

Data Hygiene/Data Processing

Production Day

April 10, 2025





Who Has Your Data?



Shopped on your phone or computer.



Donated to a nonprofit on their website or through social media.



If you ever attended a gala or walk.

DON'T FORGET THE DATA!

You Can 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

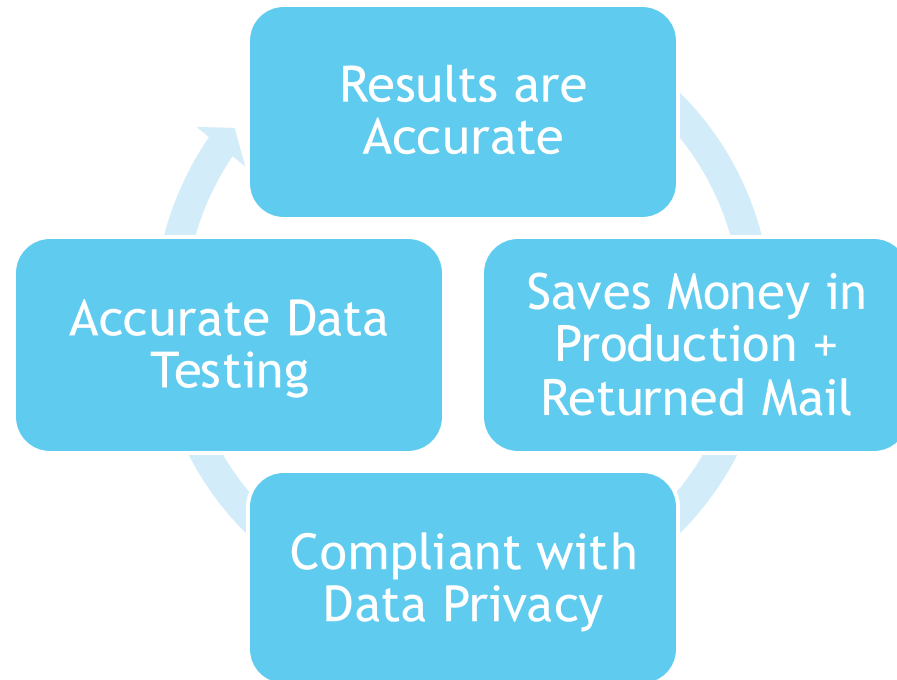
- First Gift/Last Gift Information
- Donation History
- Preference of Communication
- Any Appended/Element Information: Net Worth, Age, Board Member, etc.
- Donor ID

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

Merge/purge is the process of merging records from one data source or multiple data sources and eliminating duplicate records.

Description	Input	Conversion Rejects	Deceased Rejects	NCOA Rejects	CASS Rejects	State Rejects	List Hygiene Rejects	Total Rejects Prior To Merge
List	6,500	0	7	3	0	4	64	78
List	1,541	0	11	4	1	44	5	65
List	5,003	0	59	18	0	36	9	122
List	3,263	0	31	1	0	2	20	54
List	6,507	0	118	7	0	5	32	162
List	35,000	0	165	44	0	23	183	415
List	15,000	0	128	35	0	9	25	197
List	35,000	0	301	85	0	27	150	563
List	30,002	0	1,212	57	0	4	8	1,281
List	35,000	0	406	50	0	30	132	618
List	15,000	0	197	42	0	18	60	317
List	6,505	0	90	10	0	5	20	125
List	4,062	0	59	5	0	9	9	82
List	11,203	1	68	14	0	3	32	118
List	9,583	0	212	16	0	21	19	268
List	9,113	0	95	24	0	13	11	143
List	4,432	1	25	5	0	6	29	66
List	5,338	1	100	12	0	12	8	133
	238,052	3	3,840	529	2	271	1,147	5,792

- ▶ In this acquisition example, we lose 5,792 records when we just upload the files to process the merge purge from deceased, CASS and List Hygiene Rejects.
- ▶ A record may be missing a first or last name or perhaps an address to drop out in this process.

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)

