

Data Hygiene/Data Processing

Production Day

April 11, 2024

Who Already Has Your Information?

Have you already:

- Given to an organization?
- Attended a gala or walk?
- Purchased anything on Amazon? Tik Tock Shop? Etsy?
- Subscribed to a News Source? A Doorbell Subscription?

Do you have a credit card?

If you have answered “yes” to any of these, don’t panic.

It does mean that you’re contributing to data that many of the nonprofits are using today!



DON'T FORGET THE DATA!

You May Have:

- Great Package
- Perfect Premium
- A Perfect Mail Date

None of these matter if the data is missing or not clean- you will not reach the correct audience.

Data ensures we're targeting the correct people to interact with the perfect package received.



WHEN DO WE USE DATA?

HOUSE APPEALS/RENEWALS

- Targeting Current Donors, Event Attendees, Petition/Survey Responders
- To Build on Relationship
- Get a 2nd+ Gift to Recoup Investment
- Able to Focus on Specific Programs + Needs
- Narrow focus to select populations within the house file to target.

ACQUISITION

- Increase awareness around organization
- Build Donor Pipelines
- Begin the Relationship
- Less Personalized in some ways because it is an introduction

WHAT DATA DO WE USE?

HOUSE APPEALS/RENEWALS

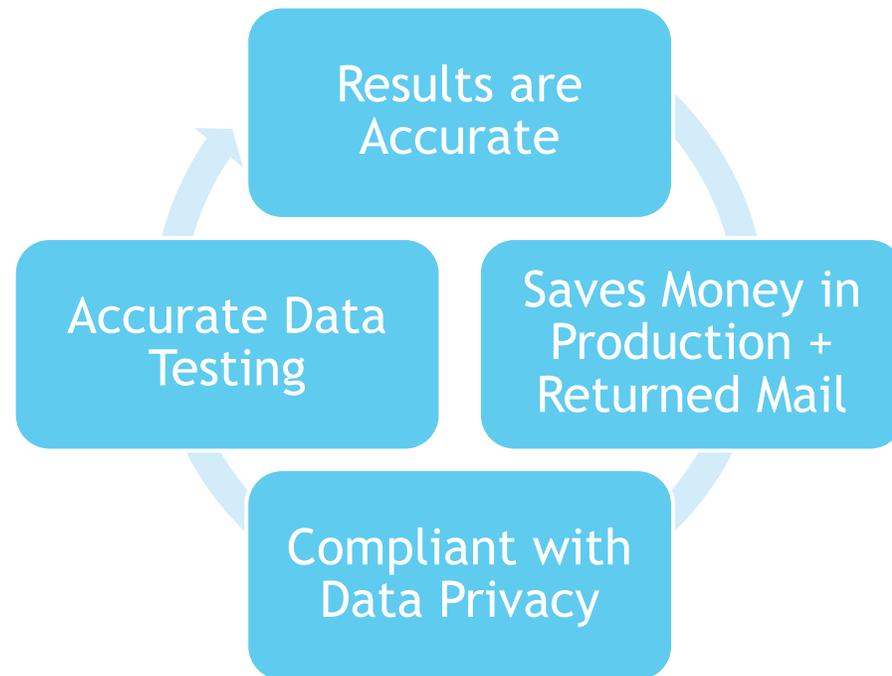
- First Gift/Last Gift Information
- Donation History
- Preference of Communication
- Any Appended/Element Information: Net Worth, Age, Board Member, etc.
- Donor ID

ACQUISITION

- Source Code List Information Results (no PII)
- First Name, Last Name
- Mailing Address
- List Types: Exchange, Rented, Lapsed/Inactive Names

HOW CLEAN IS THE DATA & WHY DO WE CARE?

Once we know who we want to target, we can hope that the data sources or the database we are pulling from have clean data, *but that is not always the case.*



