



# DART Golden Record:

*Measuring Constituent Quality and Contactability*

Avery Gleason, Jessica VanElls | Integrated Data Services

# Webinar Outline

- Data quality reminders
- What is a “good” DART record?
- What can you do to improve constituent quality?
- Questions/Answers



# OUD-IDS Team Overview

## OUD-Integrated Data Services

- Communication Data
- Reporting
- Data Quality
- Data Management



# Integrated Data Services

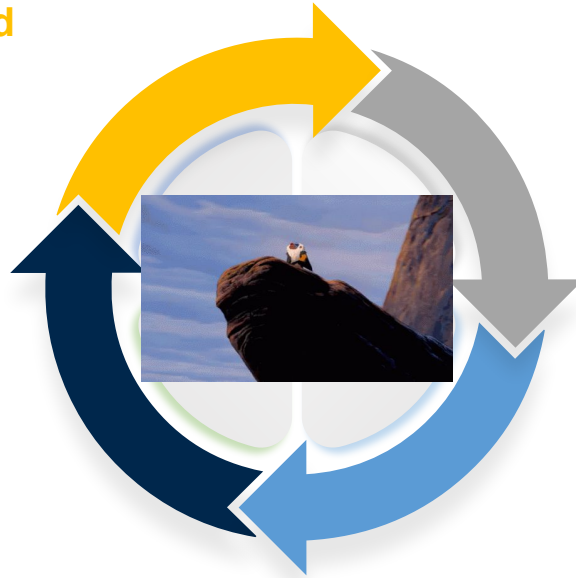
Data circle of life, IDS supports each step!

**1. Data Acquisition and Bulk DART Updates**

**2. Data Quality, Cleaning, and Governance**

**3. Data Analysis**

**4. Data Informed Action, Strategy, and Education**



# What is Constituent “Data”?

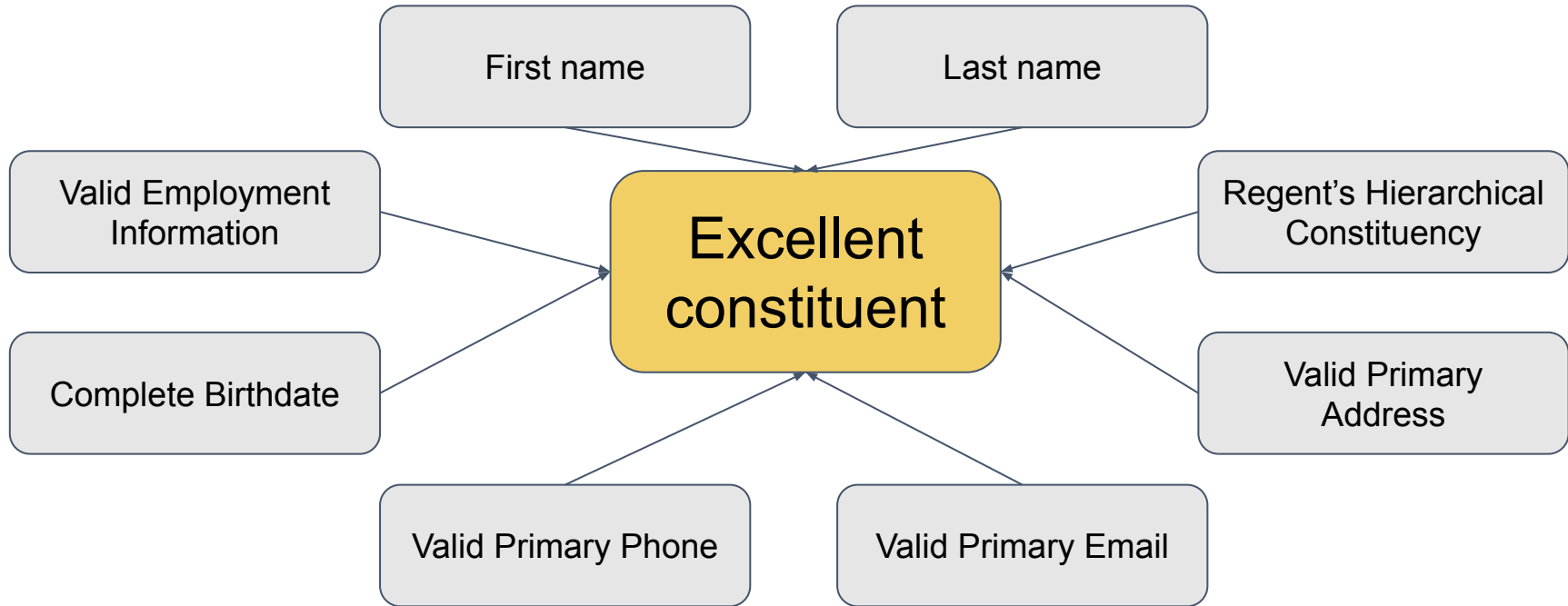
- Addresses, phone numbers, email addresses
- Names and titles
- Demographics (e.g., ethnicity, birthdate, gender)
- Relationships between constituents
- Education history
- Giving and recognition
- Wealth ratings
- Interactions
- Plans

