

ASSESSMENT FRAMEWORK

Supporter **Data Health** Scorecard

A Comprehensive Framework for Assessing and Improving Donor & Supporter Database Quality in Not-for-Profit Organisations

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Data Quality

CRM Hygiene

Donor Database

Privacy Compliance

Self-Assessment

NZ & Australia

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Introduction

Why supporter data health matters and how to use this scorecard

Why Supporter Data Health Matters

Your supporter database is one of your organisation's most valuable assets. High-quality data enables effective fundraising, meaningful engagement, and compliance with privacy obligations. Poor data quality costs time, money, and donor relationships.

Direct Costs of Poor Data

- Wasted postage on mail returns
- Failed email deliveries reducing campaign reach
- Staff time manually fixing errors
- Duplicate mailings and wasted resources
- Lost donations from incorrect payment details
- Fines for privacy breaches (up to \$350,000 in NZ)

Indirect Costs of Poor Data

- Damaged donor relationships from errors
- Missed opportunities from incomplete data
- Poor decision-making from inaccurate reporting
- Inability to segment and personalise
- Reduced donor retention and lifetime value
- Reputational damage from communication mistakes

Research Findings

DATA QUALITY ISSUE	IMPACT
5% duplicate rate	5% wasted campaign budget
Missing email addresses	30-50% of addressable market lost
Outdated addresses	3-5% mail return rate (industry average)
Poor consent records	Risk of privacy complaints and fines

Who This Scorecard Is For

Fundraising Managers

Seeking to improve donor data quality

Database Admins

Responsible for CRM data hygiene

Finance Teams

Ensuring accurate donation processing

Communications Staff

Relying on supporter data for campaigns

Compliance Officers

Managing privacy obligations

Senior Leaders

Wanting to understand data health status

How to Use This Scorecard

1

Understand the Dimensions

Read through the six data health dimensions to understand what good data looks like in each area

2

Run the Assessment

Use the Self-Assessment Scorecard in Section 9 to evaluate your current data health across all dimensions

3

Analyse Your Results

Identify your strongest and weakest dimensions. Calculate your overall Data Health Score

4

Build Your Improvement Plan

Use Section 11 to create a prioritised action plan for improving your data quality

5

Implement Maintenance Practices

Apply the Ongoing Maintenance Framework in Section 12 to sustain data health over time

6

Reassess Regularly

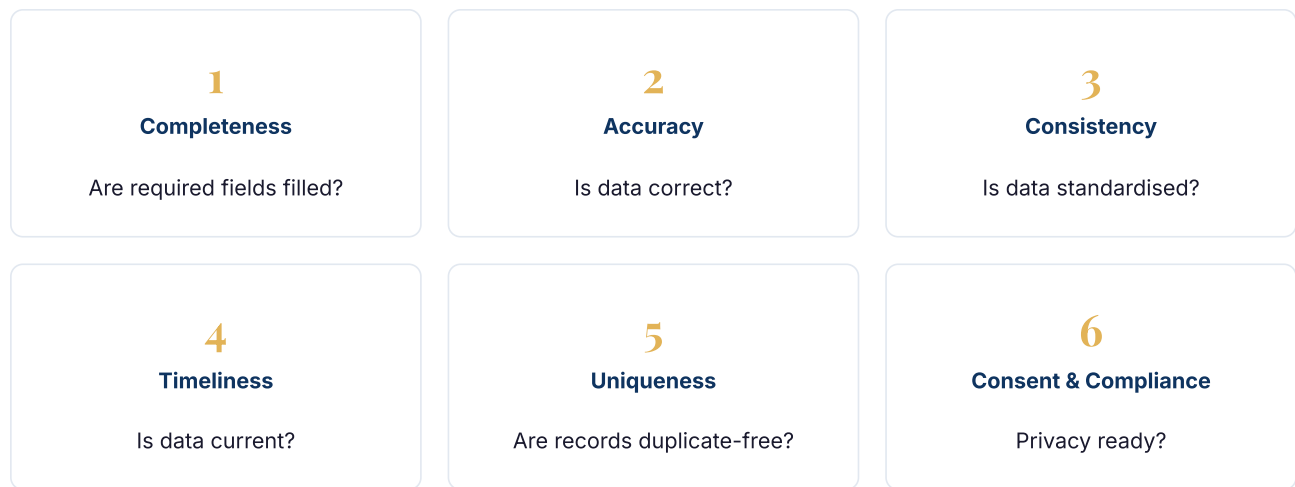
Run this assessment quarterly to track progress and identify new issues