CLEAN THE DATA

Merge Purge

Description	Merge Purge Input	DMA Pander Drops	Suppression File Drops	Multi Buyer Drops	Single Buyer Drops	Single Buyer Output	Multi Buyer Output	Net Input	Merge Purge Output	Overall Percent Kept
List	6,422	10	69	64	3	6,230	46	6,416	6,276	96.55%
List	1,476	79	692	158	0	467	80	1,442	547	35.50%
List	4,881	65	1,482	1,329	3	1,255	747	4,852	2,002	40.02%
List	3,209	37	148	245	4	2,578	197	3,174	2,775	85.04%
List	6,345	20	398	339	1	5,365	222	6,330	5,587	85.86%
List	34,585	101	2,494	4,095	41	24,694	3,160	34,507	27,854	79.58%
List	14,803	33	942	17	33	13,778	0	14,779	13,778	91.85%
List	34,437	135	1,402	2,981	32	27,041	2,846	34,329	29,887	85.39%
List	28,721	35	2,354	678	57	25,275	322	28,690	25,597	85.32%
List	34,382	302	5,802	5,132	11	19,577	3,558	34,110	23,135	66.10%
List	14,683	86	431	2,855	1	8,363	2,947	14,615	11,310	75.40%
List	6,380	61	1,393	1,147	4	2,992	783	6,324	3,775	58.03%
List	3,980	187	571	414	0	2,514	294	3,802	2,808	69.13%
List	11,085	28	1,327	1,003	1	8,031	695	11,060	8,726	77.89%
List	9,315	302	1,546	933	3	5,997	534	9,034	6,531	68.15%
List	8,970	260	1,668	2,014	2	3,707	1,319	8,723	5,026	55.15%
List	4,366	19	426	318	2	3,400	201	4,353	3,601	81.25%
List	5,205	23	1,880	1,233	0	1,352	717	5,194	2,069	38.76%
								0		
Totals	233,245	1,783	25,025	24,955	198	162,616	18,668	231,734	181,284	77.72%

➤ Once we add the DMA Pander (Do Not Mail Registry) and the House suppression, we lose an additional 21% of the acquisition names.

- This process makes sure we aren't mailing board members, current donors or people that have enacted their right to be removed from list exchanges and rentals.
- This also allows us to save money as well with production + postage costs.

CLEAN THE DATA

House File

Issue: the address field was just one field as opposed to split out.

Email + Address Append
of records supplied= 3,162
of records matched = 0

Take 2!

Email + Address Append
of records supplied= 3,162
of records matched = 307
Match Rate = 9.7% (307/3,162)

Summary: The file of 3,162 records to try and append email addresses unfortunately had mostly bad/missing information for addresses

- 182 blank
- 1,724 only had a state and zip code, i.e. no street address
- 138 records just listed “Advocate” as the last name and provided no first name

PERSONALIZATION

Current Donor Personalization

Name: Kelly Leech

Member ID: 103927511

Please upgrade my monthly gift to the new amount of: \$ _____

Card number: _____ Exp. Date: _____

I want to change how I am making my monthly gift. Please stop charging my monthly gift to a credit card, and start withdrawing from my checking account. I've enclosed a voided check with my account information.

Signature: _____

You may also call us at 202-973-2002 or email questions to Membership@ReproductiveFreedomForAll.org

1725 Eye Street NW, Suite 900 ■ Washington, DC 20006-2420 ■ www.ReproductiveFreedomForAll.org



January 29, 2024

Kelly Leech
6608 The Pkwy
Alexandria, VA 22310

Dear Kelly,

Thank you for your generous monthly contribution of \$15 to Reproductive Freedom for All, formerly NARAL Pro-Choice America. Monthly donors like you provide the bedrock of support that makes our work possible. Please accept my deepest appreciation.

We've just entered 2024 – an inflection point for reproductive freedom and abortion access – on the heels of BIG wins in 2023. In last November's elections, we helped secure the right to abortion in Ohio by making it a part of the state's constitution, elected a judge who is our fundamental rights to the Pennsylvania Supreme Court, and won control of both chambers of the Virginia General Assembly.

But this fall is when the rubber meets the road. The elections for president, U.S. Senate, U.S. House could decide whether abortion is banned or protected nationally. The stakes are astronomical for all of us, which is why I hope you'll consider increasing your gift through the form below, today.

Elections for governor and state legislature will have immediate consequences on whether people across the country are guaranteed autonomy over their bodies, free from politicians' interference. And ballot initiatives will put reproductive freedom directly to voters in multiple states.

That's why we are redoubling our work organizing, energizing, and mobilizing the 8 in 10 Americans who support abortion rights to join us and take action. And, that's why we are so grateful for your donation.

The stakes couldn't be higher. Thank you for standing with us every step of the way, and we consider upgrading your generous gift today using the form below. We could not do this vital work without friends like you.