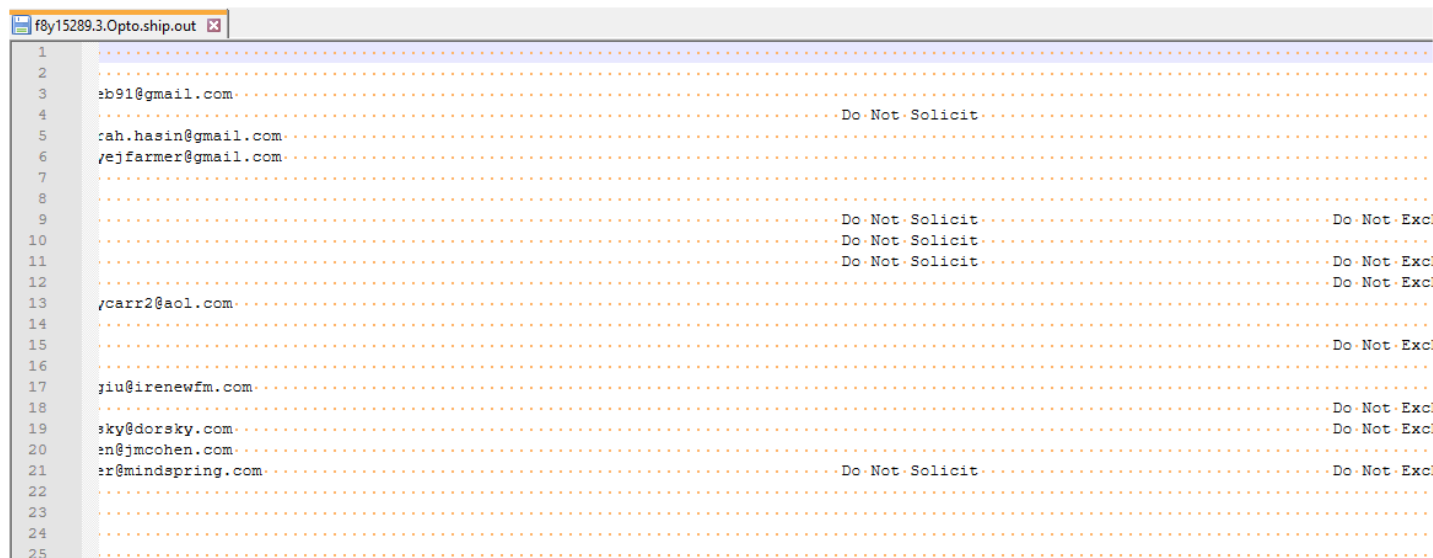
Summary: The file of 3,162 records to try and append email addresses unfortunately had mostly bad/missing information for addresses

- 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

CHECK THE DATA

House File: Communication is Key!

I will be the person processing this job for you. I was looking at the Abacus Lapsed Optimization 37+ file (f8y15289.3.Opto.ship.out) and noticed some files that look like solicit codes. Since they say Do Not Solicit and No Paper mail, should Abacus have included them in the file? Or should we be excluding those records on our end?



The screenshot shows a text file with the following content:

Line	Email Address	Status
1		
2		
3	eb91@gmail.com	
4		Do Not Solicit
5	rah.hasin@gmail.com	
6	yejfarmer@gmail.com	
7		
8		
9		Do Not Solicit
10		Do Not Solicit
11		Do Not Solicit
12		Do Not Solicit
13	ycarr2@aol.com	
14		
15		Do Not Solicit
16		
17	yiui@irenewfm.com	
18		Do Not Solicit
19	sky@dorsky.com	
20	en@jmcohen.com	
21	er@mindspring.com	
22		Do Not Solicit
23		
24		
25		

Lapsed file put through optimization. The file returned has 9,212 records.

- 13 say Do Not Contact
- 166 say Do Not Solicit
- 94 say No Paper Mail

What Happened? The data pull instructions were clear about including omits for foreign and military names, but there were no instructions on omitting any data with flags.

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 please 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 

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)



Printed on Recycled Paper

3939 Campbell Avenue | Arlington, Virginia 22206 | 703-998-2724 | weta.org

PERSONALIZATION



Dear Friend,

It's one of those magical moments only nature can give us. The sight of a brilliantly colored monarch butterfly fluttering gently on a warm summer day delights children and adults of all ages.

The fleeting visit to your garden or a local park is just a short stopover on its migration journey — the same path past generations of monarchs have followed for thousands of years.

But perhaps you've noticed something alarming ... you're not seeing monarchs in summer gardens and fields nearly as often as you did when you were a child. And there's a reason: Over the past two decades, the population of North American monarchs has plummeted from more than 1 billion to about 50 million today. That's more than a 90% decline, and the monarch is now classified as critically endangered.

This is urgent. If we don't act right now, monarchs could be completely wiped out. And the monarch is not alone. Many species of butterflies that delight our senses and pollinate our food crops are disappearing. The cause ...

For decades, herbicides and urbanization have posed a threat to butterflies' ability to thrive. And today, the impacts of climate change — severe weather, record droughts, and more frequent and expansive wildfires — have decimated their habitat, making our responsibility as nature lovers increasingly important.

What this means for the butterflies' survival — and why I urge you to get involved today — is if the current trend continues, the North American monarch population could collapse in 50 years.

That's why, at this pivotal moment for the monarch and other butterflies, I hope you will make two personal commitments today:

First, I have enclosed some Butterfly-Friendly Garden Tips to assist you with creating a safe landing space for these wondrous creatures. You can start today if you have not already!