The Six Dimensions of Data Health

Comprehensive framework across six key quality areas

Overview

This framework assesses supporter data health across six dimensions:



Scoring Framework

Each dimension is scored from 0-100%:

SCORE	RATING	DESCRIPTION
90-100%	Excellent	Best practice standard
75-89%	Good	Minor improvements needed
60-74%	Fair	Significant gaps to address
40-59%	Poor	Urgent attention required
0-39%	Critical	Immediate action needed

Dimension Weighting

DIMENSION	WEIGHT	YOUR SCORE	WEIGHTED
1. Completeness	20%	___%	___
2. Accuracy	20%	___%	___
3. Consistency	15%	___%	___
4. Timeliness	15%	___%	___
5. Uniqueness	15%	___%	___
6. Consent & Compliance	15%	___%	___
Overall Data Health Score	100%		___%

Dimension 1: Data Completeness

Measuring whether critical fields contain values

What This Dimension Measures

Completeness measures whether critical fields in your supporter records contain values. Missing data limits your ability to communicate effectively and understand your supporters.

Critical Fields for NGO Supporter Data

Essential Fields (Must Have)

Identification:

- First Name
- Last Name (or Organisation Name for corporate)
- Record Type (Individual/Organisation/Household)

Contact:

- At least one contact method (email OR postal OR phone)
- Primary email address (for email-able contacts)
- Postal address (for mail-able contacts)

Giving:

- First gift date
- Last gift date
- Total lifetime giving
- Current giving status (active/lapsed/etc.)

Important Fields (Should Have)

Demographics:

- Salutation/Title
- Gender (if collected respectfully)
- Date of birth or age range (for legacy planning)

Engagement:

- Source/how acquired
- Communication preferences
- Interest areas/causes supported
- Event attendance history

Relationships:

- Linked relationships (spouse, employer, etc.)
- Volunteer status
- Board/committee membership

Completeness Benchmarks

FIELD CATEGORY	MINIMUM	TARGET	BEST PRACTICE
Email Address	70%	85%	95%+
Postal Address	60%	80%	90%+
Phone Number	40%	60%	75%+
Date of Birth	20%	40%	60%+
Salutation	75%	90%	98%+
First Gift Date	95%	99%	100%
Communication Prefs	50%	75%	90%+
Source/Acquisition	60%	85%	95%+

Improving Completeness

Quick Wins

- Data Append Services:** Use NZ Post Address Finder or Australia Post AMAS
- Email Finder Tools:** Locate missing email addresses (with consent)
- Welcome Surveys:** Ask new donors for missing information
- Progressive Profiling:** Request one piece of information at each touchpoint

Best Practice

- Set required fields at data entry to prevent incomplete records
- Use form validation to ensure quality at point of capture
- Regular data completeness reports and accountability
- Incentivise data collection in frontline processes

Dimension 2: Data Accuracy

Ensuring the data you have is correct

What This Dimension Measures

Accuracy measures whether the data you have is correct. Inaccurate data leads to embarrassing errors, failed communications, and damaged relationships.

Common Accuracy Issues

Email Accuracy

Typos (gmial.com, hotmal.com), role-based addresses, outdated work emails, unbounced flags

Target: Less than 2% hard bounces

Postal Address Accuracy

Outdated addresses, formatting errors, incomplete addresses, invalid postcodes

Target: Less than 3% mail returns

Phone Accuracy

Disconnected numbers, wrong numbers, old mobile numbers, missing area codes

Target: Greater than 80% verified

Name Accuracy

Misspelled names, wrong salutation/gender, incorrect titles, maiden vs married name

Target: Less than 2% errors

Accuracy Benchmarks

METRIC	POOR	FAIR	GOOD	EXCELLENT
Email bounce rate	>5%	3-5%	1-3%	<1%
Mail return rate	>5%	3-5%	1-3%	<1%
Phone disconnect rate	>20%	10-20%	5-10%	<5%
Name/salutation errors	>5%	3-5%	1-3%	<1%

Improving Accuracy

Email Validation Steps

1

Syntax Validation

Check format at point of entry: contains @ symbol, valid domain format, no obvious typos

2

Domain Verification

Check domain exists and accepts mail via MX record lookup and domain exists check

3

Engagement Monitoring

Process hard bounces immediately, monitor soft bounces, flag non-openers for verification

4

Regular Hygiene

Remove hard bounces, re-engage or remove non-openers (12+ months), email append for missing/invalid

Address Validation (NZ)

- Use NZ Post Address Finder API
- Validate against LINZ address data
- Process Undeliverable As Addressed (UAA) returns
- Run NCOA (National Change of Address) annually

Address Validation (AU)

- Use Australia Post AMAS validation
- Process Return to Sender mail
- Run NCOA annually
- Consider Geocoding validation

Deceased Suppression

Avoid distressing bereaved families, prevent reputational damage, comply with privacy obligations, and maintain database accuracy.