Warmly,

Leah Chandler
Senior Vice President of Development

▼ PLEASE RETURN THIS PORTION. ▼

PERSONALIZATION

Acquisition can also personalize vs. the traditional “Dear Friend”.

Although they do not have prior donation history, there are ways to personalize outside of just the salutation.

<<CITY>> Area Annual Membership Drive
WETA TV and WETA Classical
3939 Campbell Avenue • Arlington, Virginia 22206

WETA  **Passport**

*Yes, I want to activate my WETA Passport streaming video benefit with a membership gift of \$60 or more.

My WETA Membership Support is Enclosed: \$35 \$60* \$75* \$100* Other \$

XXXX NAME XXXX
XXXX Address XXXX
XXXX City, State_Code Zipcode XXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Send my WETA Passport activation link to this email address (required to access WETA Passport):

Please make your check payable to WETA, or complete the information on the back of this form to pay by credit card.

XXXXSCANLINEXXXX

WETA MEMBERSHIP STATEMENT - PLEASE RETURN WITH PAYMENT

WETA  **PBS**

XXXX NAME XXXX
XXXX Address XXXX
XXXX City, State_Code Zipcode XXXX

Dear <Salutation>

We urgently need to find new friends who will help keep the quality TV and radio programs you expect from WETA on the air and streaming everywhere!

That's why this year's <CITY> Area Annual Membership Drive is more important than ever before in our history!

Consequently, with this letter I am cordially inviting you to step forward and join with our other TV viewers and our FM classical music listeners who are making their annual membership commitment. We need you!

Of course, I don't know how often you watch WETA TV, catch your British favorites on WETA UK, or tune in to WETA Classical 90.9 FM. But I suspect it happens at least once a week—maybe more.

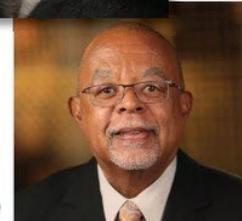
And perhaps you or your family are one of the many here in the Greater Washington area that has an abiding passion for quality TV programs and an unquenchable thirst for classical music.

Dating back—how long? (Can you still hum the theme song from *Sesame Street*?) And now as an adult, do you enjoy *Antiques Roadshow* ... or *PBS NewsHour* ... or *Masterpiece* ... or *NOVA* ... or WETA shows about our local communities ...?

Regardless, I'm sure you understand that when you are listening to Beethoven's magnificent Ninth Symphony, the glorious final movement is not going to be interrupted by a commercial.

And that's because, as a community-licensed station, we bring you programs that are not interrupted by commercials. But to continue to do this, we must find new friends who will join with their neighbors and become members of WETA.

(over, please)



PERSONALIZATION



2023 Membership Drive

Join Greenpeace today by detaching your 2023 Membership Card and returning the reply and petition below with your contribution.

XXXXXNameXXXXXX
 XXXXXAddressXXXXXXXXXX
 XXXXXAddressXXXXXXXXXX
 XXXXCity, State, ZipXXXXX
 |||||



PLEASE SEPARATE AND RETURN BOTTOM PORTION

Yes, I want a more just, green, and peaceful future!

To support all of Greenpeace's bold direct action and advocacy for people, wildlife, and the planet I am enclosing my membership contribution of:

- \$25
- \$35*
- \$75
- \$100
- Other \$ _____

XXXXXNameXXXXXX
 XXXXXAddressXXXXXXXXXX
 XXXXXAddressXXXXXXXXXX
 XXXXCity, State, ZipXXXXX

**Gifts at this level are urgently needed!*



Greenpeace, Inc. is a 501(c)(4) non-profit organization. Contributions to Greenpeace, Inc. are not tax-deductible.

You can also make a contribution online at [greenpeace.org/usa/join](https://www.greenpeace.org/usa/join)

XXXSCANLINEXXX

▼ DO NOT DETACH ▼

Restore Forests, Restore Hope!

Industrial agriculture contributes to 80% of deforestation across the globe, posing a threat to communities and the planet. Greedy companies are literally setting tropical forests on fire to clear land and expand their operations, fueling the climate crisis.

The Amazon is being ripped apart for huge cattle pastures and feed for livestock. Meanwhile, Indonesia's forests are being cleared, set on fire, and bulldozed to make way for palm oil plantations. More and more fragile ecosystems like savannahs and peatlands are also being destroyed to make way for industrial food production.

