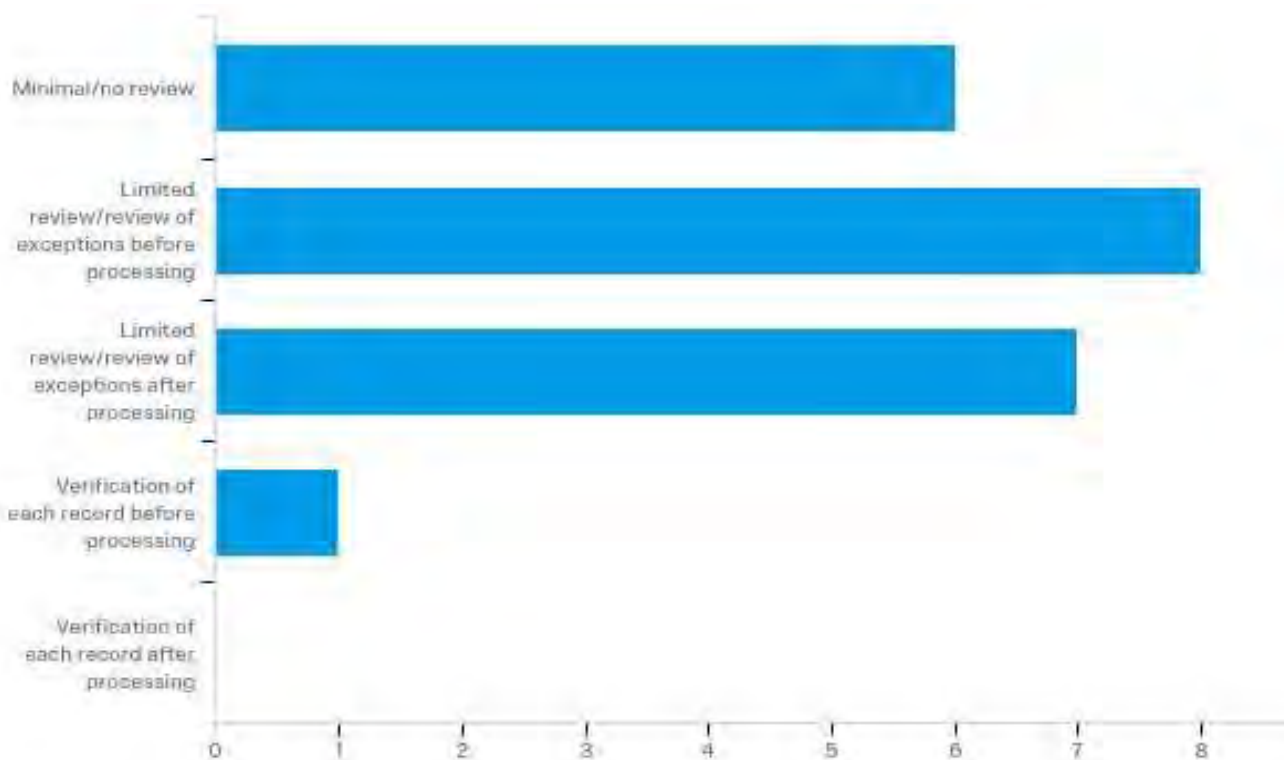
#	Answer	%	Count
1	Minimal/no review	27.27%	6
2	Limited review/review of exceptions before processing	36.36%	8
3	Limited review/review of exceptions after processing	31.82%	7
4	Verification of each record before processing	4.55%	1
5	Verification of each record after processing	0.00%	0
	Total	100%	22

Q1.10.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
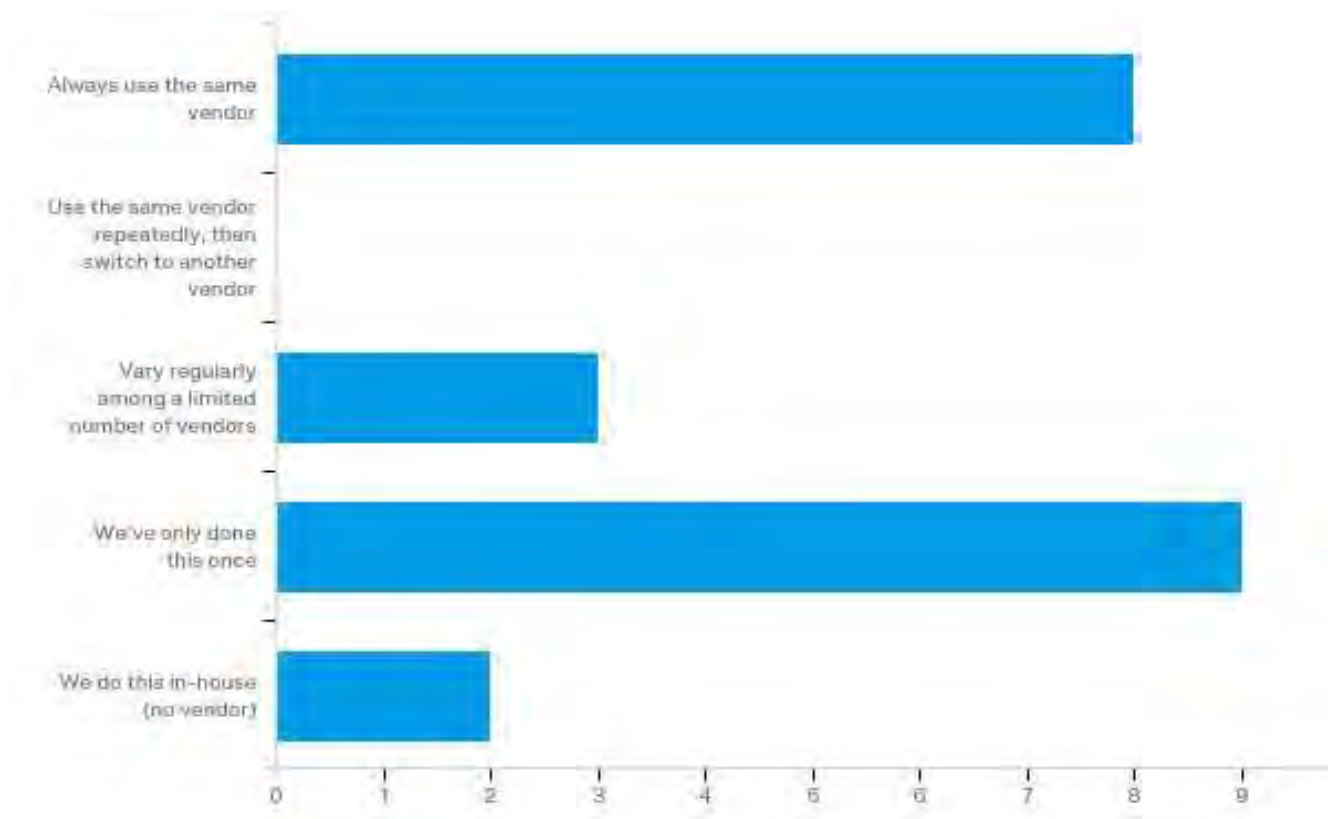
#	Answer	%	Count
1	Always use the same vendor	36.36%	8
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	13.64%	3
4	We've only done this once	40.91%	9
5	We do this in-house (no vendor)	9.09%	2
	Total	100%	22

Q1.10.7 - On a scale of 0-10, over time, how happy are you with the results of birth date appends?

19%
5

38%
7

6.14

0   10
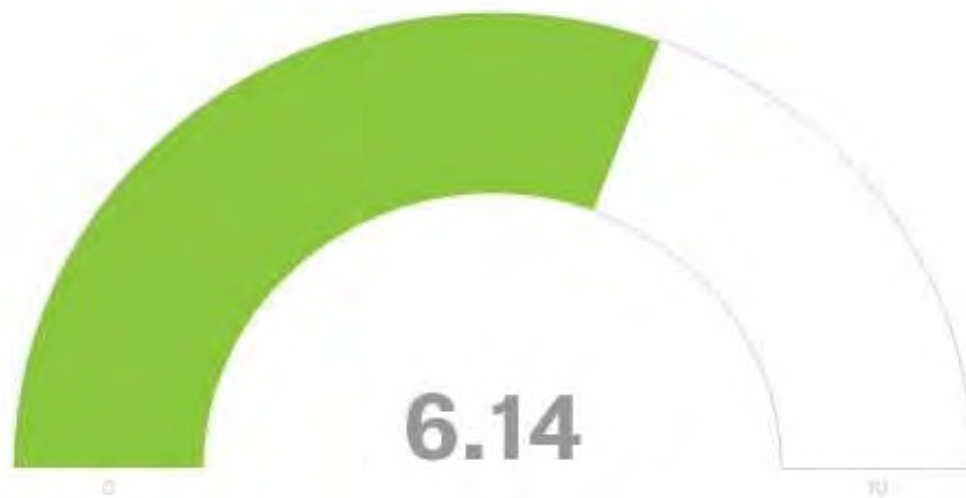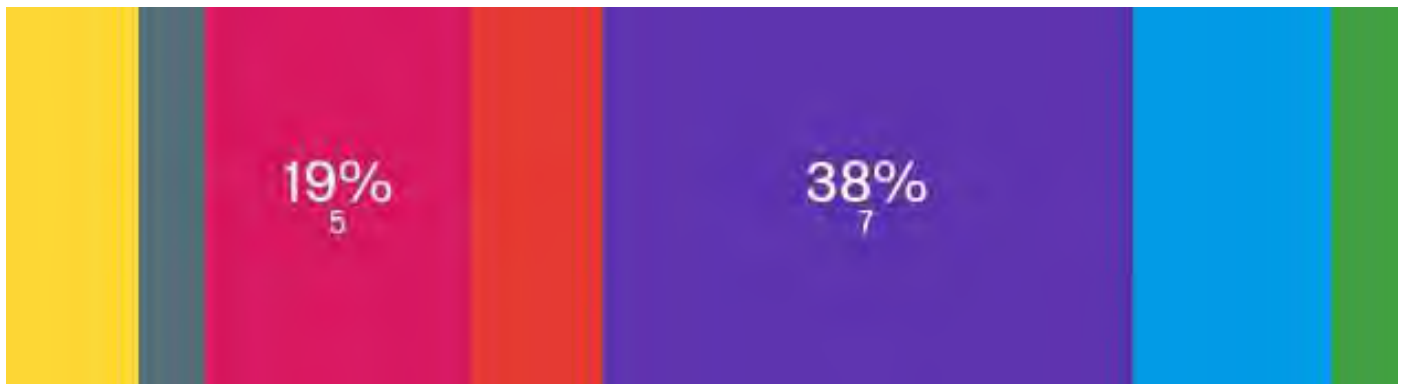
Q1.10.8 - Comments/Additional Information

has not been done in several years, currently in the process of setting up birth date append to run in September
We receive all graduate birthdates as they're added to our system. Non alum birthdates are only added as needed.
We did this years ago when you could also purchase social security numbers. We try to find a date of birth using Lexis Nexis when we create records now.
Not sure I trust the info we imported. Granted our population tends towards the elderly, but we seem to have a great deal of VERY elderly people. Good to know people are living so much longer these days.
Data quality was poor. Often received children records.

Q.1.11 Deceased Append

Deceased appends identify constituents who have died and may return additional information such as date or place of death, the source of the information confirming the death, or a link to an obituary. Identifying information, most commonly name and address, is used to match constituents to a reference database, and information about matched constituents database is returned.

Q1.11.1 - How often do you do a deceased append?
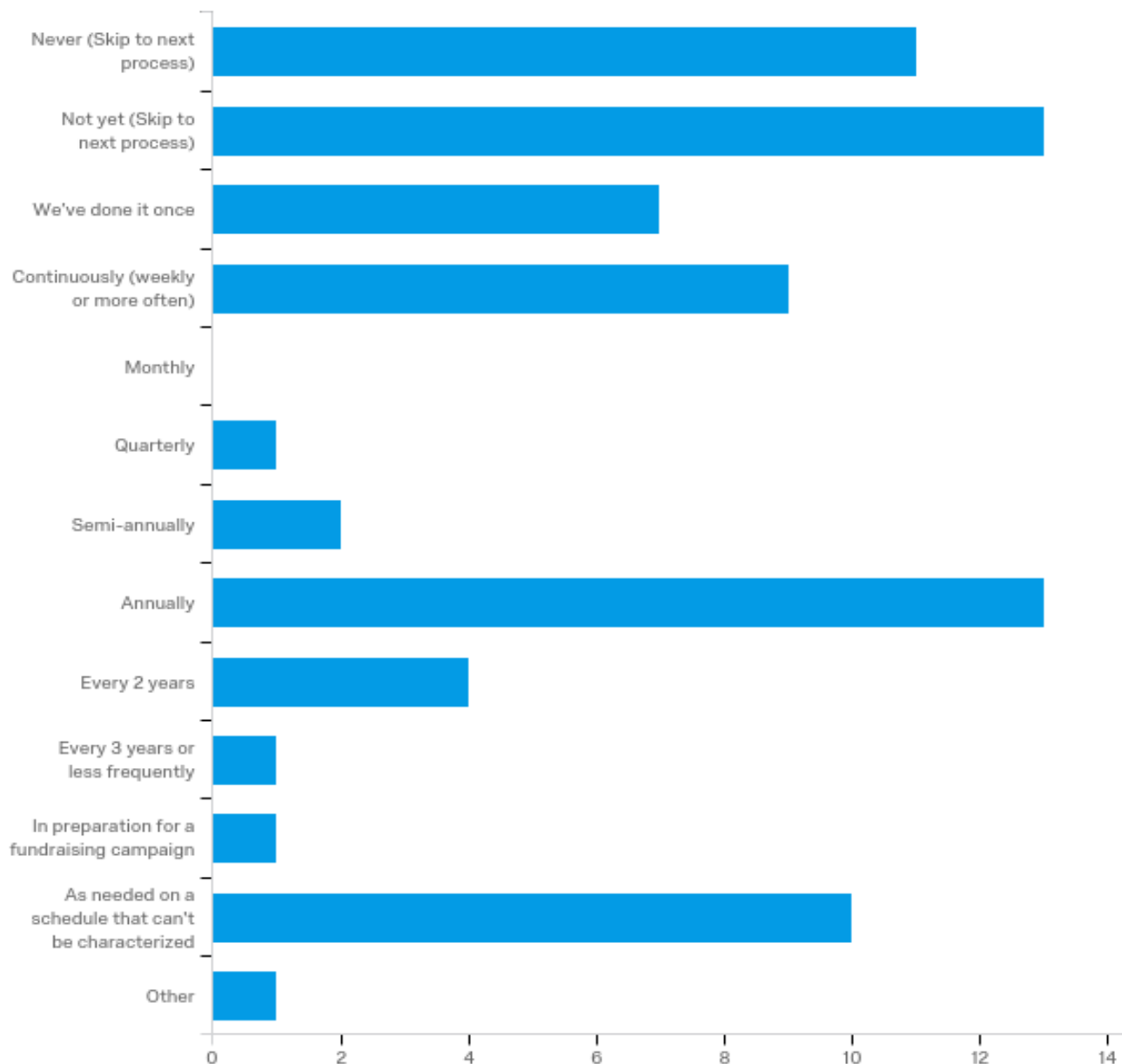
#	Answer	%	Count
1	Never (Skip to next process)	15.07%	11
2	Not yet (Skip to next process)	17.81%	13
3	We've done it once	9.59%	7
4	Continuously (weekly or more often)	12.33%	9
5	Monthly	0.00%	0
6	Quarterly	1.37%	1
7	Semi-annually	2.74%	2
8	Annually	17.81%	13
9	Every 2 years	5.48%	4
10	Every 3 years or less frequently	1.37%	1
11	In preparation for a fundraising campaign	1.37%	1
12	As needed on a schedule that can't be characterized	13.70%	10
13	Other	1.37%	1
	Total	100%	73

Other
In conjunction with the address research, not specifically

Q1.11.2 - How do you conduct this sort of enhancement?
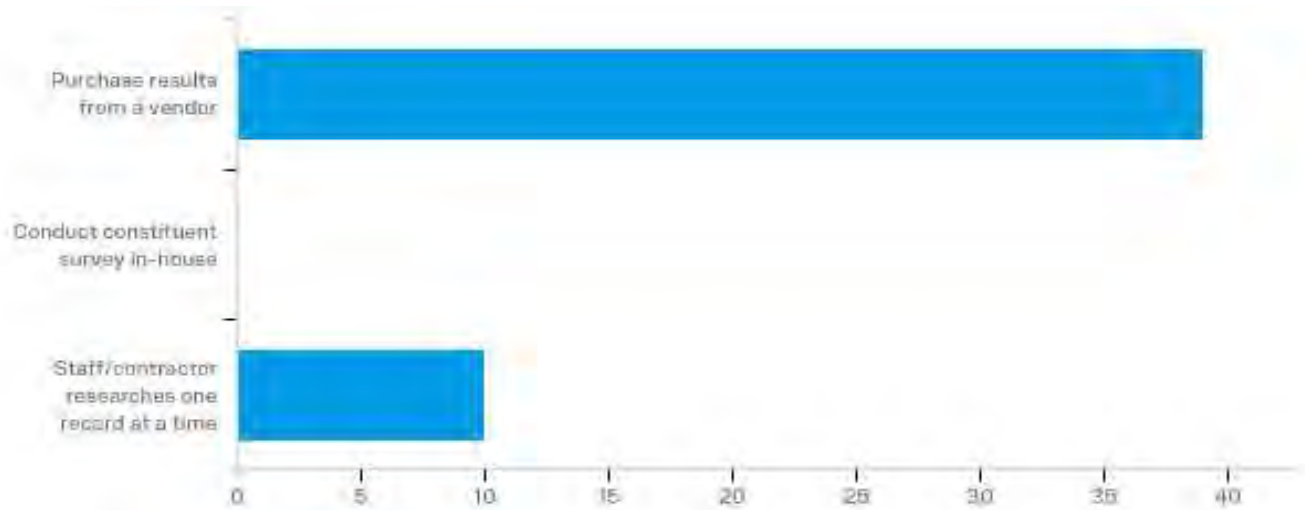
#	Answer	%	Count
1	Purchase results from a vendor	79.59%	39
2	Conduct constituent survey in-house	0.00%	0
3	Staff/contractor researches one record at a time	20.41%	10
	Total	100%	49

Q1.11.3 - How do you apply the results?
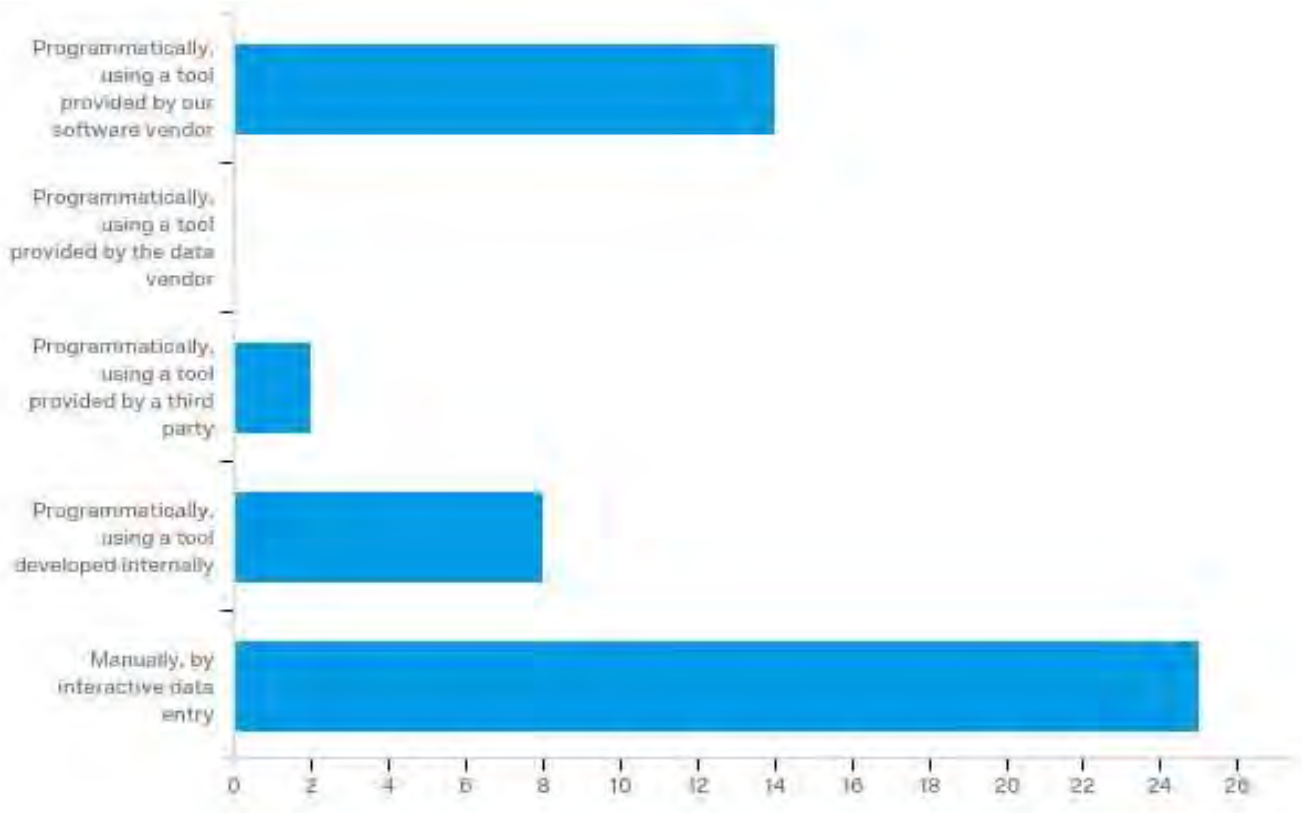
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	28.57%	14
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	4.08%	2
4	Programmatically, using a tool developed internally	16.33%	8
5	Manually, by interactive data entry	51.02%	25
	Total	100%	49

Q1.11.4 - Who applies the results?
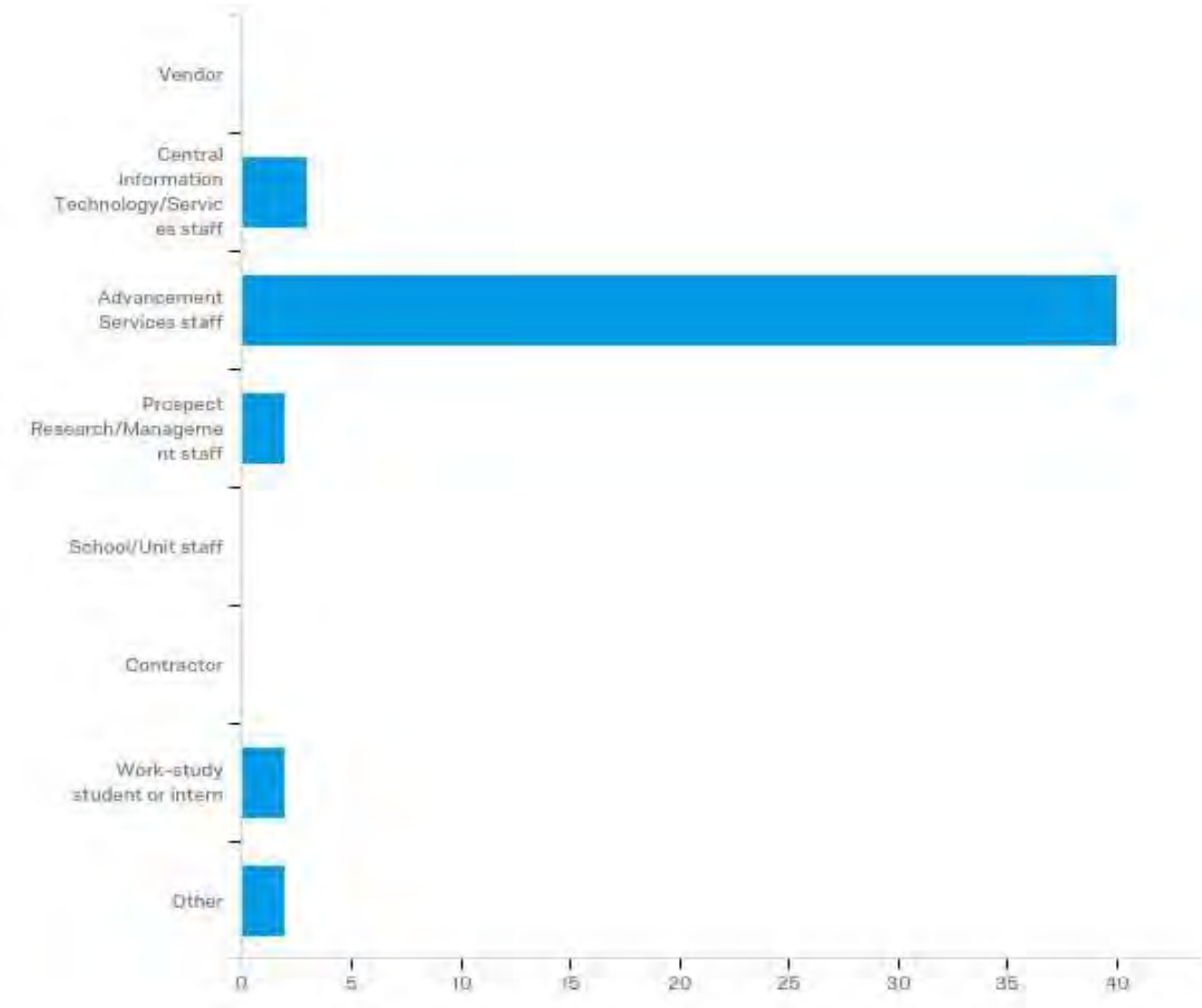
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	6.12%	3
3	Advancement Services staff	81.63%	40
4	Prospect Research/Management staff	4.08%	2
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	4.08%	2
8	Other	4.08%	2
	Total	100%	49

Other
Gift Management Staff
Programming Team in Adv Svcs

Q1.11.5 - How do you review/evaluate/verify the results?
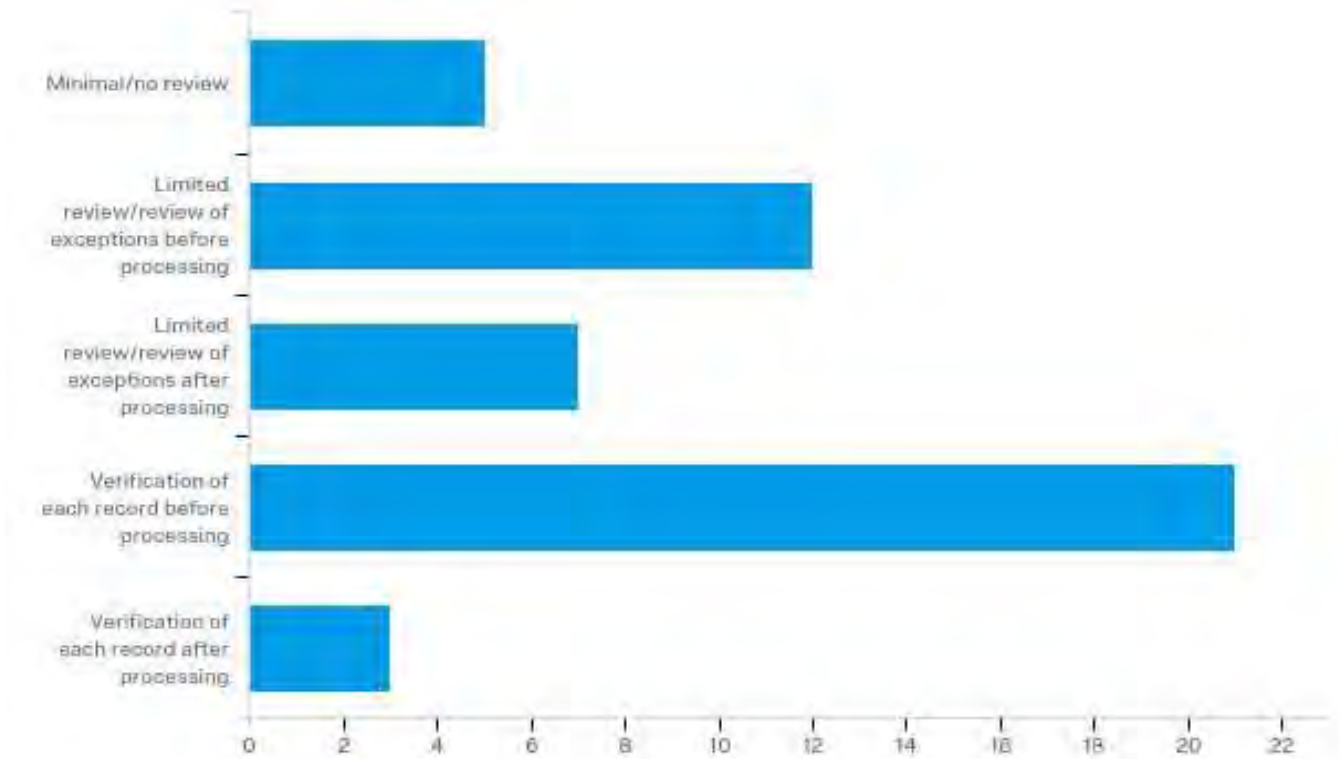
#	Answer	%	Count
1	Minimal/no review	10.42%	5
2	Limited review/review of exceptions before processing	25.00%	12
3	Limited review/review of exceptions after processing	14.58%	7
4	Verification of each record before processing	43.75%	21
5	Verification of each record after processing	6.25%	3
	Total	100%	48

Q1.11.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
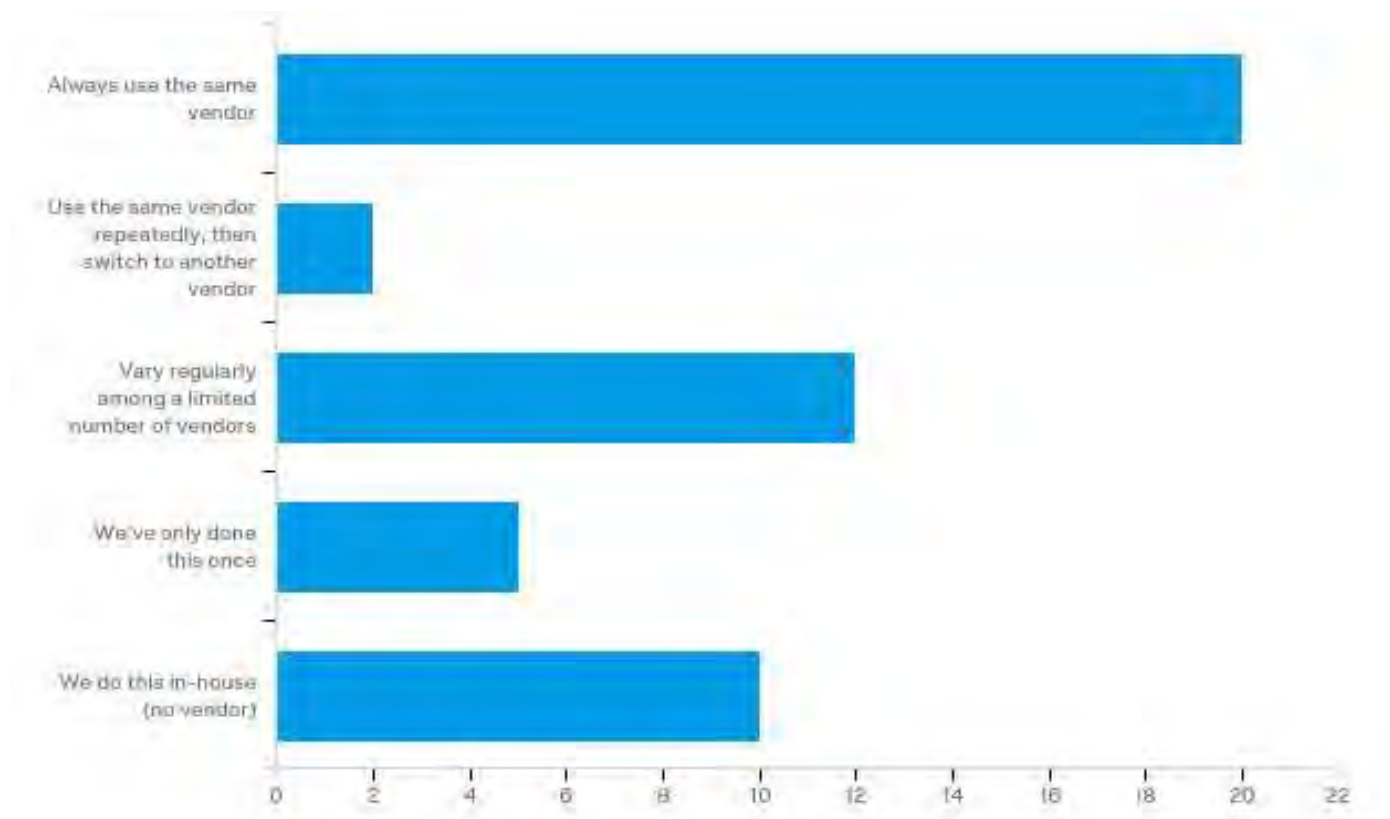
#	Answer	%	Count
1	Always use the same vendor	40.82%	20
2	Use the same vendor repeatedly, then switch to another vendor	4.08%	2
3	Vary regularly among a limited number of vendors	24.49%	12
4	We've only done this once	10.20%	5
5	We do this in-house (no vendor)	20.41%	10
	Total	100%	49

Q1.11.7 - On a scale of 0-10, over time, how happy are you with the results of deceased appends?

21%
7

27%
8

7.17

0   10
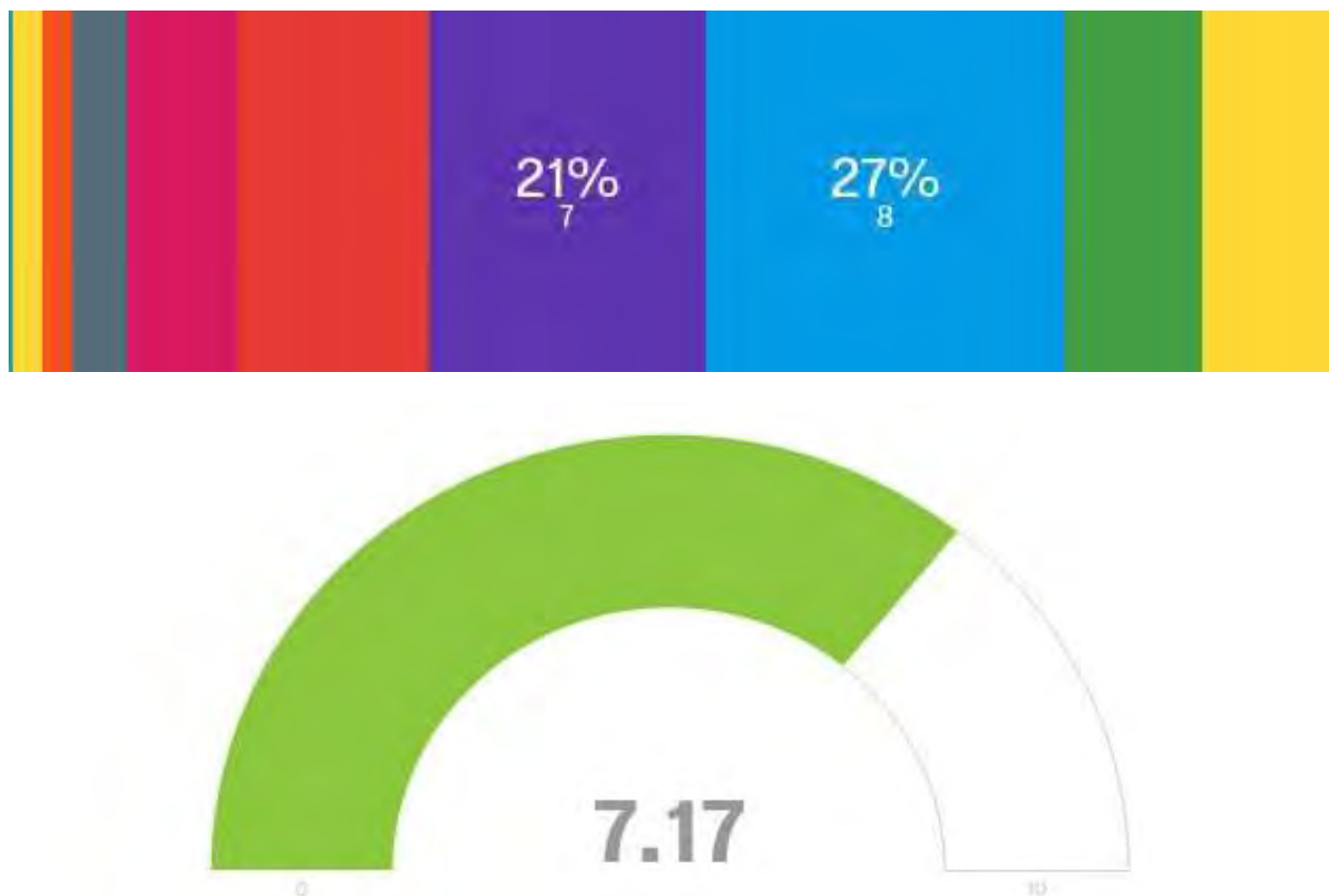
Q1.11.8 - Comments/Additional Information

We do this by searching local obituaries but it is sometimes difficult to ensure that the deceased is actually the constituent in question.
We have done a vendor append a couple of times, usually with a group of alums that due to their age may be deceased. But it's not on a regular basis. We identify most deceased through our other normal processes.
We've used a vendor - most recently when we did a directory project. We run lists periodically of 'older' people in our database and manually search them.
The first append was around 7 years ago, we found that the results need to be verified and since then we also require a DOB in the append file from the vendor for verification. Too many father/son records were confused etc.
Data was good, but our policy is to verify before marking a record as deceased.

Q1.12 Marital Status/Spouse Name Append

Marital status/spouse name appends provide information about a constituent's marital status. The name of the spouse might also be returned. Identifying information, most commonly name and address, is used to match constituents to a reference database, and marital status and other marriage-related data from the reference database are returned.