# Which Constituents Are We Talking About?

- Individuals (not organizations, not households, not groups)
- Active (not deceased, not inactivated)
- Not MiMed Friends, not constituents named Anonymous

What do you think makes an individual's record ***“good”*** ?

# What Makes an Individual's Record "good"?



# Constituent Contactability

There are **three** points of contact possible for each constituent

- Mailing address
- Email address
- Phone

We generally recommend using the **primary** as long as it is **not marked as “Do Not mail/email/call”**

# DART Golden Record

The Golden Record is a framework to discuss, communicate, and strategize around the data quality of DART records.

**The Golden Record Data Standard measures to the overall completeness or “goodness” of individual DART records.**

Golden Record allows us to rate every single DART record for completeness and quality.

# So What?

1. Shared language across the development community when reviewing DART records
2. Strategic focus of clean-up on most important records
3. Provides prioritization for data acquisitions and data append initiatives

## Record 1: Jane Smith

- Managed Prospect at UM
- Lifetime Recognition 100K
- On the Dean's Advisory Board



## Record 2: Jim Robinson










- Attended a summer seminar in the 80s



# ODD Target Populations


- Alumni
- Parents
- Recent Graduates
- Next Generation Donors
- Committee Members
- Ultra High Net Worth
- Managed Prospects
- UAG Recency Donors (Prior, Lapsed, etc.)

# Constituent Quality




	Gold 
First Name	
Last Name	
Regent's Hierarchical Constituency	
Valid Primary Address	
Valid Primary Email	
Valid Primary Phone	
Complete Birthdate	
Valid Employment Information	



# Constituent Quality

	Gold 	Silver 
First Name	✓	✓
Last Name	✓	✓
Regent's Hierarchical Constituency	✓	✓
Valid Primary Address	✓	✓
Valid Primary Email	✓	✓
Valid Primary Phone	✓	✓
Complete Birthdate	✓	✓
Valid Employment Information	✓	✗