We are running out of time to win this fight against the climate and biodiversity crisis, and I demand your company stop doing business with forest destroyers. We urgently need to protect and restore the world's forests.

Sincerely,

<Full Name>

<Source Code>



If greedy corporations continue to spew out climate pollution, burn down rainforests, overfish, and trash the oceans with plastics, one million species could go extinct. This is the scientific bombshell of the last decade, but it's not inevitable.

Greenpeace takes action for people, wildlife, and the planet every day—but how much good we can do depends on friends like you.

Please help ... we need you with us!

Dear Friend,

We're on the edge of living in a world without animals like whales, polar bears, tigers, elephants, and a treasure trove of wonderfully diverse wildlife.

Animals like orangutans are critically endangered, as their irreplaceable rainforest habitat is destroyed for corporate profit.

And during a recent Greenpeace expedition to Antarctica, scientists surveying chinstrap penguins there found drastic reductions in many colonies, with some declining by as much as 77% since they were last surveyed almost 50 years ago. Climate breakdown is likely why.

Earth is in trouble, and wildlife is feeling it in a big way.

But through Greenpeace, you have the power to create a better future for the animals you love

	Greenpeace exposes the problems. Research and investigation uncovers the threats to our environment.			
at	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>
fr	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>	<Name> <Address> <Address> <City>, <State>, <Zip>
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Most Common Data Processing Missteps

Insufficient Data Quality Control

Missteps:

Not looking over the data you have + receive

Making sure you're using the most current data set.



Correction:

- ✓ Establish Data quality control procedures.
- ✓ Include regular data cleansing time.
- ✓ Use a data processor to run merges as an extra accuracy check.

Most Common Data Processing Missteps

Ineffective Tracking & Analysis

Missteps:

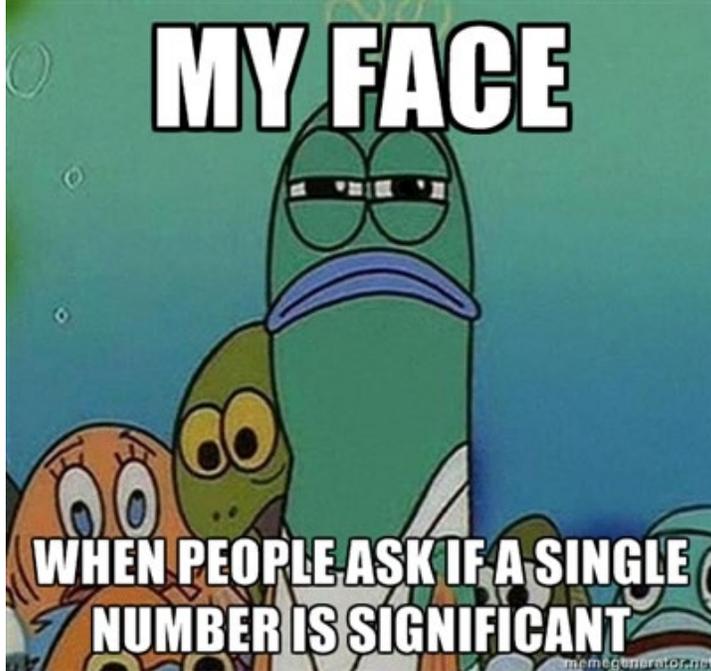
Not including source code/list code information to new donor record on the database. Leads to not being able to have complete picture of your donors, impacts acquisition efforts down the line.

Correction:

- ✓ Develop standardized data formats to make sure you have consistency across data sources.



Most Common Data Processing Missteps



Lack of Testing & Analysis

Missteps:

Failing to test different messaging, offers or personalization can limit your campaign.

Splitting the data out into incredibly small segments that have no statistical validity.

Correction:

- ✓ Conduct A/B Testing or different elements.
- ✓ Make sure that you are paying attention to the volume in each package from each segment.

Most Common Data Processing Missteps

Not Segmenting Your Audience

Missteps:

Sending same message to all donors with no personalized content or looking at the date of the last donation.