- Process reported deaths immediately
- Mark record as deceased (don't delete - preserve giving history)
- Remove from all active communications
- Update household relationships appropriately
- Retain for historical reporting

Dimension 3: Data Consistency

Whether data follows standard formats and conventions

What This Dimension Measures

Consistency measures whether data follows standard formats and conventions. Inconsistent data makes segmentation, reporting, and merging difficult.

Common Consistency Issues

FIELD	INCONSISTENT	CONSISTENT
Names	john smith / JOHN SMITH / Smith, John	John Smith
Addresses	123 Main St / 123 Main St. / 123 main street	123 Main Street
Phones	021 123 4567 / (021) 123-4567 / +6421234567	+64 21 123 4567
Titles	Mr / Mr. / Mister / MR	Mr

Data Standards Template

Names & Titles

Format: Title Case (First letter capitalised)

First Name: Required, single word (no titles)

Last Name: Required, can include particles (von, de, O')

Titles: Mr, Mrs, Ms, Miss, Dr, Prof, Rev, Hon

Addresses (NZ)

Line 1: Unit/Level + Street number + Street name + Street type

Line 2: Suburb (optional)

City/Town: Full name (not abbreviated)

Postcode: 4 digits

Phone Numbers (NZ)

Format: +64 X XXX XXXX

Mobile: +64 2X XXX XXXX

Landline: +64 X XXX XXXX

Other Standards

Email: Lowercase only, one designated as primary

Dates: DD/MM/YYYY (NZ/AU) or YYYY-MM-DD (ISO). Never MM/DD/YYYY

Currency: NZD or AUD, format \$X,XXX.XX

Improving Consistency

Standardisation Approaches

CRM Field Validation

- Picklists for standardised values
- Format validation on entry
- Required field enforcement

Data Cleaning

- Title case conversion for names
- Address parsing and standardisation
- Phone number formatting scripts

Dimension 4: Data Timeliness

Whether your data is current and up-to-date

What This Dimension Measures

Timeliness measures whether your data is current. Supporter circumstances change - people move, change jobs, update preferences, and unfortunately, pass away.

Data Decay Rates

Without maintenance, your database loses 1-2% quality per month!

DATA TYPE	ANNUAL DECAY RATE
Email addresses	20-25%
Postal addresses	10-15%
Phone numbers	15-20%
Job titles/employers	20-30%

~20%

EMAILS INVALID AFTER 1 YEAR

~35%

EMAILS INVALID AFTER 2 YEARS

~50%

EMAILS INVALID AFTER 3 YEARS

Timeliness Maintenance Schedule

Monthly

- Process email bounces (hard and soft)
- Process mail returns
- Update records from returned mail/email
- Process deceased notifications

Quarterly

- Run email verification on non-engaged segment
- Review and clean "no contact" records
- Analyse engagement trends

Bi-Annually

- Run address verification/NCOA
- Re-engagement campaign for lapsed
- Phone verification on key segments

Annually

- Full database audit
- Archive truly inactive records
- Update source/acquisition data
- Comprehensive Data Health Scorecard assessment

Dimension 5: Data Uniqueness

Ensuring your database is free from duplicate records

What This Dimension Measures

Uniqueness measures whether your database contains duplicate records. Duplicates cause multiple mailings, split giving history, and inaccurate reporting.