Q1.12.1 - How often do you do a marital status/spouse name append?
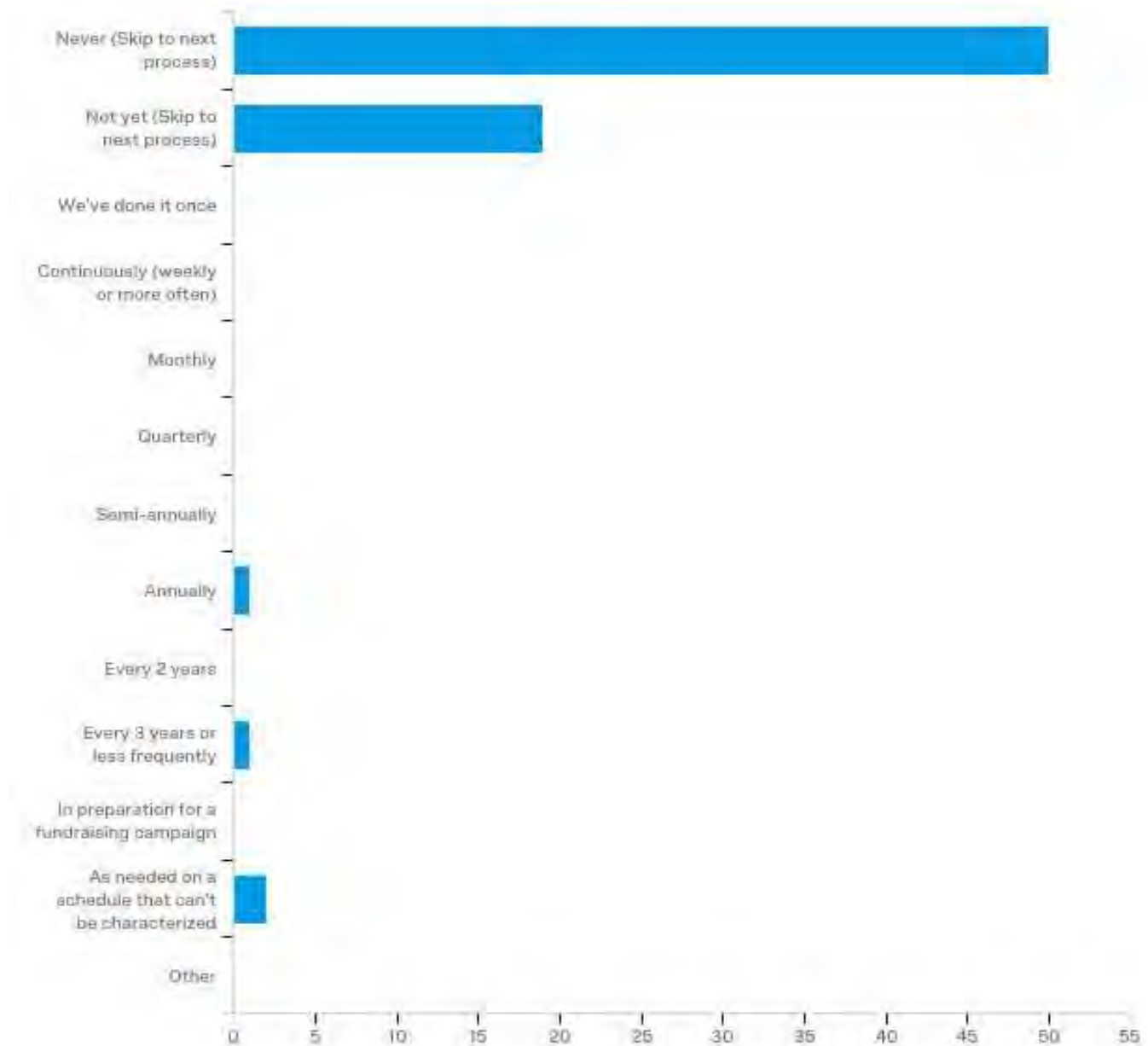
#	Answer	%	Count
1	Never (Skip to next process)	68.49%	50
2	Not yet (Skip to next process)	26.03%	19
3	We've done it once	0.00%	0
4	Continuously (weekly or more often)	0.00%	0
5	Monthly	0.00%	0
6	Quarterly	0.00%	0
7	Semi-annually	0.00%	0
8	Annually	1.37%	1
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	1.37%	1
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	2.74%	2
13	Other	0.00%	0
	Total	100%	73

Q1.12.2 - How do you conduct this sort of enhancement?
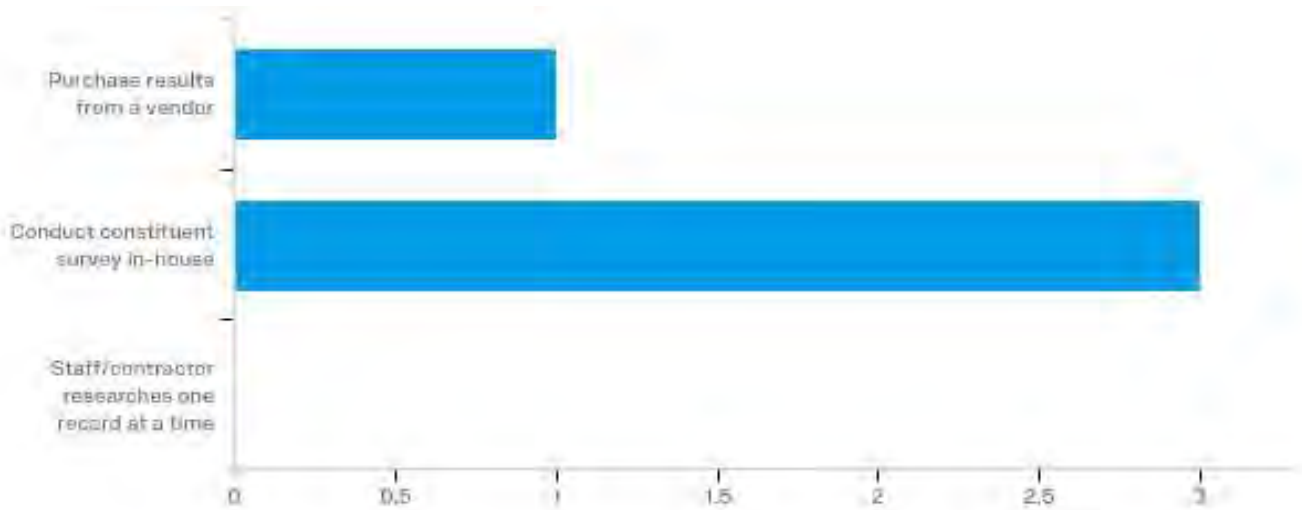
#	Answer	%	Count
1	Purchase results from a vendor	25.00%	1
2	Conduct constituent survey in-house	75.00%	3
3	Staff/contractor researches one record at a time	0.00%	0
	Total	100%	4

Q1.12.3 - How do you apply the results?
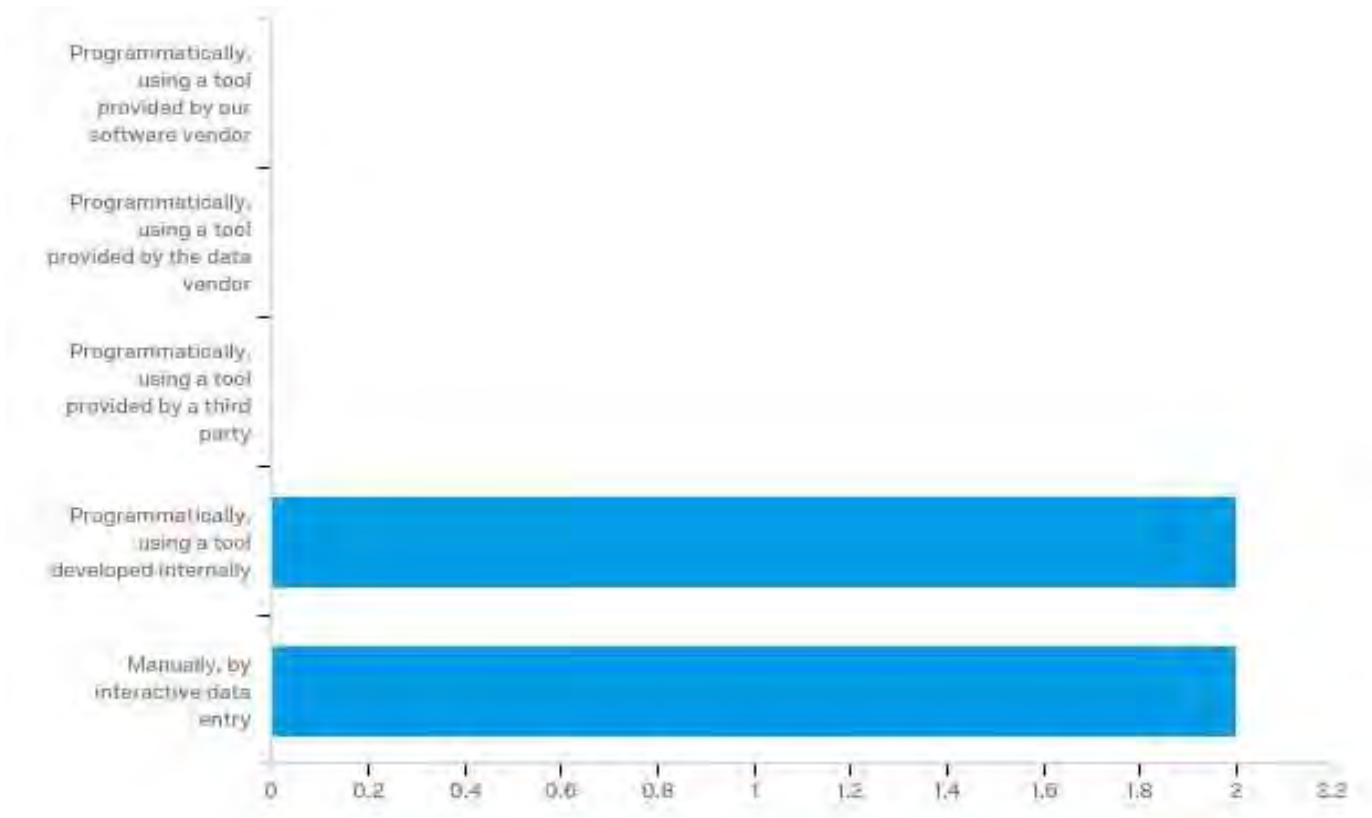
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	0.00%	0
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	50.00%	2
5	Manually, by interactive data entry	50.00%	2
	Total	100%	4

Q1.12.4 - Who applies the results?
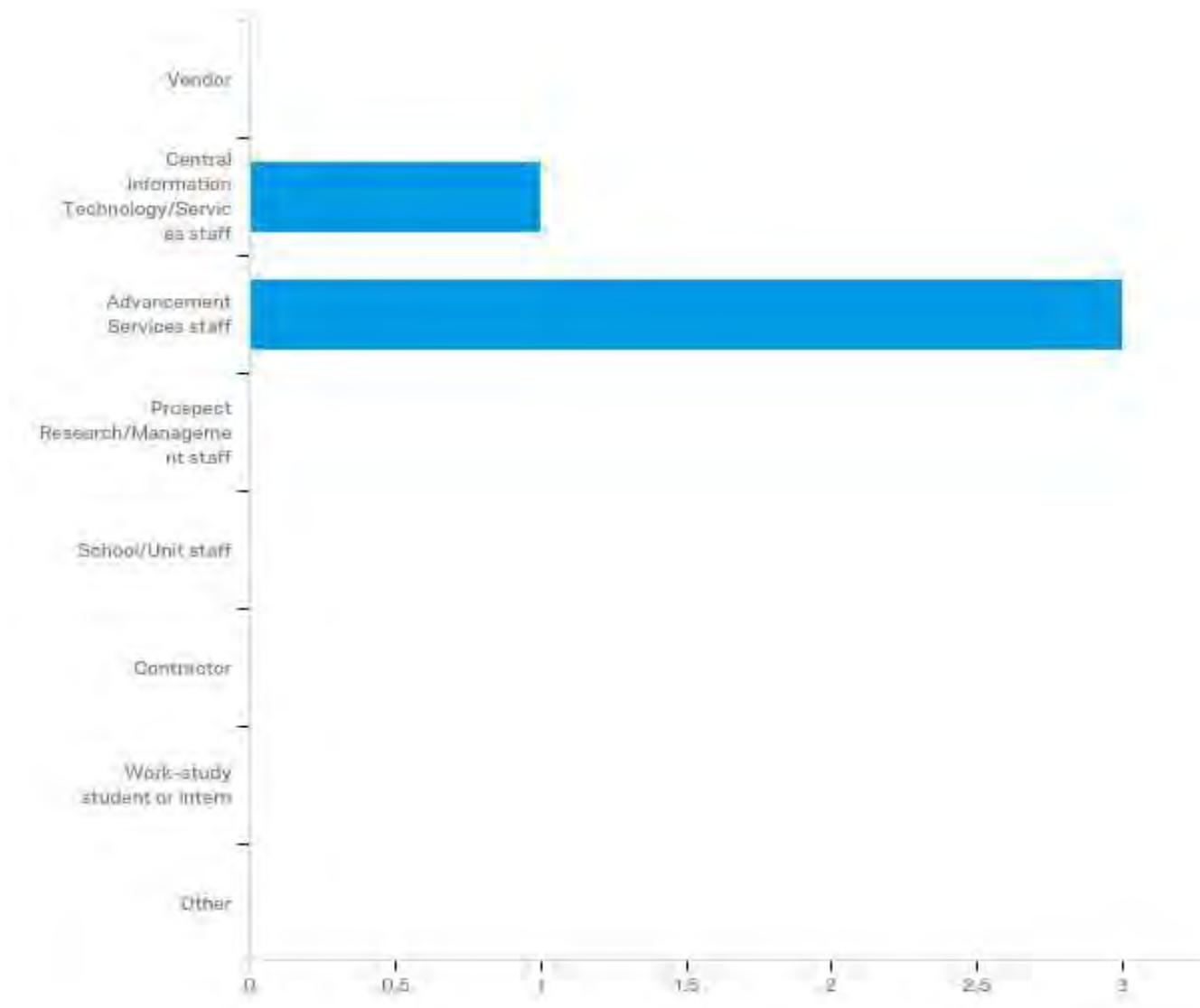
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	25.00%	1
3	Advancement Services staff	75.00%	3
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	0.00%	0
	Total	100%	4

Q1.12.5 - How do you review/evaluate/verify the results?
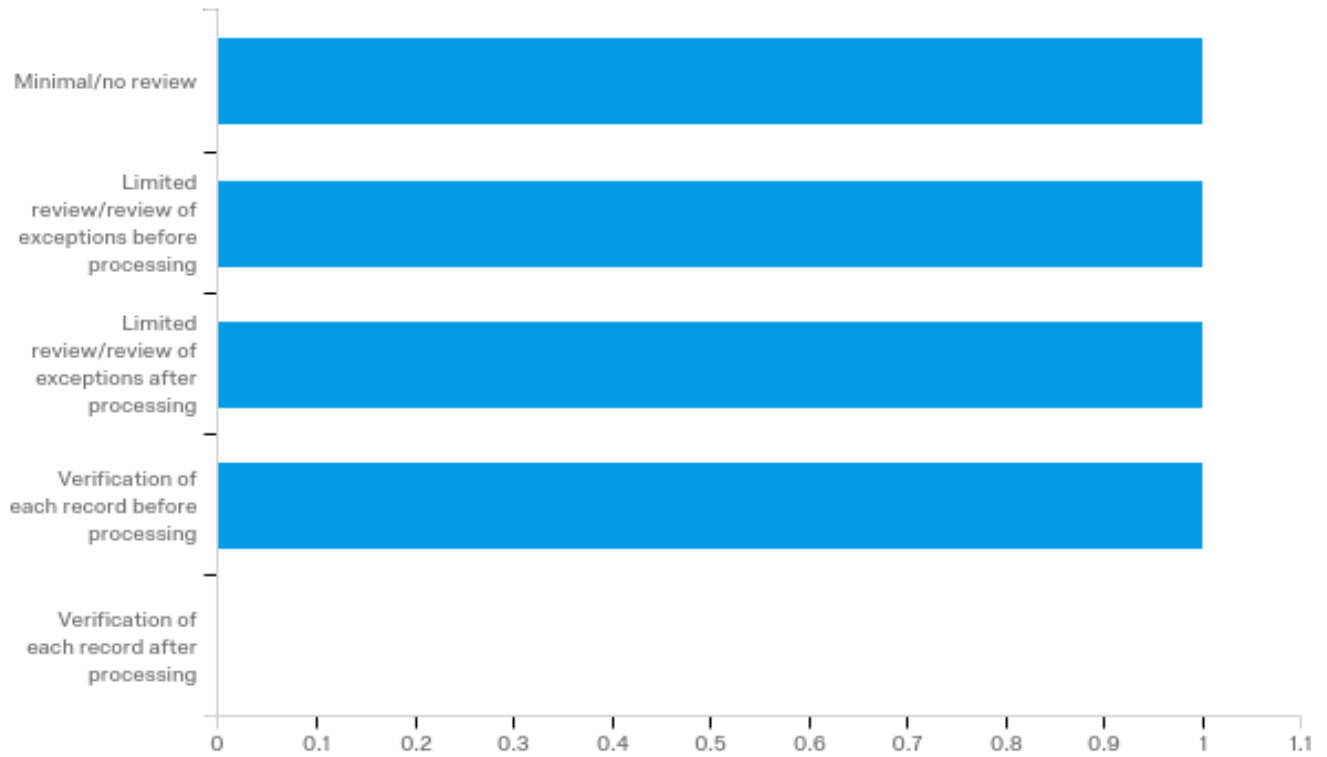
#	Answer	%	Count
1	Minimal/no review	25.00%	1
2	Limited review/review of exceptions before processing	25.00%	1
3	Limited review/review of exceptions after processing	25.00%	1
4	Verification of each record before processing	25.00%	1
5	Verification of each record after processing	0.00%	0
	Total	100%	4

Q1.12.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
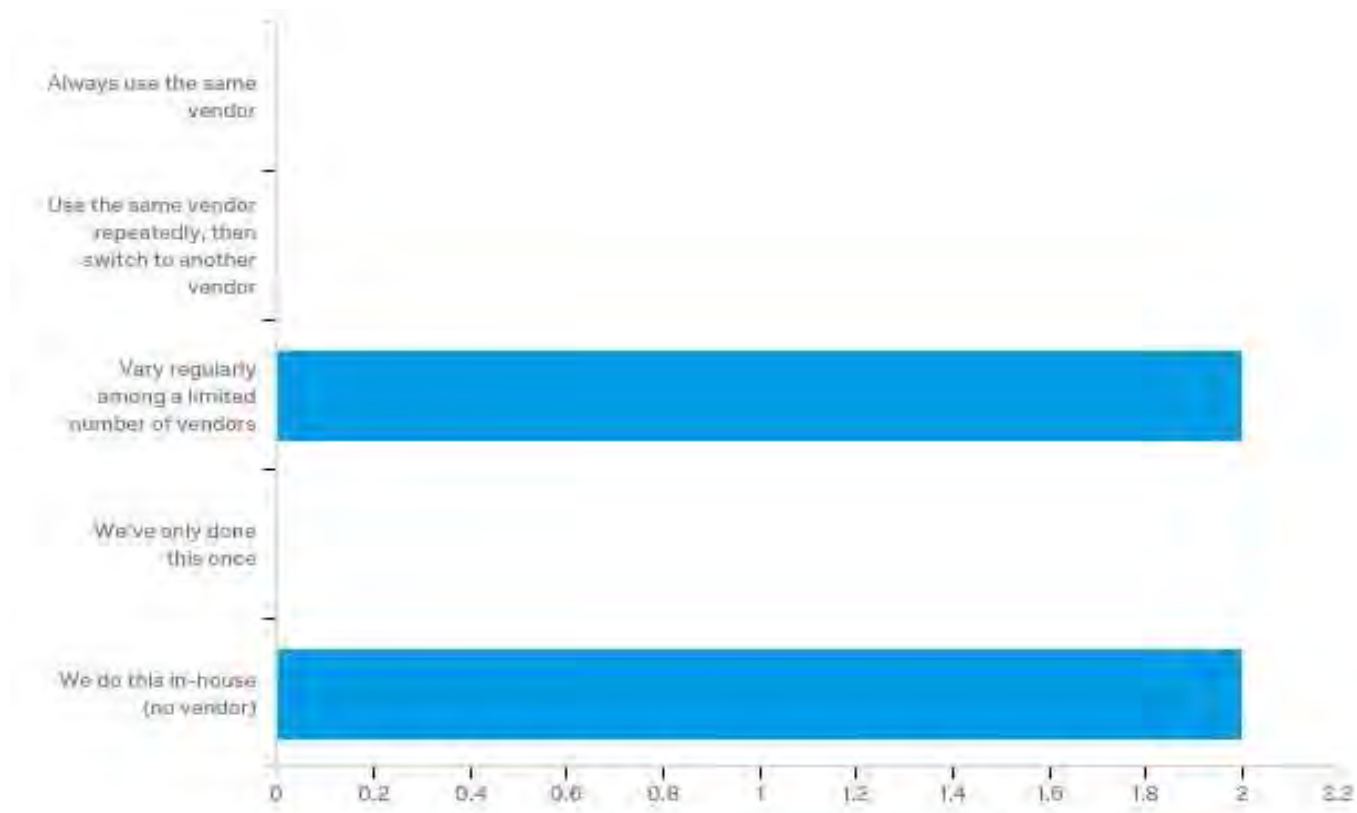
#	Answer	%	Count
1	Always use the same vendor	0.00%	0
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	50.00%	2
4	We've only done this once	0.00%	0
5	We do this in-house (no vendor)	50.00%	2
	Total	100%	4
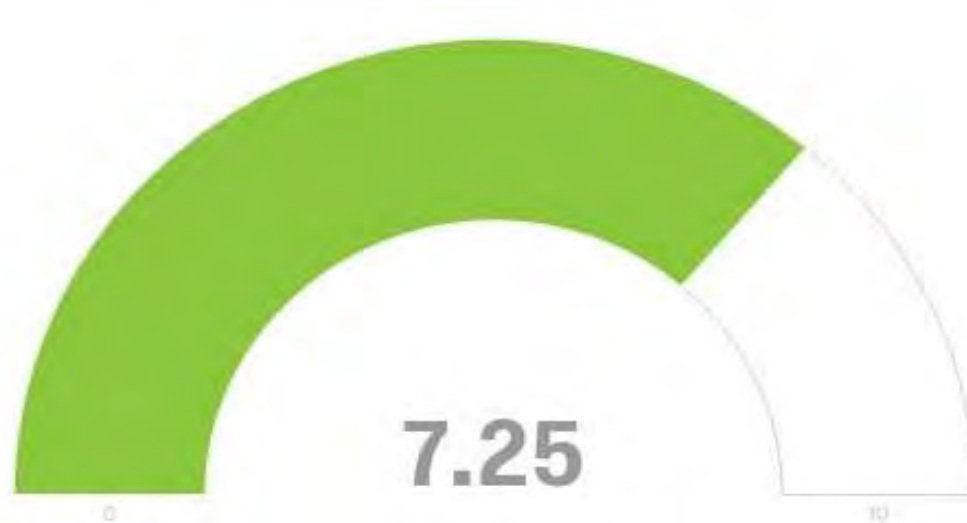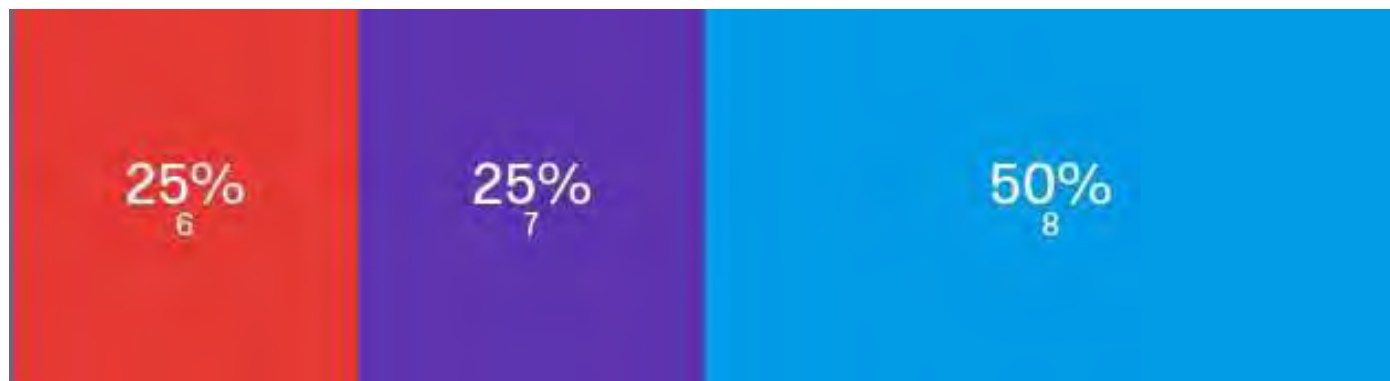
Q1.12.8 - Comments/Additional Information

Q1.13 Presence/Number of Children Append

Presence/number of children appends provide information about a constituent's immediate family. This information is sometimes used to identify constituents who do not have children and may then be more likely to be Planned Giving prospects. More detailed information about children might be used by offices of admission to recruit children of alumni as prospective students. Identifying information, most commonly name and address, is used to match constituents to a reference database, and child- related data from the reference database is returned.

Q1.13.1 - How often do you do a presence/number of children append?
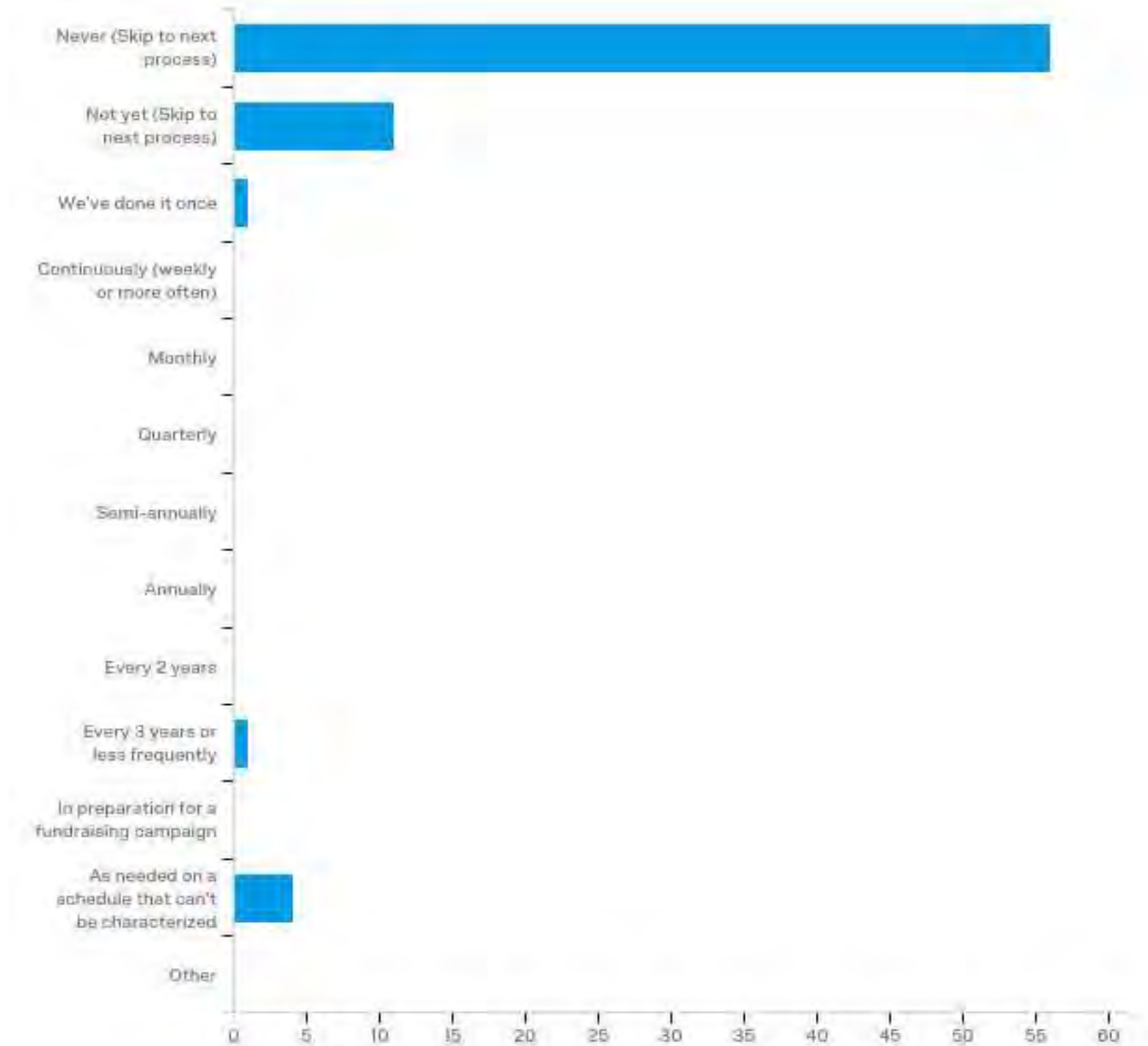
#	Answer	%	Count
1	Never (Skip to next process)	76.71%	56
2	Not yet (Skip to next process)	15.07%	11
3	We've done it once	1.37%	1
4	Continuously (weekly or more often)	0.00%	0
5	Monthly	0.00%	0
6	Quarterly	0.00%	0
7	Semi-annually	0.00%	0
8	Annually	0.00%	0
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	1.37%	1
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	5.48%	4
13	Other	0.00%	0
	Total	100%	73

Q1.13.2 - How do you conduct this sort of enhancement?
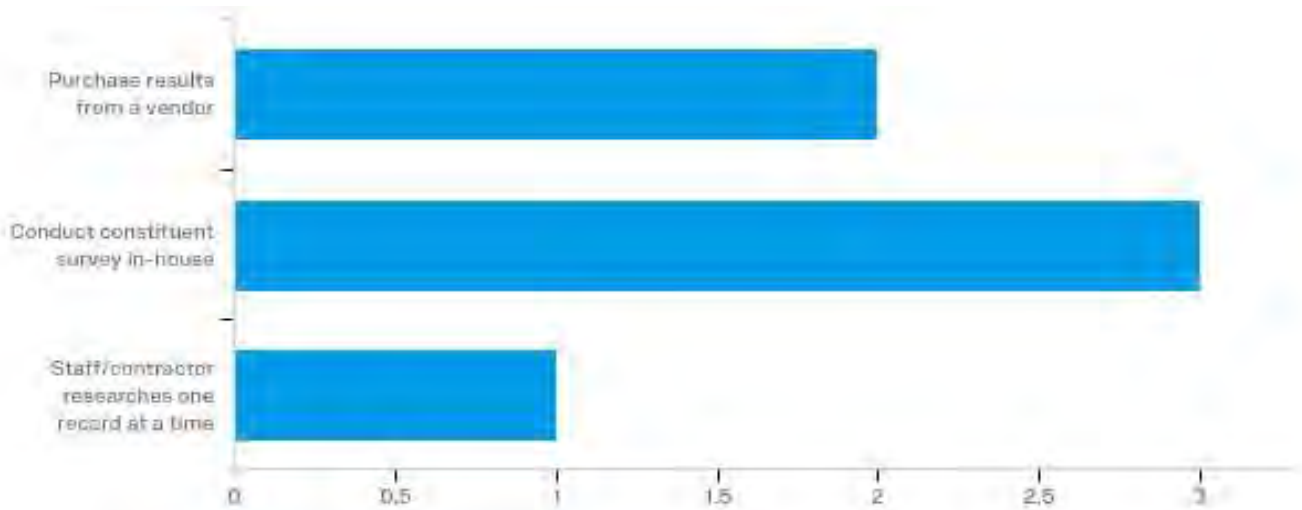
#	Answer	%	Count
1	Purchase results from a vendor	33.33%	2
2	Conduct constituent survey in-house	50.00%	3
3	Staff/contractor researches one record at a time	16.67%	1
	Total	100%	6

Q1.13.3 - How do you apply the results?
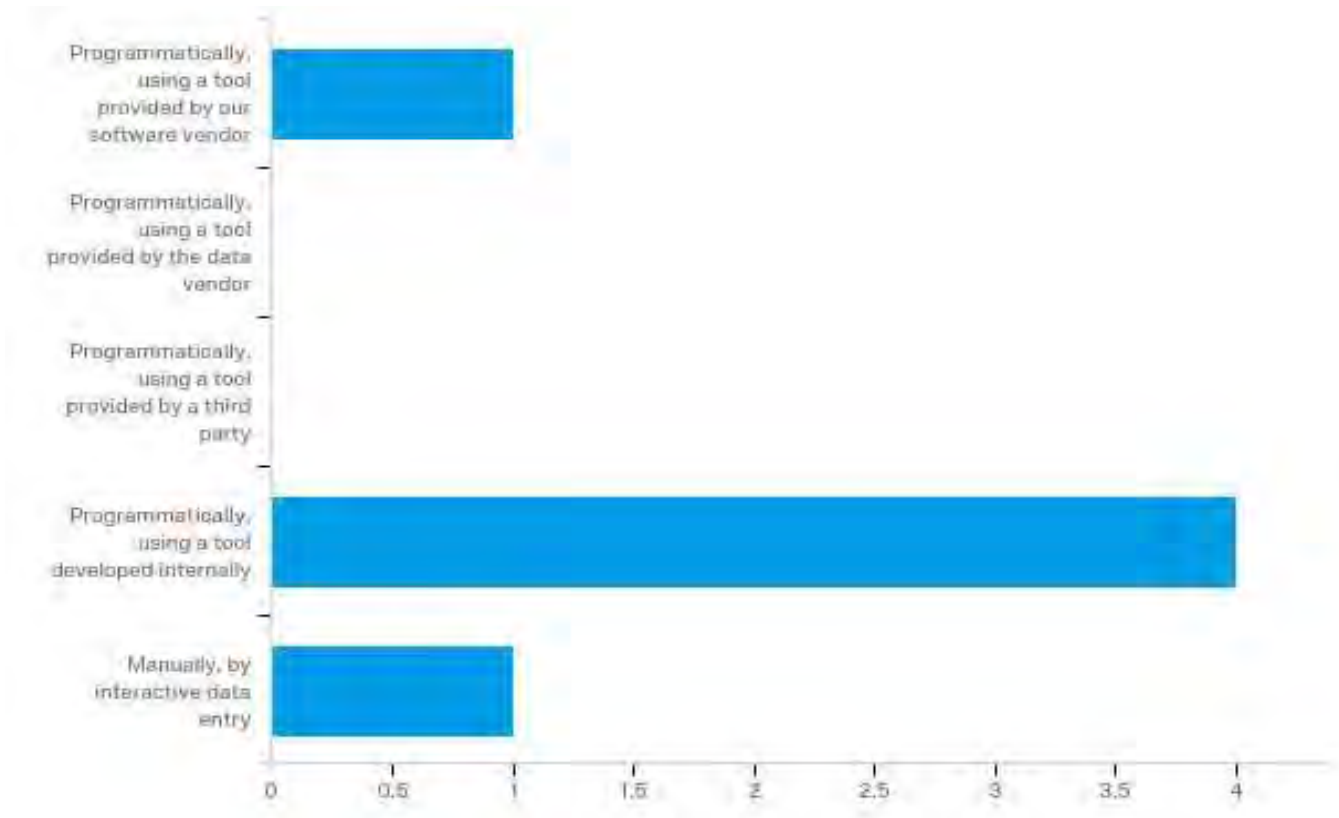
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	16.67%	1
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	66.67%	4
5	Manually, by interactive data entry	16.67%	1
	Total	100%	6

Q1.13.4 - Who applies the results?
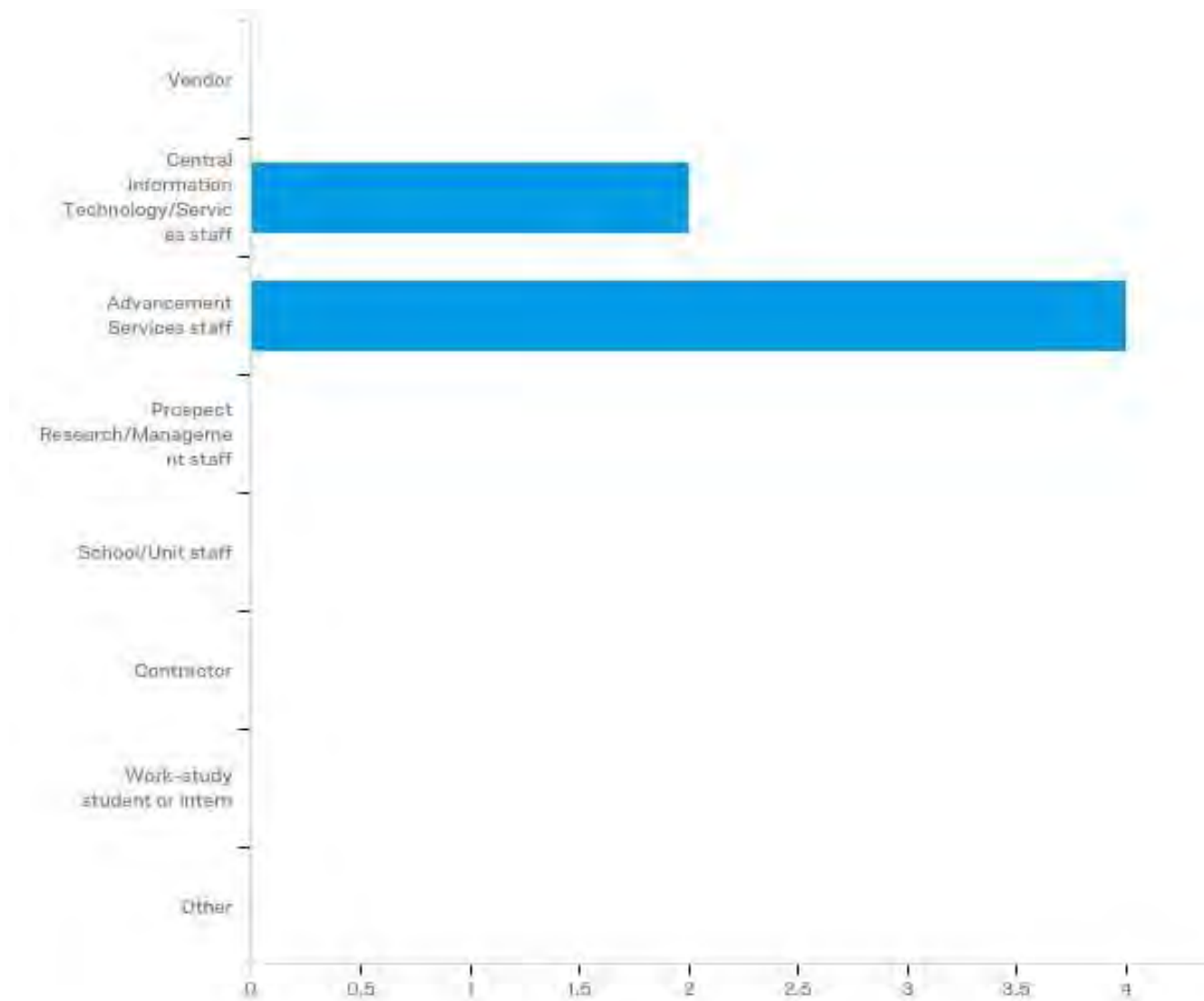
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	33.33%	2
3	Advancement Services staff	66.67%	4
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	0.00%	0
	Total	100%	6

Q1.13.5 - How do you review/evaluate/verify the results?
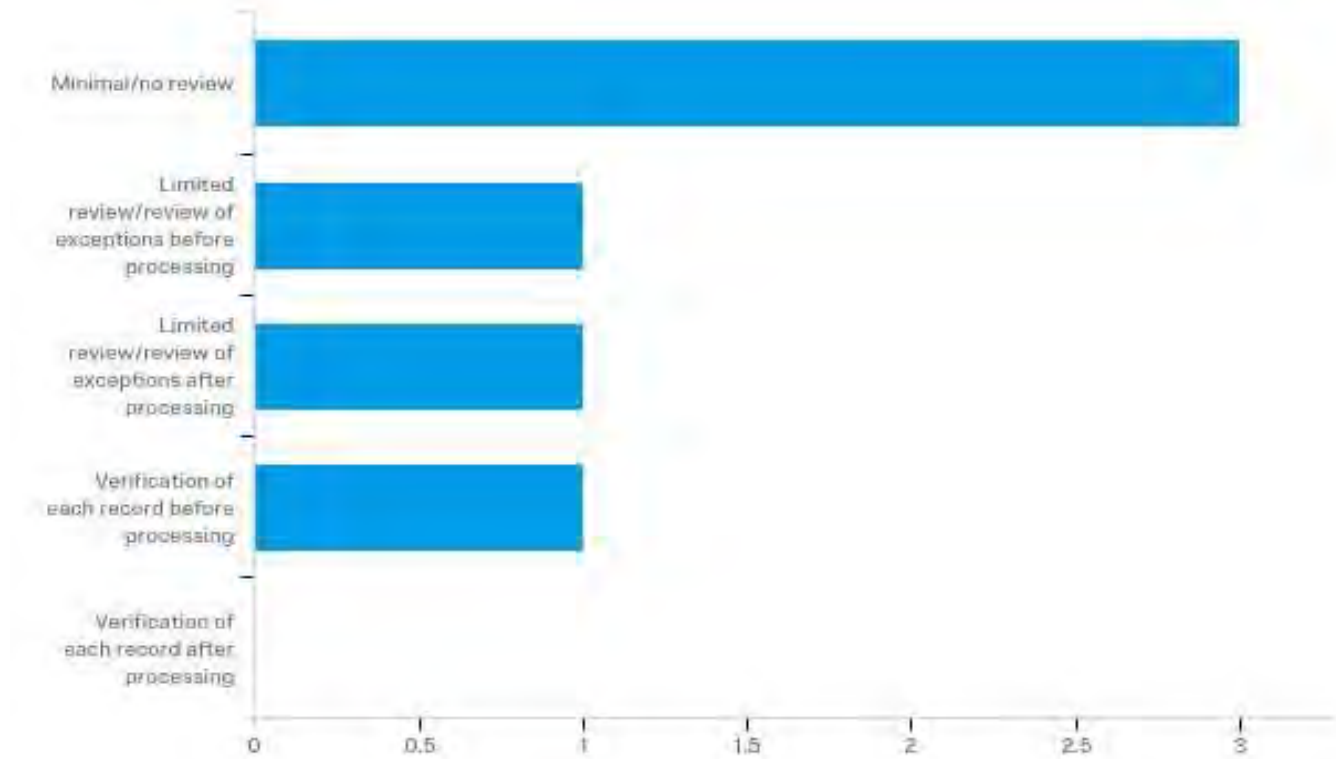
#	Answer	%	Count
1	Minimal/no review	50.00%	3
2	Limited review/review of exceptions before processing	16.67%	1
3	Limited review/review of exceptions after processing	16.67%	1
4	Verification of each record before processing	16.67%	1
5	Verification of each record after processing	0.00%	0
	Total	100%	6

Q1.13.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
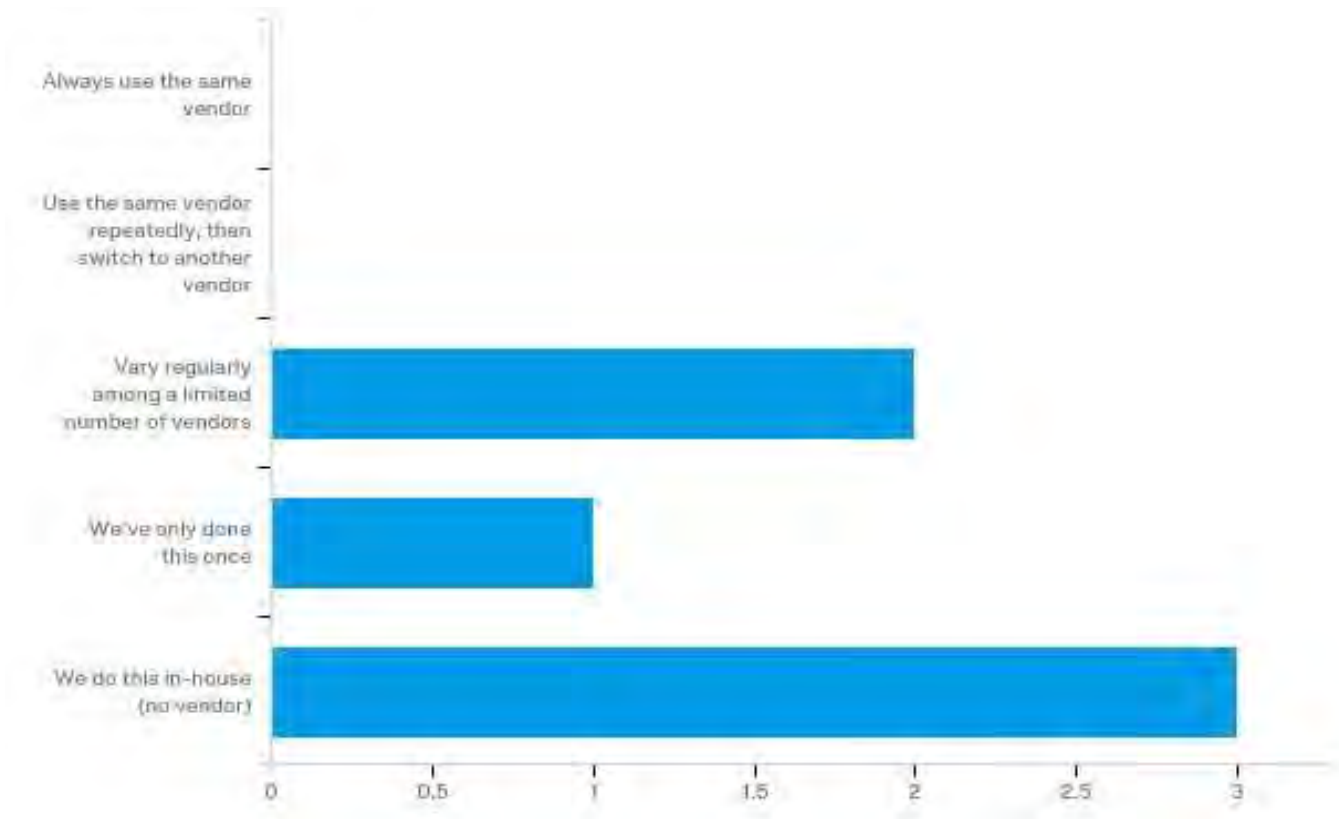
#	Answer	%	Count
1	Always use the same vendor	0.00%	0
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	33.33%	2
4	We've only done this once	16.67%	1
5	We do this in-house (no vendor)	50.00%	3
	Total	100%	6

Q1.13.7 - On a scale of 0-10, over time, how happy are you with the results of presence/number of children appends?
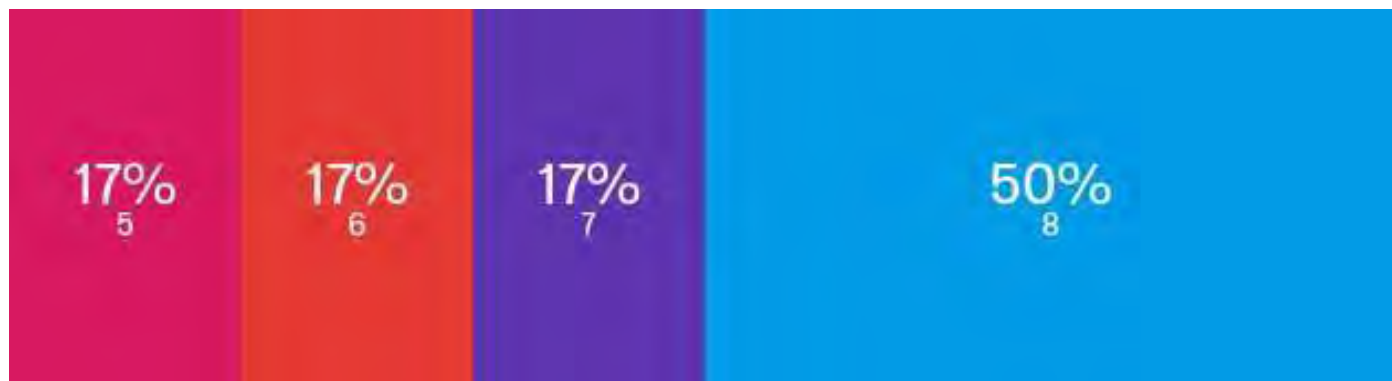
Q1.13.8 - Comments/Additional Information

Q1.14 Education/Degree Append

Education/degree appends provide information about academic degrees earned by constituents. This information typically includes the degree, major, awarding institution, and date of award. Identifying information, most commonly name and address, is used to match constituents to a reference database, and education-related information from the reference database are returned.