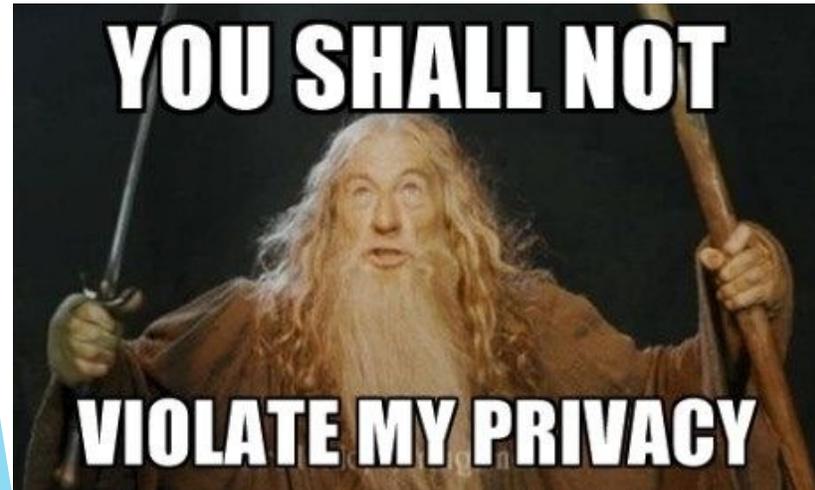
Correction:

- ✓ Treat your lapsed + current donor files differently.
- ✓ Use the database to segment out by any relevant criteria- donation amount, interests, etc.



Most Common Data Processing Missteps

Ignoring Data Privacy Regulations and Internal Suppressions



Missteps:

Failing to update suppressions internally.

Not paying attention to data privacy regulations at the state level or thinking “this doesn’t apply to me!”

Leads to an increased number of angry donors.

Correction:

- ✓ Securely store information + make sure your data partners are as well.
- ✓ Make sure to provide new suppression files for each campaign.

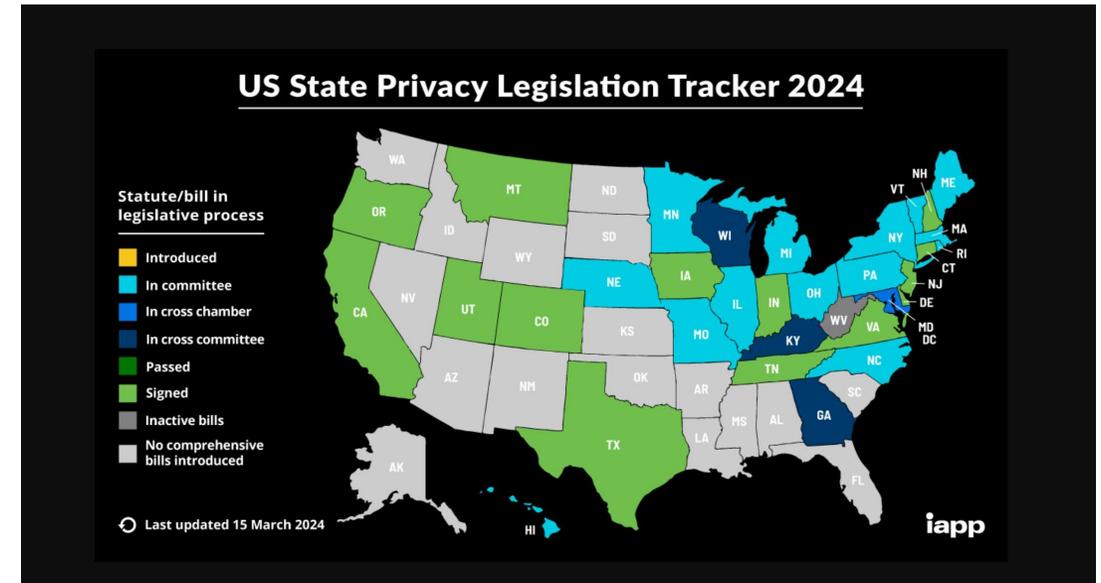
Data Privacy

▶ Five do not exempt Nonprofits; CO, DE, IN, NJ and OR

▶ This is a moving landscape. All have state specific information that you can keep on file about donors.

▶ Data points like Ethnicity, Health, etc. are being removed which is why it's so important to stay on top of these.

▶ A recent example is “Daniel’s Law” in New Jersey.



Data Privacy 2024 & Beyond

This isn't an issue that is going away! A few states that the TNPA is closely monitoring:

Oklahoma: Likely going to attempt an “opt-in” state privacy statute- this is the 3rd attempt.

California: Recently signed a “delete my information” provision attached to the CCPA. This goes into affect 2026.

TNPA.ORG is a great resource for those that are interested in remaining on top of the privacy legislation.