Impact of Duplicates - Example Cost Calculation

10,000 records x 5% duplicates = 500 duplicate records
500 duplicates x \$2.50 per mail piece = \$1,250 wasted per mailing
4 mailings per year = **\$5,000+ annual waste**

Types of Duplicates

Exact Duplicates

Same name, same address, same email. Usually from data imports or system errors. **Easiest to identify and merge.**

Fuzzy Duplicates

Same person, different data variations: John Smith vs J. Smith, 123 Main St vs 123 Main Street. **Requires matching algorithms.**

Household Duplicates

Same household, different records. May be intentional (separate relationships) or unintentional. **Requires business rules.**

Cross-System Duplicates

Same person in different source systems: event registration vs donation record. **Often hardest to identify and resolve.**

Duplicate Detection Methods

Threshold Scoring Approach

MATCH TYPE	SCORE	ACTION
Email exact match	100 points	Definite duplicate - auto-merge
Name + Address match	80 points	Likely duplicate - review
Name + Phone match	70 points	Probable duplicate - review
Name only match	20 points	Possible - needs review

Merge automatically above 90 points. Review manually between 60-90. Ignore below 60.

Uniqueness Score Targets



Dimension 6: Consent & Compliance

Aligning data practices with privacy legislation and supporter preferences

Privacy Requirements

NZ Privacy Act 2020

Key Principles for NGOs:

- **IPP 1:** Only collect information you need
- **IPP 3:** Tell people why you're collecting
- **IPP 5:** Keep information secure
- **IPP 6:** Give people access to their information
- **IPP 10:** Only use for intended purposes

Mandatory breach notification if breach causes/likely to cause serious harm.

Australian Privacy Act

Key Australian Privacy Principles:

- **APP 1:** Open and transparent management
- **APP 3:** Collection of solicited personal information
- **APP 6:** Use and disclosure
- **APP 7:** Direct marketing (explicit rules)
- **APP 11:** Security of information

Notifiable Data Breaches Scheme - must notify OAIC and affected individuals.

Consent Tracking Requirements

For Each Supporter Record, Track:

Email: Consent status, date, source

Postal: Consent status, date, source

Phone: Consent status, date, source

SMS: Consent status, date, source (if applicable)

Compliance Checklist

Policies & Procedures

- Privacy policy published on website
- Privacy policy reviewed in last 12 months
- Collection notices used on all forms
- Data retention policy documented
- Data breach response plan in place
- Staff trained on privacy obligations

Consent Management

- Consent tracked for all contact methods
- Consent date and source recorded
- Opt-out processed within 5 working days
- Unsubscribe link on all marketing emails
- Preference centre available
- Third-party list consent verified

Data Access & Security

- Process for handling access requests
- Process for handling correction requests
- CRM access limited to those who need it
- User access reviewed annually
- Data exported securely
- Third-party data sharing agreements in place

Special Categories

- Children's data handled with extra care
- Sensitive information appropriately managed
- Deceased records flagged and suppressed
- Vulnerable beneficiary data protected

Self-Assessment Scorecard

Complete assessment template for your organisation

Supporter Data Health Scorecard - Self-Assessment Worksheet

Organisation: _____
 Date: _____ Database/CRM: _____
 Total Active Records: _____ Completed by: _____

Dimension Scores

DIMENSION	SCORE	WEIGHT	WEIGHTED SCORE
1. Completeness	___%	x 0.20	=
2. Accuracy	___%	x 0.20	=
3. Consistency	___%	x 0.15	=
4. Timeliness	___%	x 0.15	=
5. Uniqueness	___%	x 0.15	=
6. Consent & Compliance	___%	x 0.15	=
Overall Data Health Score			___%

Rating

90-100%	Excellent - Best practice standard
75-89%	Good - Minor improvements needed
60-74%	Fair - Significant gaps to address
40-59%	Poor - Urgent attention required
0-39%	Critical - Immediate action needed

CRM-Specific Guidance

Form-specific tips for Salesforce, Blackbaud, and other popular CRMs

Salesforce Nonprofit (NPSP)

Key Reports for Data Health

Completeness: Contacts with blank Email, Mailing Address, Primary Affiliation

Accuracy: Contacts with "test"/"example" emails, bounced emails

Duplicates: Potential Duplicate Contacts (NPSP feature), matching rules summary

Timeliness: Contacts with no activity in 24 months

Duplicate Management

1. Setup > Duplicate Management > Duplicate Rules - enable standard Contact matching
2. Configure Matching Rules: Email Exact Match, Name + Address Match
3. Run Duplicate Finder jobs, review in Duplicate Record Sets, merge using NPSP Merge tool

Blackbaud (Raiser's Edge NXT, eTapestry)

Raiser's Edge NXT Key Steps

- Use Query module for data health reports across completeness, accuracy, duplicates, timeliness
- Run Address Finder/Duplicate Finder, review and merge through Constituent screen
- Run Address Finder/NCOA annually, process deceased flags from mail returns
- Always use Import module with matching and review exception reports after imports