Q1.14.1 - How often do you do an education/degree append?
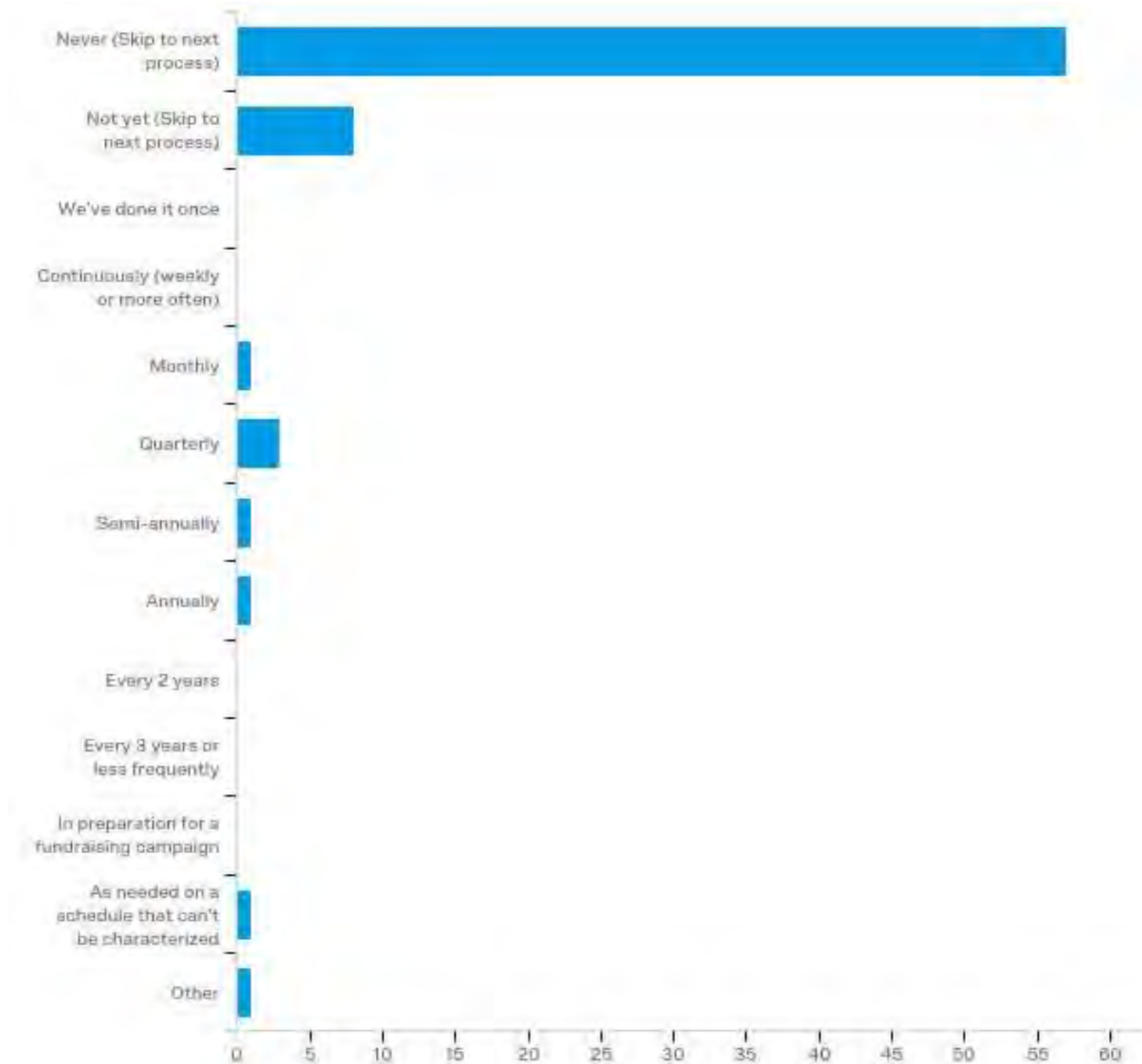
#	Answer	%	Count
1	Never (Skip to next process)	78.08%	57
2	Not yet (Skip to next process)	10.96%	8
3	We've done it once	0.00%	0
4	Continuously (weekly or more often)	0.00%	0
5	Monthly	1.37%	1
6	Quarterly	4.11%	3
7	Semi-annually	1.37%	1
8	Annually	1.37%	1
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	0.00%	0
11	In preparation for a fundraising campaign	0.00%	0
12	As needed on a schedule that can't be characterized	1.37%	1
13	Other	1.37%	1
	Total	100%	73

Other
When degrees are awarded 3 times a year

Q1.14.2 - How do you conduct this sort of enhancement?
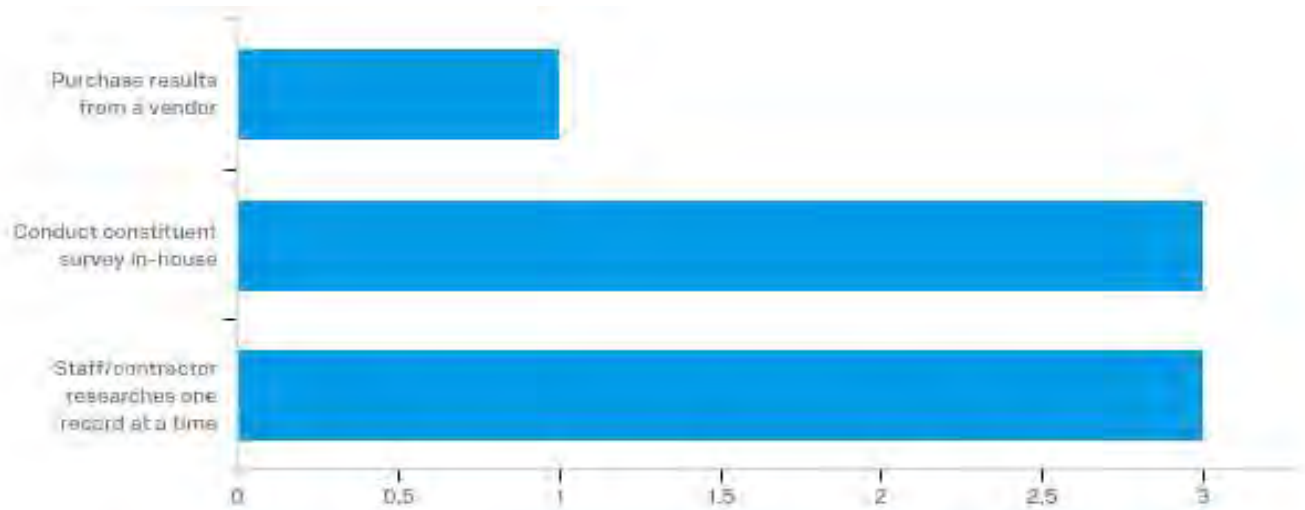
#	Answer	%	Count
1	Purchase results from a vendor	14.29%	1
2	Conduct constituent survey in-house	42.86%	3
3	Staff/contractor researches one record at a time	42.86%	3
	Total	100%	7

Q1.14.3 - How do you apply the results?
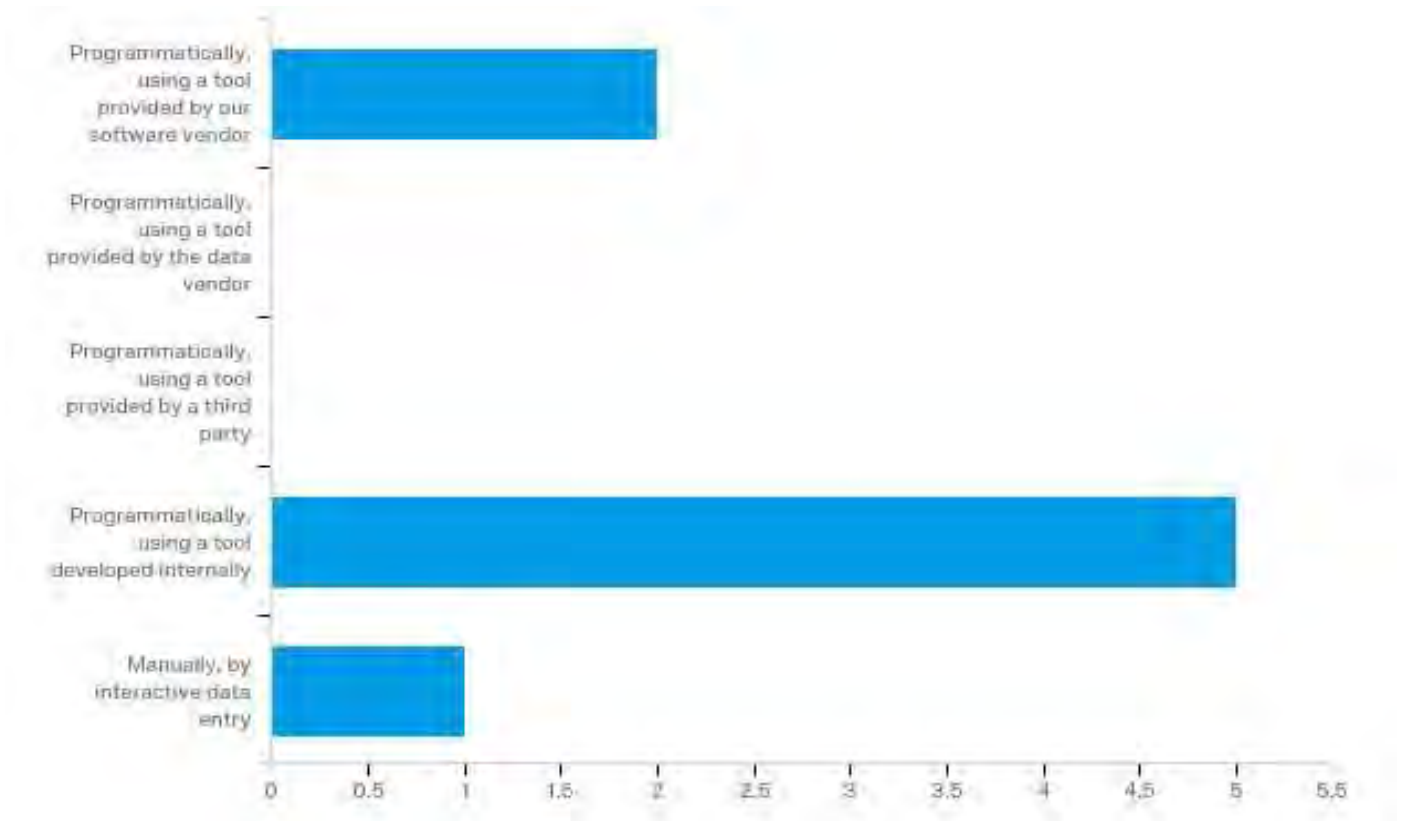
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	25.00%	2
2	Programmatically, using a tool provided by the data vendor	0.00%	0
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	62.50%	5
5	Manually, by interactive data entry	12.50%	1
	Total	100%	8

Q1.14.4 - Who applies the results?
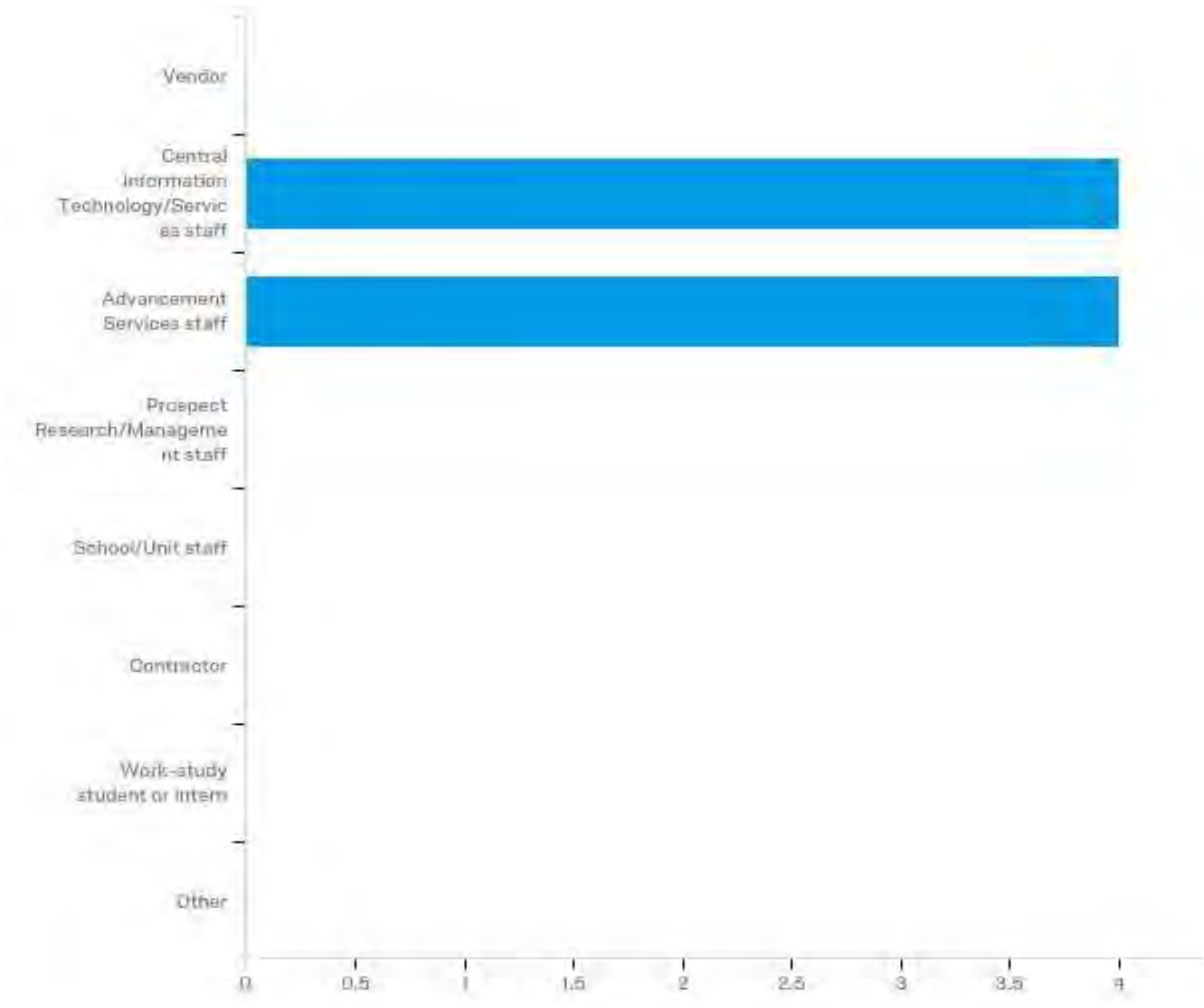
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	50.00%	4
3	Advancement Services staff	50.00%	4
4	Prospect Research/Management staff	0.00%	0
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	0.00%	0
	Total	100%	8

Q1.14.5 - How do you review/evaluate/verify the results?
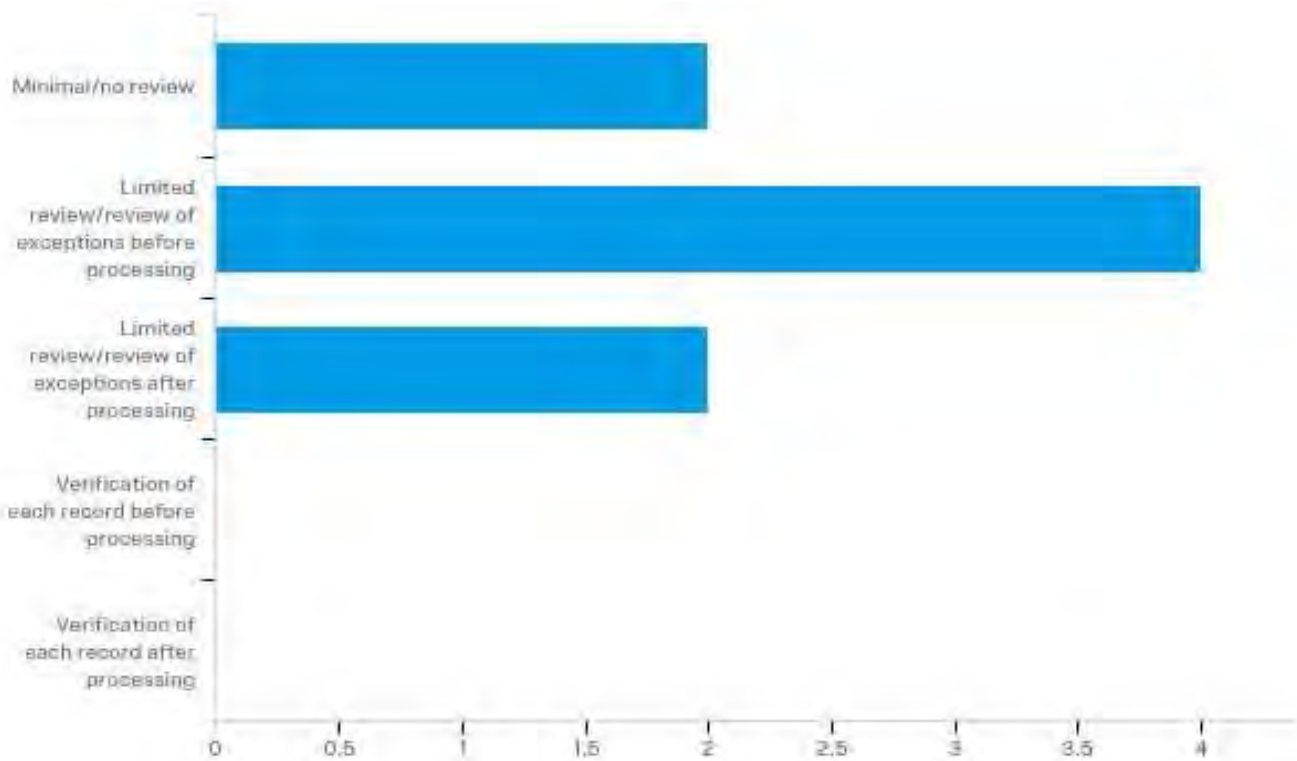
#	Answer	%	Count
1	Minimal/no review	25.00%	2
2	Limited review/review of exceptions before processing	50.00%	4
3	Limited review/review of exceptions after processing	25.00%	2
4	Verification of each record before processing	0.00%	0
5	Verification of each record after processing	0.00%	0
	Total	100%	8

Q1.14.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
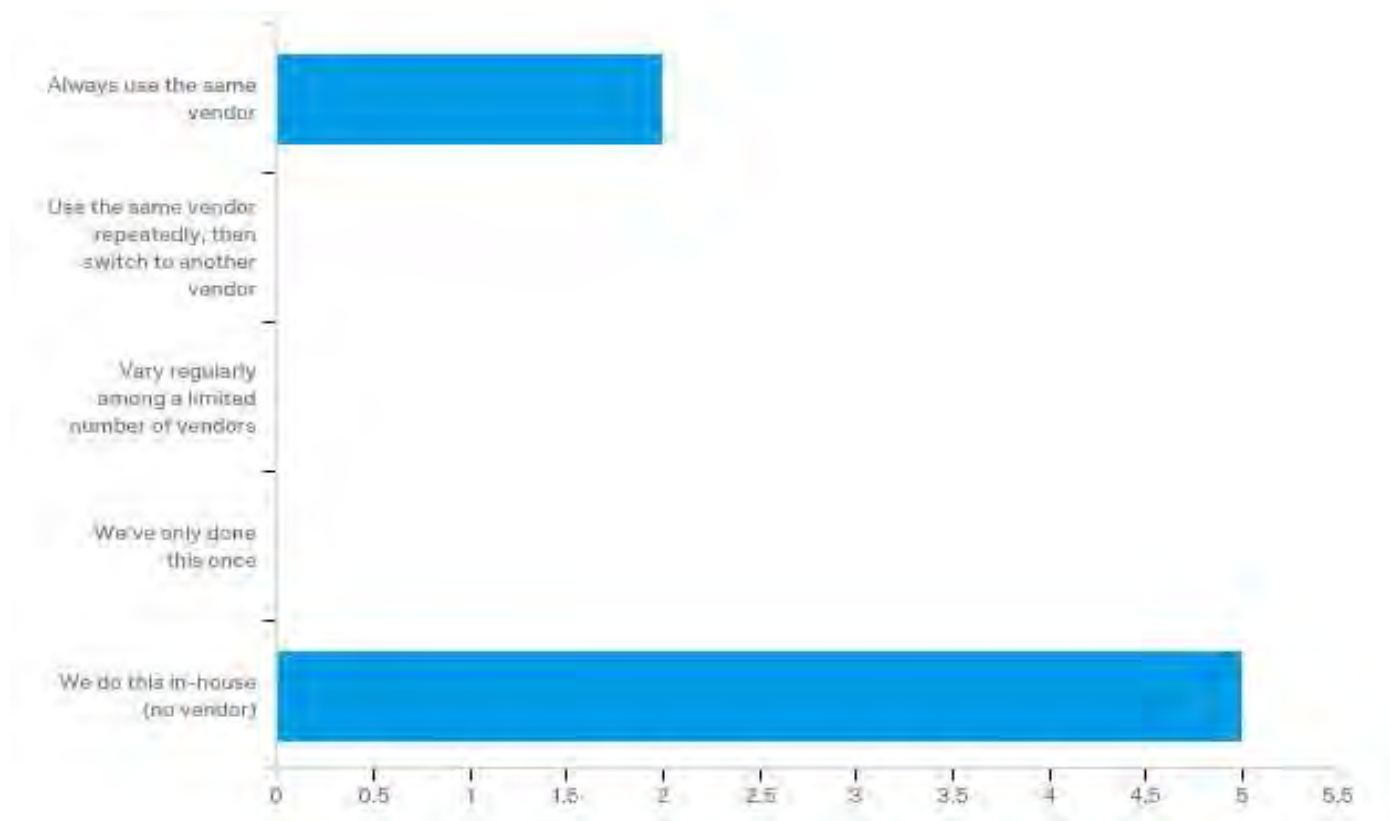
#	Answer	%	Count
1	Always use the same vendor	28.57%	2
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	0.00%	0
4	We've only done this once	0.00%	0
5	We do this in-house (no vendor)	71.43%	5
	Total	100%	7

Q1.14.7 - On a scale of 0-10, over time, how happy are you with the results of education appends?

25%
6

38%
8

25%
9

0

8

10

Q1.14.8 - Comments/Additional Information

We regularly import degrees from our student system. We do not get this from an outside source.
This information comes over from the university each month using an automatic process. We do also use manual surveys to find degrees that are not from our institution.

Q1.15 Wealth/Gift Likelihood Modeling

Wealth/gift likelihood modeling combines information from an organization's own records (including giving history) with reference information (such as indications of wealth, financial behavior data, and census data) in order to characterize an organization's best supporters and to identify other constituents with similar characteristics. Wealth/gift likelihood modeling may return a number of data points based on the models, including gift likelihood and target gift amount, possibly further delineated by separate scores for annual giving, major gifts, and planned gifts. Other profile scores may also be returned. Wealth/gift likelihood modeling focuses on scoring records rather than on returning specific information about salary or stock or real estate holdings.

Q1.15.1 - How often do you do wealth/gift likelihood modeling?
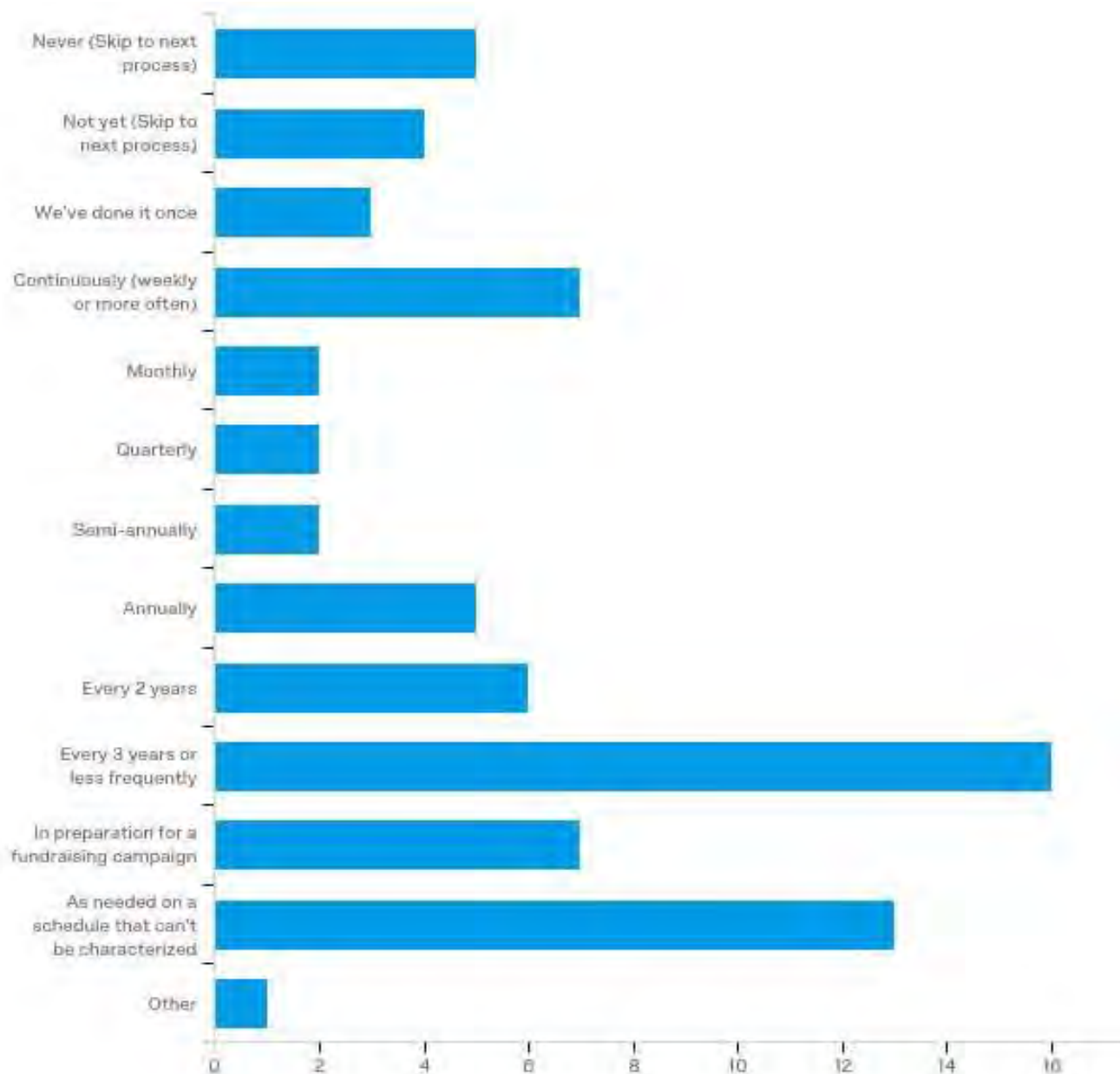
#	Answer	%	Count
1	Never (Skip to next process)	6.85%	5
2	Not yet (Skip to next process)	5.48%	4
3	We've done it once	4.11%	3
4	Continuously (weekly or more often)	9.59%	7
5	Monthly	2.74%	2
6	Quarterly	2.74%	2
7	Semi-annually	2.74%	2
8	Annually	6.85%	5
9	Every 2 years	8.22%	6
10	Every 3 years or less frequently	21.92%	16
11	In preparation for a fundraising campaign	9.59%	7
12	As needed on a schedule that can't be characterized	17.81%	13
13	Other	1.37%	1
	Total	100%	73

Other
We used to do it continuously from 2008-2012 but then it was discontinued
Programming Team in Adv Svcs

Q1.15.2 - How do you conduct this sort of enhancement?
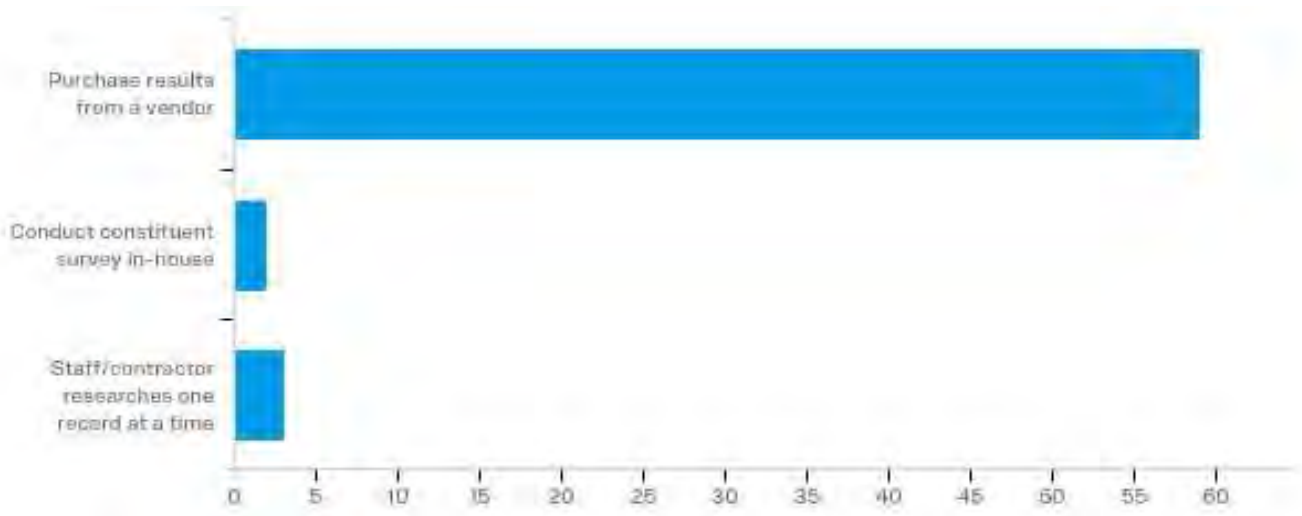
#	Answer	%	Count
1	Purchase results from a vendor	92.19%	59
2	Conduct constituent survey in-house	3.13%	2
3	Staff/contractor researches one record at a time	4.69%	3
	Total	100%	64

Q1.15.3 - How do you apply the results?
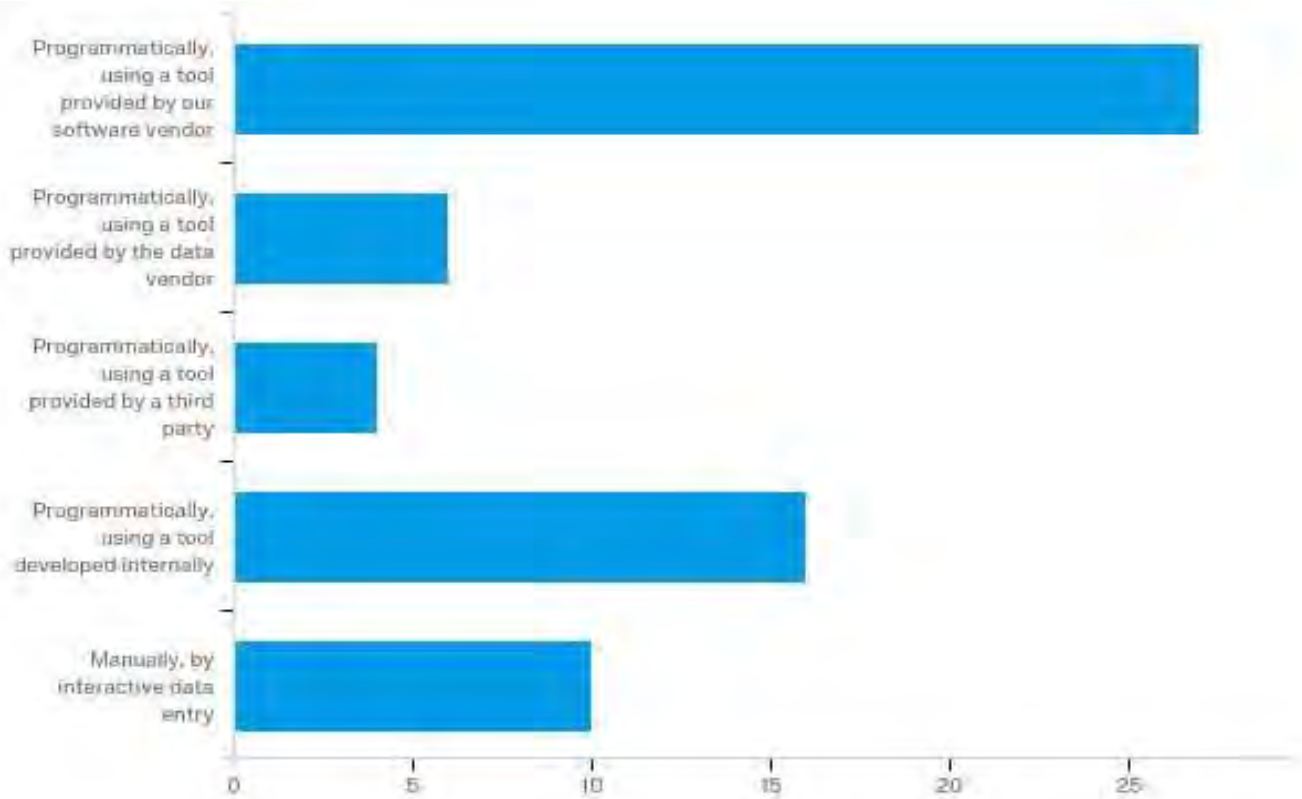
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	42.86%	27
2	Programmatically, using a tool provided by the data vendor	9.52%	6
3	Programmatically, using a tool provided by a third party	6.35%	4
4	Programmatically, using a tool developed internally	25.40%	16
5	Manually, by interactive data entry	15.87%	10
	Total	100%	63

Q1.15.4 - Who applies the results?
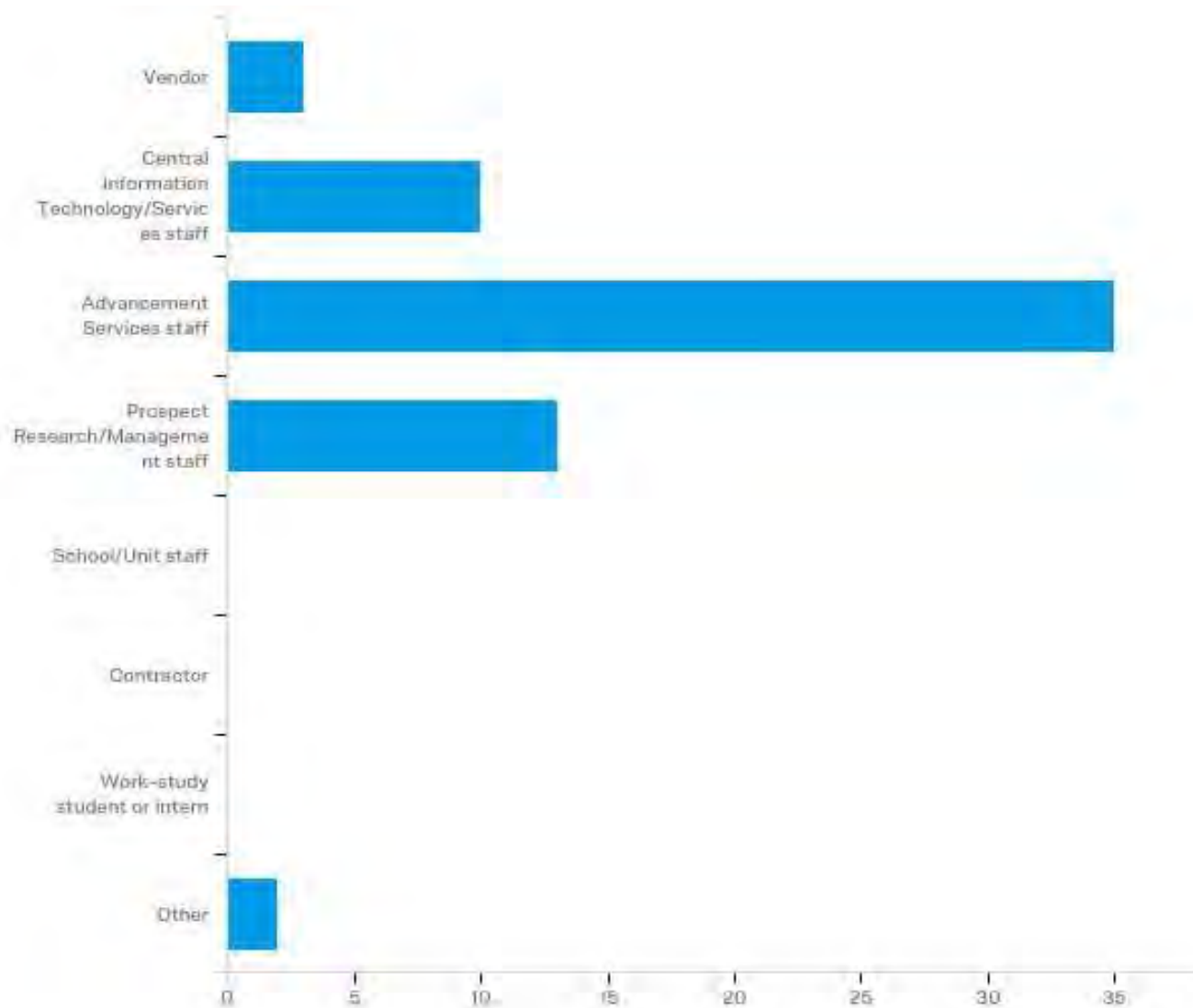
#	Answer	%	Count
1	Vendor	4.76%	3
2	Central Information Technology/Services staff	15.87%	10
3	Advancement Services staff	55.56%	35
4	Prospect Research/Management staff	20.63%	13
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	3.17%	2
	Total	100	6

Other
separate database, only ratings applied programmatically in house
Programming Team in Adv Svcs

Q1.15.5 - How do you review/evaluate/verify the results?
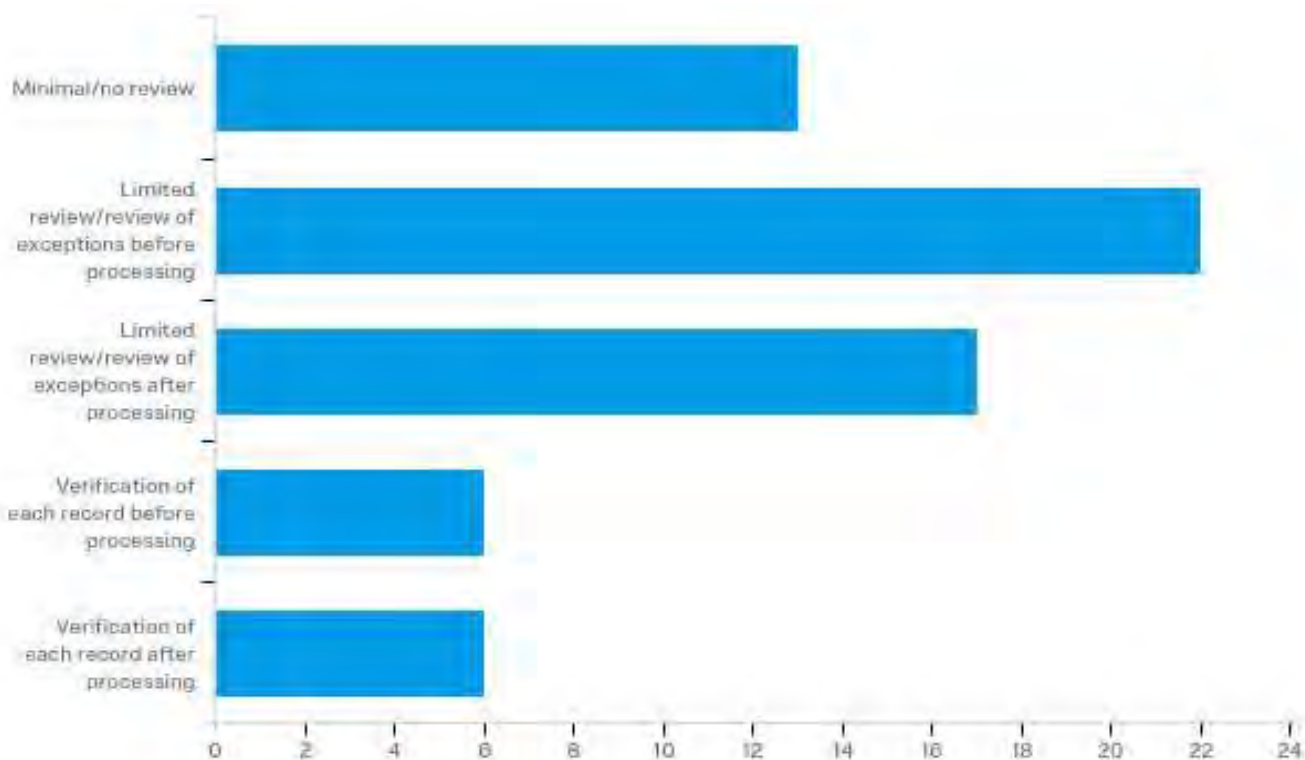
#	Answer	%	Count
1	Minimal/no review	20.31%	13
2	Limited review/review of exceptions before processing	34.38%	22
3	Limited review/review of exceptions after processing	26.56%	17
4	Verification of each record before processing	9.38%	6
5	Verification of each record after processing	9.38%	6
	Total	100%	64

Q1.15.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
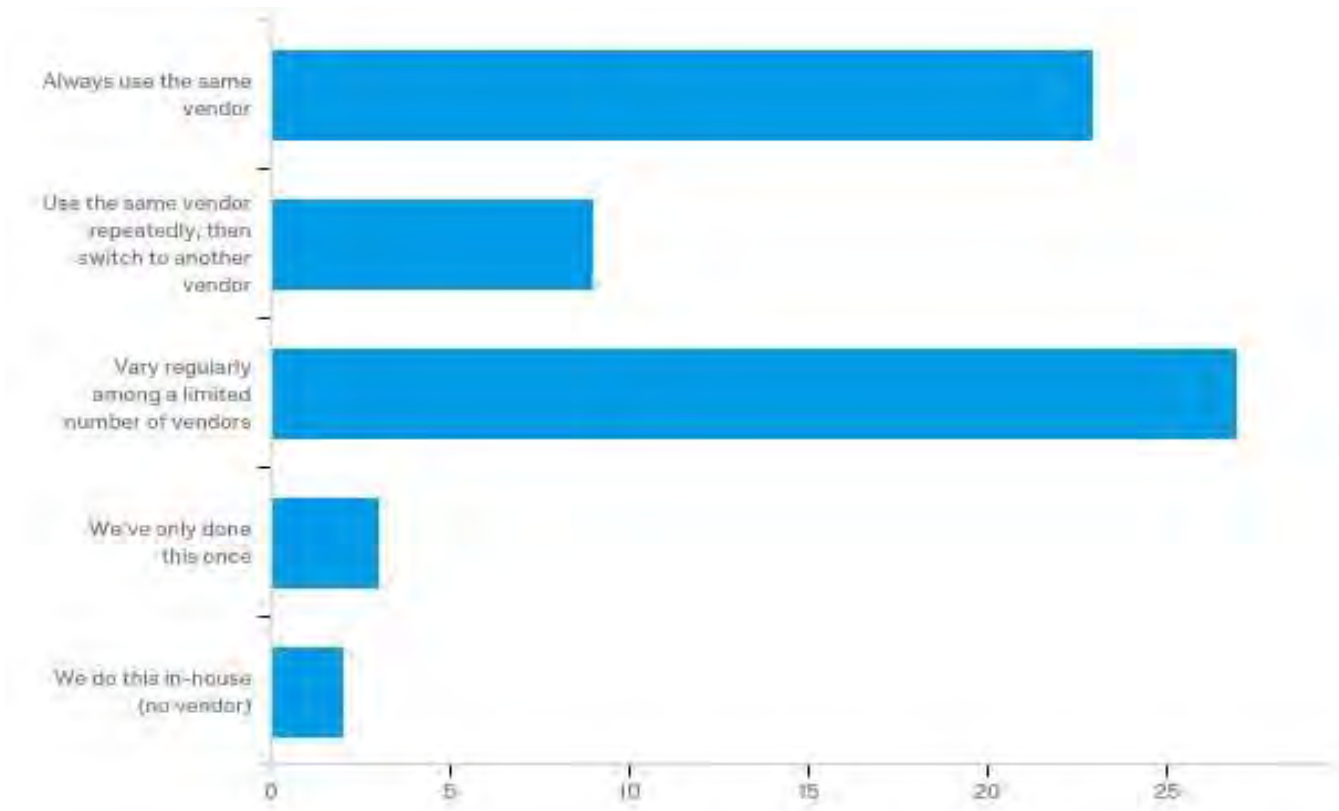
#	Answer	%	Count
1	Always use the same vendor	35.94%	23
2	Use the same vendor repeatedly, then switch to another vendor	14.06%	9
3	Vary regularly among a limited number of vendors	42.19%	27
4	We've only done this once	4.69%	3
5	We do this in-house (no vendor)	3.13%	2
	Total	100%	64

Q1.15.7 - Where do you store the results?
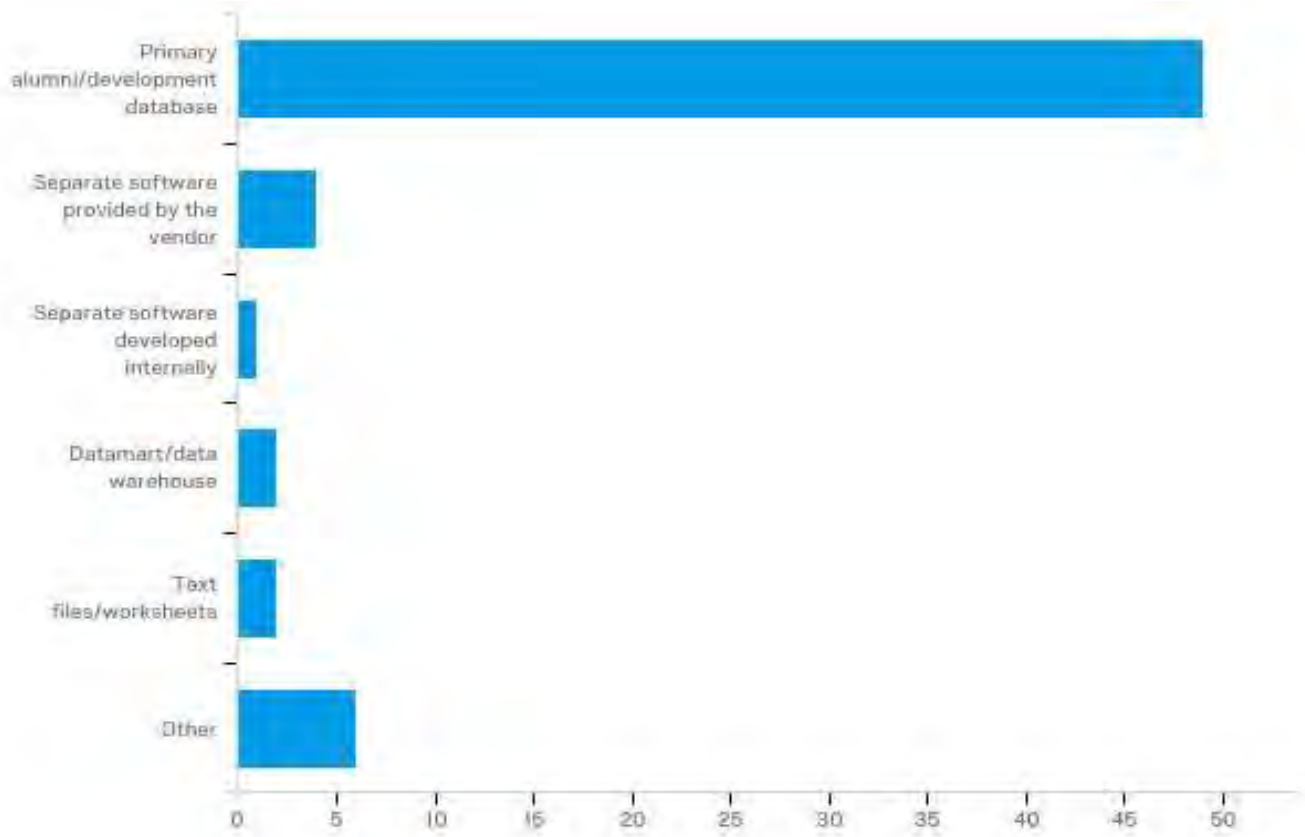
#	Answer	%	Count
1	Primary alumni/development database	76.56%	49
2	Separate software provided by the vendor	6.25%	4
3	Separate software developed internally	1.56%	1
4	Datamart/data warehouse	3.13%	2
5	Text files/worksheets	3.13%	2
6	Other	9.38%	6
	Total	100%	64

Other
Some will Sync to Dev Database
access database except for ratings-primary database
in our database plus in vendor database
Primary database, Separate software provided by the vendor, Datamart
Mix of above
primary database, also separate software from vendor, also data warehouse

Q1.15.8 - On a scale of 0-10, over time, how happy are you with the results of wealth/gift likelihood modeling?