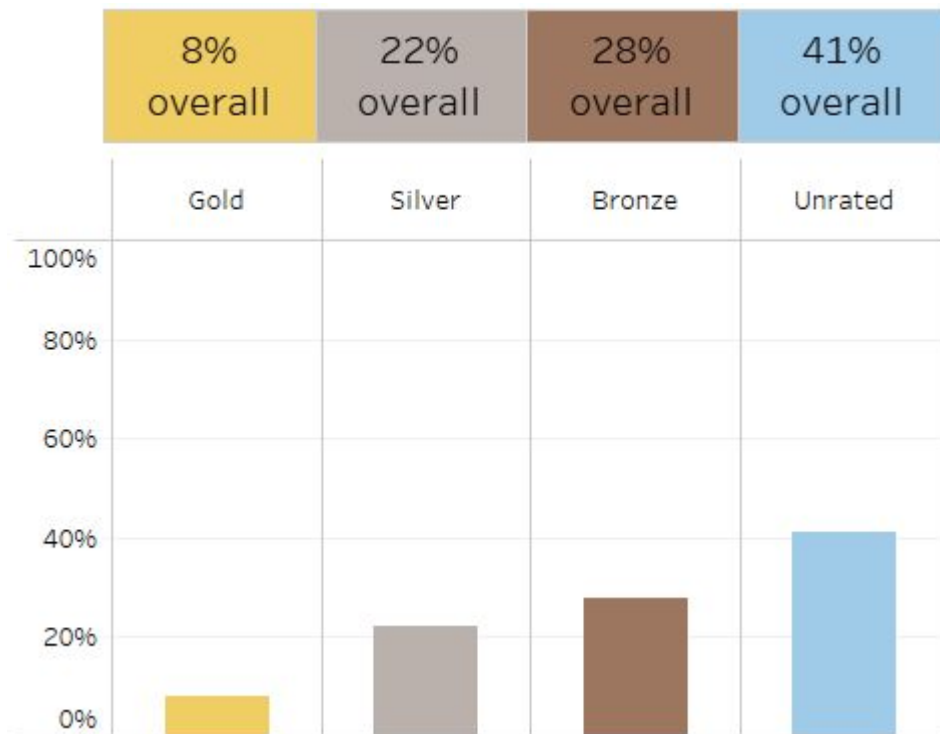
# Constituent Quality

	Gold 	Silver 	Bronze 
First Name	✓	✓	✓
Last Name	✓	✓	✓
Regent's Hierarchical Constituency	✓	✓	✓
Valid Primary Address	✓	✓	✓
Valid Primary Email	✓	✓	✓
Valid Primary Phone	✓	✓	✗
Complete Birthdate	✓	✓	✗
Valid Employment Information	✓	✗	✗