Second, I urge you to join the fight against climate change by making the most generous contribution of \$25, \$35, \$50 or \$100, or by starting a monthly gift of \$5 or more today. Every gift helps, especially when it's matched \$1 for \$1 by the Robert W. Wilson Charitable Trust. *(See reply form for details.)*

As you consider the amount of your gift, let me tell you about what sets EDF apart ...

EDF knows what it takes to get big things done! It all started for us when a handful of lawyers and scientists joined forces to bring the distinctive osprey back from extinction
(over, please)

P.O. Box 98051 • Washington, DC 20090-8051 • 1-800-684-3322 • www.edf.org

Recycled (30% Post-Consumer) Paper



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:

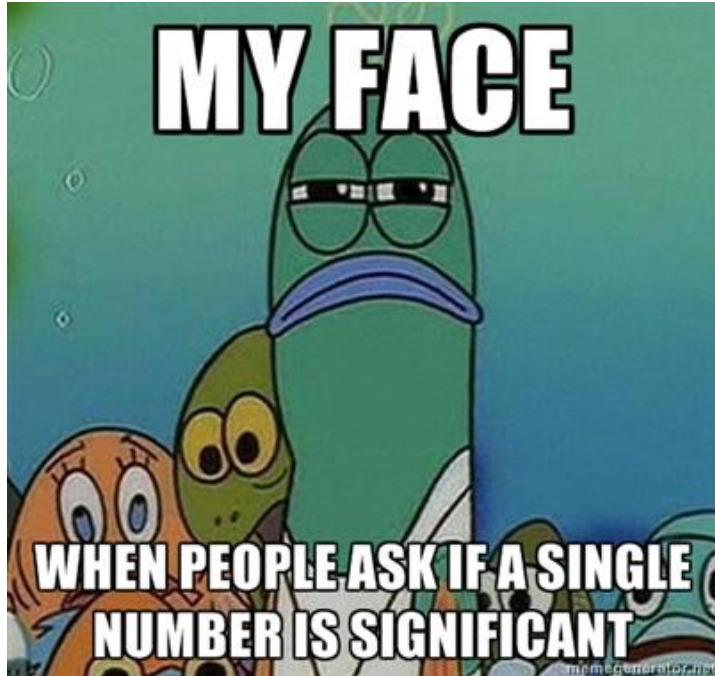
Not including source code/list code information to new donor record on the database. Leads to not being able to have complete picture of your donors, impacts acquisition efforts down the line.

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.

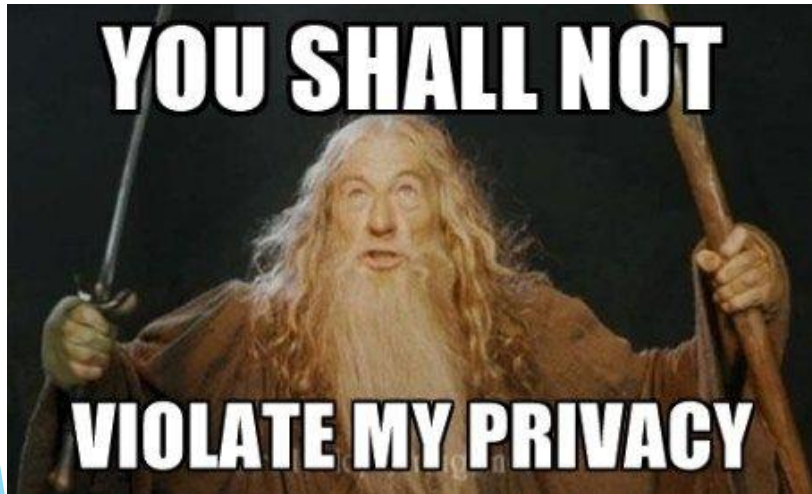
Not paying attention to data privacy regulations at the state level or thinking “this doesn’t apply to me!”

Leads to an increased number of angry donors.

The Attorney Generals are watching!

Correction:

