

# Nonprofit Data Health Checklist

Free Resource · 2026 Edition · Prismatic Consulting

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 end 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**  
One clear owner, not 'everyone'
- 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**
- Online donations flow into our CRM without manual re-entry**  
Your giving platform (Zeffy, Classy, Donorbox, etc.) syncs cleanly
- 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 VOLUNTEER DATA

- Volunteer hours, skills, and contact records live in one system**  
Not a binder, an inbox, or five spreadsheets
- Volunteer records are connected to donor records**  
Your most engaged volunteers are visible as donor prospects
- Volunteer data follows the same quality standards as donor data**  
Deduplicated and formatted on the same schedule

## 04 PROGRAM & IMPACT DATA

- We consistently track program participation**  
Who was served, when, and how many times
- Outcome data is collected for each program**  
Measurable results, not only outputs
- Program data connects directly to grant reporting**  
We're not re-entering data for every funder
- Government and funder-mandated reports run from data we already collect**  
Required fields and formats are documented, not rebuilt each cycle
- We can show year-over-year program trends**  
Growth, decline, seasonal patterns

## 05 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 only activity**  
People served and outcomes achieved, not 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

## 06 DATA STRATEGY & GOVERNANCE

- Leadership uses data in strategic decisions**  
Not only 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 'fix everything eventually'

## 07 SYSTEMS & TOOLS

- Our main data system is actively maintained**  
Updated, backed up, and supported
- Key systems are integrated or connected**  
Donor CRM talks to your email and giving platforms
- Our email list and CRM stay in sync**  
Bounces, unsubscribes, and duplicates are reconciled regularly
- Multiple staff can access and use our 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

**28–33**

### Strong foundation

Data is in good shape. Focus on strategy and growth.

**18–27**

### Room to grow

Basics are there, but gaps are costing you. Prioritize unchecked items.

**9–17**

### Needs attention

Quality issues are likely affecting operations and fundraising.

**0–8**

### Start here

Your data needs a reset. A structured cleanup has immediate impact.

## Ready to fix what you found?

Book a free 30-minute discovery call. No pitch, no pressure.

[prismaticconsulting.us](https://prismaticconsulting.us) · [hello@prismaticconsulting.us](mailto:hello@prismaticconsulting.us)