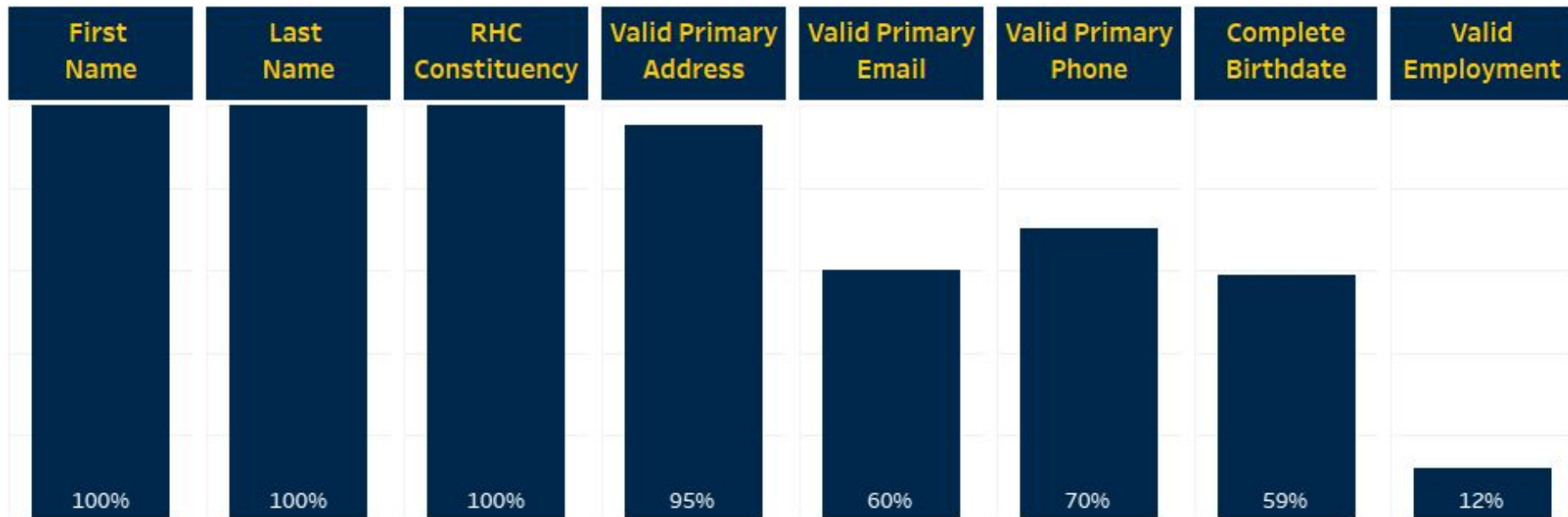


# Constituent Quality

	Gold	Silver	Bronze
Has First Name	●	●	●
Has Last Name	●	●	●
Has RHC Constituency	●	●	●
Has Valid Primary Address	●	●	●
Has Valid Primary Email	●	●	●
Has Valid Primary Phone	●	●	●
Has Complete Birthdate	●	●	●
Has Valid Employment Relationship	●	●	●



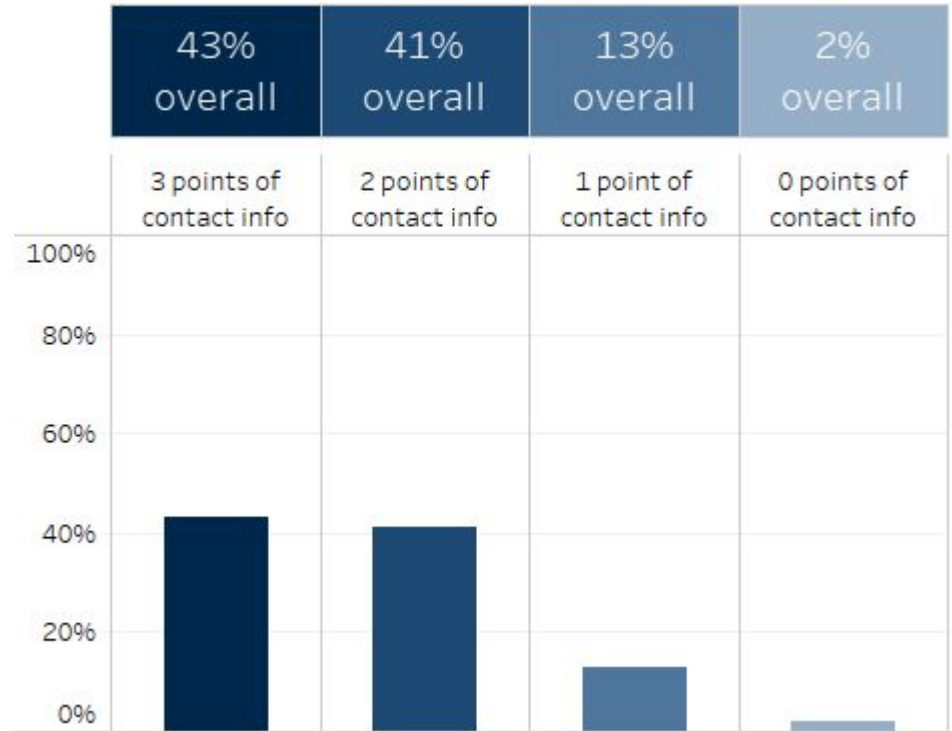
# Constituent Quality



# Constituent Contactability

For all active individuals,

- **98%** are contactable in some way
- An average of **2.3** pieces of valid primary contact information are available



What if I want to see the  
quality for *a population* of  
constituents?