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

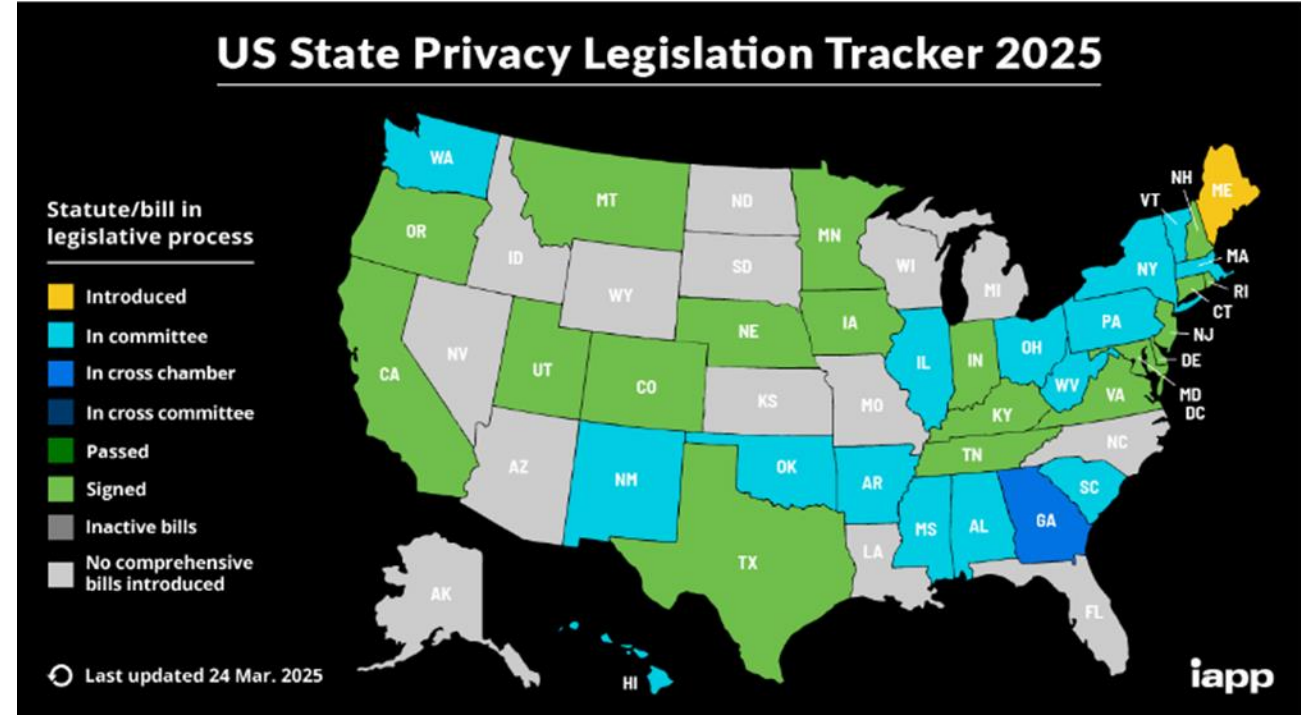


Data Privacy

► Six states do not exempt Nonprofits from their privacy policies: CO, DE, IN, MD, MN, NJ and OR

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

► With a change in Senate control three Republican senators on the Commerce committee have a long history of advocating for a national privacy legislation.



Data Privacy

► Identifying information is being deleted across many databases as it becomes illegal in many states (or restricted) to keep health and ethnicity, religious beliefs, language and sexual orientation information.

Sensitive personal data restrictions by state																				
Data use restricted Data deletion required	2023			2024							2025									
	VA	CO	CT	NV	WA	FL	OR	TX	MT	DE	NH	NE	NJ	TN	MN	MD	CA	UT	IA	
Data description	Opt-in consent to process sensitive data required																			
Physical/mental health condition or diagnosis	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●				
Shopper's Voice® opt-in responses are deleted for Colorado, Nevada, Washington and Maryland																				
Health related: Interventions, treatments, procedures, medication, bodily functions				●	●														●	
Shopper's Voice® opt-in responses are deleted for Nevada, Washington and Maryland																				
Reproductive health, sex life		●	●	●	●				●	●	●		●						●	
Shopper's Voice® opt-in responses are deleted for Colorado, Nevada, Washington and Maryland																				
Sexual orientation, ethnic origin, race, religious beliefs, citizenship	●	●	●			●	●	●	●	●	●	●	●	●	●	●			●	
Shopper's Voice® opt-in responses are deleted for Colorado and Maryland																				
Ethnic origin, race, religious beliefs, language, citizenship	●	●	●			●	●	●	●	●	●	●	●	●	●	●			●	
Derived data are deleted for all states indicated																				
Honor consumer opt-out requests																				

Data Privacy 2025 & Beyond

This isn't an issue that is going away! One state that the community is closely monitoring:

California: Recently signed a “delete my information” provision attached to the CCPA. This goes into affect 2026. They are building a portal for CA residents to remove personal info that has been collected.

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



Eight new state laws go into effect during 2025.

- Delaware Personal Data Privacy Act, January 1, 2025
- Iowa Consumer Data Protection Act, January 1, 2025
- Nebraska Data Privacy Act, January 1, 2025
- New Hampshire Privacy Act, January 1, 2025
- New Jersey Data Privacy Act, January 15, 2025
- Tennessee Information Protection Act, July 1, 2025
- Minnesota Consumer Data Privacy Act, July 31, 2025
- Maryland Online Data Privacy Act, October 1, 2025