Other Common NGO CRMs

Beacon (NZ)

NZ-specific address formatting, email bounce tracking integrated, duplicate checking on constituent entry

Donorbox

Export to CSV for data health analysis, duplicate detection on import, consider external tools for advanced querying

HubSpot (Free CRM)

Data quality dashboard built-in, automatic duplicate detection, email bounce handling, property completeness tracking

Microsoft Dynamics 365

Power BI dashboards for data health, duplicate detection rules, NCOA integration available

Data Health Improvement Plan

A prioritised approach to improving your data quality

Priority Framework

	LOW EFFORT	HIGH EFFORT
High Impact	Quick Wins - Do First Fix email bounces, enable MFA, process returns, train staff	Big Bets - Plan Carefully CRM implementation, major data cleanse, system integration, consent rebuild
Low Impact	Fill Ins - Do When Time Minor formatting, additional fields, documentation	Avoid/Defer - Low Priority Historic cleanup, archive projects, custom development

90-Day Improvement Plan

Days 1-30: Quick Wins

Week 1: Process all outstanding bounces, returns, and obvious duplicates

Week 2: Run completeness report, set required fields, staff awareness

Week 3: Run duplicate detection, begin merges, train staff

Week 4: Audit consent records, identify gaps, plan campaign

Days 31-60: Systematic

Week 5-6: Implement data standards, run address & email verification, update CRM rules

Week 7-8: Complete duplicate merge, launch consent campaign, create quality dashboards

Days 61-90: Sustainability

Week 9-10: Implement ongoing hygiene schedule, create training materials, establish data steward

Week 11-12: Run full reassessment, compare to baseline, document lessons, plan next cycle

Ongoing Maintenance Framework

Maintaining data health with regular hygiene and stewardship

Data Hygiene Calendar

FREQUENCY	ACTIVITIES	TIME
Daily	Process new email bounces, duplicate check on new records, apply data standards to new entries	15 mins
Weekly	Review mail returns, process deceased notifications, review duplicate matches, check import logs	30 mins
Monthly	Run completeness report, review unsubscribes, check consent coverage, review user access	1 hour
Quarterly	Run full Data Health Scorecard, email verification on inactive segment, re-engagement campaign, staff training refresh	Half day
Bi-Annually	Address verification/NCOA, phone verification, major duplicate run, privacy policy review	1 day
Annually	Comprehensive audit, archive inactive records, year-over-year comparison, strategy and budget planning	2 days

Data Stewardship Model

Data Owner (Senior Leader)

- Accountable for data quality
- Approves data policies
- Allocates resources
- Reviews quarterly metrics

Data Steward (Manager)

- Manages day-to-day quality
- Runs hygiene processes
- Trains staff
- Reports on data health

Data Users (All Staff)

- Follow data entry standards
- Flag data issues
- Complete required training
- Maintain own record updates

Resources & Tools

Recommended tools, free resources, and glossary

Recommended Tools

Email Verification

NeverBounce (nonprofit pricing), ZeroBounce, EmailListVerify, Kickbox

Cost: Typically \$0.003-0.01 per email verified

Address Verification (NZ)

NZ Post Address Finder, Addressfinder.nz, Dataquality.co.nz, LINZ Address data (free)

Address Verification (AU)

Australia Post AMAS, AddressFinder.com.au, Experian QAS, Loqate

Duplicate Detection

Built into most CRMs, Cloudingo (Salesforce), DemandTools (Salesforce), Excel (basic matching)

Free Resources

Learning

- Salesforce Trailhead - Data Quality modules
- HubSpot Academy - Data Management
- Google Analytics Academy
- LinkedIn Learning (free via some libraries)

Tools

- OpenRefine - Free data cleaning tool
- Excel - Powerful for basic data analysis
- Google Sheets - Collaborative data cleaning
- LINZ Address data - Free NZ address validation

Glossary

TERM	DEFINITION
AMAS	Address Matching Approval System (AU Post)
Bounce (Hard)	Email permanently undeliverable
Data Decay	Natural degradation of data quality over time
Deduplication	Identifying and merging duplicate records
NCOA	National Change of Address
NPSP	Nonprofit Success Pack (Salesforce)
UAA	Undeliverable As Addressed (mail returns)

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This scorecard is provided as general guidance only. Organisations should consider their specific context, CRM system, and resources when applying this framework.