Q1.15.9 - Comments/Additional Information

I'm not responsible for this, but think research staff finds value in it
I keep checking off that Advancement Services staff does this sort of work, however I wanted to mention that the staff member who does this is also our Prospect Researcher and does some prospect management work as well.
As stated on the previous page, we currently do not do this.
Prospect Research drives this process and they are not under Advancement Services in our operation. Advancement Services loads the results.
working on developing and applying affinity scores in-house
We store the general ratings in our alumni/donor database, but some of the other details (depending on the vendor) are in a separate software package provided by the vendor.
We have appended wealth scores into our database. We have also purchased products that store information about wealth in a separate database.
Level of satisfaction with results has been contingent on level of support from Central Information Technology/Services staff in incorporating recent data into alumni/development database as well as level of use of data by Prospect Research/Management staff with fundraising colleagues - it is not a reflection on the product received from the vendor, which was, as far as we can tell, solid work. There is also an amount of peer review that happens at the prospect-by-prospect level where those results are not fed back into our alumni/development database at this time.
The results are very spotty.
I appreciate the results we get, but we do not apply the findings in a usable way, nor are we timely about it.
Performed one set of modeling with a vendor about five years ago. This was expensive and not very helpful. Currently our analytics team performs this modeling.

Q1.16 Wealth/Asset Appends

Wealth/asset appends provide specific information about the financial assets of constituents, typically to identify constituents who have the resources to make leadership or major gifts. Identifying information, most commonly name and address, is used to match constituents to a number of reference databases, including databases that identify stock holdings by officers and directors of public companies and individuals or entities owning more than 10% of a company's stock, records of real estate ownership, databases with information of privately-held companies, etc. Salary information may be returned.

Wealth/asset appends differ from wealth/gift likelihood modeling in that detailed information about specific assets is returned, rather than only scores that might, in part, be derived from such information. Wealth/asset appends are sometimes performed in the context of modeling, with the specific asset information returned for constituents with high scores.

Q1.16.1 - How often do you do wealth/asset appends?

#	Answer	%	Count
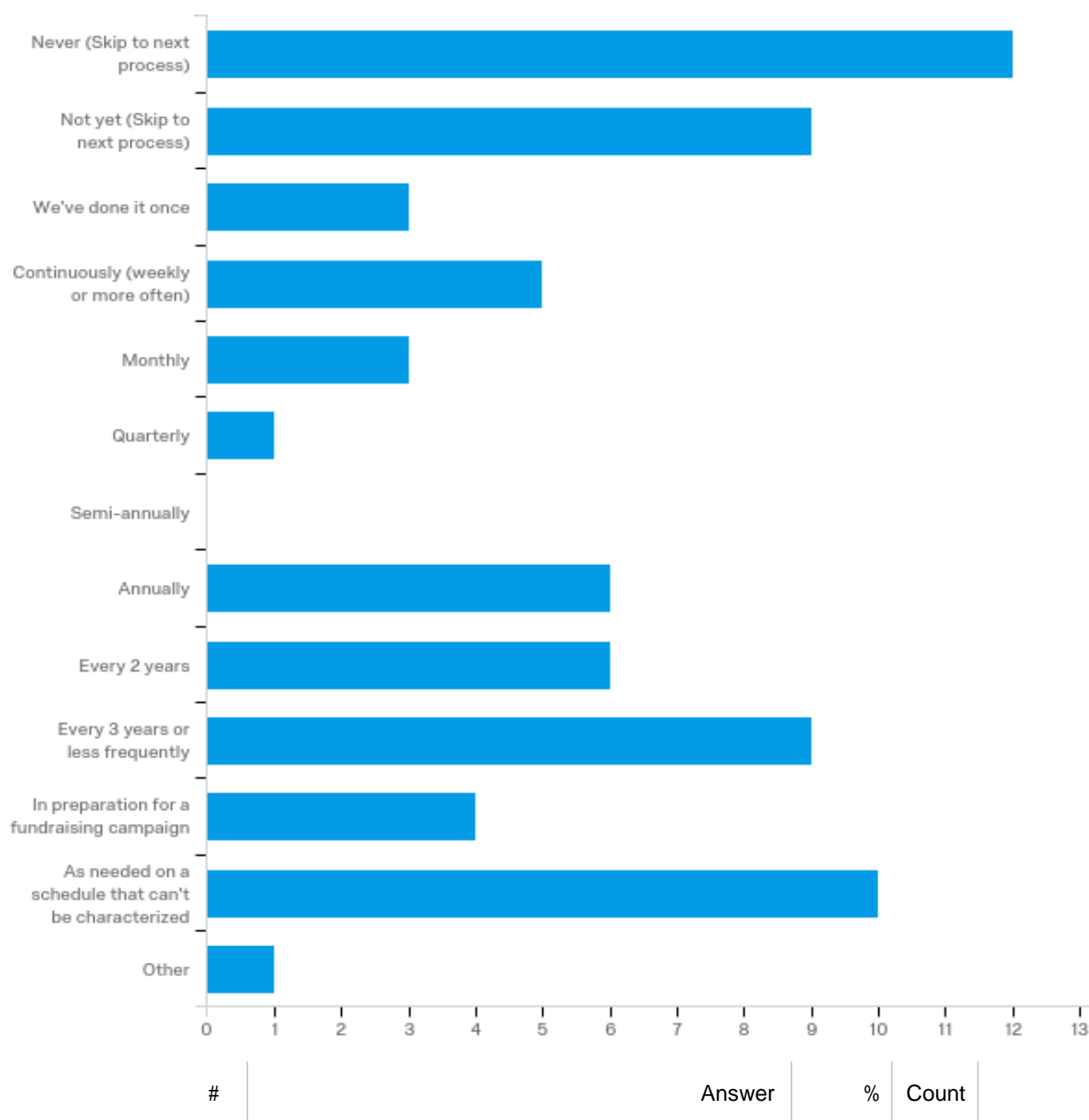
1	Never (Skip to next process)	17.39%	12	
2	Not yet (Skip to next process)	13.04%	9	
3	We've done it once	4.35%	3	
4	Continuously (weekly or more often)	7.25%	5	
5	Monthly	4.35%	3	
6	Quarterly	1.45%	1	
7	Semi-annually	0.00%	0	
8	Annually	8.70%	6	
9	Every 2 years	8.70%	6	
10	Every 3 years or less frequently	13.04%	9	
11	In preparation for a fundraising campaign	5.80%	4	
12	As needed on a schedule that can't be characterized	14.49%	10	
13	Other	1.45%	1	
	Total	100%	69	

Other
On an individual basis as needed.

Q1.16.2 - How do you conduct this sort of enhancement?
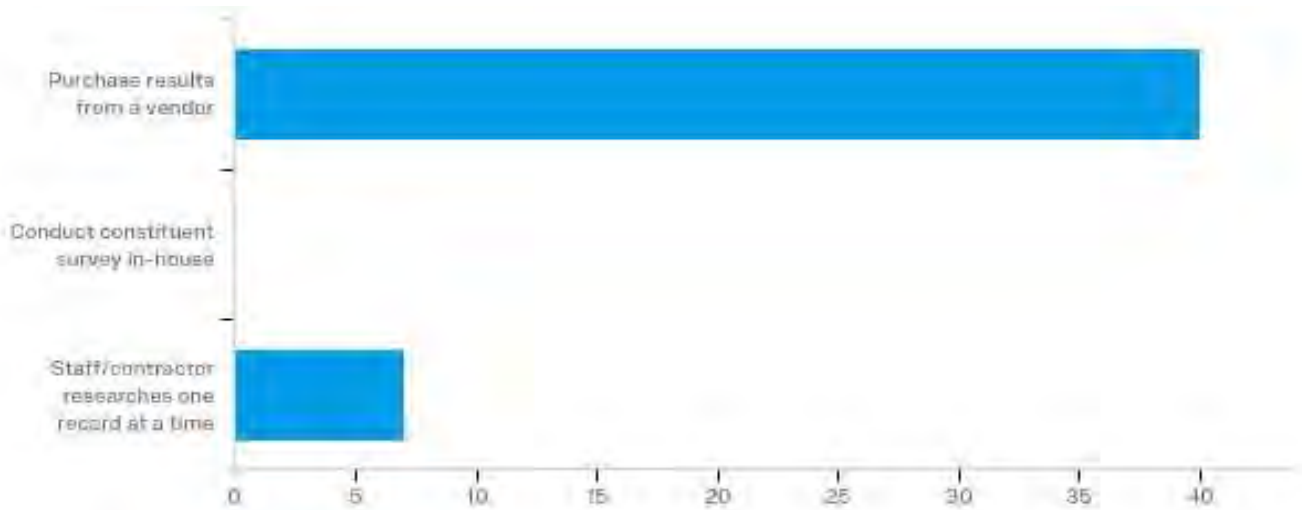
#	Answer	%	Count
1	Purchase results from a vendor	85.11%	40
2	Conduct constituent survey in-house	0.00%	0
3	Staff/contractor researches one record at a time	14.89%	7
	Total	100%	47

Q1.16.3 - How do you apply the results?
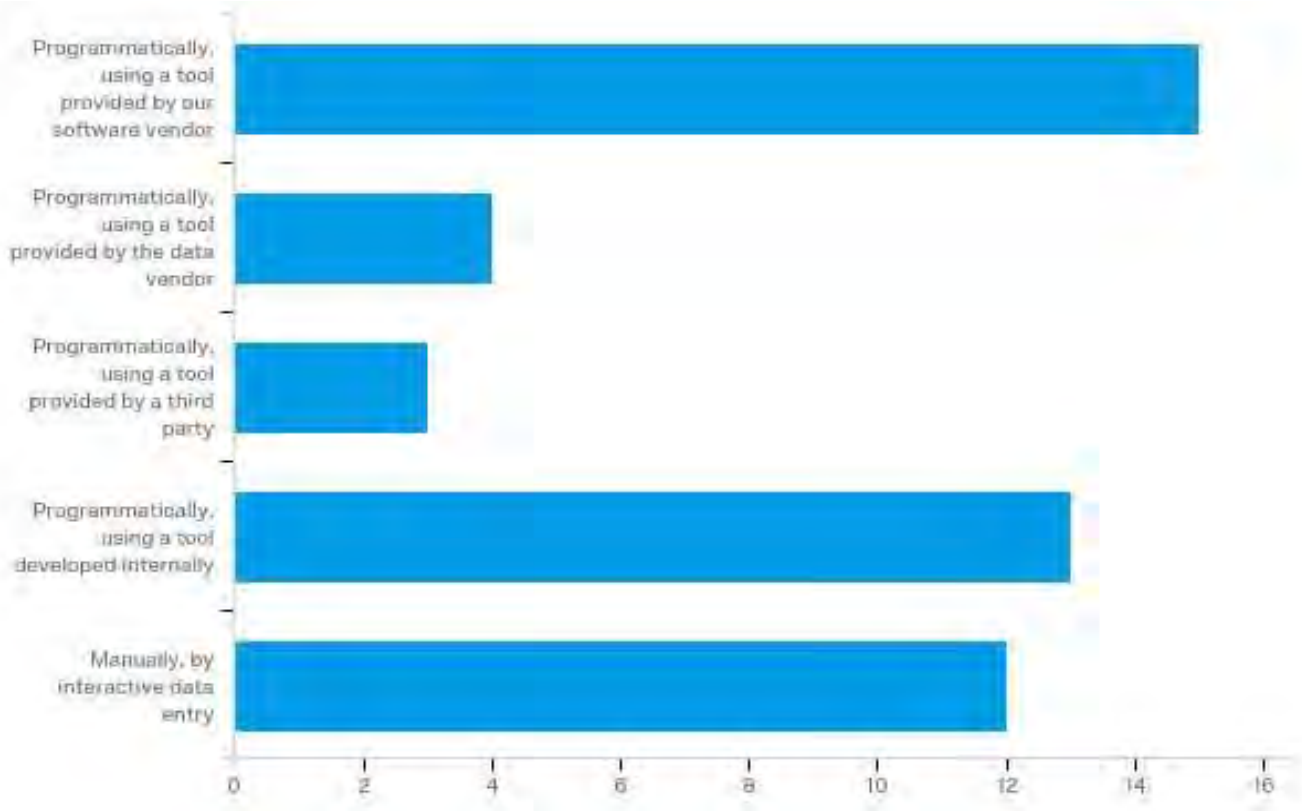
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	31.91%	15
2	Programmatically, using a tool provided by the data vendor	8.51%	4
3	Programmatically, using a tool provided by a third party	6.38%	3
4	Programmatically, using a tool developed internally	27.66%	13
5	Manually, by interactive data entry	25.53%	12
	Total	100%	47

Q1.16.4 - Who applies the results?
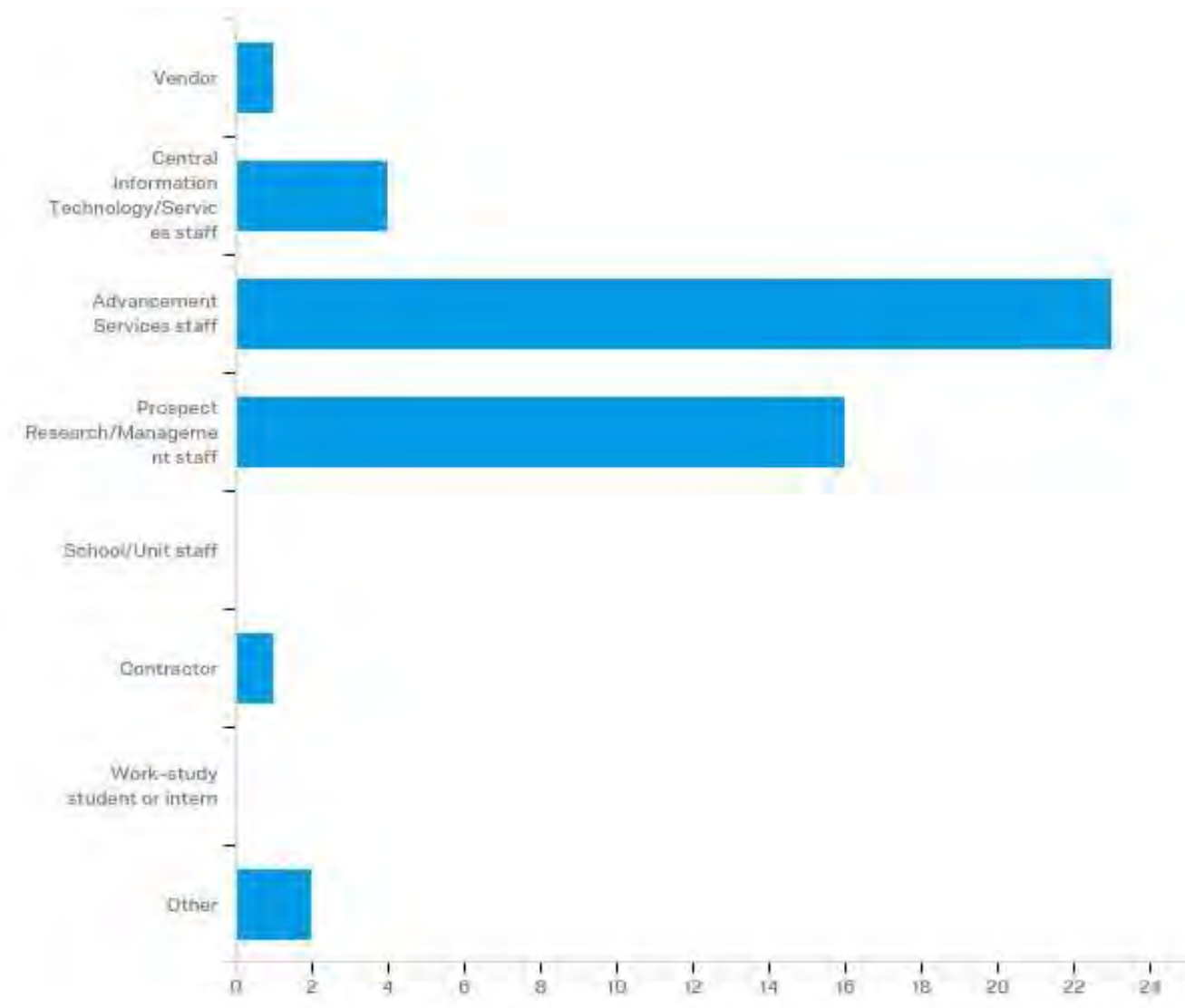
#	Answer	%	Count
1	Vendor	2.13%	1
2	Central Information Technology/Services staff	8.51%	4
3	Advancement Services staff	48.94%	23
4	Prospect Research/Management staff	34.04%	16
5	School/Unit staff	0.00%	0
6	Contractor	2.13%	1
7	Work-study student or intern	0.00%	0
8	Other	4.26%	2
	Total	100%	47

Other
Gift Management Staff
Programming Team in Adv Svcs

Q1.16.5 - How do you review/evaluate/verify the results?
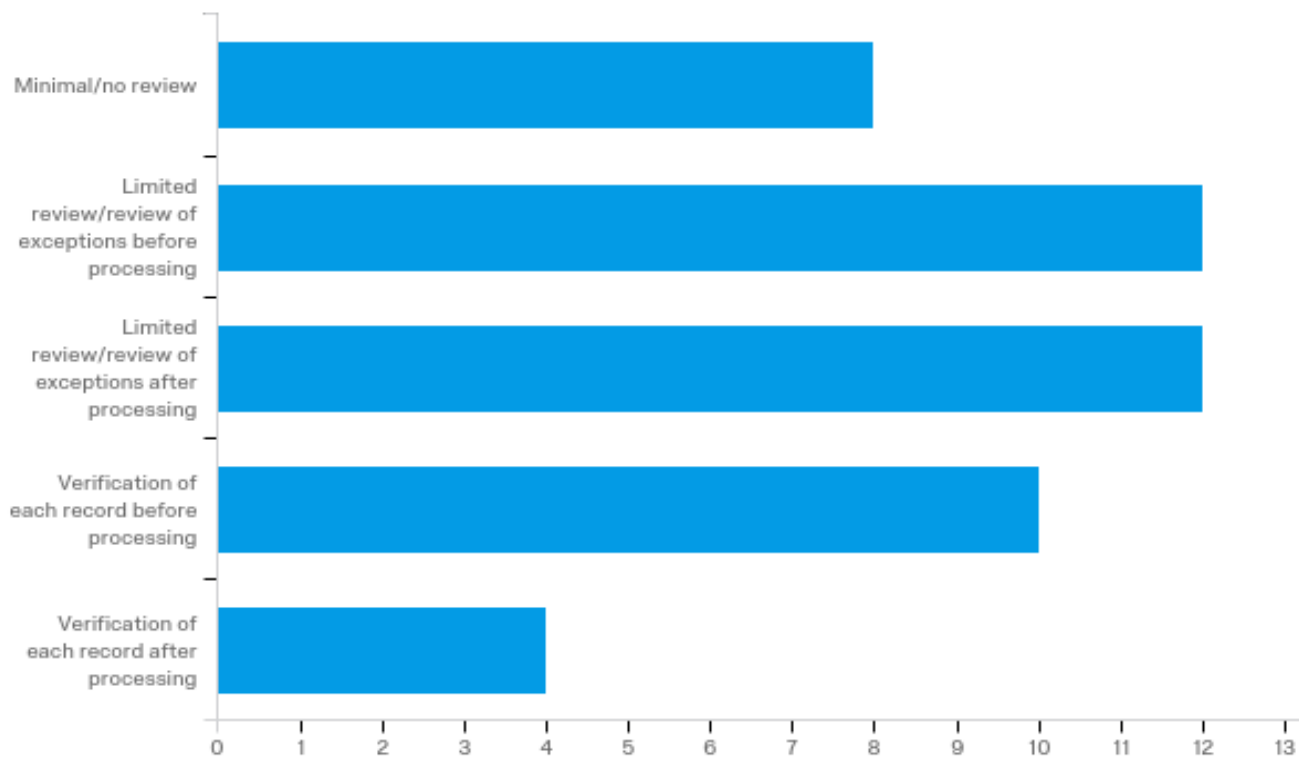
#	Answer	%	Count
1	Minimal/no review	17.39%	8
2	Limited review/review of exceptions before processing	26.09%	12
3	Limited review/review of exceptions after processing	26.09%	12
4	Verification of each record before processing	21.74%	10
5	Verification of each record after processing	8.70%	4
	Total	100%	46

Q1.16.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
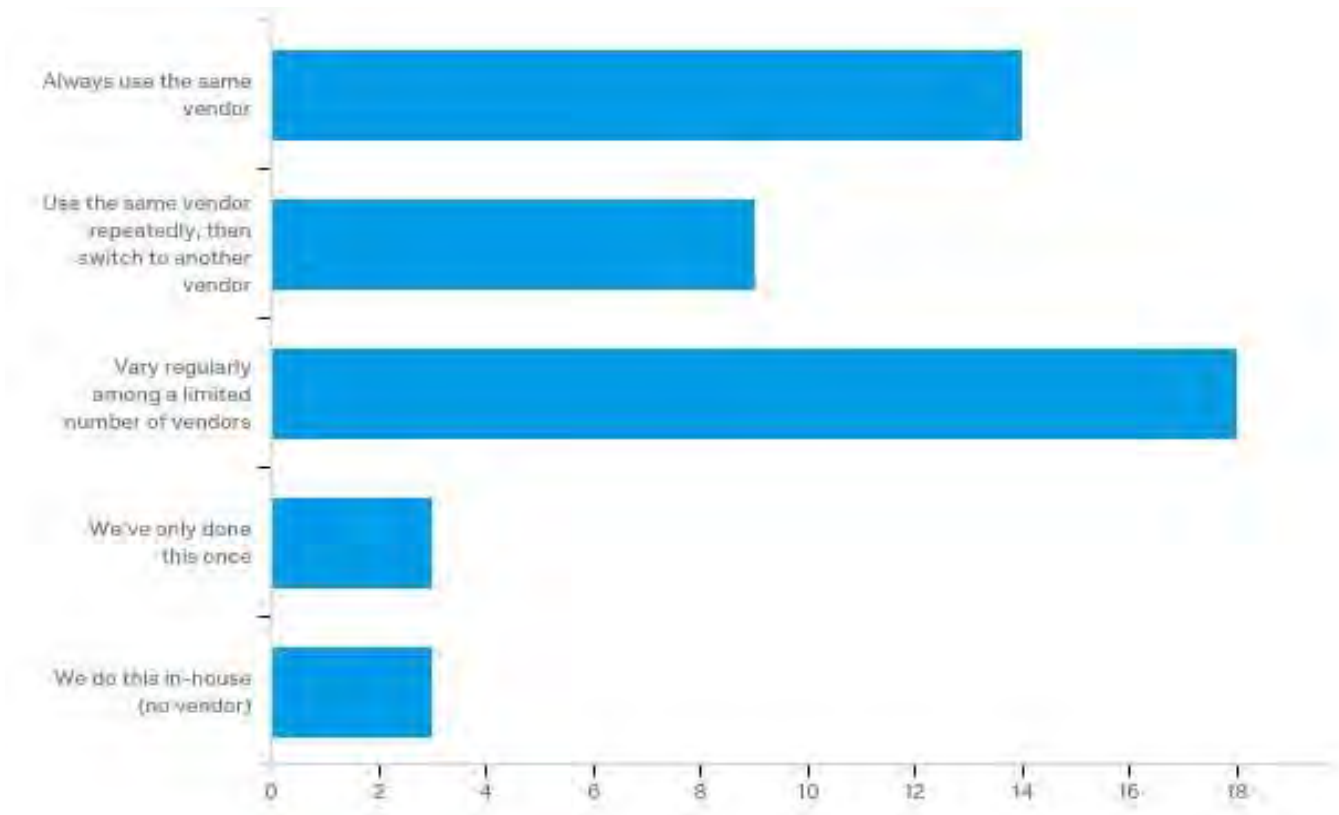
#	Answer	%	Count
1	Always use the same vendor	29.79%	14
2	Use the same vendor repeatedly, then switch to another vendor	19.15%	9
3	Vary regularly among a limited number of vendors	38.30%	18
4	We've only done this once	6.38%	3
5	We do this in-house (no vendor)	6.38%	3
	Total	100%	47

Q1.16.7 - Where do you store the results?
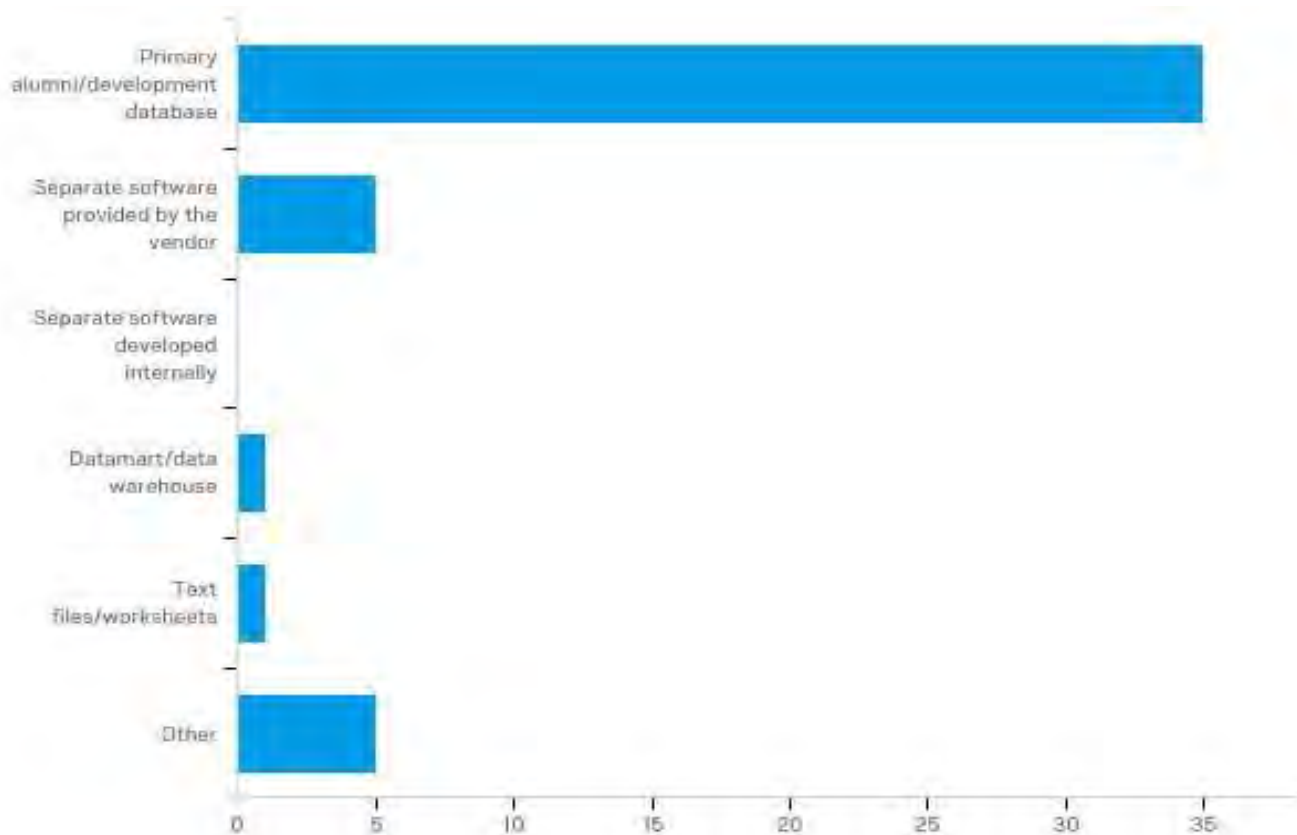
#	Answer	%	Count
1	Primary alumni/development database	74.47%	35
2	Separate software provided by the vendor	10.64%	5
3	Separate software developed internally	0.00%	0
4	Datamart/data warehouse	2.13%	1
5	Text files/worksheets	2.13%	1
6	Other	10.64%	5
	Total	100%	47

Other
Development database and at times in custom reports
Primary, Vendor Software, Datamart
Software provided by vendor and some pieces in development database
primary database, separate software, and data warehouse

Q1.16.8 - On a scale of 0-10, over time, how happy are you with the results of wealth/asset appends?

37%
7

20%
8

7.04

0   10
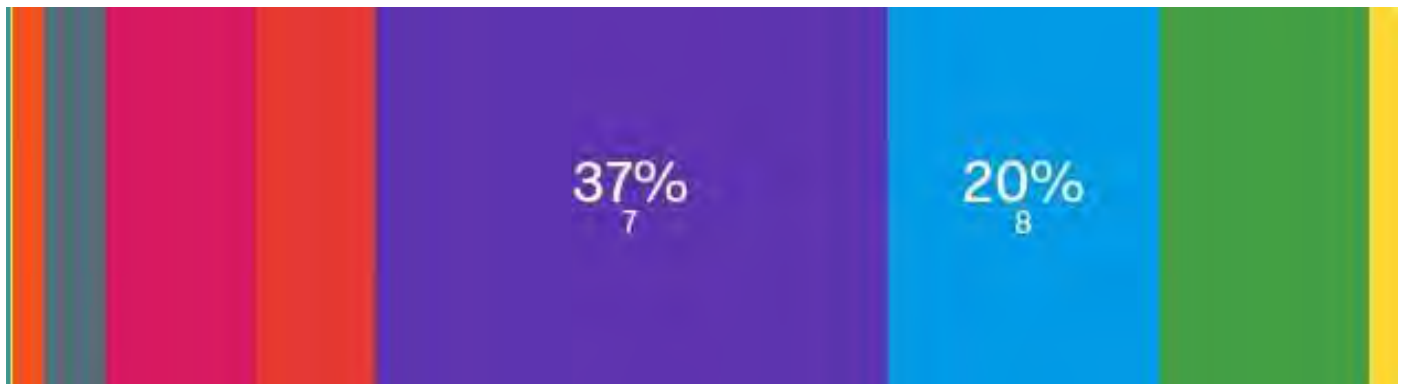
Q1.16.9 - Comments/Additional Information

Manual searches are performed by Research staff and entered into database. We've also used a vendor and applied the resulting ratings.
As this is a more traditional method of segmenting prospects, our fundraising enterprise (both Advancement Services and fundraising staff) are more comfortable utilizing wealth scores. Although there are still fundraisers who do not understand wealth/asset scoring, these scores are used more regularly and consistently than modeling.
see prior comments

Q1.17 Board Membership Append

Board membership appends provide specific information about the for-profit and non- profit governing boards on which a constituent serves. Identifying information, most commonly name and address, is used to match constituents to a reference database, and information about governing board service from the reference database is returned.

Q1.17.1 - How often do you do a board membership append?
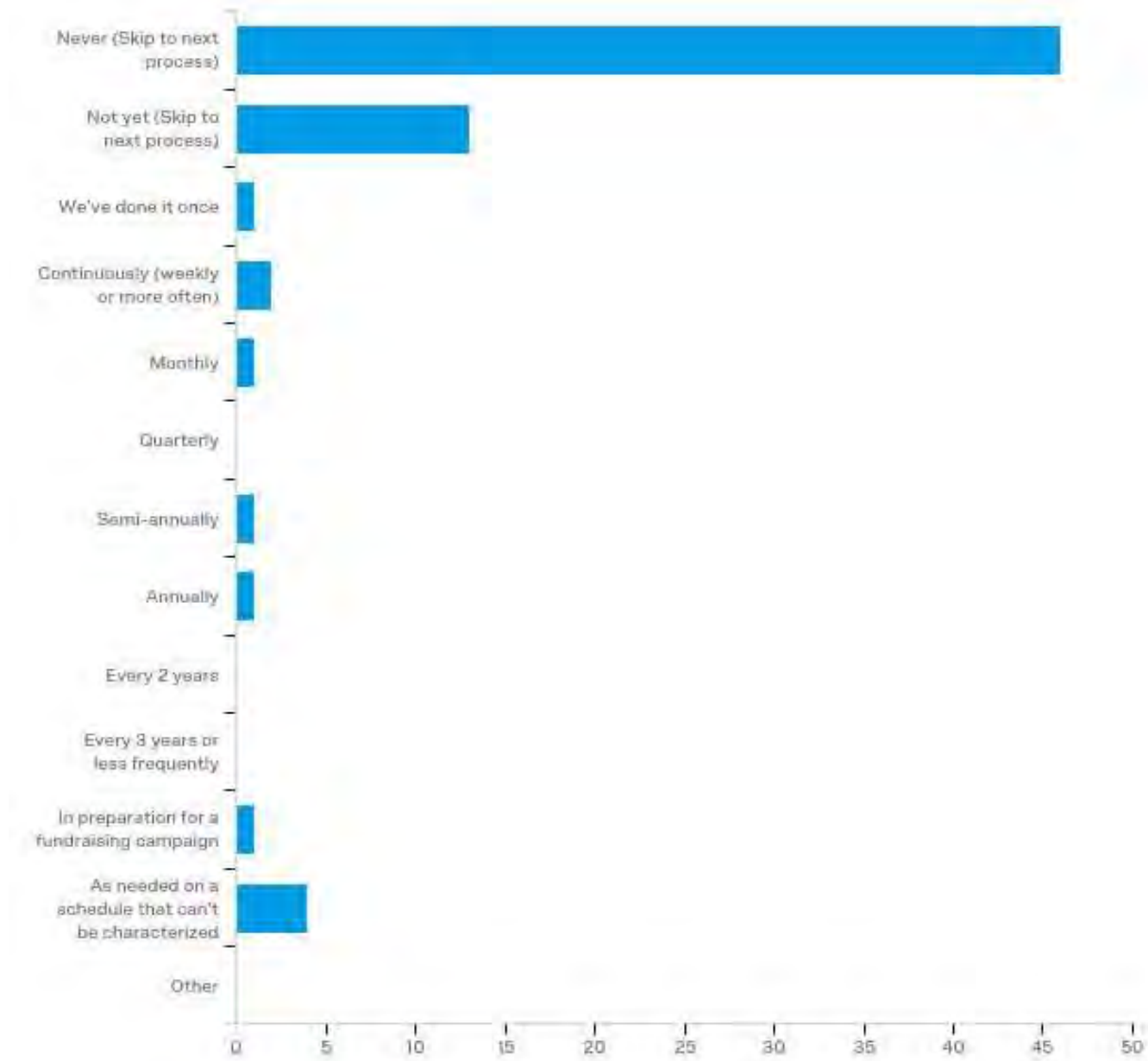
#	Answer	%	Count
1	Never (Skip to next process)	65.71%	46
2	Not yet (Skip to next process)	18.57%	13
3	We've done it once	1.43%	1
4	Continuously (weekly or more often)	2.86%	2
5	Monthly	1.43%	1
6	Quarterly	0.00%	0
7	Semi-annually	1.43%	1
8	Annually	1.43%	1
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	0.00%	0
11	In preparation for a fundraising campaign	1.43%	1
12	As needed on a schedule that can't be characterized	5.71%	4
13	Other	0.00%	0
	Total	100%	70

Q1.17.2 - How do you conduct this sort of enhancement?
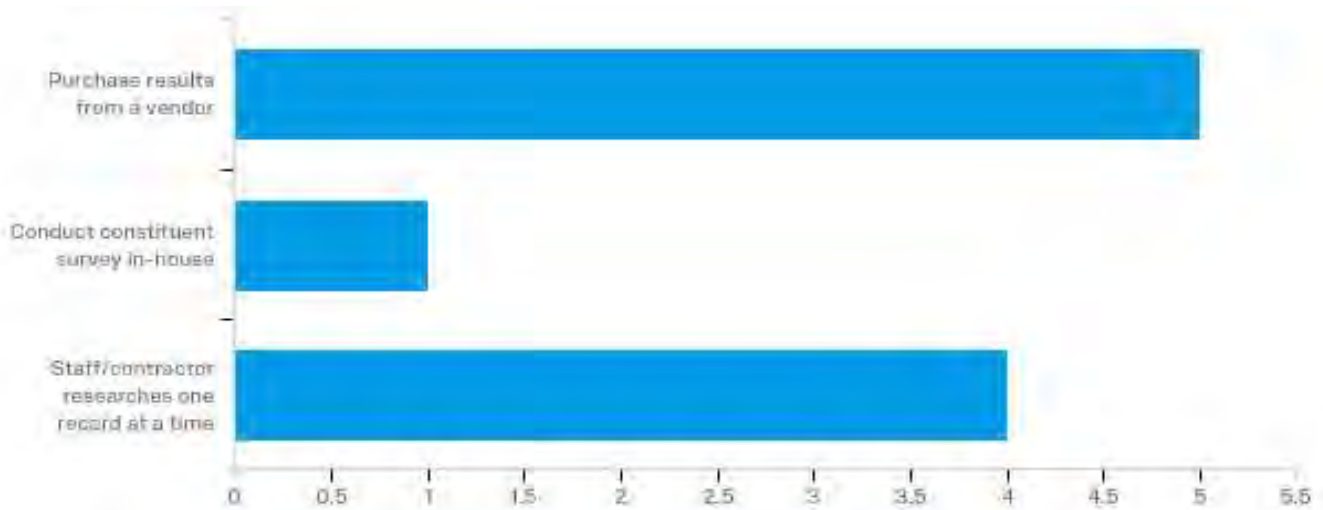
#	Answer	%	Count
1	Purchase results from a vendor	50.00%	5
2	Conduct constituent survey in-house	10.00%	1
3	Staff/contractor researches one record at a time	40.00%	4
	Total	100%	10

Q1.17.3 - How do you apply the results?
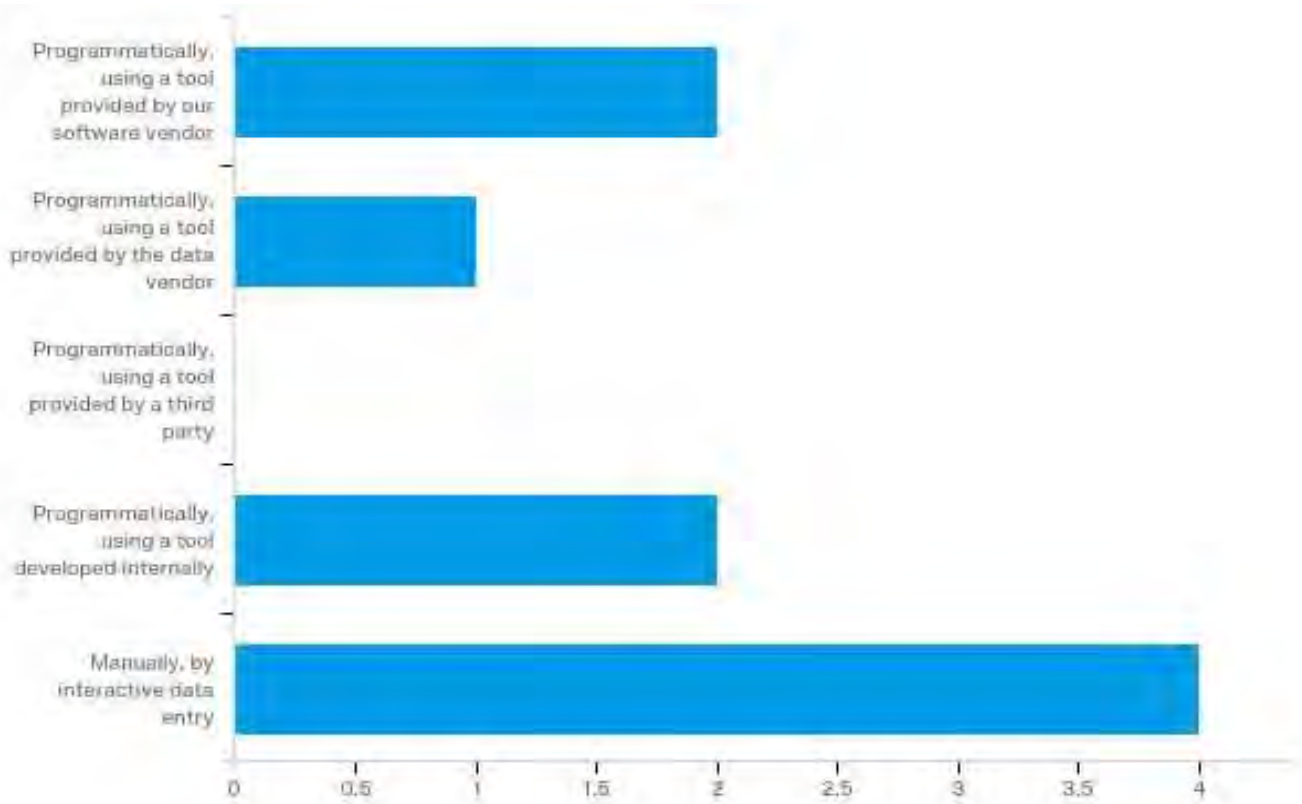
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	22.22%	2
2	Programmatically, using a tool provided by the data vendor	11.11%	1
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	22.22%	2
5	Manually, by interactive data entry	44.44%	4
	Total	100%	9

