

How healthy is your nonprofit's data?

Work through this checklist in about 10 minutes. Check each box your organization has covered, then tally your score at the bottom to see where you stand.

- 01 DATA QUALITY**
 - We have one primary database for donor/contact records
Not multiple spreadsheets or siloed systems
 - Duplicate records are reviewed and merged at least quarterly
 - Address and name fields follow a consistent format
e.g. all states as abbreviations, consistent capitalization
 - A named staff member is responsible for data quality
Not 'everyone' — one clear owner
 - New data entry follows written standards
Staff know how each field should be filled in
- 02 DONOR & FUNDRAISING DATA**
 - We know our donor retention rate and track it year over year
 - Lapsed donors are flagged in our system
We can identify who hasn't given in 12+ months
 - Gift records are tied to the correct campaign or fund
 - We can run a major donor report in under 5 minutes
Without manually sorting a spreadsheet
 - Donor communication preferences are recorded
Email opt-in, mail preference, do-not-contact flags
- 03 PROGRAM & IMPACT DATA**
 - We consistently track program participation
Who was served, when, and how many times
 - Outcome data is collected for each program
Not just outputs — actual measurable results
 - Program data connects directly to grant reporting
We're not re-entering data for every funder
 - We can show year-over-year program trends
Growth, decline, seasonal patterns
- 04 REPORTING & VISIBILITY**
 - We produce a standard board report each meeting
Not built from scratch every time
 - Staff can answer basic data questions without digging through spreadsheets
 - Our reports show impact, not just activity
People served, outcomes achieved — not just events held
 - We have at least one data visualization in regular use
A chart, dashboard, or map your team actually references
 - Funder reports are generated from live data
Not from memory or manual compilation
- 05 DATA STRATEGY & GOVERNANCE**
 - Leadership uses data in strategic decisions
Not just for compliance or reporting
 - We have a data retention and privacy policy
Staff know what to keep and what to delete
 - Staff have received at least basic data training
They know what to collect and why
 - We have a plan for what data to improve first
Not just 'fix everything eventually'
- 06 SYSTEMS & TOOLS**
 - Our main data system is actively maintained
Updated, backed up, and supported
 - Key systems are integrated or connected
Donor CRM talks to email platform, etc.
 - Multiple staff can access and use your data tools
No single-person dependency
 - We have a data backup or recovery plan
If something breaks, we won't lose everything

SCORE YOUR RESULTS — count your checkmarks:

<p>20–22</p> <p>Strong foundation</p> <p>Data is in good shape. Focus on strategy and growth.</p>	<p>13–19</p> <p>Room to grow</p> <p>Basics are there, but gaps are costing you. Prioritize unchecked items.</p>	<p>7–12</p> <p>Needs attention</p> <p>Quality issues are likely affecting operations and fundraising.</p>	<p>0–6</p> <p>Start here</p> <p>Your data needs a reset. A structured cleanup has immediate impact.</p>
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Ready to fix what you found?
 Book a free 30-minute discovery call — no pitch, no pressure.
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