# Population Quality

Last Updated  
2025-02-17



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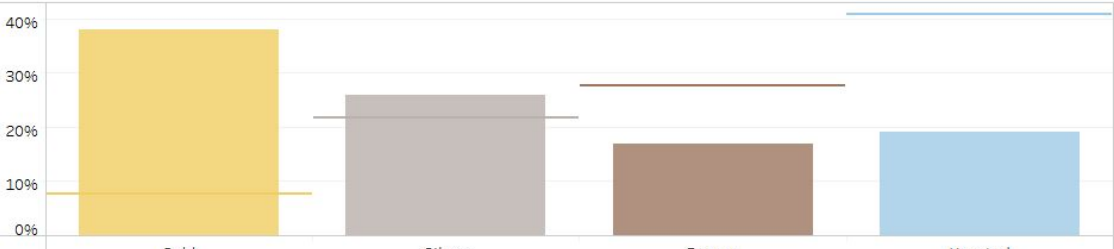
Managed Prospect 11,278 constituents

The average constituent quality of the Managed Prospect population is higher than the overall population of active individuals.

Gold	Silver	Bronze	Unrated
38% of population	26% of population	17% of population	19% of population
8% overall	22% overall	28% overall	41% overall

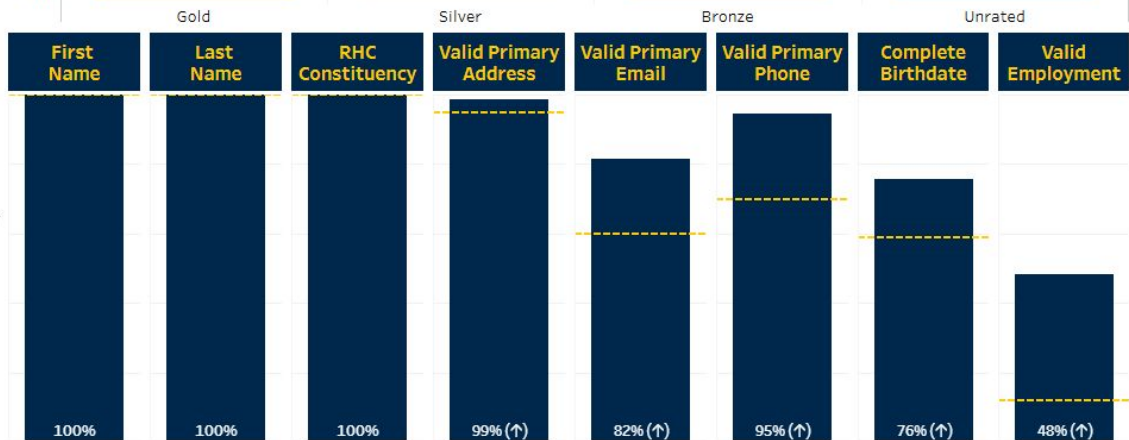
Constituents with a quality rating of **Gold** must have the following data elements on their record:

- A first and last name
- A Regent's hierarchical constituency
- A valid primary address
- A valid primary email address
- A valid primary phone number
- A complete birthdate
- A valid employment relationship



Constituents with a quality rating of **Silver** must have the following data elements on their record:

- A first and last name
- A Regent's hierarchical constituency
- A valid primary address
- A valid primary email address
- A valid primary phone number
- A complete birthdate



Constituents with a quality rating of **Bronze** must have the following data elements on their record:

- A first and last name
- A Regent's hierarchical constituency
- A valid primary address
- A valid primary email address

Constituents not meeting these requirements are **Unrated**. Individual constituent records are not created unless the constituent has a full name and one contact information.

What if I want to see the  
quality for *a specific  
constituent?*



## Constituent Lookup

Last Updated  
2025-02-19



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DART LID Lookup  
14100782

Jessica VanElls (LID 14100782)

Gold Rating

3 contact pieces



Has First Name



Has Last Name



Has RHC Constituency



Has Valid Primary  
Address



Has Valid Primary  
Email



Has Valid Primary  
Phone



Has Complete Birthdate



Has Valid Employment  
Relationship

This constituent belongs to the following populations:

Active Faculty/Staff, Nevergiver



# DART Golden Record Dashboard

## [DEV Development Dashboards and Reports / DART Golden Record](#)

- Snapshot updated monthly, usually mid-month
- Overall and Population Quality and Contactability
- Population Comparisons
- Constituent Lookup

What is being done to  
*improve* the quality and  
contactability of constituents?