Q1.17.4 - Who applies the results?
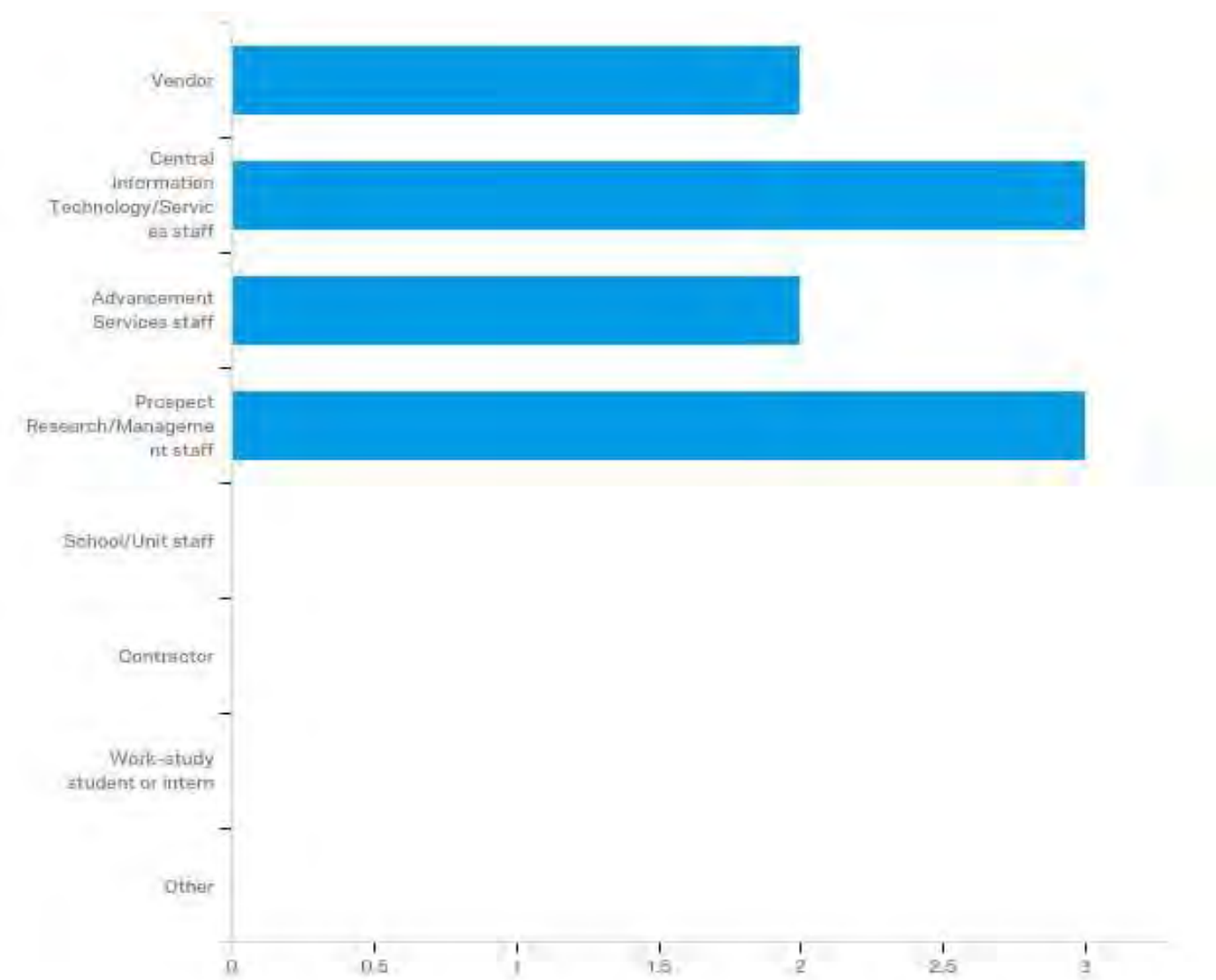
#	Answer	%	Count
1	Vendor	20.00%	2
2	Central Information Technology/Services staff	30.00%	3
3	Advancement Services staff	20.00%	2
4	Prospect Research/Management staff	30.00%	3
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	0.00%	0
	Total	100%	10

Q1.17.5 - How do you review/evaluate/verify the results?
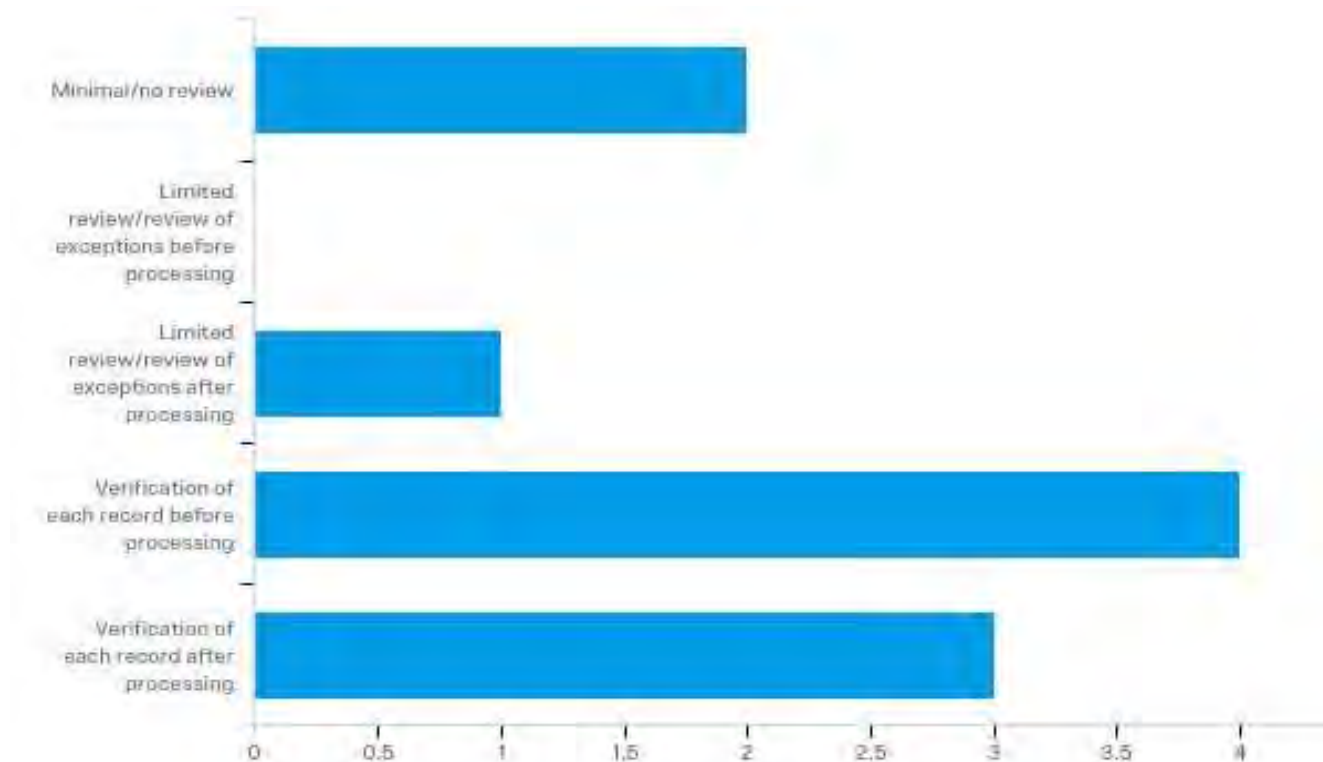
#	Answer	%	Count
1	Minimal/no review	20.00%	2
2	Limited review/review of exceptions before processing	0.00%	0
3	Limited review/review of exceptions after processing	10.00%	1
4	Verification of each record before processing	40.00%	4
5	Verification of each record after processing	30.00%	3
	Total	100%	10

Q1.17.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
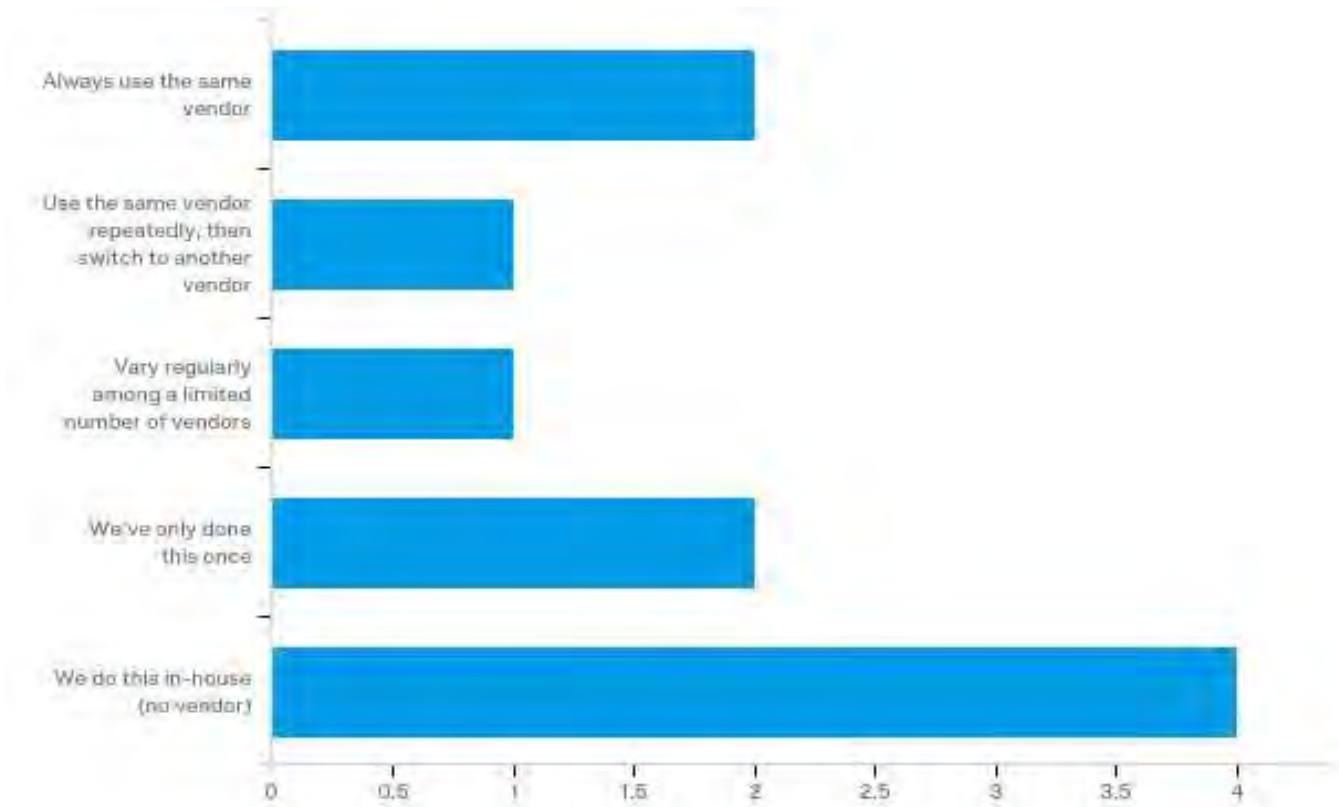
#	Answer	%	Count
1	Always use the same vendor	20.00%	2
2	Use the same vendor repeatedly, then switch to another vendor	10.00%	1
3	Vary regularly among a limited number of vendors	10.00%	1
4	We've only done this once	20.00%	2
5	We do this in-house (no vendor)	40.00%	4
	Total	100%	10

Q1.17.7 - Where do you store the results?
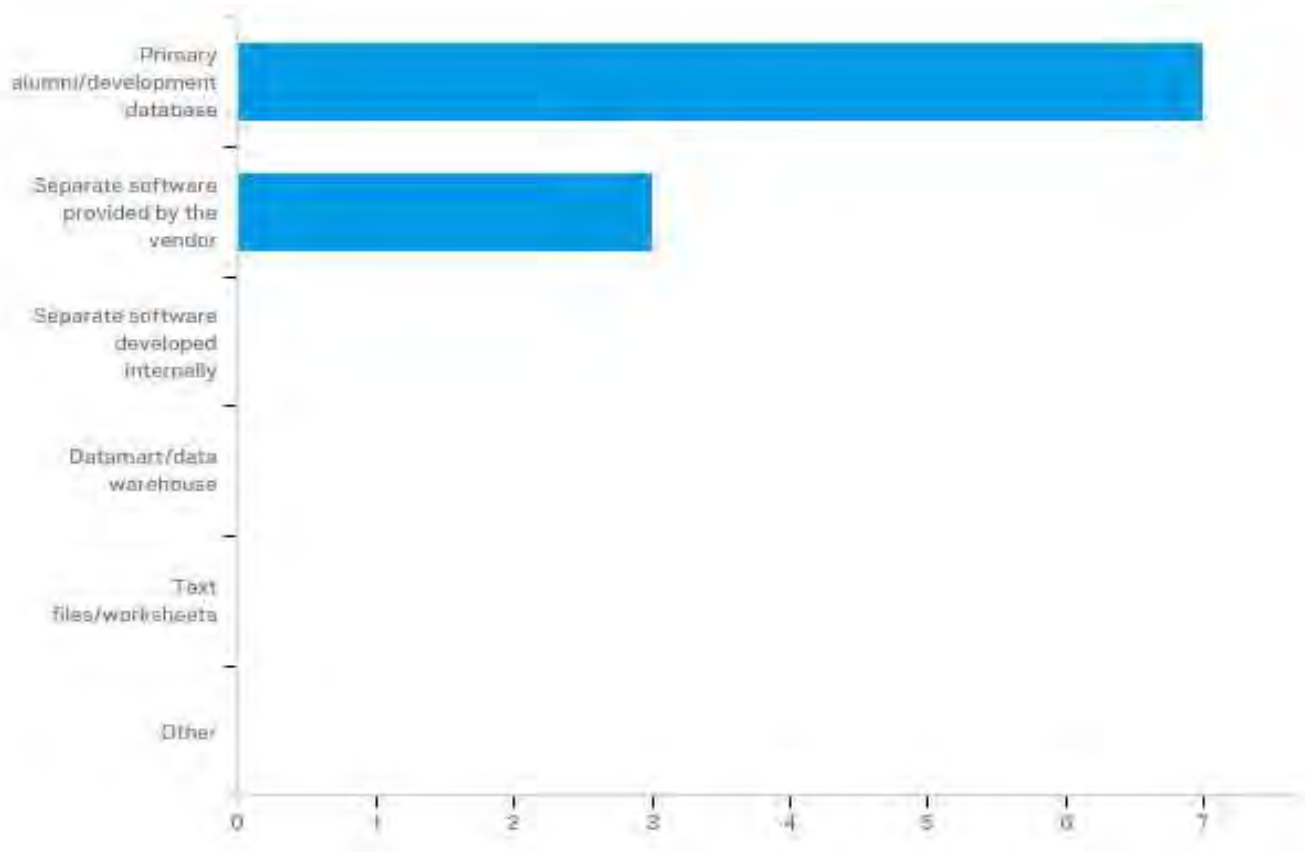
#	Answer	%	Count
1	Primary alumni/development database	70.00%	7
2	Separate software provided by the vendor	30.00%	3
3	Separate software developed internally	0.00%	0
4	Datamart/data warehouse	0.00%	0
5	Text files/worksheets	0.00%	0
6	Other	0.00%	0
	Total	100%	10

Q1.17.8 - On a scale of 0-10, over time, how happy are you with the results of board membership appends?

20%
7

20%
8

30%
9

7.5

0

10

Q1.17.9 - Comments/Additional Information

We purchased this information from a vendor. It was kept in a separate database and not appended to ours.

The board information we have received from screening is only as a result of wealth/asset screening and those specific board results are not fed back into our alumni/development database at a macro level. Board information entered in our alumni/development database is as a result of prospect-by-prospect identification and verification, including historical board service.

Q1.18 Append of Philanthropic Giving to Other Organizations

Philanthropic giving to other organizations appends provide specific information about gifts that a constituent has made to other non-profit organizations. The information may include specific gift amounts or levels of giving to an organization. Identifying information, most commonly name and address, is used to match constituents to a reference database, and information about gifts from the reference database is returned.

Q1.18.1 - How often do you do an append of philanthropic giving to other organizations?
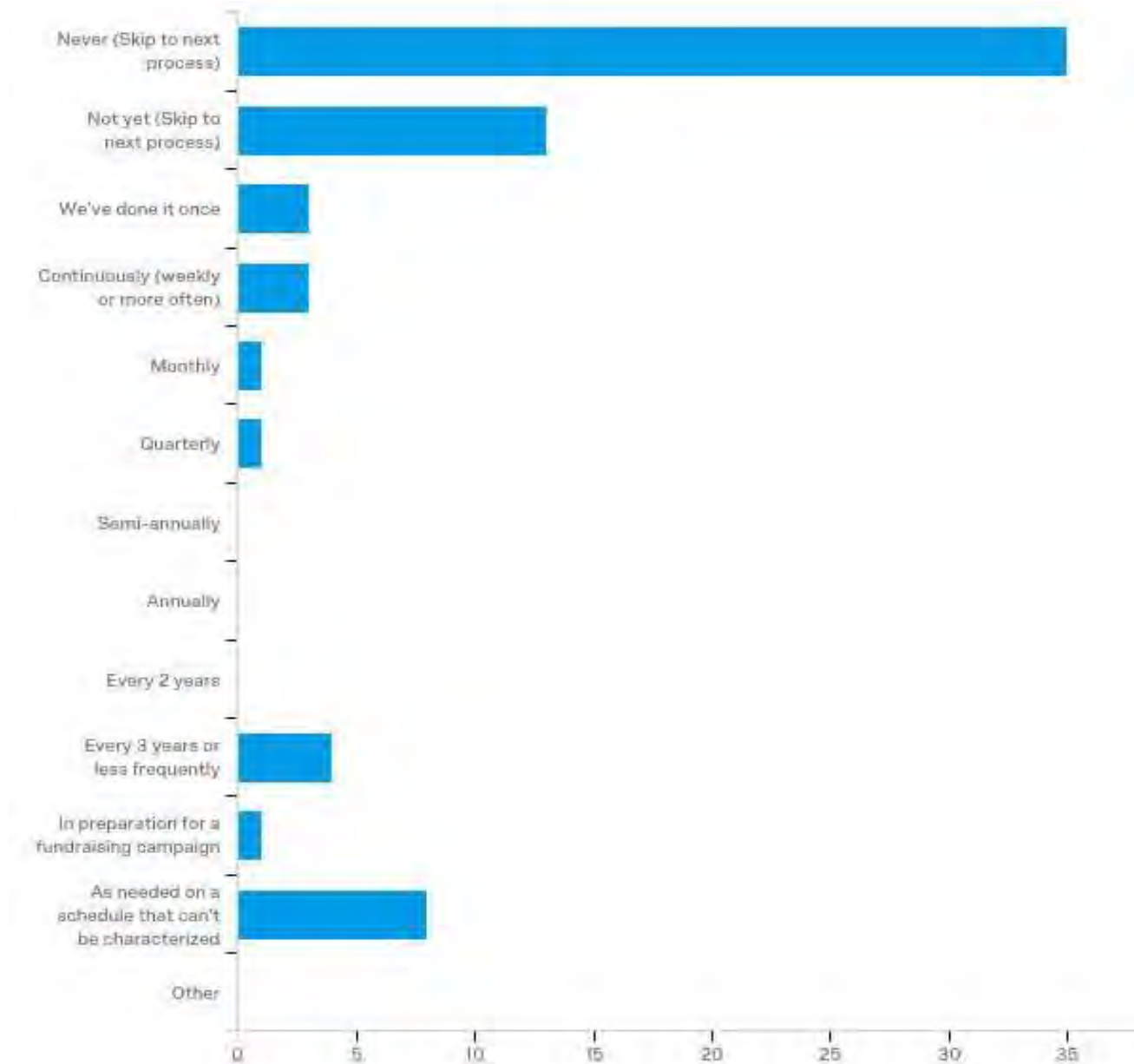
#	Answer	%	Count
1	Never (Skip to next process)	50.72%	35
2	Not yet (Skip to next process)	18.84%	13
3	We've done it once	4.35%	3
4	Continuously (weekly or more often)	4.35%	3
5	Monthly	1.45%	1
6	Quarterly	1.45%	1
7	Semi-annually	0.00%	0
8	Annually	0.00%	0
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	5.80%	4
11	In preparation for a fundraising campaign	1.45%	1
12	As needed on a schedule that can't be characterized	11.59%	8
13	Other	0.00%	0
	Total	100%	69

Q1.18.2 - How do you conduct this sort of enhancement?
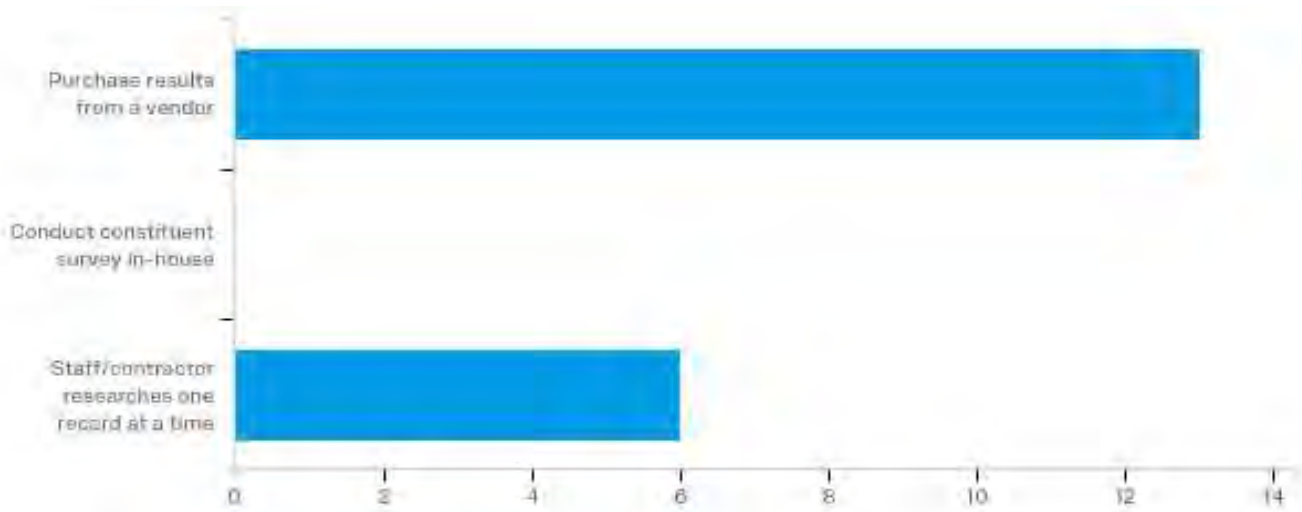
#	Answer	%	Count
1	Purchase results from a vendor	68.42%	13
2	Conduct constituent survey in-house	0.00%	0
3	Staff/contractor researches one record at a time	31.58%	6
	Total	100%	19

Q1.18.3 - How do you apply the results?
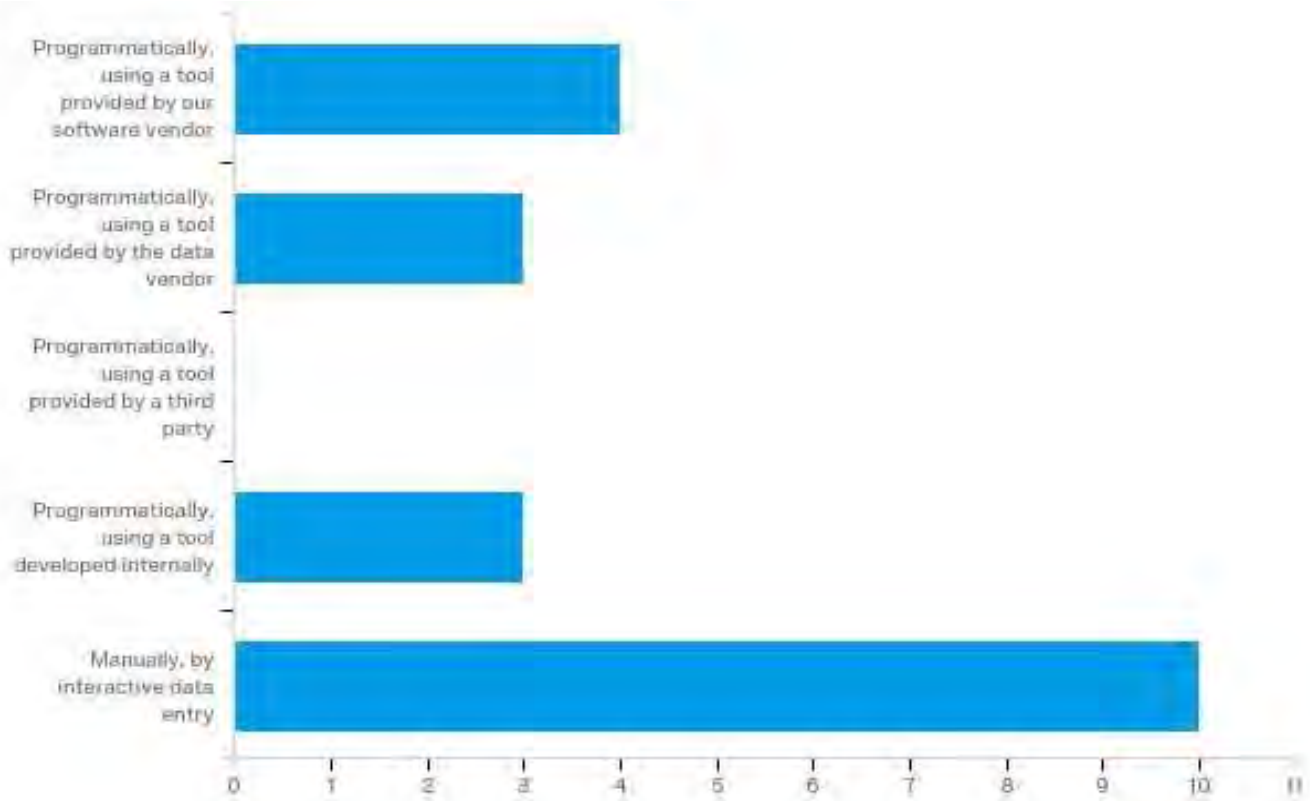
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	20.00%	4
2	Programmatically, using a tool provided by the data vendor	15.00%	3
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	15.00%	3
5	Manually, by interactive data entry	50.00%	10
	Total	100%	20

Q1.18.4 - Who applies the results?
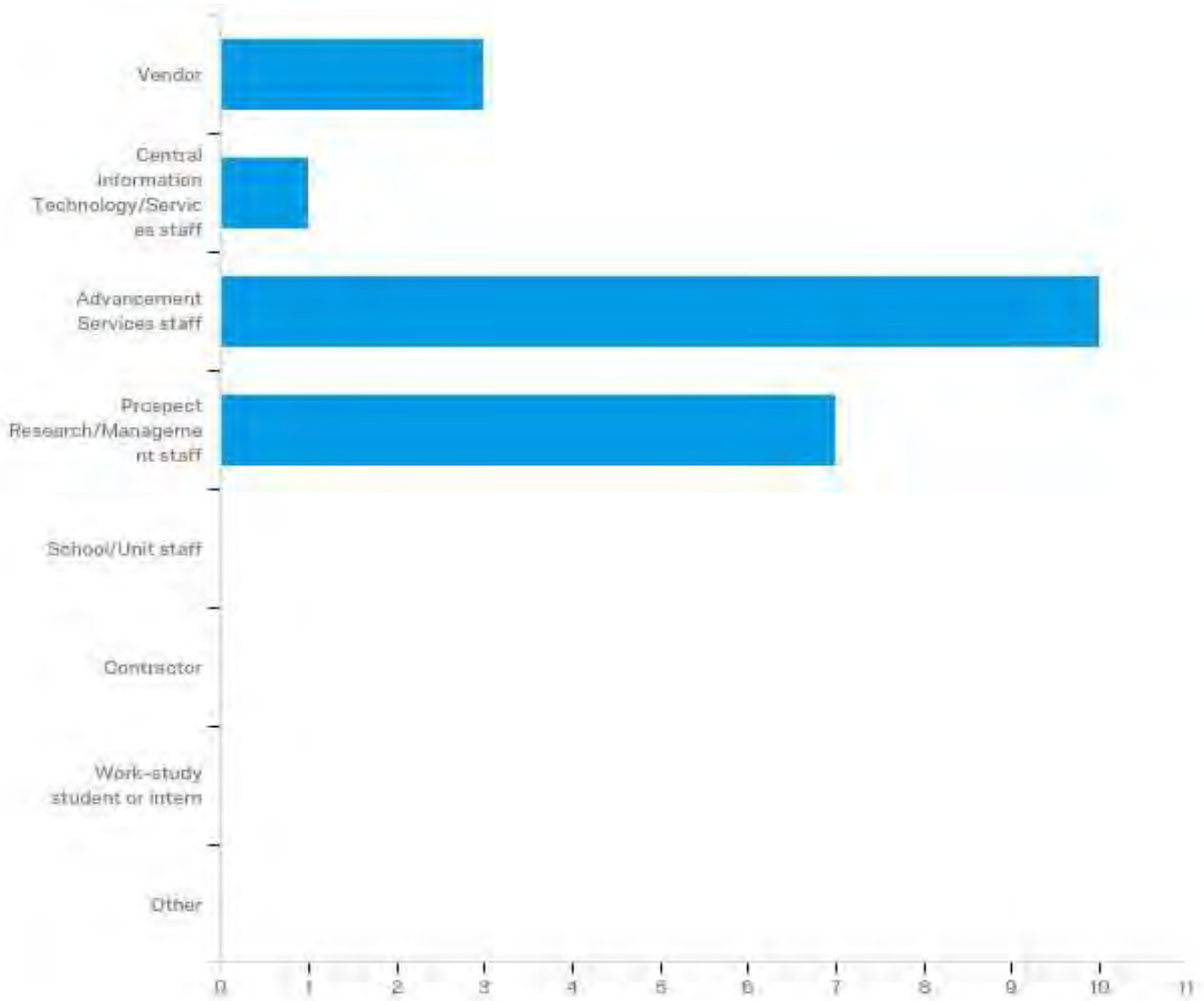
#	Answer	%	Count
1	Vendor	14.29%	3
2	Central Information Technology/Services staff	4.76%	1
3	Advancement Services staff	47.62%	10
4	Prospect Research/Management staff	33.33%	7
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	0.00%	0
8	Other	0.00%	0
	Total	100%	21

Q1.18.5 - How do you review/evaluate/verify the results?
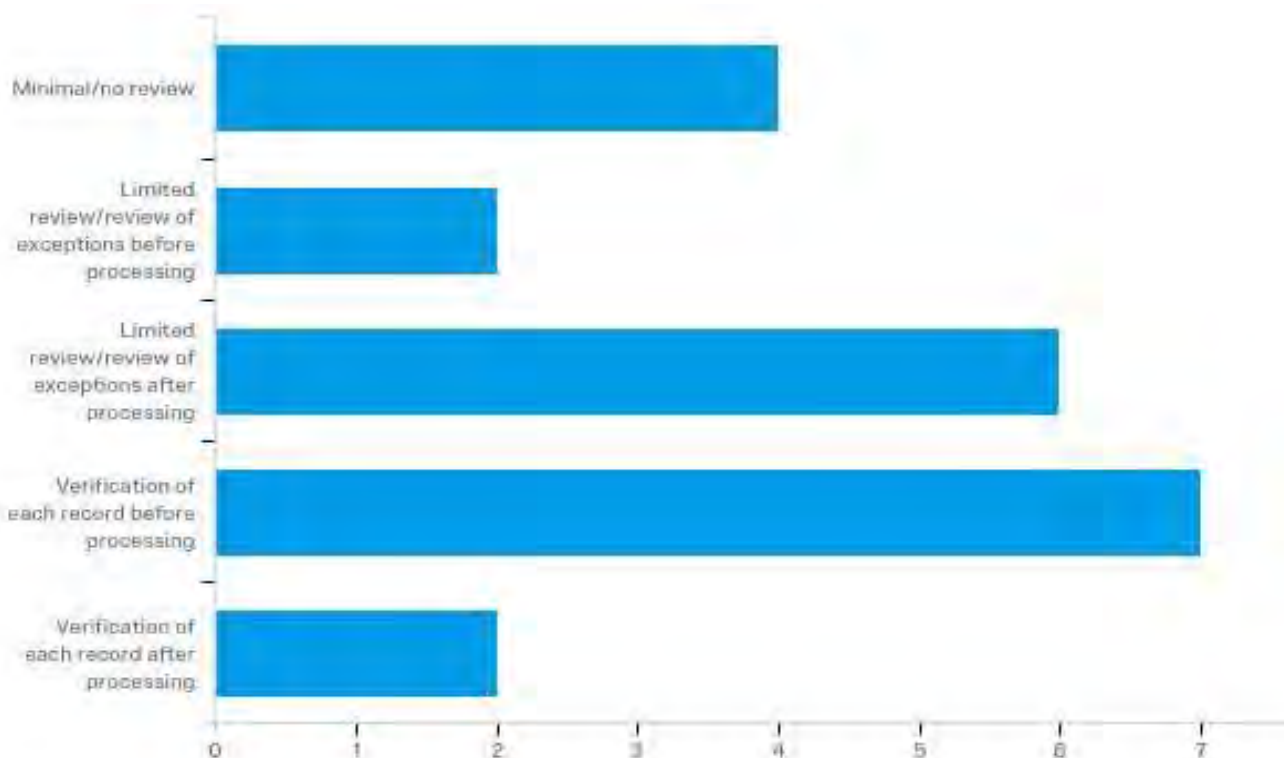
#	Answer	%	Count
1	Minimal/no review	19.05%	4
2	Limited review/review of exceptions before processing	9.52%	2
3	Limited review/review of exceptions after processing	28.57%	6
4	Verification of each record before processing	33.33%	7
5	Verification of each record after processing	9.52%	2
	Total	100%	21

Q1.18.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
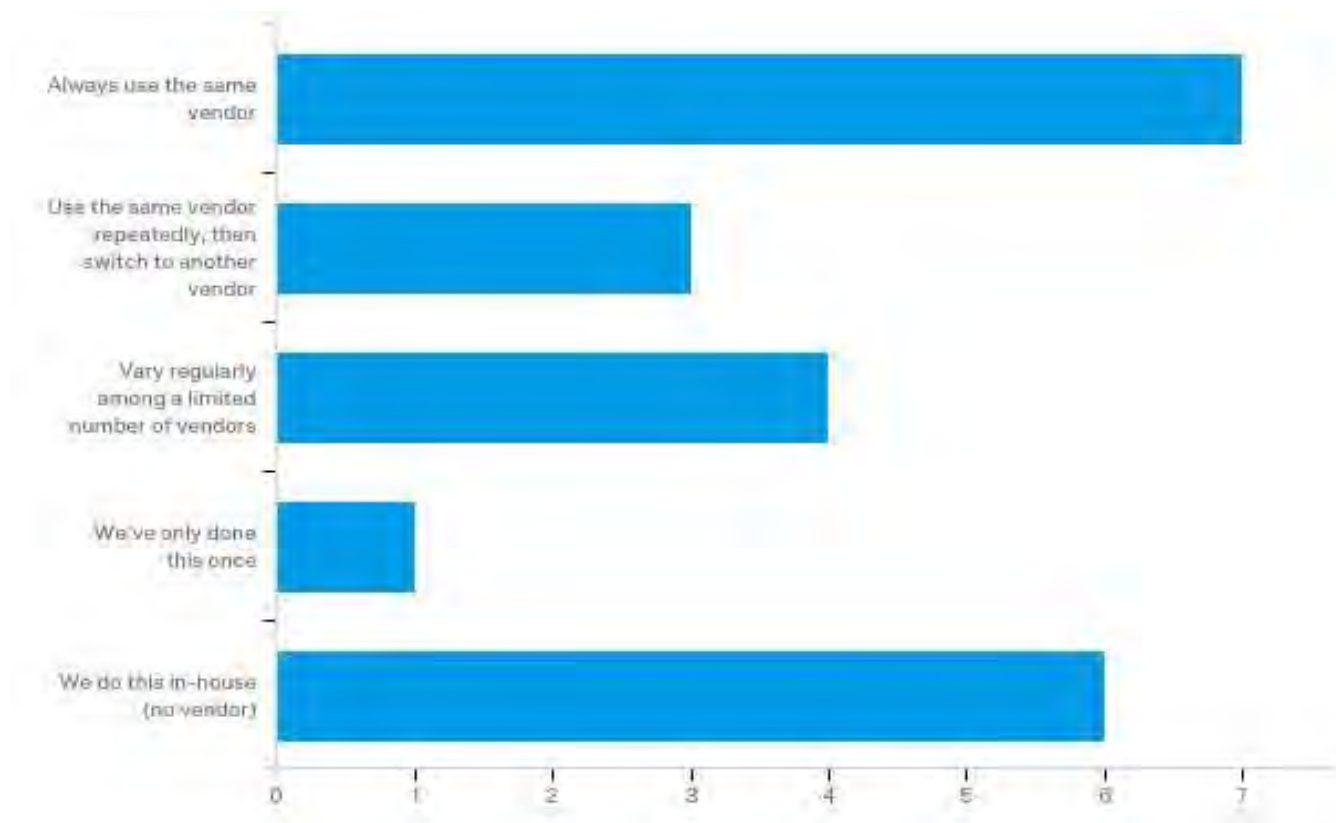
#	Answer	%	Count
1	Always use the same vendor	33.33%	7
2	Use the same vendor repeatedly, then switch to another vendor	14.29%	3
3	Vary regularly among a limited number of vendors	19.05%	4
4	We've only done this once	4.76%	1
5	We do this in-house (no vendor)	28.57%	6
	Total	100%	21

Q1.18.7 - Where do you store the results?
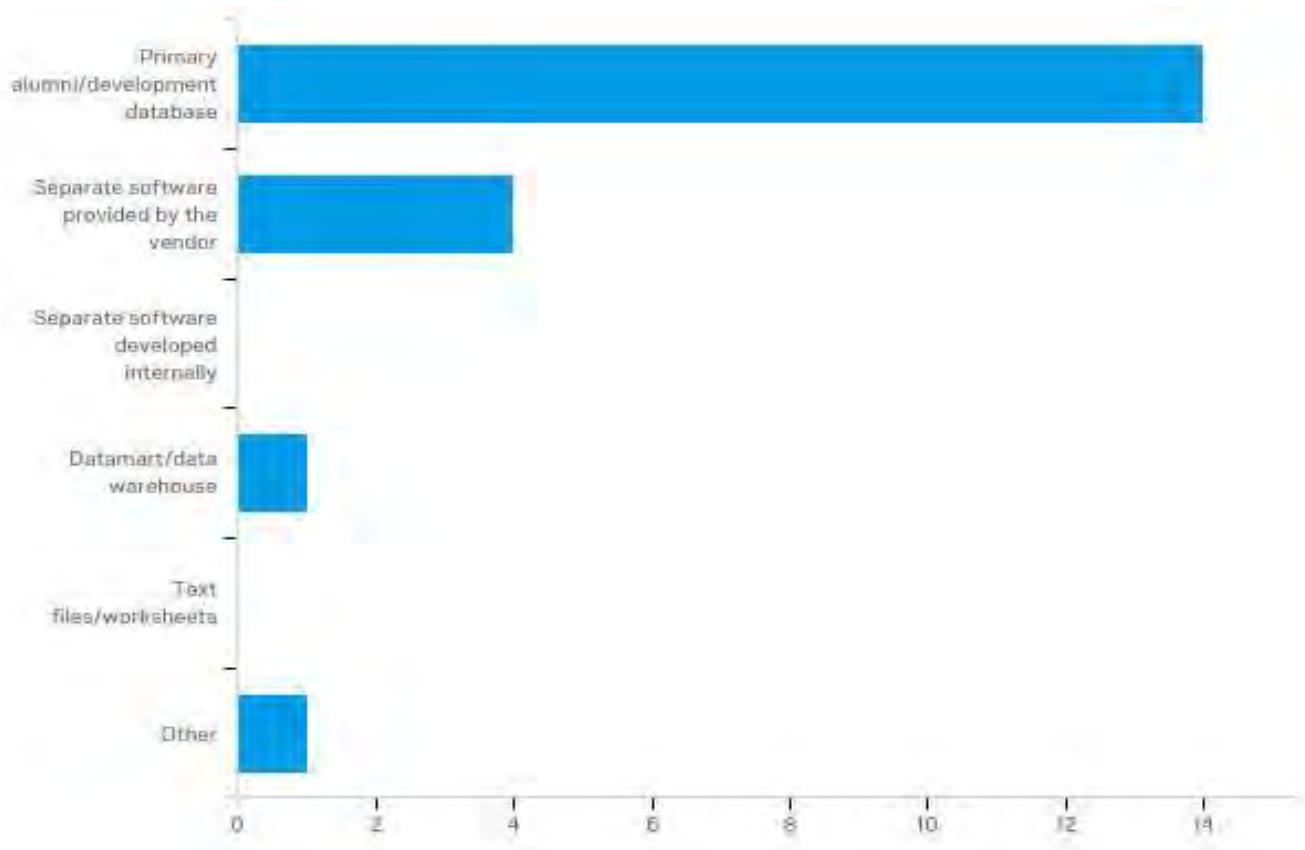
#	Answer	%	Count
1	Primary alumni/development database	70.00%	14
2	Separate software provided by the vendor	20.00%	4
3	Separate software developed internally	0.00%	0
4	Datamart/data warehouse	5.00%	1
5	Text files/worksheets	0.00%	0
6	Other	5.00%	1
	Total	100%	20

Other
Primary, Vendor Software, Datamart

Q1.18.8 - On a scale of 0-10, over time, how happy are you with the results of philanthropic giving to other organizations appends?

Q1.18.9 - Comments/Additional Information

We continually add philanthropic giving as we come across it--most often annual reports from local non-profits. We also use a product that is supported by our software provider on an as-needed basis, when researching specific records, and when we do a wealth/asset append--this information is usually returned with the file.

We purchased this information from a vendor and it was kept outside of our database.

Philanthropic giving to other organizations we have received from screening is only as a result of wealth/asset screening and those specific giving results are not fed back into our alumni/development database at a macro level. Philanthropic giving information entered in our alumni/development database is as a result of prospect-by-prospect identification and verification.

Used this for political contributors.

Q1.19 Append of Philanthropic Interests

Philanthropic interest appends provide information about the categories of philanthropic activities (education, arts/culture, social welfare, environmental, etc.) that appear to be of interest to a constituent. It may reflect the purposes of gifts that the constituent has made, boards on which the individual has served, or other indications. Philanthropic interest appends differ from philanthropic giving to other organizations appends in that one or more interests are retuned, typically drawn from a structured list of possible affinities, rather than information about specific organizations or gifts. Identifying information, most commonly name and address, is used to match constituents to a reference database, and information about philanthropic information from the reference database is returned.

