# Data / Self-Assessment Checklist

| | YES | NO | UNSURE | ACTION STEPS |
|---|---|---|---|---|
| We have reliable mailing addresses for the majority of our donors*. | | | | |
| We have email addresses for most of our donors. | | | | |
| We have reliable giving records for at least 10 years for our donors, including the project/area they gave to. | | | | |
| We are confident that our data is reliable for key giving milestones, such as first gift date and years of repeat giving. | | | | |
| We know and track when our donors give us unsolicited or unprompted gifts. | | | | |
| We know how our donors do NOT want to be contacted (such as Do Not Phone, Do Not Email, etc.) | | | | |
| We track when our donors tell us how they DO want to be contacted, i.e. "Send Impact Report" or "Prefers Email".<br>…and we follow through. | | | | |
| Data from third-party platforms is integrated with our primary database, including things like:<br>• Events<br>• Email unsubscribe/preferences<br>• P2P event participation<br>• Fundraising on our behalf | | | | |
| We track 'soft data' when our donors share it with us, such as areas of interest, reasons for supporting us, family connections to the cause, etc. | | | | |
| We can run and periodically review our key metrics such as donor acquisition, retention and lapse rates:<br>• Overall<br>• By Program (i.e. Mid-level, Monthly, Members, etc.)<br>• By Channel (i.e. Online, Mail, In-Person, etc.) | | | | |
| We know, or can find, who our 'top supporters' are in terms of cumulative giving. | | | | |
| We use our past results to forecast items such as:<br>• Appeal Response Rates<br>• Monthly Donor Acquisitions<br>• Donor Attrition<br>• Channel Growth (i.e. Online vs. Mail) | | | | |
| We track key metrics over time, and visualize them using Excel or a tool such as Tableau. | | | | |
| We use advanced analytics tools to enhance reporting, such as Tableau or MS PowerBI. | | | | |
| We are conducting advanced analytics, using techniques such as:<br>• Clustering<br>• Regression for Correlation Analysis<br>• Modeling/Scoring | | | | |
| We are using our analytics results to guide day-to-day activity, for example providing frequent updates to prospect lists or new mid-level giving acquisition pools. | | | | |

*For brevity, donors is used in the checklist but represents all applicable supporters or stakeholders your organization would engage with, including volunteers, alumni, prospective donors, members, etc.

KCI
What's Next.