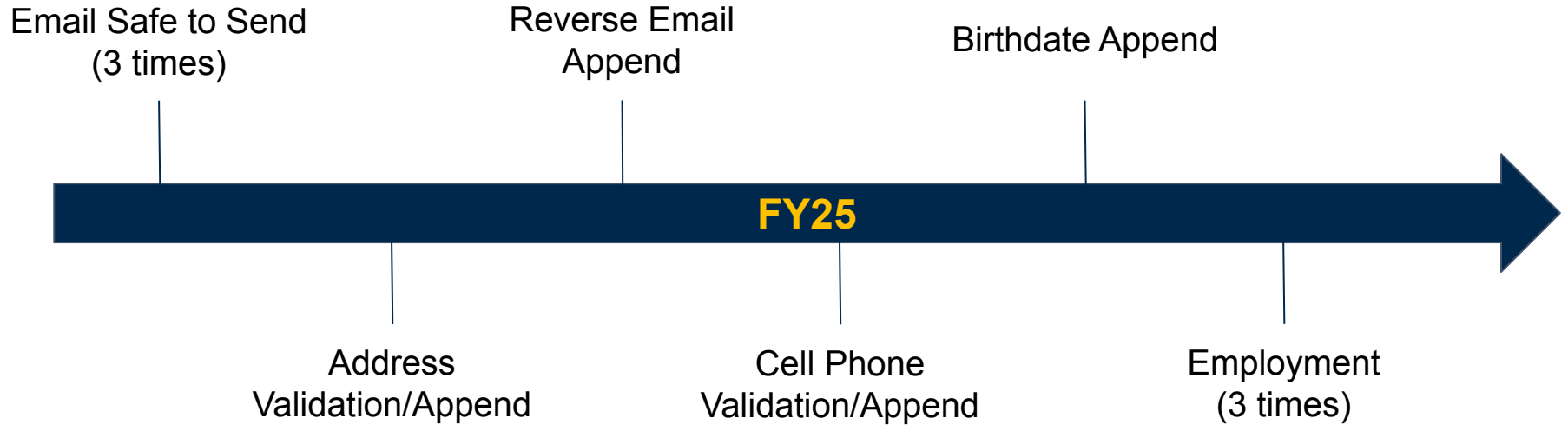
# Data Quality

If you see something that doesn't look right or that you know is outdated, submit a request to DS3 to update the record!

We run dozens of integrity checks every month, and several data validation and append projects throughout the year.

[DART Cleaner](#)

# Data Acquisition



# Address Finder

The AddressFinder process works to identify and update new addresses in DART based on information from the US Postal System.

December (2024):

- 6,611 new addresses were added to DART.
- 19,738 addresses were validated as correct.
- 8,216 addresses were corrected with a start date.

What can *my unit* do to help improve the quality and contactability of constituents?

# Constituent Quality Reports

## Request a Constituent Quality Report (CQR)

- For your SCCU
- For your portfolio
- For another sub-population

Only **38%** of managed prospects have reached the level of a golden record

# Unit-Specific Vendor Data Acquisitions

## Partner with IDS!

### What IDS will bring:

- Vendor connections
- Technical expertise to pull, stage, submit, and integrate the data back into DART



### What you will bring:

- Information about what kind of data you want to acquire
- Funding for the project via a shortcode

What we will get:  
improved data quality and  
availability

# DART Days

Dedicate a day to improving DART data health

- Research constituents using LinkedIn
- Update records from your own SCCU data sources
- Update donor contact information from your phone or emails
- Update records from the side/secret spreadsheets

# Resources

[DART Golden Record Follow Up Resources](#)

[DART Data Update tickets](#)

[DART Golden Record dashboard](#)

[Data Quality video playlist](#)

+ a link to the recording and a copy of the slides will be sent out soon!

# DART CodeBook: What does that code mean in DART?

- Spring 2025 Webinar!
- Tool for documenting and maintaining DART codes
- More information to come in the Ideas for the Community newsletter





Thank you!