Q1.19.1 - How often do you do an append of philanthropic interests?
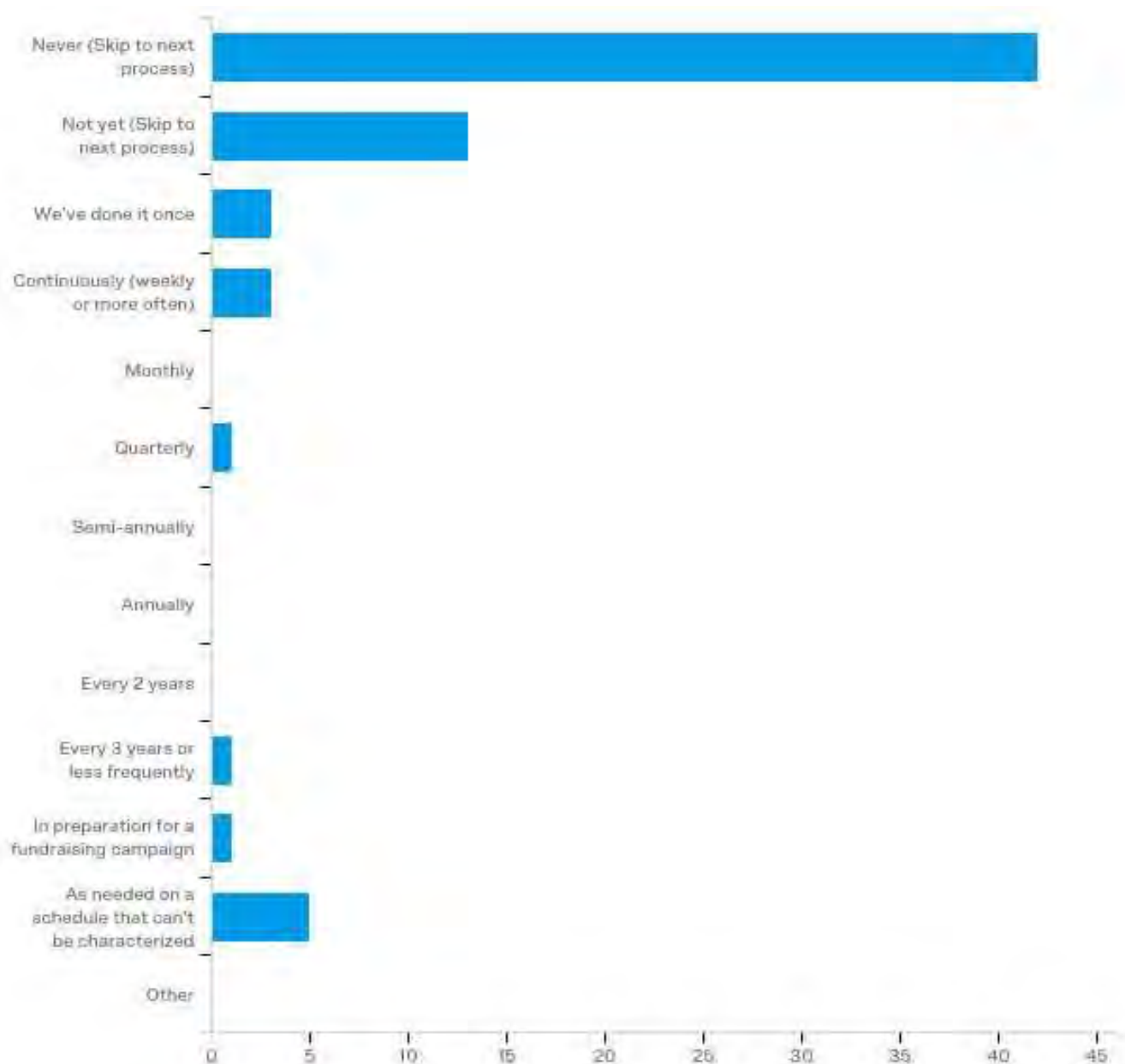
#	Answer	%	Count
1	Never (Skip to next process)	60.87%	42
2	Not yet (Skip to next process)	18.84%	13
3	We've done it once	4.35%	3
4	Continuously (weekly or more often)	4.35%	3
5	Monthly	0.00%	0
6	Quarterly	1.45%	1
7	Semi-annually	0.00%	0
8	Annually	0.00%	0
9	Every 2 years	0.00%	0
10	Every 3 years or less frequently	1.45%	1
11	In preparation for a fundraising campaign	1.45%	1
12	As needed on a schedule that can't be characterized	7.25%	5
13	Other	0.00%	0
	Total	100%	69

Q1.19.2 - How do you conduct this sort of enhancement?
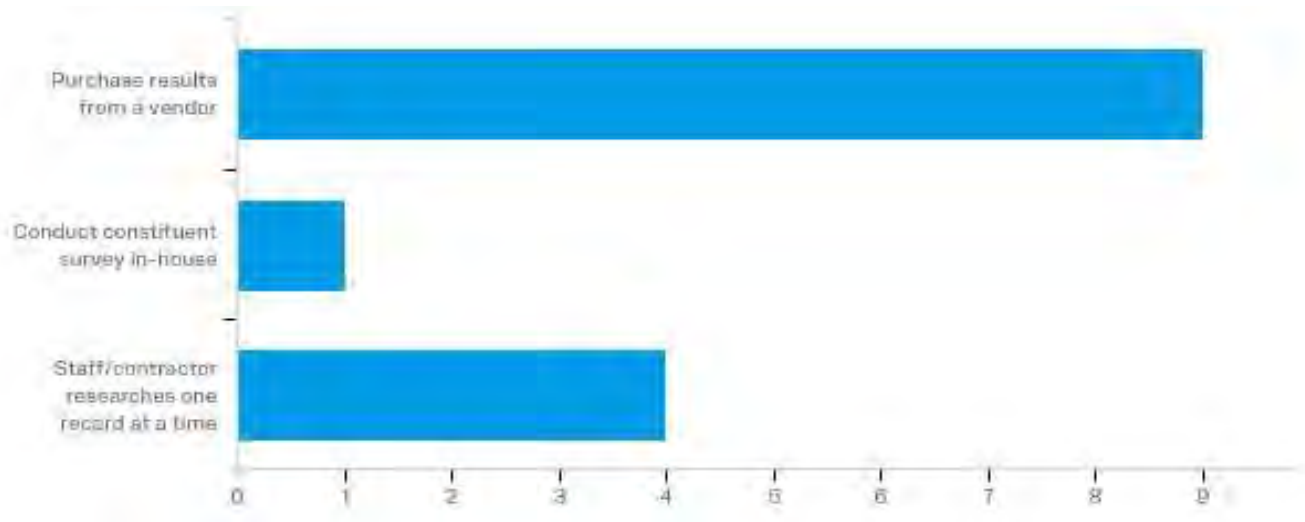
#	Answer	%	Count
1	Purchase results from a vendor	64.29%	9
2	Conduct constituent survey in-house	7.14%	1
3	Staff/contractor researches one record at a time	28.57%	4
	Total	100%	14

Q1.19.3 - How do you apply the results?
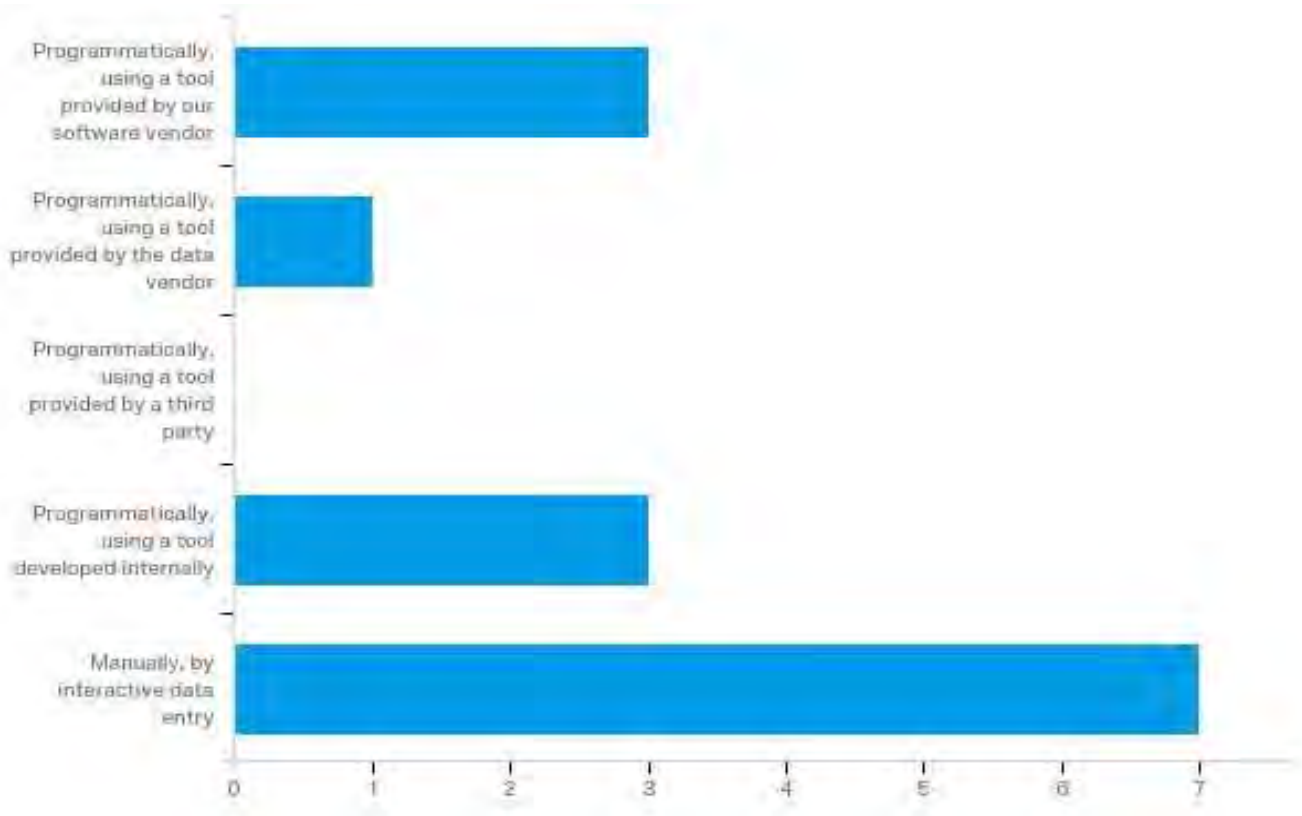
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	21.43%	3
2	Programmatically, using a tool provided by the data vendor	7.14%	1
3	Programmatically, using a tool provided by a third party	0.00%	0
4	Programmatically, using a tool developed internally	21.43%	3
5	Manually, by interactive data entry	50.00%	7
	Total	100%	14

Q1.19.4 - Who applies the results?
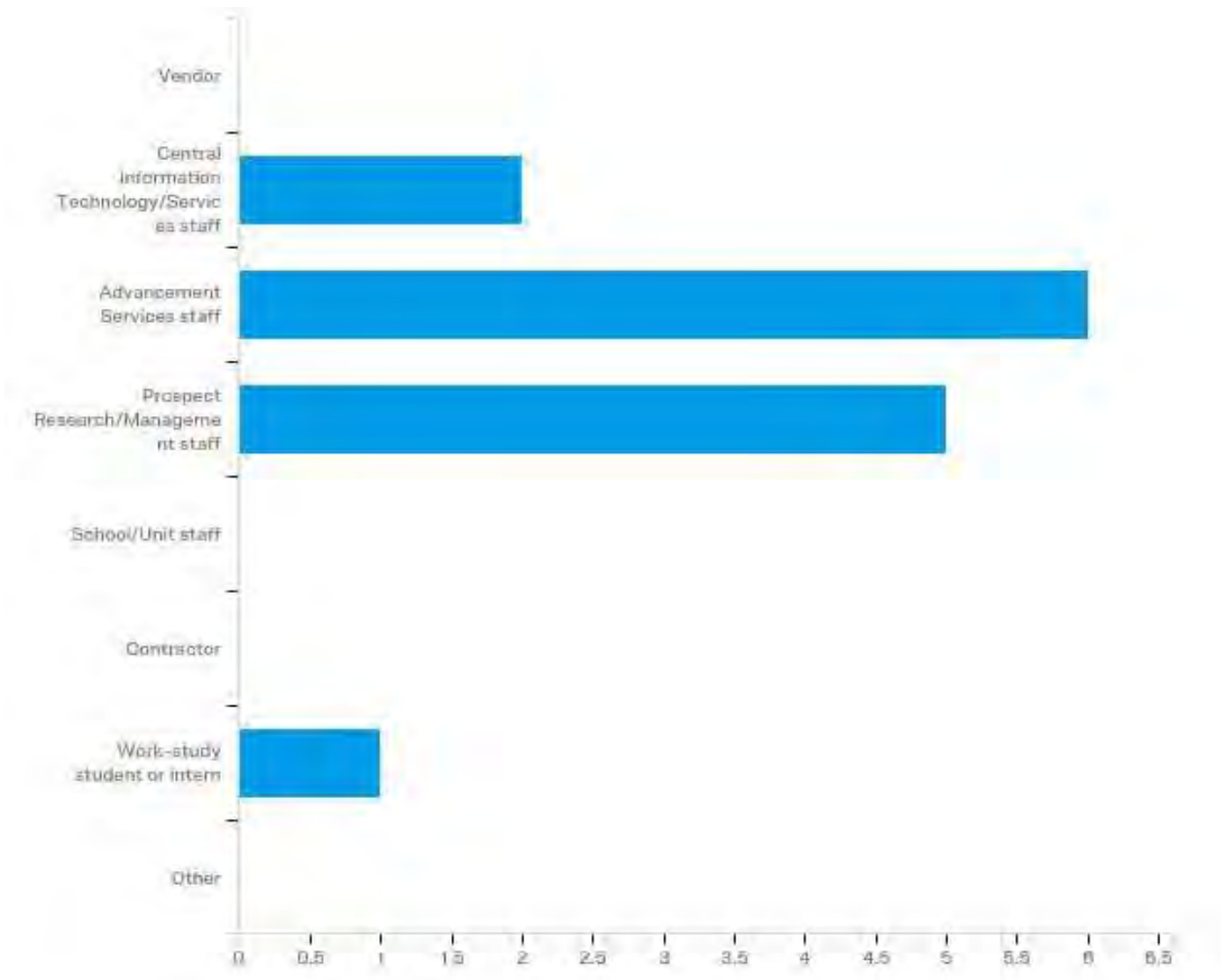
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	14.29%	2
3	Advancement Services staff	42.86%	6
4	Prospect Research/Management staff	35.71%	5
5	School/Unit staff	0.00%	0
6	Contractor	0.00%	0
7	Work-study student or intern	7.14%	1
8	Other	0.00%	0
	Total	100%	14

Q1.19.5 - How do you review/evaluate/verify the results?
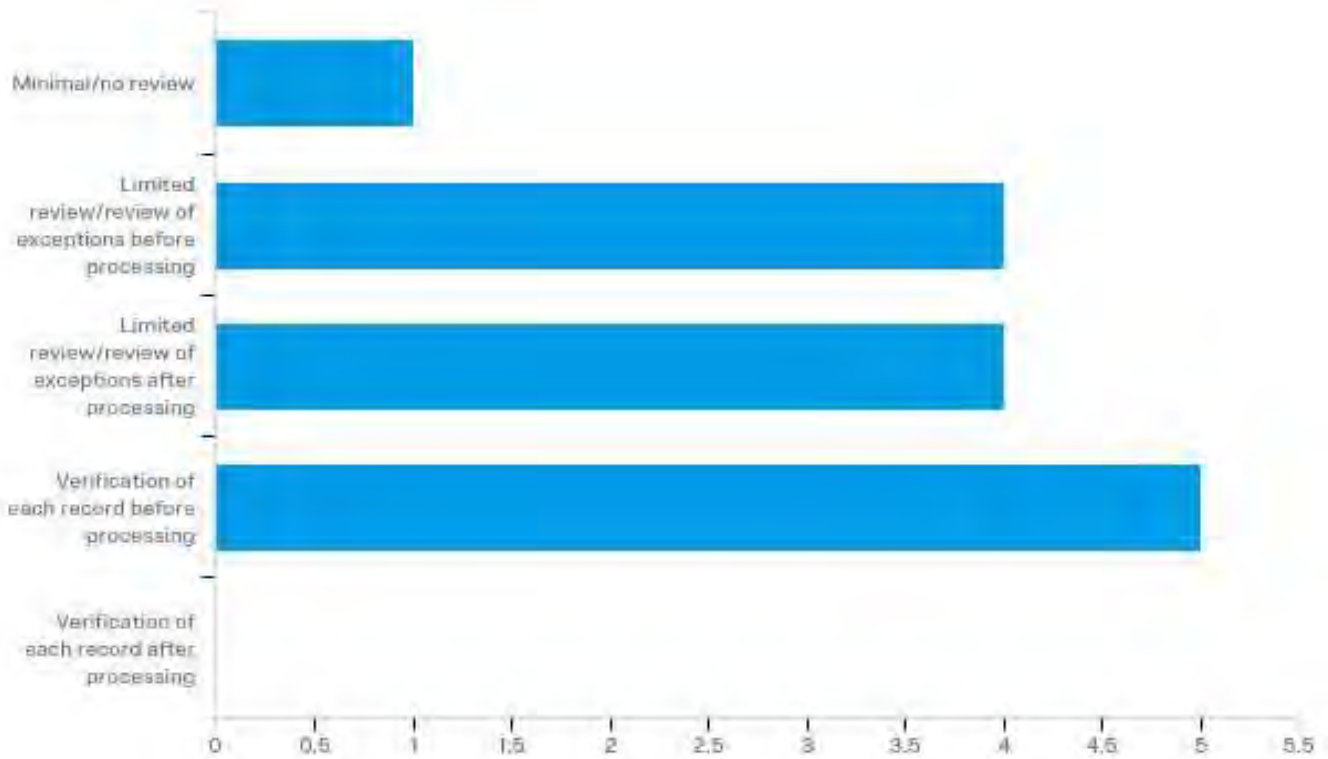
#	Answer	%	Count
1	Minimal/no review	7.14%	1
2	Limited review/review of exceptions before processing	28.57%	4
3	Limited review/review of exceptions after processing	28.57%	4
4	Verification of each record before processing	35.71%	5
5	Verification of each record after processing	0.00%	0
	Total	100%	14

Q1.19.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
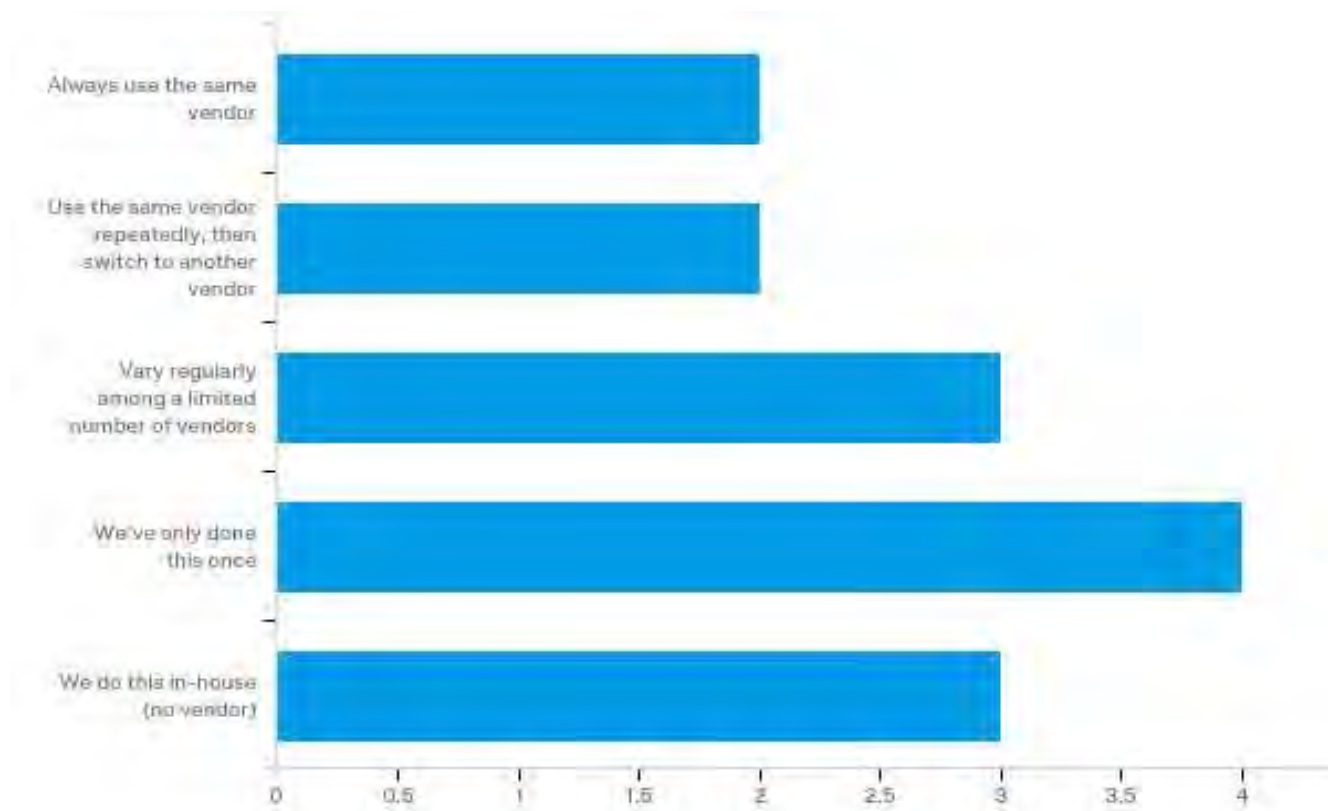
#	Answer	%	Count
1	Always use the same vendor	14.29%	2
2	Use the same vendor repeatedly, then switch to another vendor	14.29%	2
3	Vary regularly among a limited number of vendors	21.43%	3
4	We've only done this once	28.57%	4
5	We do this in-house (no vendor)	21.43%	3
	Total	100%	14

Q1.19.7 - Where do you store the results?
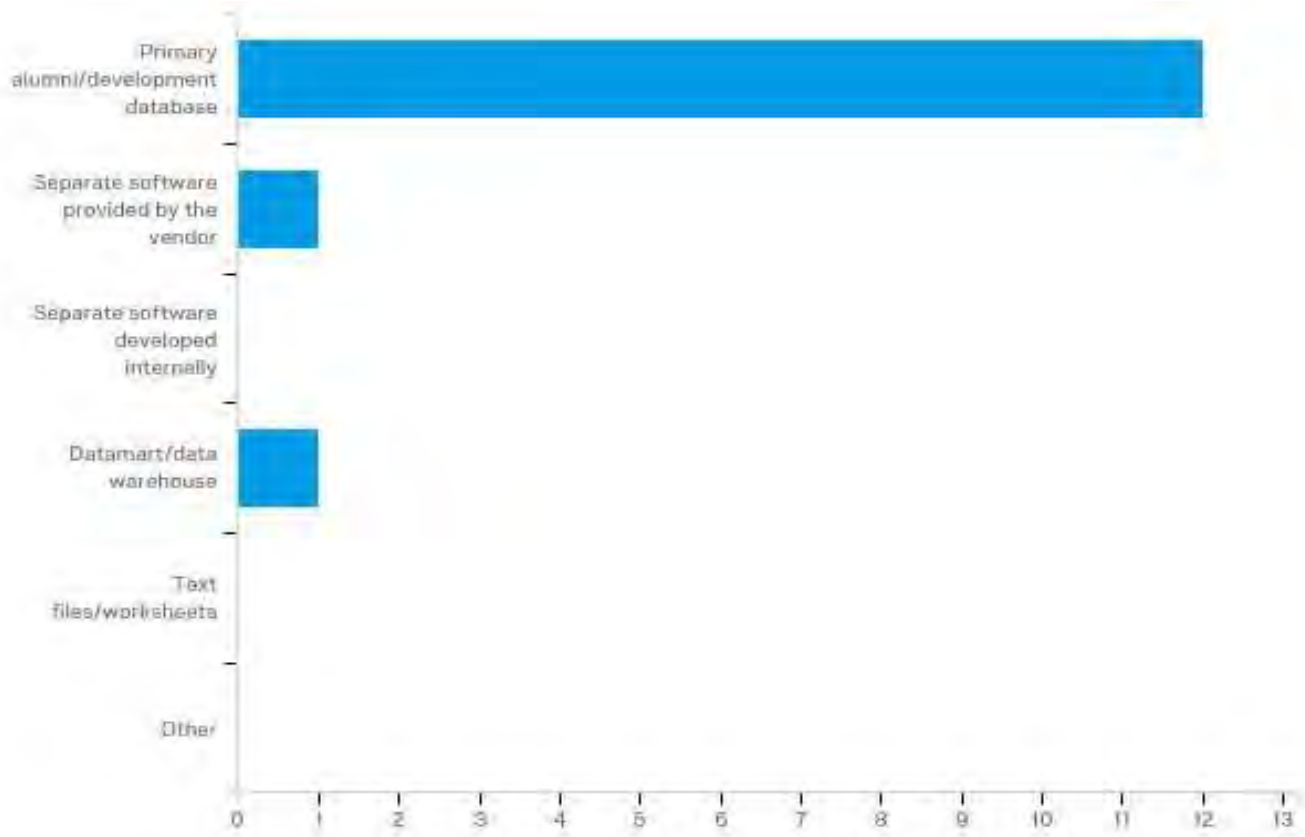
#	Answer	%	Count
1	Primary alumni/development database	85.71%	12
2	Separate software provided by the vendor	7.14%	1
3	Separate software developed internally	0.00%	0
4	Datamart/data warehouse	7.14%	1
5	Text files/worksheets	0.00%	0
6	Other	0.00%	0
	Total	100%	14

Q1.19.8 - On a scale of 0-10, over time, how happy are you with the results of philanthropic interests appends?
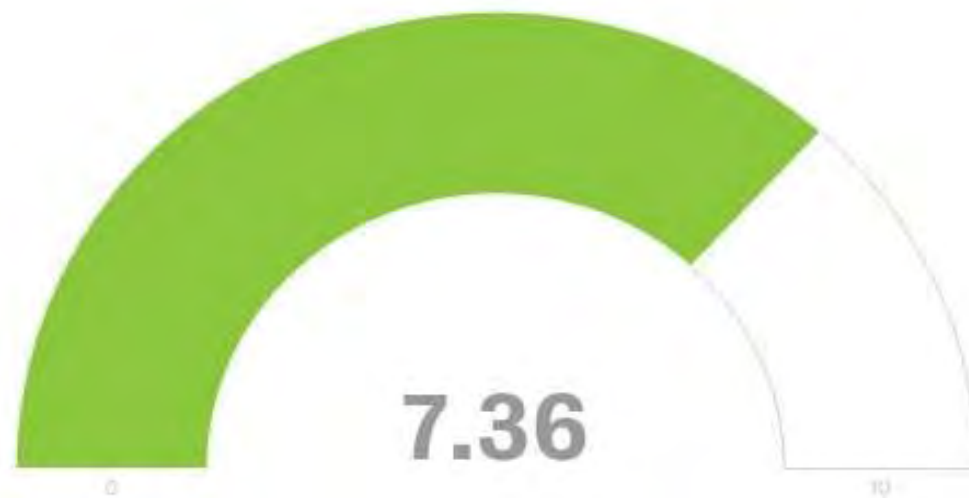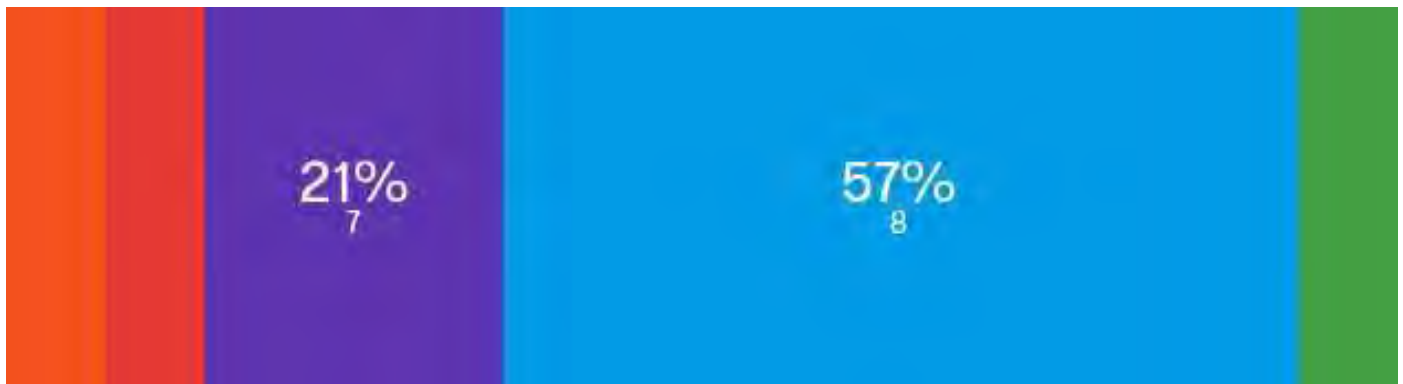
Q1.19.9 - Comments/Additional Information

We asked this once in an alumni survey. Was not used much.
Philanthropic interests received from screening are only as a result of wealth/asset screening and those specific interest results are not fed back into our alumni/development database at a macro level. Interest information entered in our alumni/development database is as a result of prospect-by-prospect identification and verification based on other giving, board service, and advocacy, as well as interests fundraisers uncover as a result of interactions with prospects and as a result of prospects self-identifying interests from surveys.

Q1.20 Survey of Alumni/Constituent Attitudes toward Your Organization

Surveys of alumni/constituent attitudes ask individual constituents to provide their opinions about any of a wide range of facets of an organization, its mission, and its activities.

Q1.20.1 - How often do you survey alumni/constituent attitudes toward your organization?
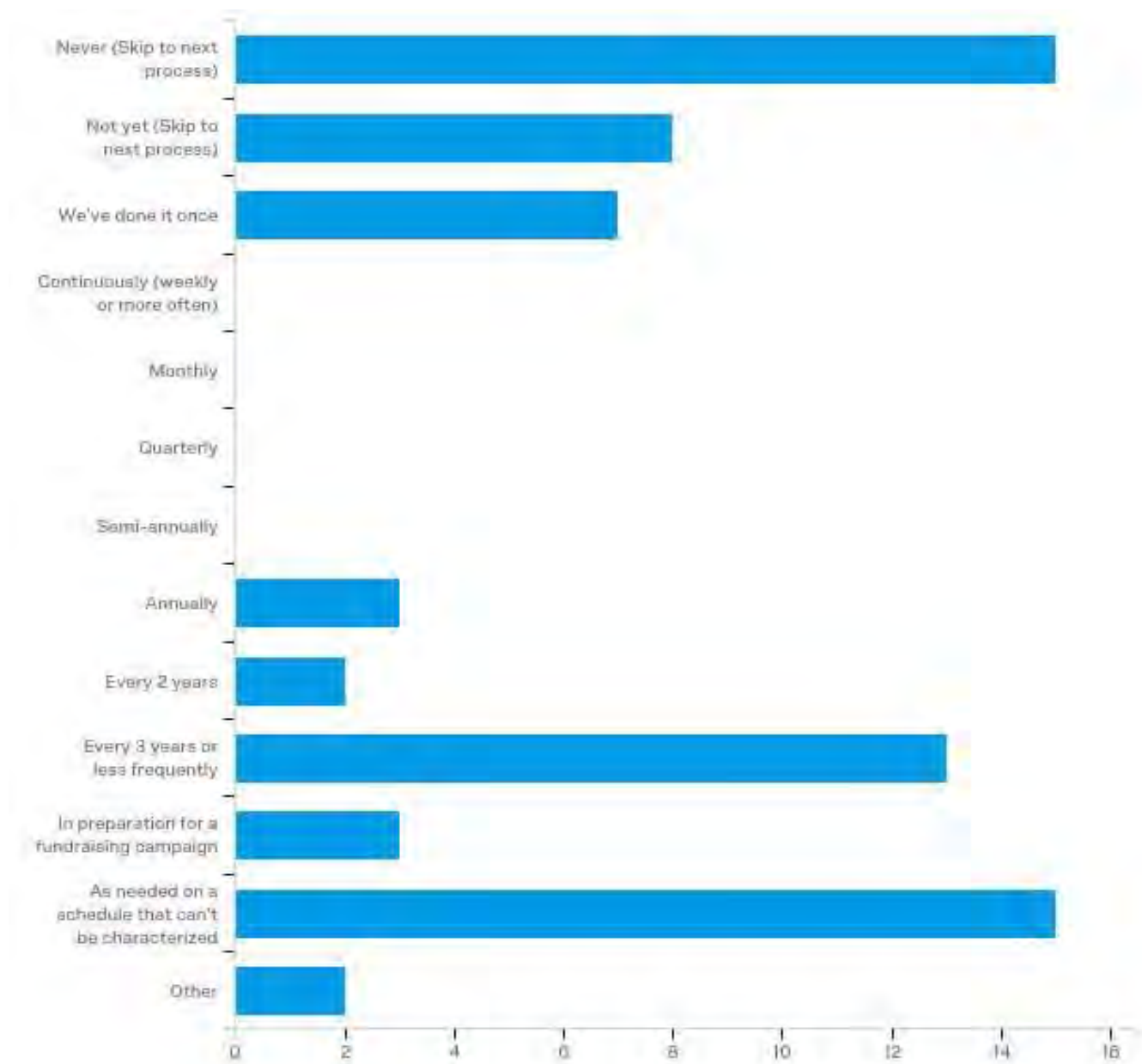
#	Answer	%	Count
1	Never (Skip to next process)	22.06%	15
2	Not yet (Skip to next process)	11.76%	8
3	We've done it once	10.29%	7
4	Continuously (weekly or more often)	0.00%	0
5	Monthly	0.00%	0
6	Quarterly	0.00%	0
7	Semi-annually	0.00%	0
8	Annually	4.41%	3
9	Every 2 years	2.94%	2
10	Every 3 years or less frequently	19.12%	13
11	In preparation for a fundraising campaign	4.41%	3
12	As needed on a schedule that can't be characterized	22.06%	15
13	Other	2.94%	2
	Total	100%	68

Other
We have done this, however it is anonymous and we use a vendor. No data is stored in the database.
I don't know if we do or not

Q1.20.2 - How do you conduct this sort of enhancement?
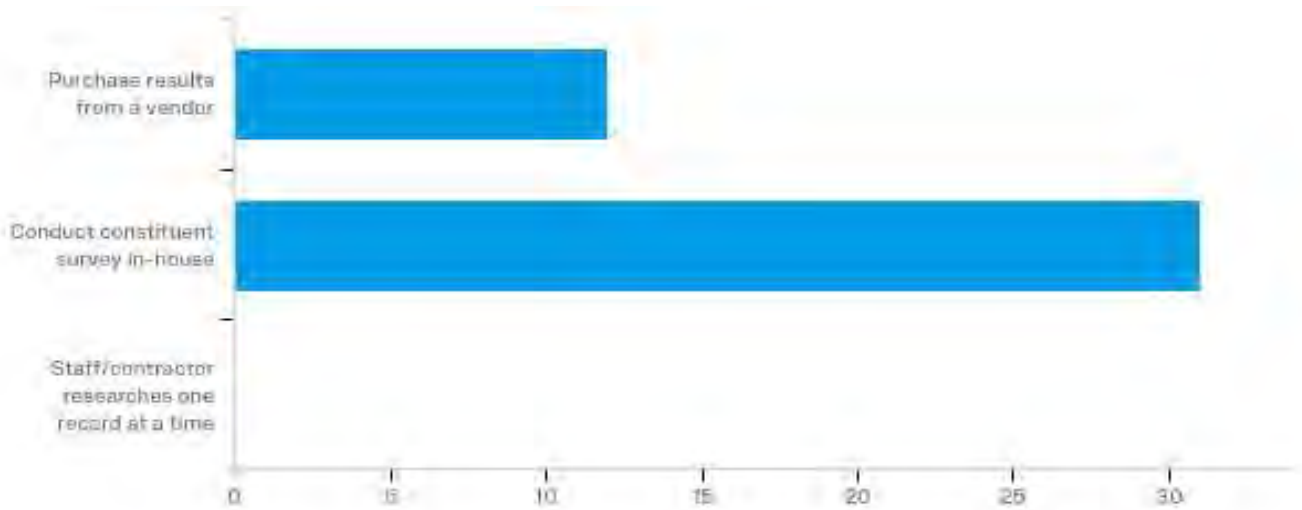
#	Answer	%	Count
1	Purchase results from a vendor	27.91%	12
2	Conduct constituent survey in-house	72.09%	31
3	Staff/contractor researches one record at a time	0.00%	0
	Total	100%	43

Q1.20.3 - How do you apply the results?
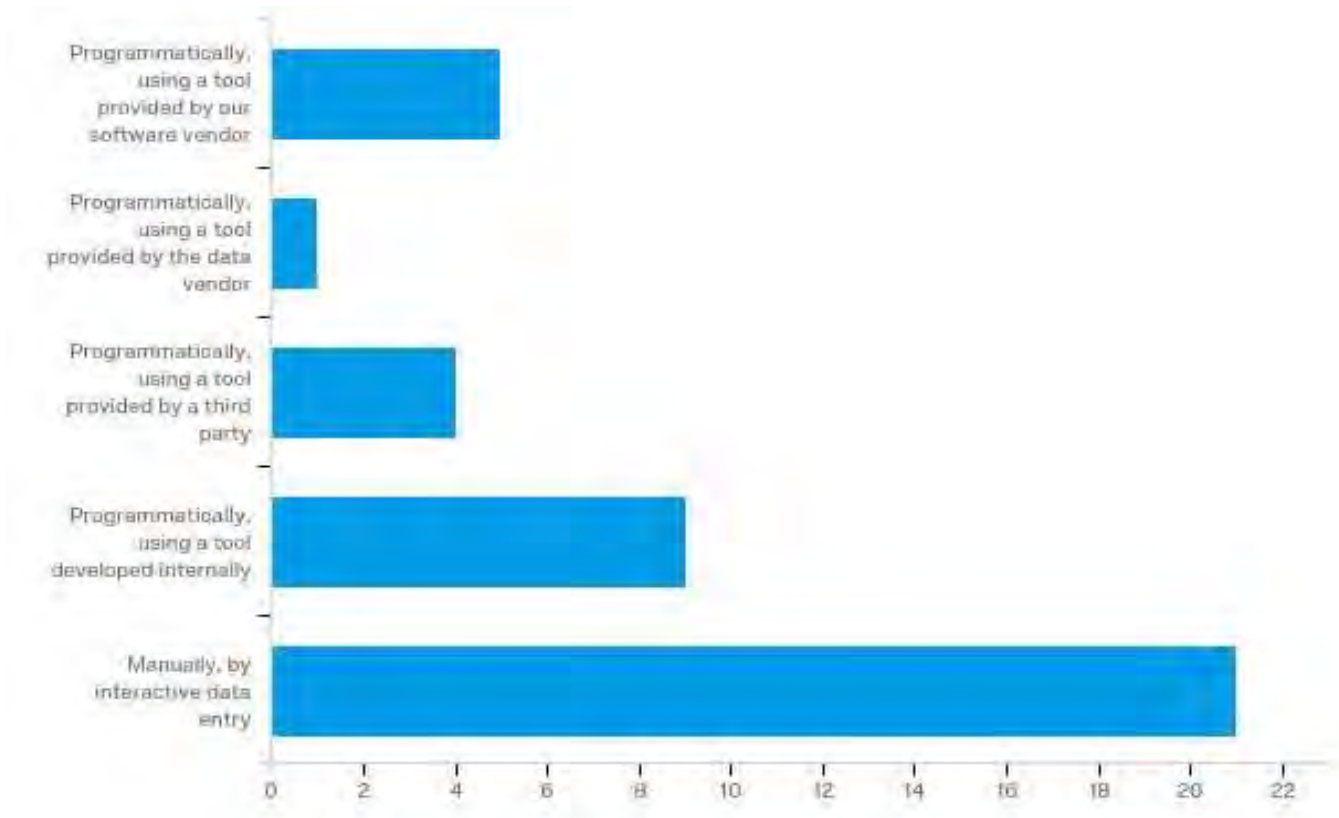
#	Answer	%	Count
1	Programmatically, using a tool provided by our software vendor	12.50%	5
2	Programmatically, using a tool provided by the data vendor	2.50%	1
3	Programmatically, using a tool provided by a third party	10.00%	4
4	Programmatically, using a tool developed internally	22.50%	9
5	Manually, by interactive data entry	52.50%	21
	Total	100%	40

Q1.20.4 - Who applies the results?
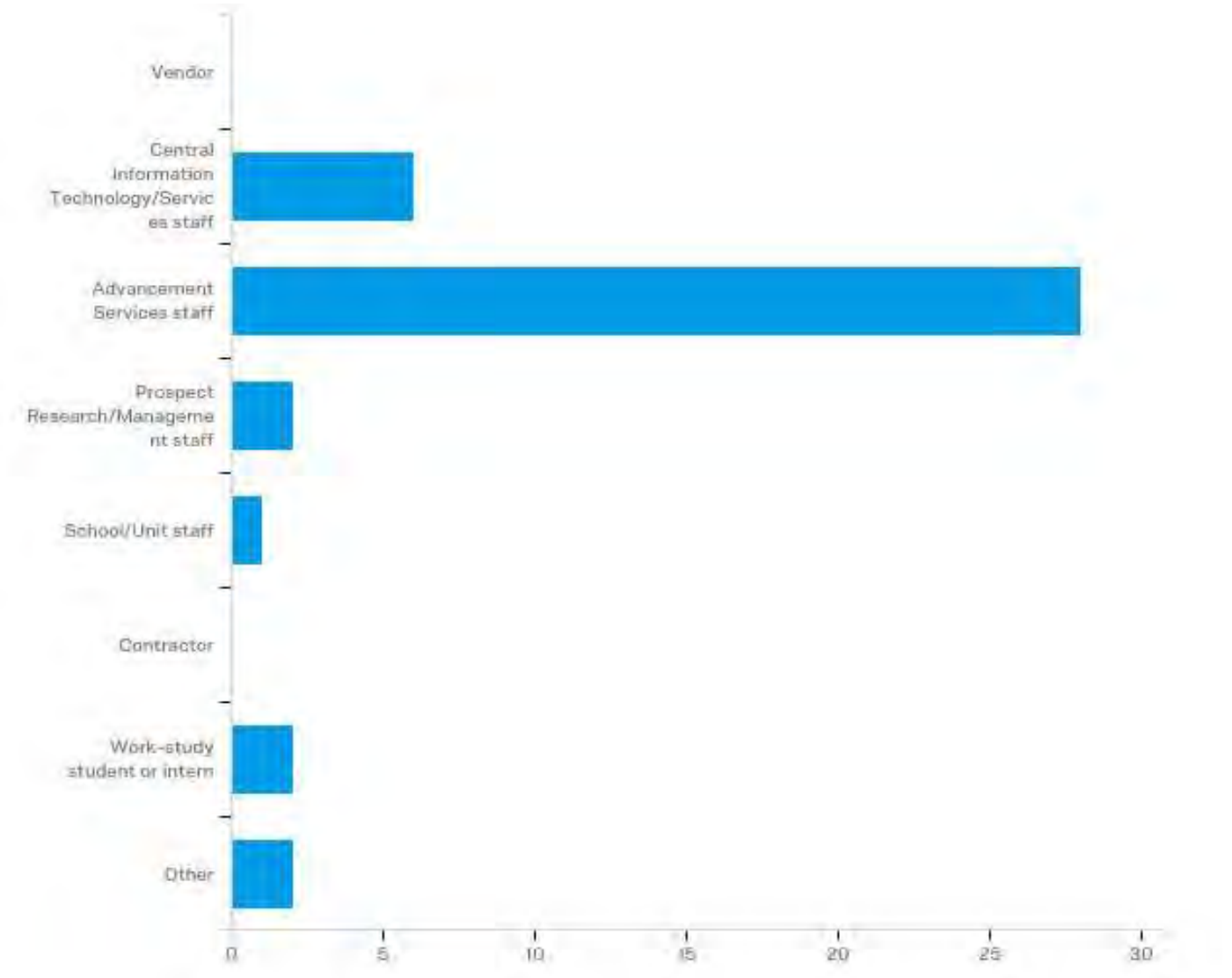
#	Answer	%	Count
1	Vendor	0.00%	0
2	Central Information Technology/Services staff	14.63%	6
3	Advancement Services staff	68.29%	28
4	Prospect Research/Management staff	4.88%	2
5	School/Unit staff	2.44%	1
6	Contractor	0.00%	0
7	Work-study student or intern	4.88%	2
8	Other	4.88%	2
	Total	100%	41

Other
Did not apply results
Membership staff

Q1.20.5 - How do you review/evaluate/verify the results?
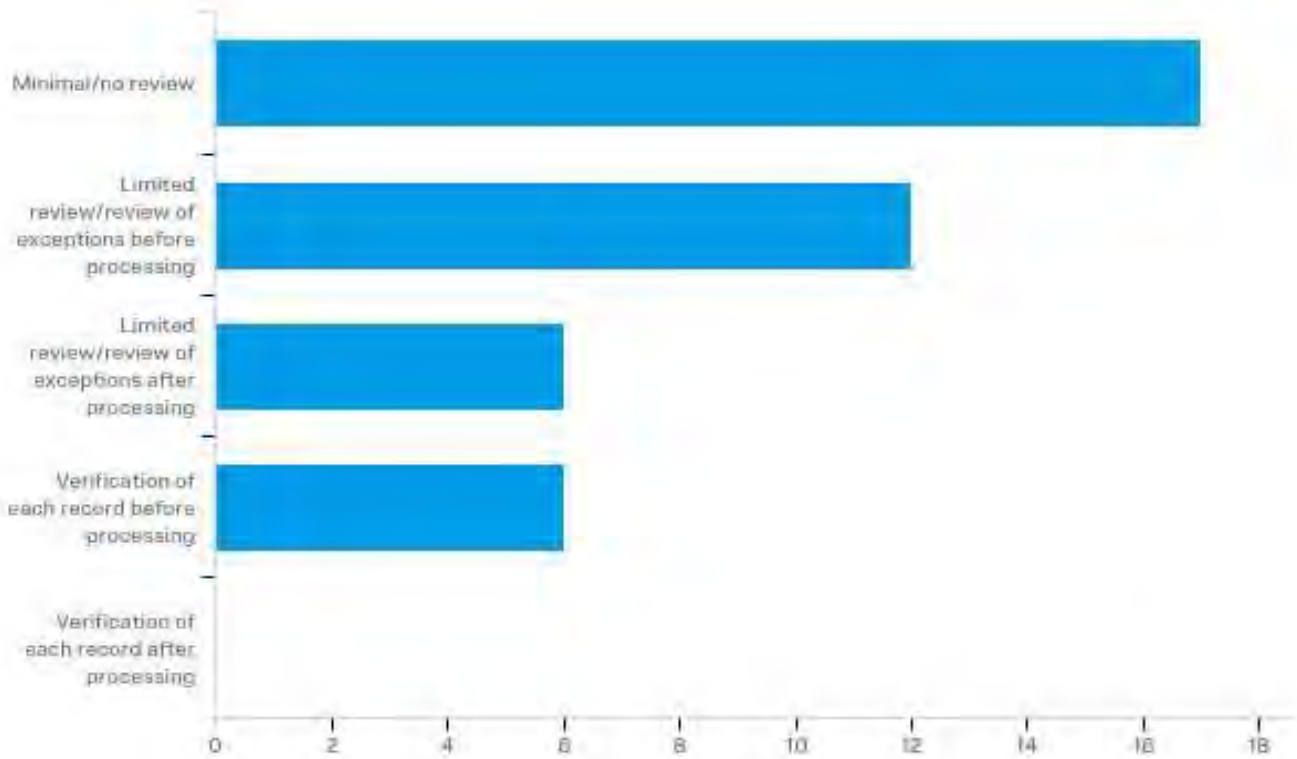
#	Answer	%	Count
1	Minimal/no review	41.46%	17
2	Limited review/review of exceptions before processing	29.27%	12
3	Limited review/review of exceptions after processing	14.63%	6
4	Verification of each record before processing	14.63%	6
5	Verification of each record after processing	0.00%	0
	Total	100%	41

Q1.20.6 - Do you use the same vendor each time you perform this data quality/data enhancement process?
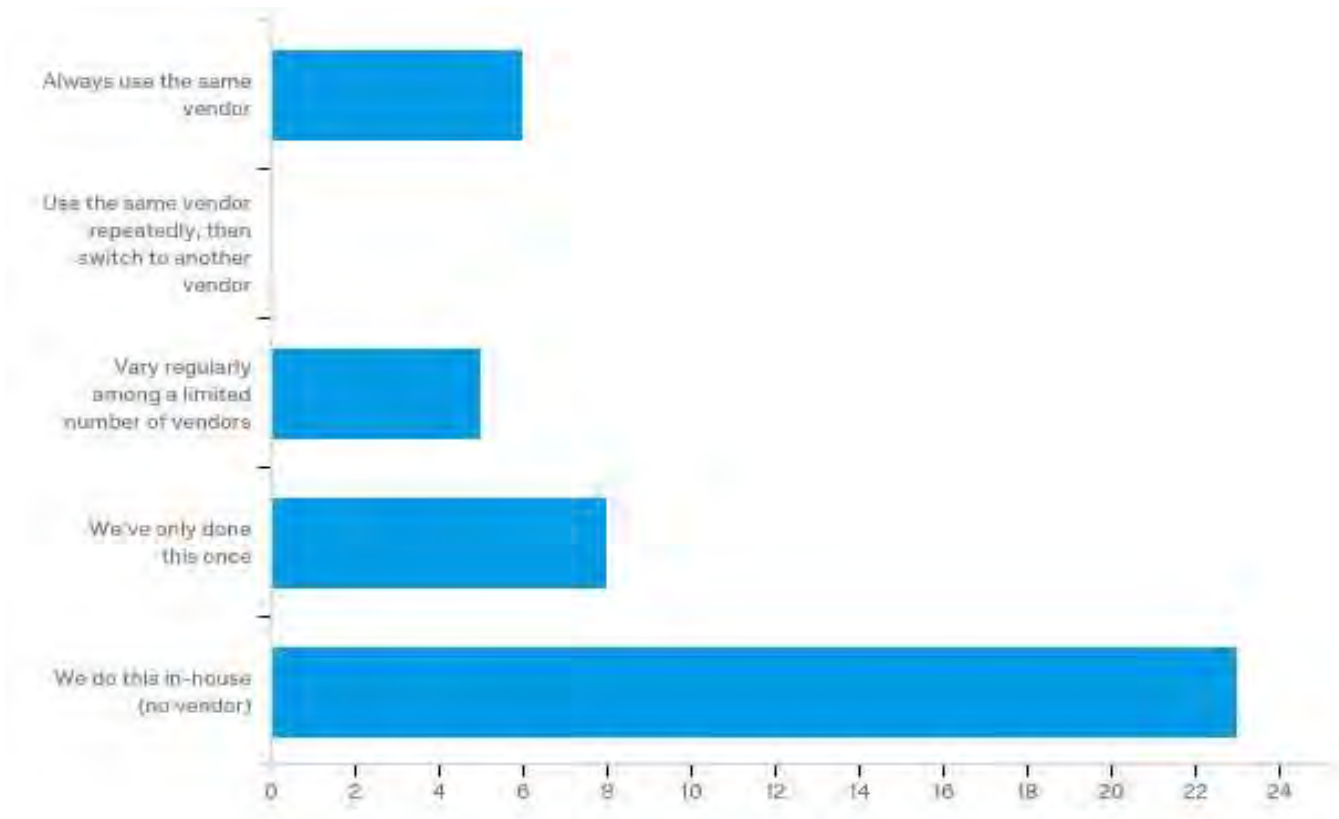
#	Answer	%	Count
1	Always use the same vendor	14.29%	6
2	Use the same vendor repeatedly, then switch to another vendor	0.00%	0
3	Vary regularly among a limited number of vendors	11.90%	5
4	We've only done this once	19.05%	8
5	We do this in-house (no vendor)	54.76%	23
	Total	100%	42

Q1.20.7 - Where do you store the results?
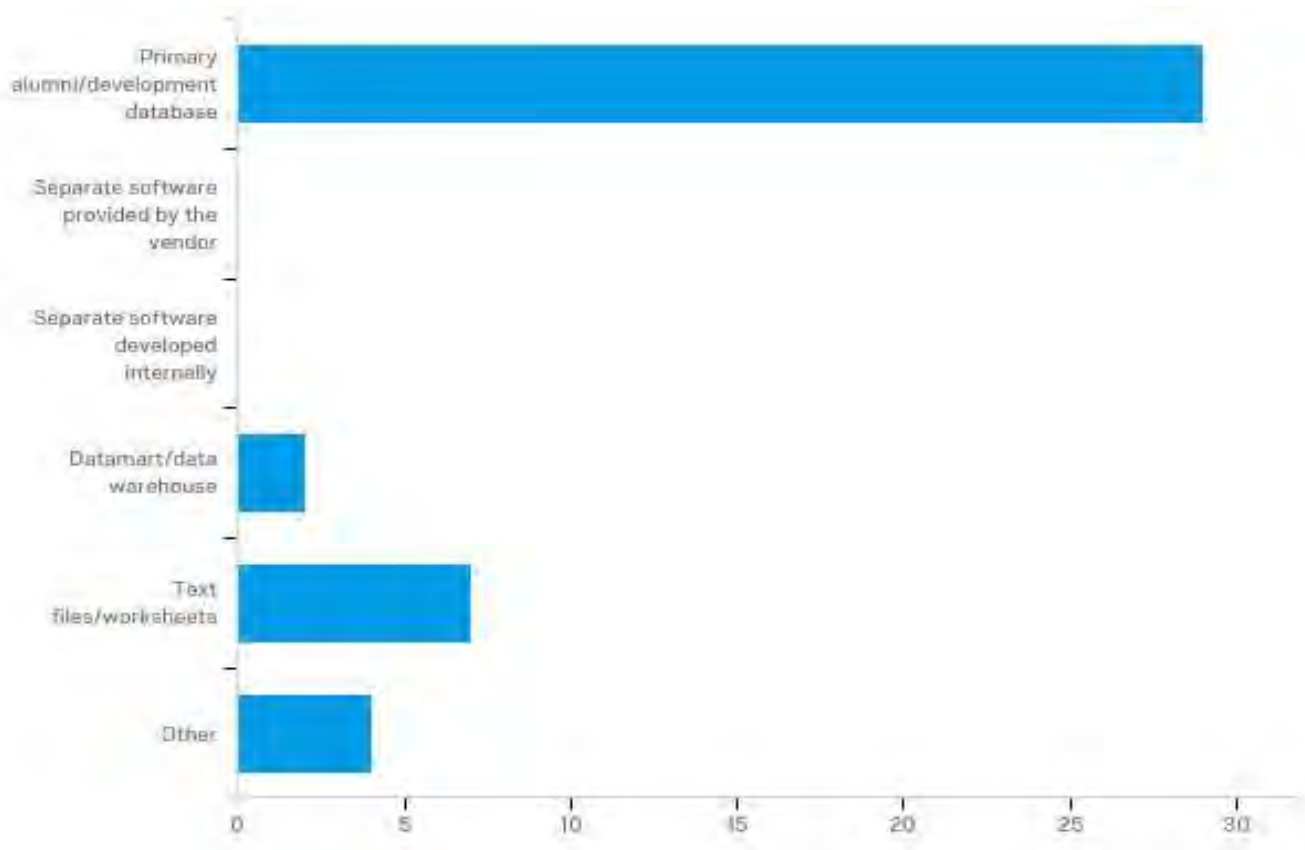
#	Answer	%	Count
1	Primary alumni/development database	69.05%	29
2	Separate software provided by the vendor	0.00%	0
3	Separate software developed internally	0.00%	0
4	Datamart/data warehouse	4.76%	2
5	Text files/worksheets	16.67%	7
6	Other	9.52%	4
	Total	100%	42

Other
Did not store results
offline
varies

Q1.20.8 - On a scale of 0-10, over time, how happy are you with the results of surveys of attitudes toward your organization?

Q1.20.9 - Comments/Additional Information

Would like to do this more often
Institutional Research does the study, provides 'non confidential' results to Advancement for data entry
It's only as good as the number of returns on our survey.
We did ask this in an Alumni Survey years ago. Data is not used much.
Alumni surveys using a tool like Qualtrics is bar none the best data append your Alumni office could ever do!
Most data is kept in separate results files but quantifiable data is stored in alumni database.

Section 2: General Questions about Data Quality/Data Enhancement Processes

Q2.1 Effect of Ease/Difficulty of Working with Results on Choice of Processes

Q2.1 - On a scale of 0-10, to what extent does ease or difficulty of working with the results influence the type of data enhancement that is done?
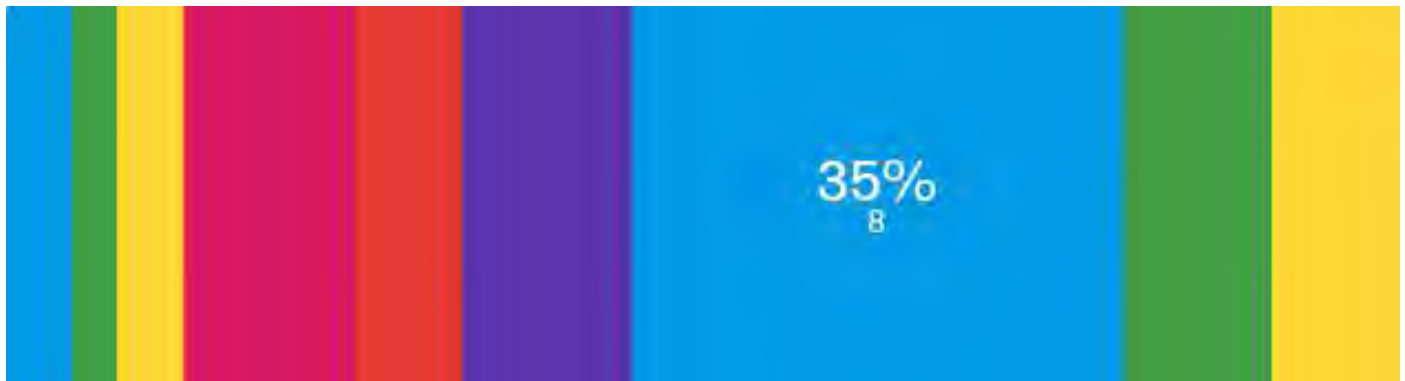
Q2.2 Effect of Ease/Difficulty of Working with Results on Vendor Selection

Q2.2 - On a scale of 0-10, to what extent does ease or difficulty of working with the results influence the selection of a vendor?

42%
8

17%
10

7.43

0

10
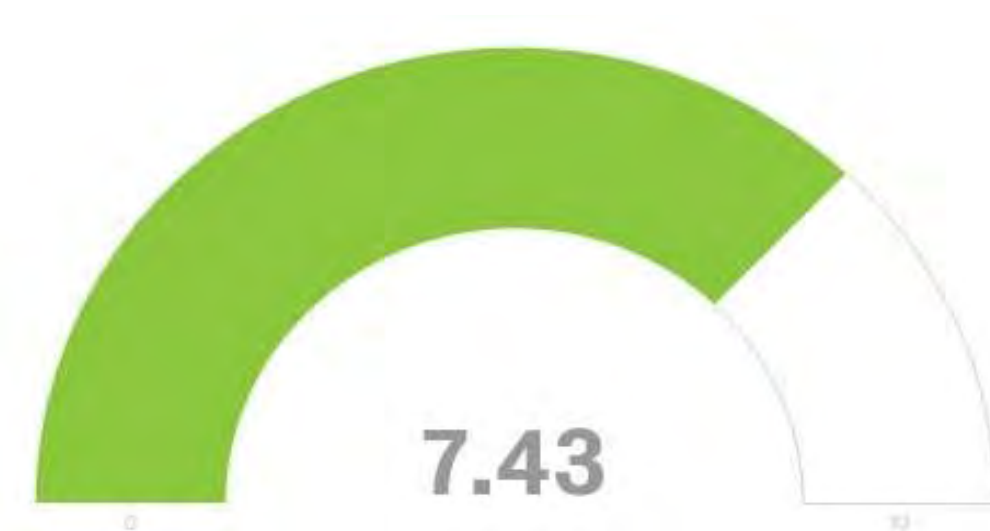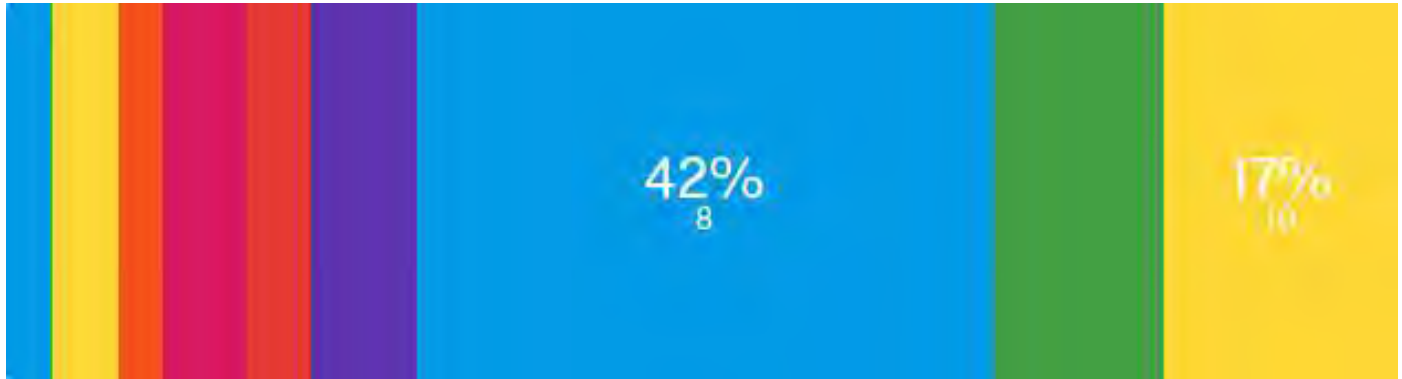
Q2.3 Factors Limiting Scope of Projects

Q2.3 - What are the factors that limit the number/scope of data quality and data enhancement projects? (Please select as many as apply.)
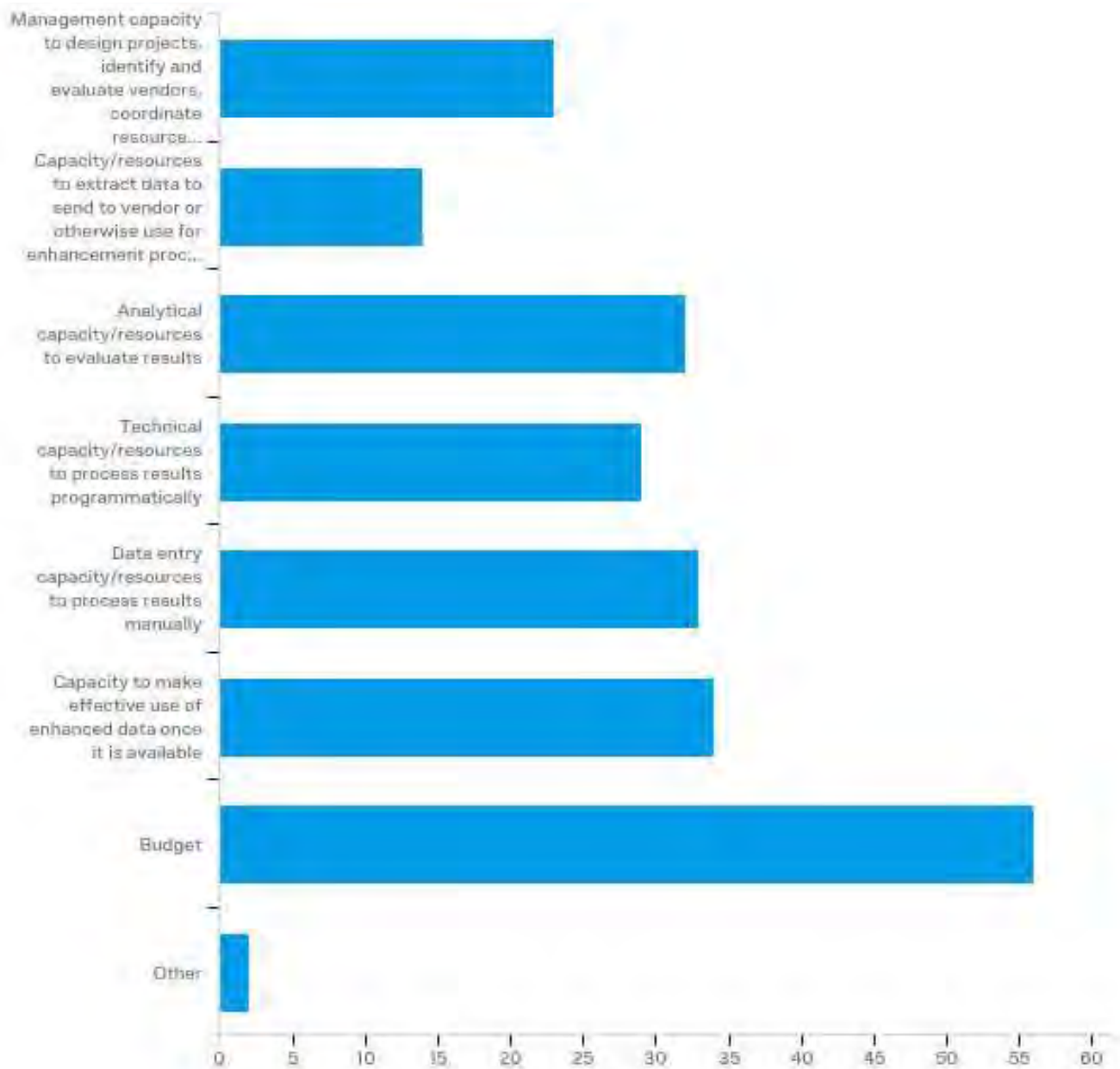
#	Answer	%	Count
1	Management capacity to design projects, identify and evaluate vendors, coordinate resources to process results,	35.94%	23
2	Capacity/resources to extract data to send to vendor or otherwise use for enhancement process	21.88%	14
3	Analytical capacity/resources to evaluate results	50.00%	32
4	Technical capacity/resources to process results	45.31%	29
5	Data entry capacity/resources to process results	51.56%	33
6	Capacity to make effective use of enhanced data once it is	53.13%	34
7	Budget	87.50%	56
8	Other	3.13%	2
	Total	100%	64

Other
understaffed Development Operations team
Powers that be understanding its importance

Q2.4 Primary Factor Limiting Scope of Projects

Q2.4 - What is the primary factor that limits the number/scope of data quality and data enhancement projects?
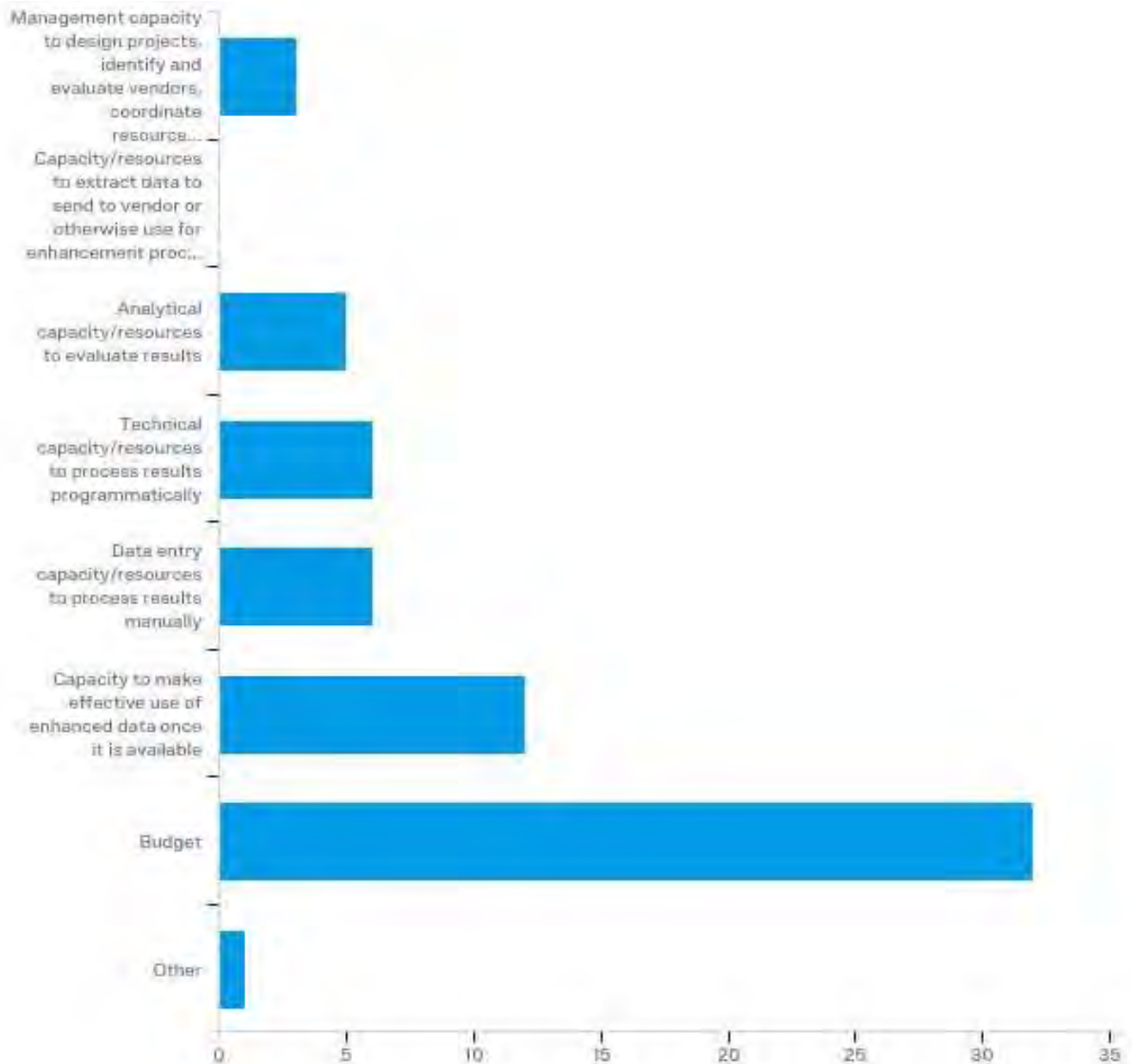
#	Answer	%	Count
1	Management capacity to design projects, identify and evaluate vendors, coordinate resources to process	4.62%	3
2	Capacity/resources to extract data to send to vendor or otherwise use for enhancement process	0.00%	0
3	Analytical capacity/resources to evaluate results	7.69%	5
4	Technical capacity/resources to process results programmatically	9.23%	6
5	Data entry capacity/resources to process results manually	9.23%	6
6	Capacity to make effective use of enhanced data once it is available	18.46%	12
7	Budget	49.23%	32
8	Other	1.54%	1
	Total	100%	65

Q2.5 Impact of Capital Campaigns on Data Enhancement Projects

Q2.5 - Does a capital campaign prompt the decision to embark on data enhancement project(s)?
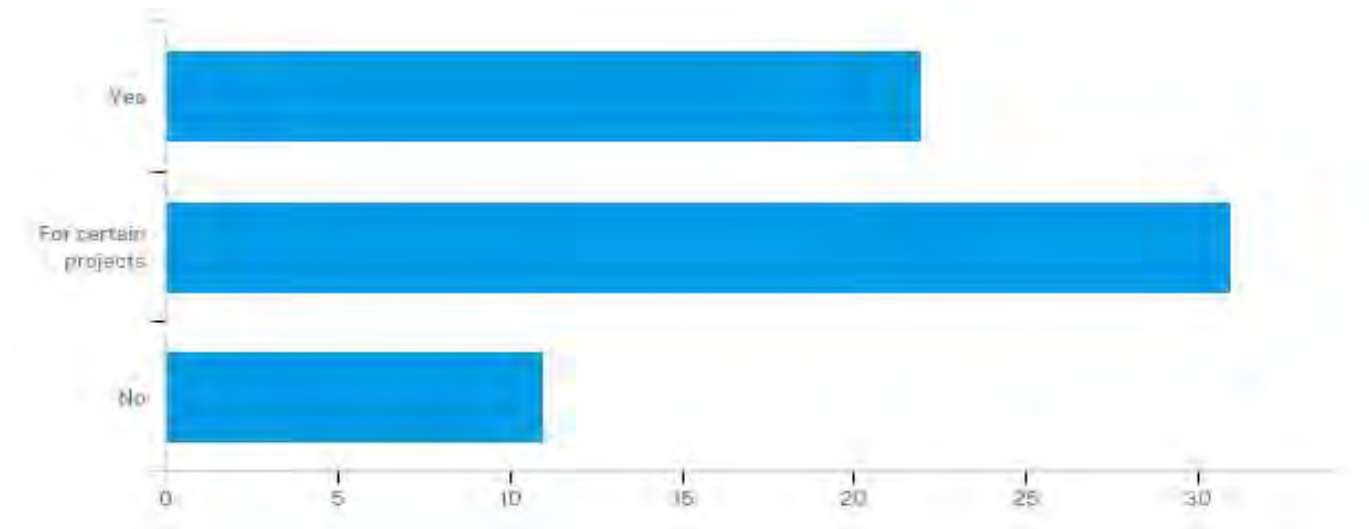
#	Answer	%	Count
1	Yes	34.38%	22
2	For certain projects	48.44%	31
4	No	17.19%	11
	Total	100%	64

Q2.6 Impact of Capital Campaign on Selection of Data Projects

Q2.6 - Which of the following types of data enhancements take place only, or more frequently, in the context of a capital campaign? (Please select as many as apply.)
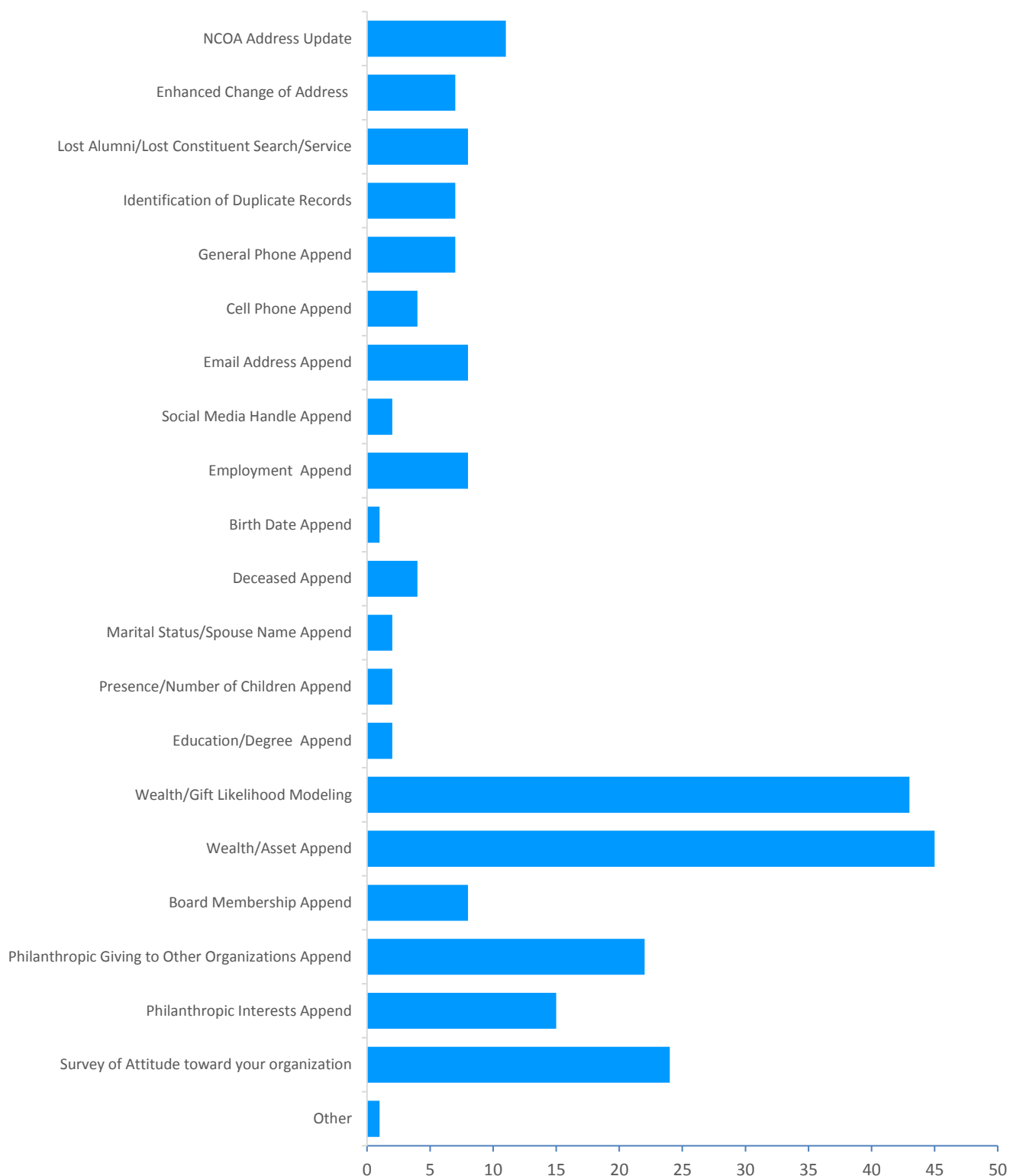
#	Answer	%	Count
1	NCOA Address Update (USPS Change of Address/NCOA^{LINK} Processing)	20.00%	11
2	Enhanced Change of Address (MCOA, PCOA) Processing	12.73%	7
3	Lost Alumni/Lost Constituent Search/Service	14.55%	8
4	Identification of Duplicate Records	12.73%	7
5	General Phone Append	12.73%	7
6	Cell Phone Append	7.27%	4
7	Email Address Append	14.55%	8
8	Social Media Handle Append	3.64%	2
9	Employment Append	14.55%	8
10	Birth Date Append	1.82%	1
11	Deceased Append	7.27%	4
12	Marital Status/Spouse Name Append	3.64%	2
13	Presence/Number of Children Append	3.64%	2
14	Education/Degree Append	3.64%	2
15	Wealth/Gift Likelihood Modeling	78.18%	43
16	Wealth/Asset Append	81.82%	45
17	Board Membership Append	14.55%	8
18	Philanthropic Giving to Other Organizations Append	40.00%	22
19	Philanthropic Interests Append	27.27%	15
20	Survey of Attitude toward your organization	43.64%	24
21	Other	1.82%	1
	Total	100%	55

Other
Our last Capital Campaign was several years ago

Q2.7 Steps in Vendor Selection

Q2.7 - Which of the following steps do you typically take when selecting a vendor? (Please select as many as apply.)
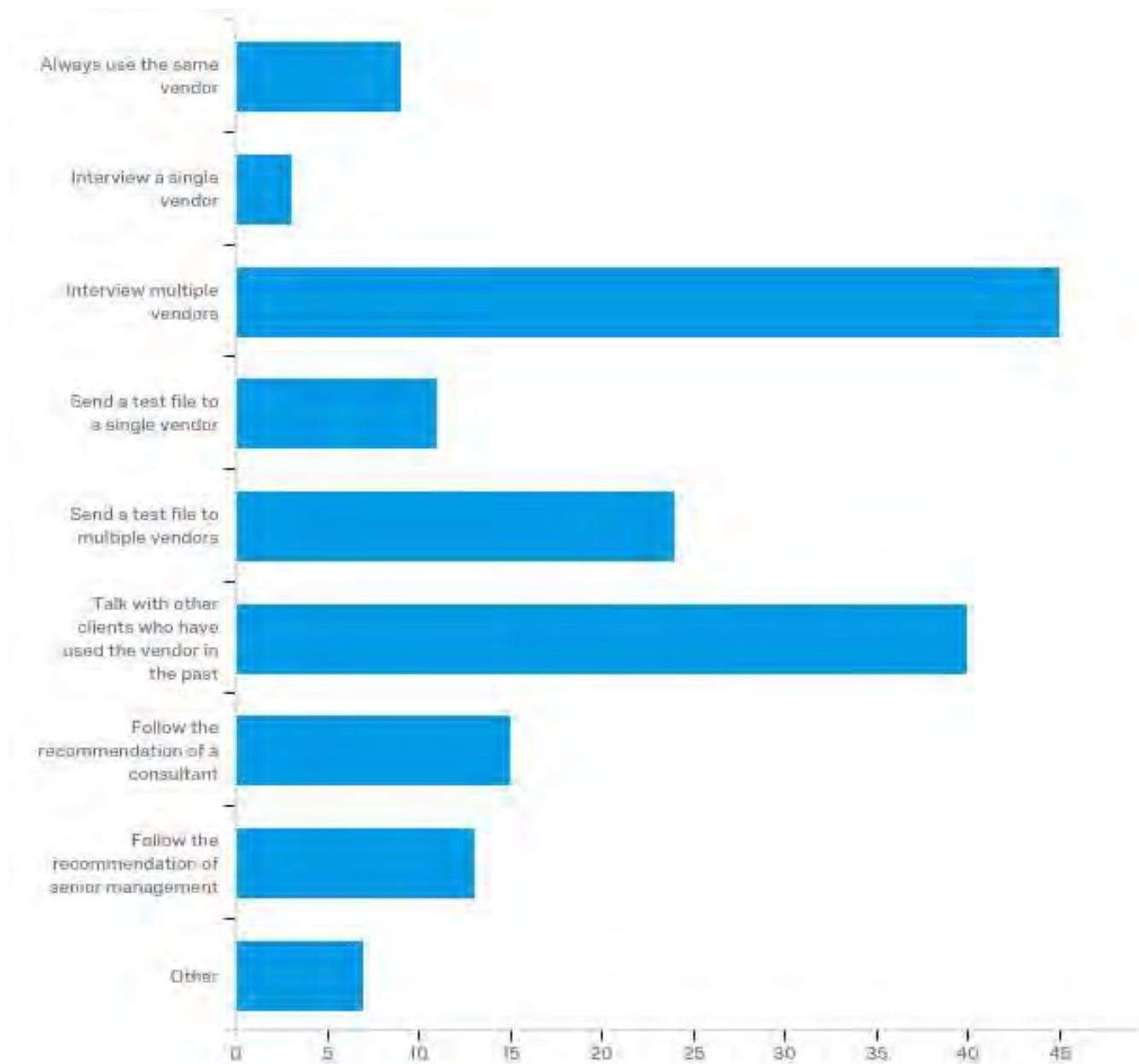
#	Answer	%	Count
1	Always use the same vendor	14.29%	9
2	Interview a single vendor	4.76%	3
3	Interview multiple vendors	71.43%	45
4	Send a test file to a single vendor	17.46%	11
5	Send a test file to multiple vendors	38.10%	24
6	Talk with other clients who have used the vendor in the past	63.49%	40
7	Follow the recommendation of a consultant	23.81%	15
8	Follow the recommendation of senior management	20.63%	13
9	Other	11.11%	7
	Total	100%	63

Q2.8 Current Data Quality/Data Enhancement Budget

Q2.8 - What is your current budget for data quality/data enhancement processes?
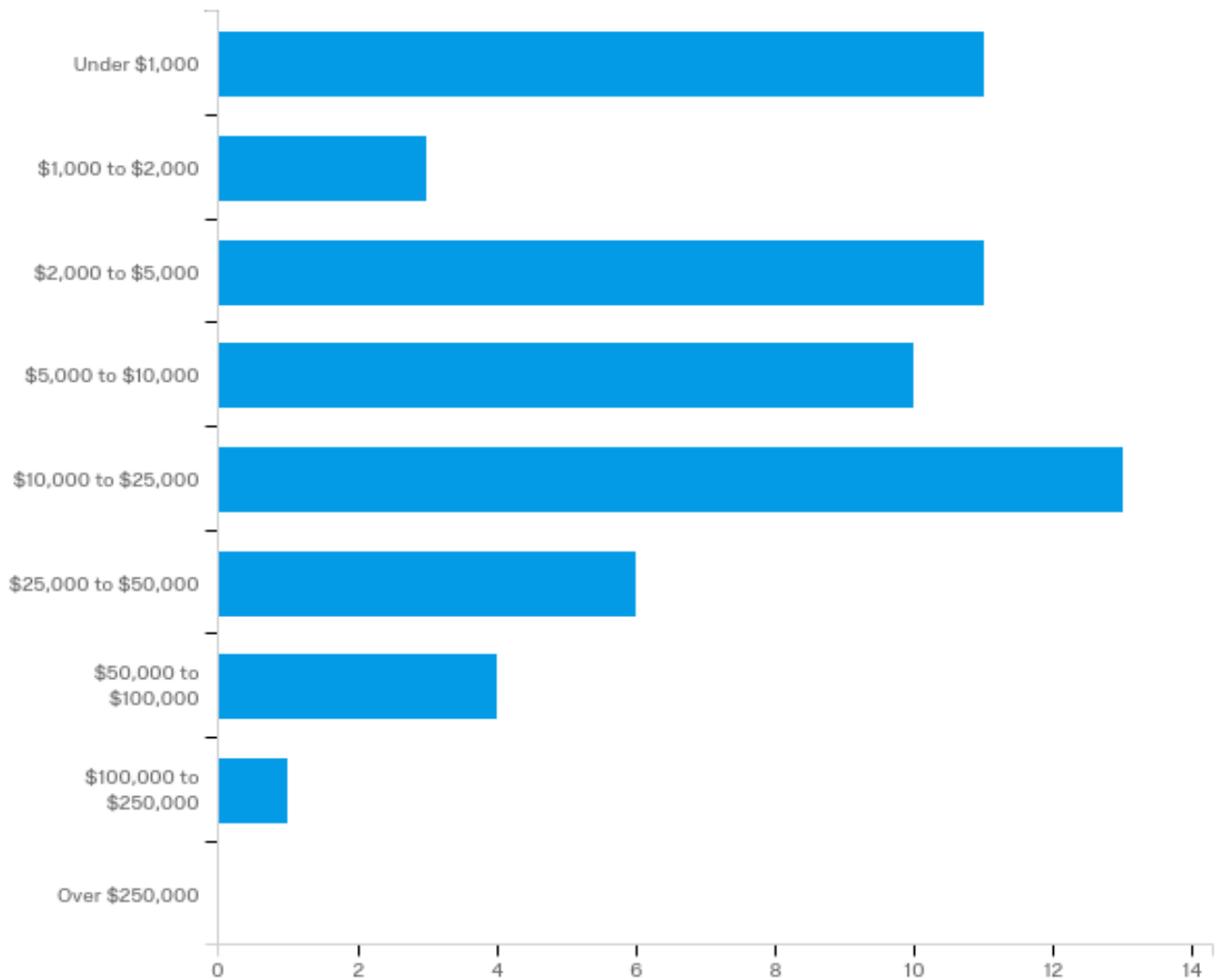
#	Answer	%	Count
1	Under $1,000	18.64%	11
2	$1,000 to $2,000	5.08%	3
3	$2,000 to $5,000	18.64%	11
4	$5,000 to $10,000	16.95%	10
5	$10,000 to $25,000	22.03%	13
6	$25,000 to $50,000	10.17%	6
7	$50,000 to $100,000	6.78%	4
8	$100,000 to $250,000	1.69%	1
9	Over $250,000	0.00%	0
	Total	100%	59

Q2.9 Requested Data Quality/Data Enhancement Budget

Q2.9 - What was your requested budget for data quality/data enhancement processes?
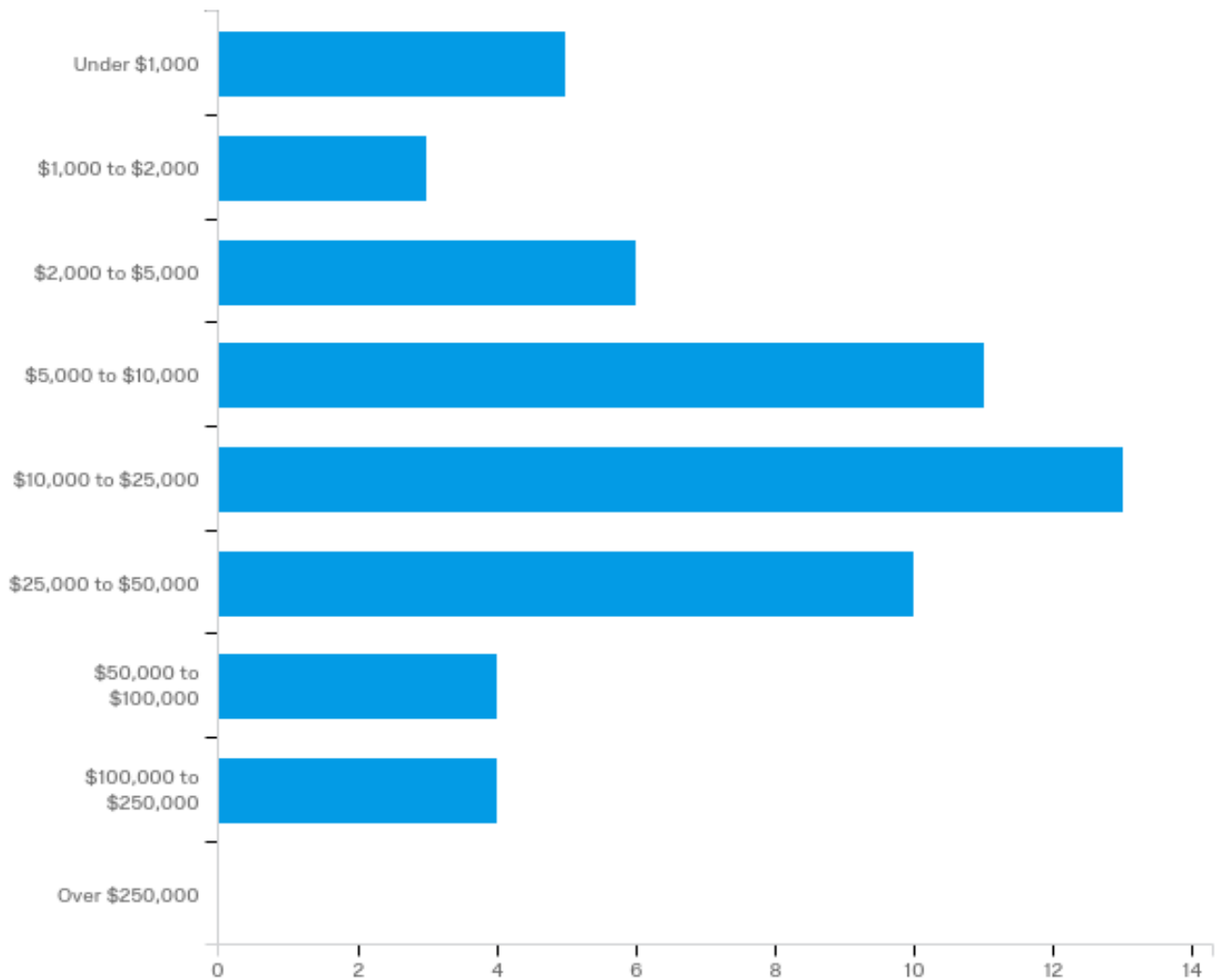
#	Answer	%	Count
1	Under $1,000	8.93%	5
2	$1,000 to $2,000	5.36%	3
3	$2,000 to $5,000	10.71%	6
4	$5,000 to $10,000	19.64%	11
5	$10,000 to $25,000	23.21%	13
6	$25,000 to $50,000	17.86%	10
7	$50,000 to $100,000	7.14%	4
8	$100,000 to $250,000	7.14%	4
9	Over $250,000	0.00%	0
	Total	100%	56

Q2.10 Optimal Data Quality/Data Enhancement Budget

Q2.10 - What would be your optimal budget for data quality/data enhancement processes?
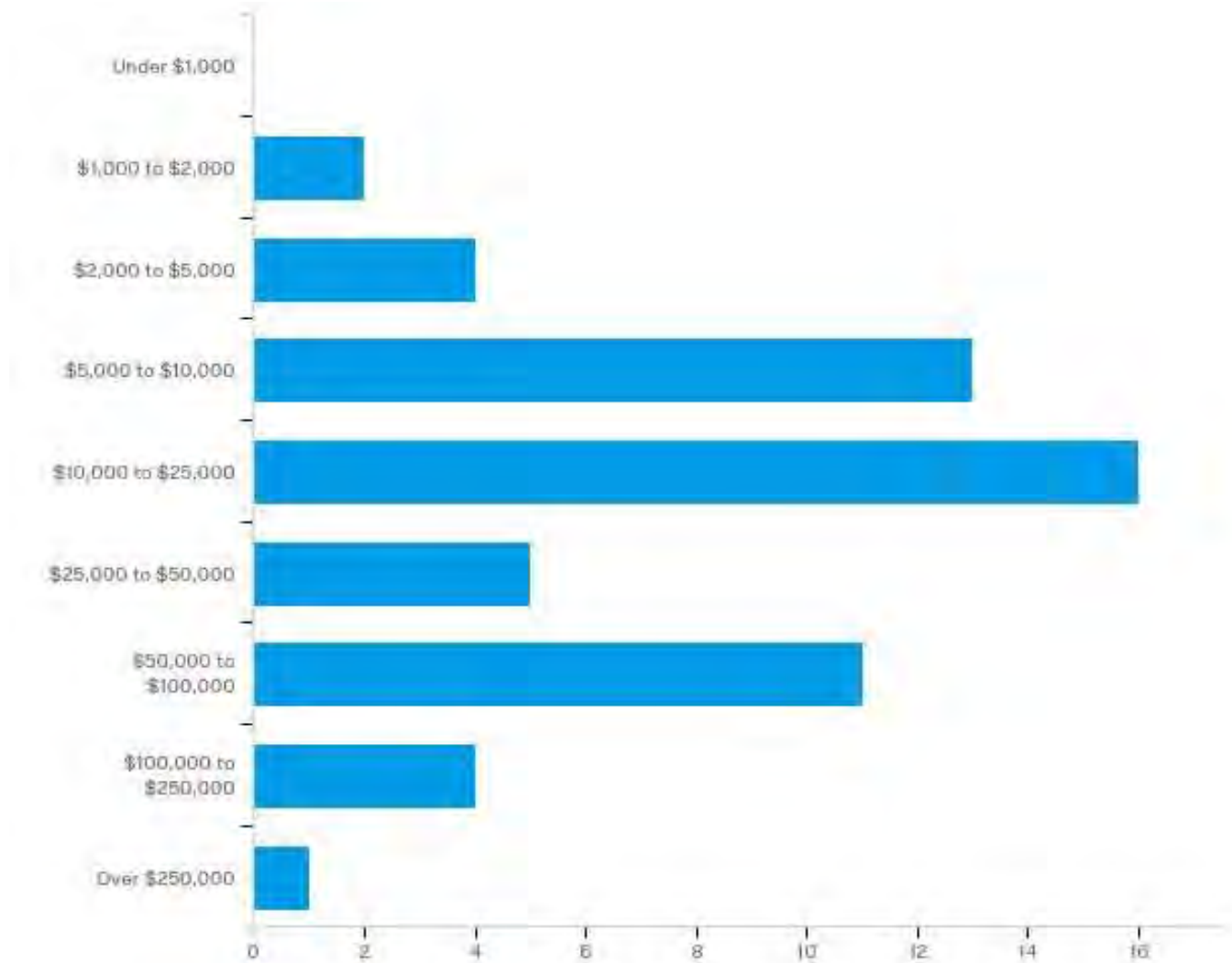
#	Answer	%	Count
1	Under $1,000	0.00%	0
2	$1,000 to $2,000	3.57%	2
3	$2,000 to $5,000	7.14%	4
4	$5,000 to $10,000	23.21%	13
5	$10,000 to $25,000	28.57%	16
6	$25,000 to $50,000	8.93%	5
7	$50,000 to $100,000	19.64%	11
8	$100,000 to $250,000	7.14%	4
9	Over $250,000	1.79%	1
	Total	100%	56

Q2.11 Programmatic Data Quality/Data Enhancement FTEs

Q2.11 - How many staff FTEs are dedicated to programmatic data quality/data enhancement processes (estimated, to the nearest .25)?
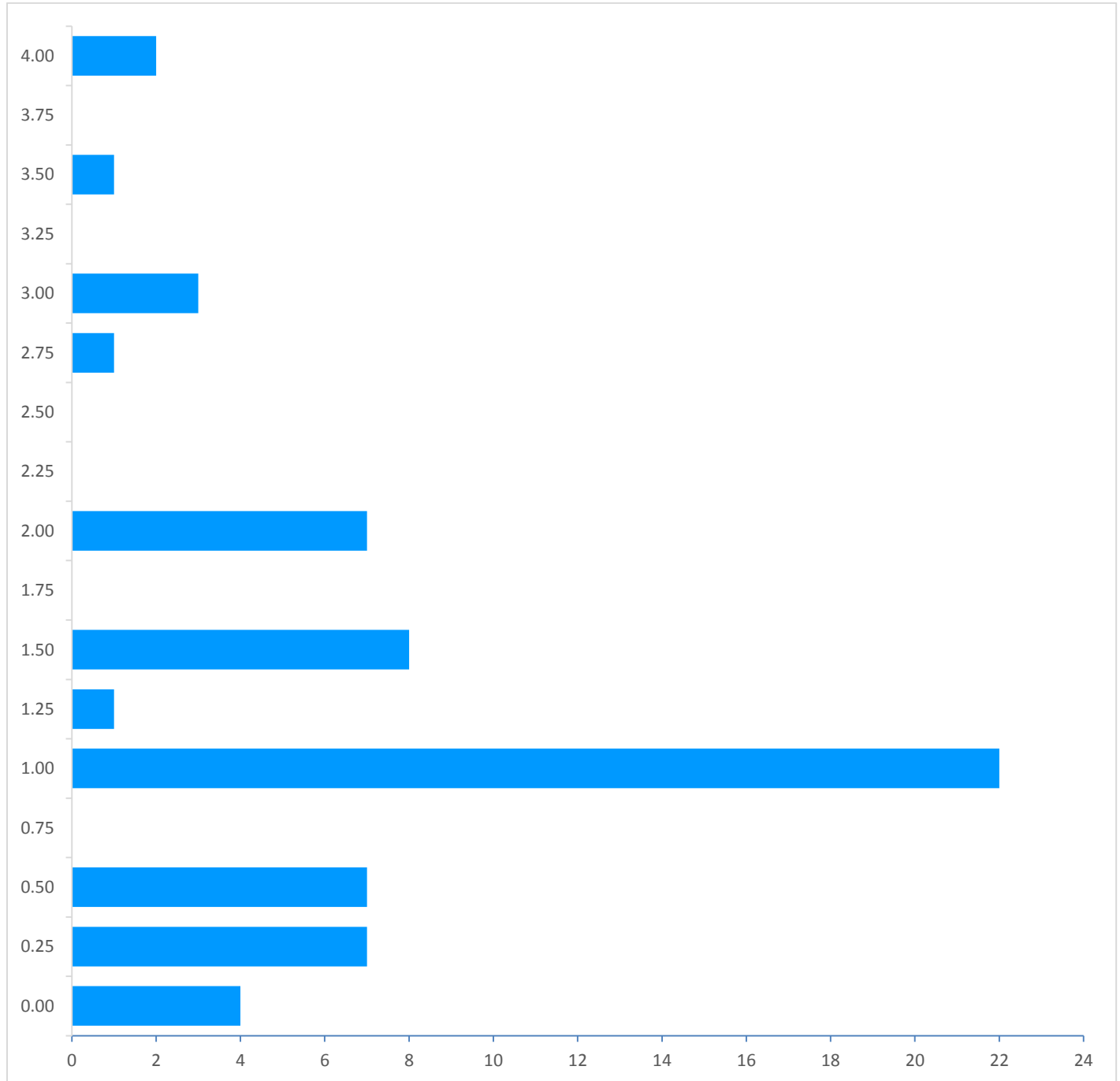
Answer	%	Count
0.00	6.35%	4
0.25	11.11%	7
0.50	11.11%	7
0.75	0.00%	
1.00	34.92%	22
1.25	1.59%	1
1.50	12.70%	8
1.75	0.00%	
2.00	11.11%	7
2.25	0.00%	
2.50	0.00%	
2.75	1.59%	1
3.00	4.76%	3
3.25	0.00%	
3.50	1.59%	1
3.75	0.00%	
4.00	3.17%	2
Total	100.00%	63

Q2.12 Manual Entry Data Quality/Data Enhancement FTEs

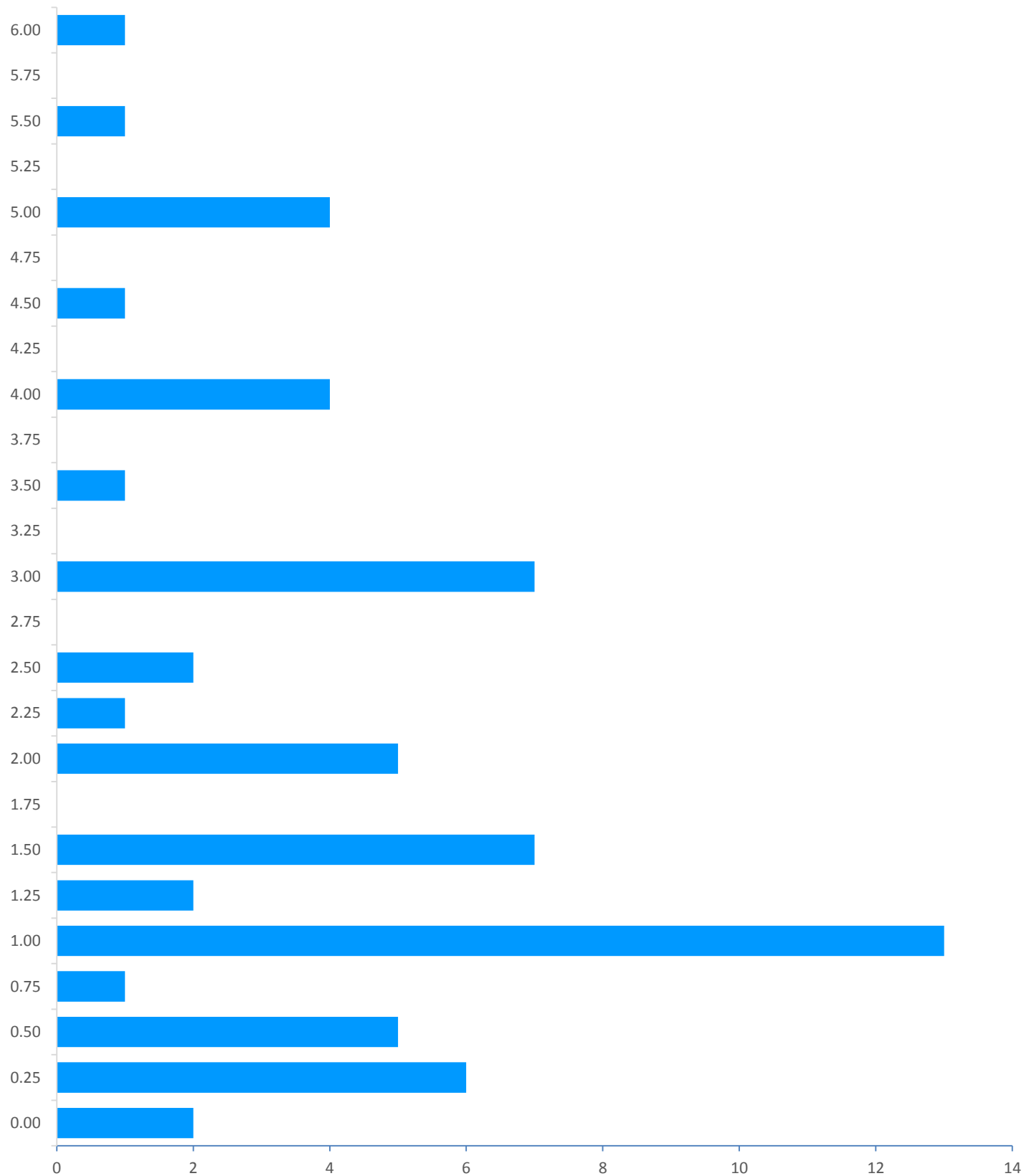*Q2.12 - How many staff FTEs are dedicated to manual data quality/data enhancement processes (estimated, to the nearest .25)?*

Answer	%	Count
0.00	3.17%	2
0.25	9.52%	6
0.50	7.94%	5
0.75	1.59%	1
1.00	20.63%	13
1.25	3.17%	2
1.50	11.11%	7
1.75	0.00%	0
2.00	7.94%	5
2.25	1.59%	1
2.50	3.17%	2
2.75	0.00%	0
3.00	11.11%	7
3.25	0.00%	0
3.50	1.59%	1
3.75	0.00%	0
4.00	6.35%	4
4.25	0.00%	0
4.50	1.59%	1
4.75	0.00%	0
5.00	6.35%	4
5.25	0.00%	0
5.50	1.59%	1
5.75	0.00%	0
6.00	1.59%	1
Total	100.00%	63

Q2.13 Other Information Important to Understanding Data Quality/Data Enhancement

Q2.13 - *What other information is important to understanding data quality and data enhancement?*

Some of the processes are hybrids. For example, we use a local tool to do analysis and sifting before using a vendor tool to do uploads, or we identify high-priority records for manual verification and updates but use a programmatic process with review of exceptions for the rest. Some projects are targeted to a small section of the database (e.g. surveys). Basic wealth screening occurs monthly for new constituents but periodically a deeper dive is done.

It's important to keep known BAD information in your system so that you do not re-incorporate "supposedly new" information into your system after vendors return results.

Examples: Bounced email addresses, disconnected phone numbers. We always compare known bad information to newly imported information, and recode the "new," as appropriate.

We have one staff member who enters and acknowledges gifts daily and does prospect research and updates our data plus one director who evaluates need, budgets (or pitches the budget), and identifies vendors. We're a small shop!

Getting leadership to understand the importance, and getting leadership to work with the data once provided. Our offices are spread out over four counties and we have 24 facilities that have staff entering data.... you can imagine the headache. Until it matters enough to get it in correctly, it will not be worth paying to fix it.

We carefully evaluate data enhancement based on how it will be used (i.e. what will you do differently with this information)? And we are in the learning process about which wealth indicator options are best. Data quality is something that we attempt to weave into usual business processes, so NCOA and deceased updates before every mailing, plus a regular attention to returned mail.

To clarify my answers on this page: we are a small school so our data counts aren't very high, so our budget for data appends does not need to be large. Most appends we do end up costing $100-$300 each. If you do one missing, one email, one phone, one address, and one deceased per year, it ends up costing about $1000 total.

Organizational Data Needs in the Future.

Success of past initiatives. When past initiatives are not very successful, it adds difficulty to getting budget for future initiatives even if a new vendor is capable of significantly improving results. The problem is that there is a catch-22. Do you take the risk of lobbying for a data enhancement initiative with a new vendor that MAY improve results if you are unsure that the new vendor actually will?

Section 3: Organizational Profile

Q3.2 Nonprofit Type

### Q3.2 - What nonprofit profile most accurately reflects your organization?
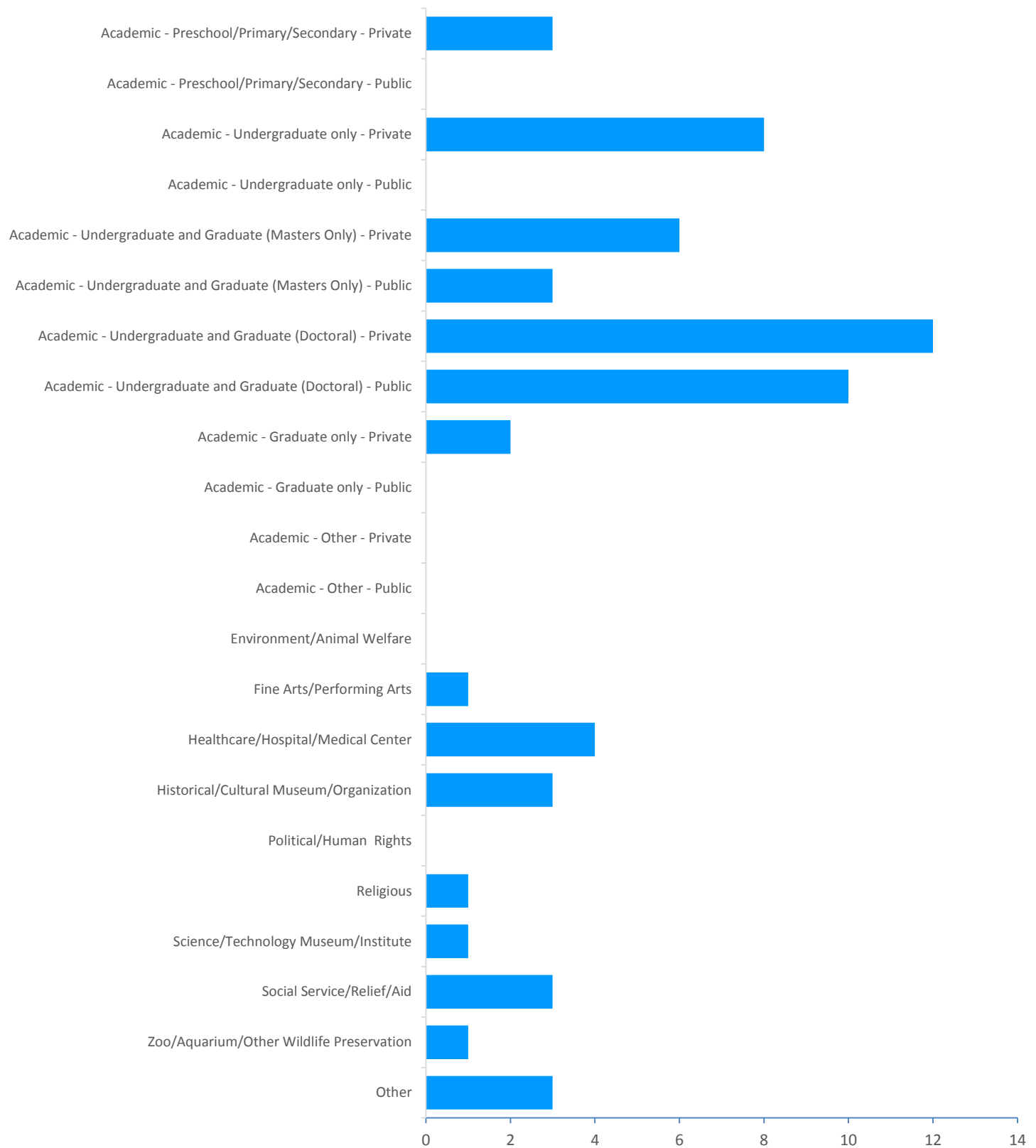
#	Answer	%	Count

1	Academic - Preschool/Primary/Secondary - Private	4.92%	3
2	Academic - Preschool/Primary/Secondary - Public	0.00%	0
3	Academic - Undergraduate only - Private	13.11%	8
4	Academic - Undergraduate only - Public	0.00%	0
5	Academic - Undergraduate and Graduate (Masters Only) - Private	9.84%	6
6	Academic - Undergraduate and Graduate (Masters Only) - Public	4.92%	3
7	Academic - Undergraduate and Graduate (Doctoral) - Private	19.67%	12
8	Academic - Undergraduate and Graduate (Doctoral) - Public	16.39%	10
9	Academic - Graduate only - Private	3.28%	2
1	Academic - Graduate only - Public	0.00%	0
1	Academic - Other - Private	0.00%	0
1	Academic - Other - Public	0.00%	0
1	Environment/Animal Welfare	0.00%	0
1	Fine Arts/Performing Arts	1.64%	1
1	Healthcare/Hospital/Medical Center	6.56%	4
1	Historical/Cultural Museum/Organization	4.92%	3
1	Political/Human Rights	0.00%	0
1	Religious	1.64%	1
1	Science/Technology Museum/Institute	1.64%	1
2	Social Service/Relief/Aid	4.92%	3
2	Zoo/Aquarium/Other Wildlife Preservation	1.64%	1
2	Other	4.92%	3
	Total	100%	61

Other
Fundraising arm of major public university
Umbrella fundraising org
health, non-hospital

Q3.3 Full-Time Employees (Organization)

*Q3.3 - How many full-time employees work for your organization?*
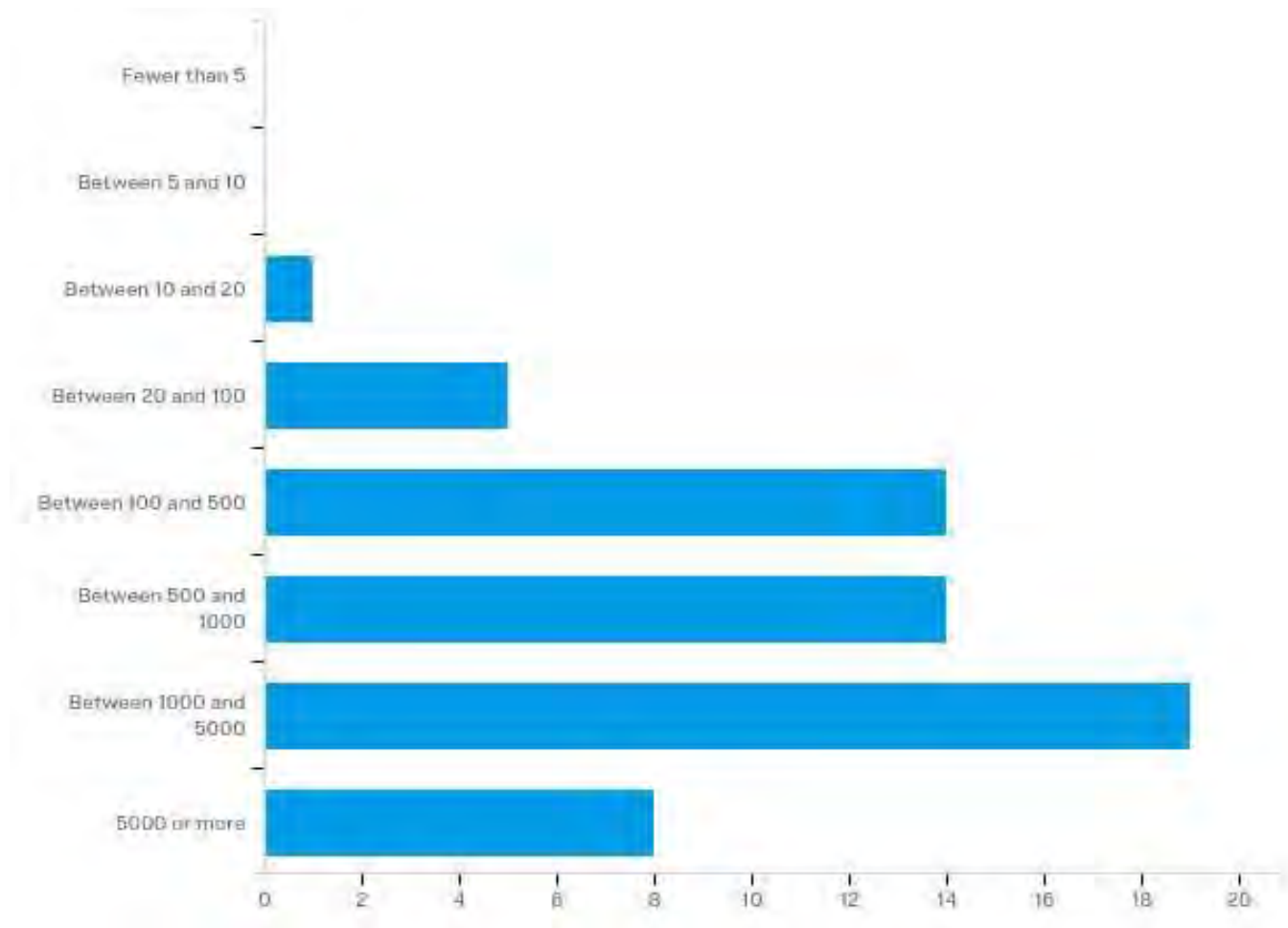
#	Answer	%	Count
1	Fewer than 5	0.00%	0
2	Between 5 and 10	0.00%	0
3	Between 10 and 20	1.64%	1
4	Between 20 and 100	8.20%	5
5	Between 100 and 500	22.95%	14
6	Between 500 and 1000	22.95%	14
7	Between 1000 and 5000	31.15%	19
8	5000 or more	13.11%	8
	Total	100%	61

Q3.4 Headcount of Institutional Advancement Staff

Q3.4 - What is the total count of all institutional advancement staff?
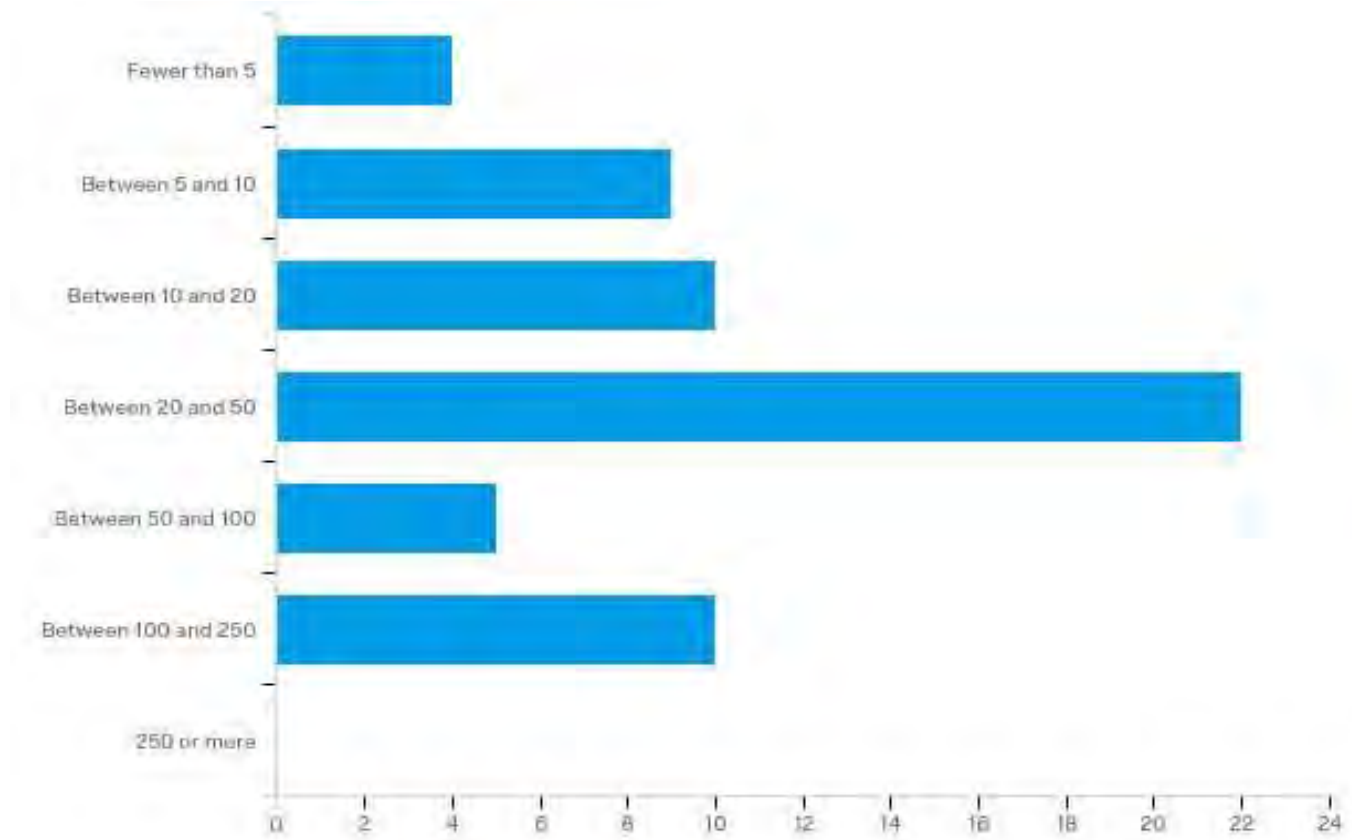
#	Answer	%	Count
1	Fewer than 5	6.67%	4
2	Between 5 and 10	15.00%	9
3	Between 10 and 20	16.67%	10
4	Between 20 and 50	36.67%	22
5	Between 50 and 100	8.33%	5
6	Between 100 and 250	16.67%	10
7	250 or more	0.00%	0
	Total	100%	60

Q3.5 Front-Line Fundraisers FTE

Q3.5 - How many full-time employees (FTEs) are represented on your front-line fundraising team?
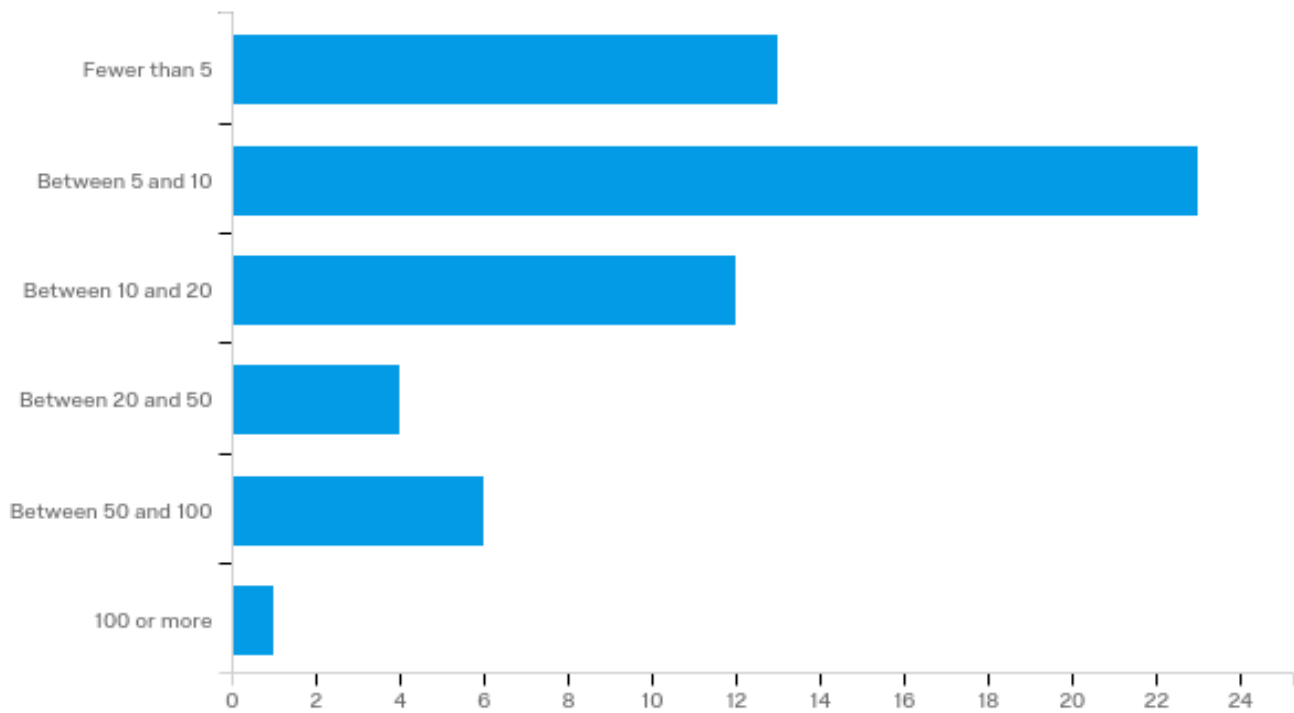
#	Answer	%	Count
1	Fewer than 5	22.03%	13
2	Between 5 and 10	38.98%	23
3	Between 10 and 20	20.34%	12
4	Between 20 and 50	6.78%	4
5	Between 50 and 100	10.17%	6
6	100 or more	1.69%	1
	Total	100%	59

Q3.6 Headcount of Development Operations/Advancement Services Staff

Q3.6 - What is the total count of development operations and/or advancement services staff?
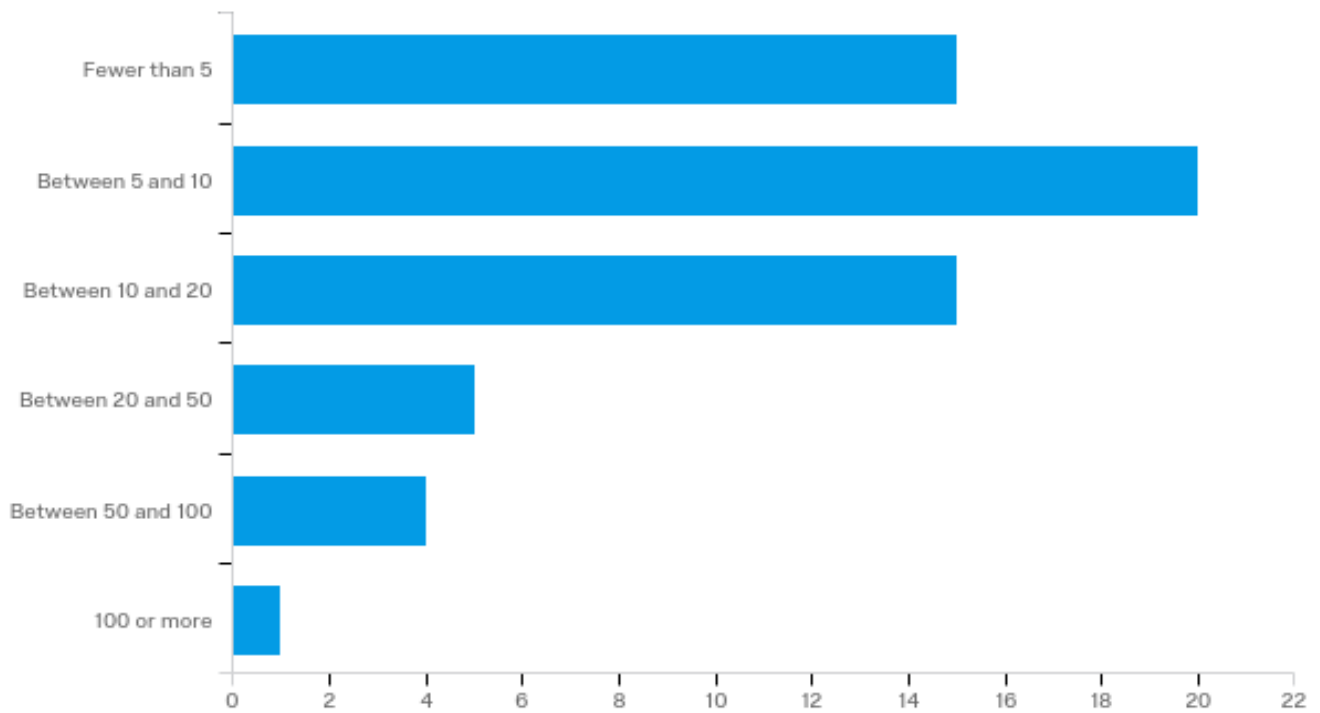
#	Answer	%	Count
1	Fewer than 5	25.00%	15
2	Between 5 and 10	33.33%	20
3	Between 10 and 20	25.00%	15
4	Between 20 and 50	8.33%	5
5	Between 50 and 100	6.67%	4
6	100 or more	1.67%	1
	Total	100%	60

Q3.7 Active Records in Fundraising Database

*Q3.7 - What is the total number of active records in your fundraising database (excluding deceased records)?*
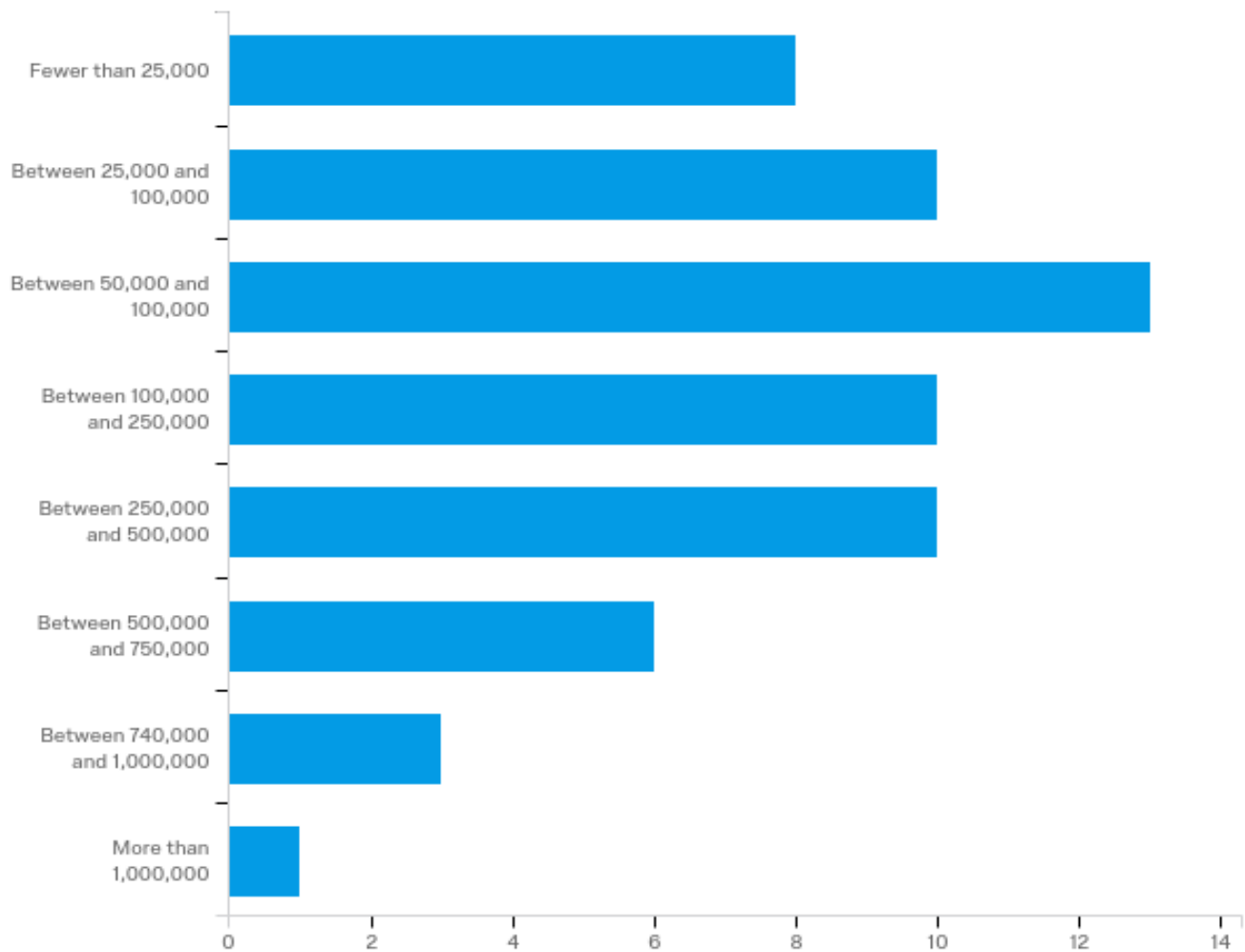
#	Answer	%	Count
1	Fewer than 25,000	13.11%	8
2	Between 25,000 and 100,000	16.39%	10
3	Between 50,000 and 100,000	21.31%	13
4	Between 100,000 and 250,000	16.39%	10
5	Between 250,000 and 500,000	16.39%	10
6	Between 500,000 and 750,000	9.84%	6
7	Between 740,000 and 1,000,000	4.92%	3
8	More than 1,000,000	1.64%	1
	Total	100%	61

Q3.8 Dollars Raised, Last Fiscal Year

Q3.8 - What was the total dollar figure raised as reported for your last fiscal year?
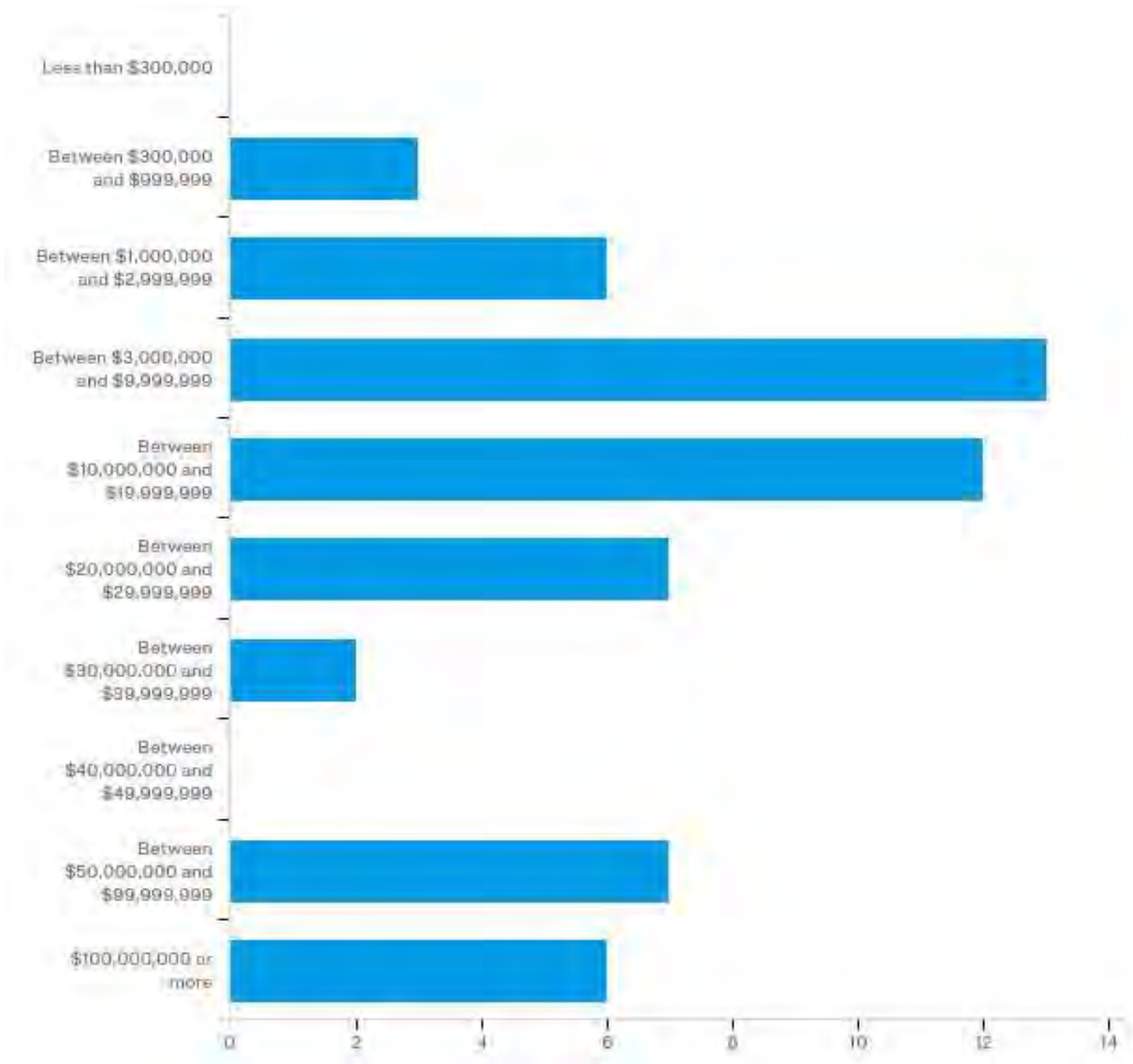
#	Answer	%	Count
1	Less than $300,000	0.00%	0
2	Between $300,000 and $999,999	5.36%	3
3	Between $1,000,000 and $2,999,999	10.71%	6
4	Between $3,000,000 and $9,999,999	23.21%	13
5	Between $10,000,000 and $19,999,999	21.43%	12
6	Between $20,000,000 and $29,999,999	12.50%	7
7	Between $30,000,000 and $39,999,999	3.57%	2
8	Between $40,000,000 and $49,999,999	0.00%	0
9	Between $50,000,000 and $99,999,999	12.50%	7
10	$100,000,000 or more	10.71%	6
	Total	100%	56