

# FAQs - Actionable Insights

## Article Number

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## Information

### TABLE OF CONTENTS

- [What engagement scores are calculated?](#)
- [What does Actionable Insights from Encompass consist of?](#)
- [What is the time frame of data the CEI uses?](#)
- [Why does the CEI model use those four engagement variables?](#)
- [What if we don't use all four Encompass modules: email, events, online giving or membership?](#)
- [How was the model for the Potential Engagement Index \(PEI\) determined?](#)
- [What does the PEI score tell me?](#)
- [How is the Engagement Quadrant calculated?](#)
- [What are the minimum data requirements?](#)
- [How long must we use Encompass before we can begin using Actionable Insights?](#)
- [How is data prepped before the data hygiene, append and scoring process?](#)
- [Which records receive a score?](#)
- [What are some data best practices that will improve the overall quality of data?](#)
- [How often are records scored?](#)
- [Can we have records re-scored more frequently?](#)
- [Do new records get scored?](#)
- [Can we add our own offline engagement data into the CEI model?](#)
- [Does Encompass plan to add other engagement data into the CEI model?](#)
- [Does Encompass plan to add data variables to the PEI model?](#)
- [Is our PEI model evaluated year to year?](#)
- [Can we calculate scores at the sub-community level?](#)
- [How will we measure results?](#)
- [Can we download the scores from Encompass?](#)
- [What strategic services are included in the standard product offering?](#)
- [Can we get additional services/consult time?](#)
- [Can Canadian clients purchase the engagement product?](#)
- [Can the score values be used via roles?](#)
- [Can we score parent, student, or other non-alumni records?](#)
- [What is the timeline for getting records scored and into Encompass?](#)
- [Who has administrative rights for Actionable Insights?](#)
- [Where will Actionable Insights stats and scores display?](#)
- [How much does the engagement product cost?](#)

### What engagement scores are calculated?

Using rigorous and statistically-based modeling techniques, Encompass will calculate statistically significant online engagement values using two proprietary scoring models. The two scores provided via the modeling are:

*Constituent Engagement Index (CEI):* This score is a measure of a constituent's level of online engagement with your organization. The score is created using data from Encompass, over a time period of the previous three years (if available). This proprietary model uses four categories of engagement data from Encompass:

1. Email activity

2. Events activity
3. Online giving
4. Membership (if applicable)
5. Website log ins
6. Form actions (profile, advanced, simple and commerce forms)

*Potential Engagement Index (PEI):* This score is a measure of a constituent's propensity to engage online with your organization. The score uses a combination of Encompass data and appended demographic and lifestyle data to calculate a constituents potential to engage online with your organization. Data is appended and used within this second proprietary model to provide a more holistic view of your constituency.

In addition, a third engagement value will be calculated using a comparison of your constituents' CEI and PEI scores.

*Engagement Quadrant:* An engagement quadrant is calculated for each constituent by calculating an average CEI and PEI value for your entire constituency, then plotting each constituent onto an X/Y axis to determine their quadrant. The quadrant values are defined as:

1. Key Targets
2. Keepers
3. Committed
4. Unlikely Targets



## **What does Actionable Insights from Encompass consist of?**

As part of the standard product offering, Actionable Insights includes:

- Kick-off meeting
- Data management services to prepare data, remove duplicate records, and process files for scoring
- Data hygiene and append
- Development of two custom scoring models
- CEI, PEI and Engagement Quadrant scores per alumni, member record
- Scores imported into Encompass
- Strategic services to interpret scores, develop initial goals and strategies, measure results
- Scoring Overview document
- Engagement Profile document
- Analysis and Strategic Recommendations document
- Mid-term CEI and Engagement Quadrant re-scores (date TBD)
- Mid-term status report
- CEI and PEI model annual refresh (per active contract status)\*
- Ongoing data and model analysis\*

Additional add-ons include, for additional fees:

- Sub-community scoring
- Additional CEI and Engagement Quadrant re-scores
- Additional strategic services

\* The model refresh and ongoing analysis is at two levels:

1. Client models – CEI and PEI client specific models re-calibrated annually (existing variables tested and adjusted if necessary)
2. Data analysis – through ongoing data analysis across the aggregate, we will determine if new variables will be added to the CEI and PEI models

### **What is the time frame of data the CEI uses?**

The CEI uses the last three years of Encompass data, on a rolling basis. If you do not have three years of historical data, the model will use what is available. We require at least one year of data to compute scores. As you use Encompass and build up historical data and once three years of data is accumulated, the model would use the three years on a rolling basis moving forward.

The model looks at three years of data, and does not weight one year's data more than another, to minimize the impact of any anomalies or incomplete data sets. By using all three years, the model will smooth out variations to determine a more accurate engagement score.

### **Why does the CEI model use those four engagement variables?**

The CEI model uses data points from four categories of data from Encompass:

1. Email
2. Events
3. Giving
4. Membership (if applicable)
5. Website log ins
6. Form actions

There are several reasons Encompass selected these data inputs:

1. Due to the flexibility the Encompass platform model offers, we started with the basic question: what can we measure?
2. The results of a client survey (Fall 2013) revealed email, events, giving, and membership as the online engagement data points most desired for tracking and measurement.
3. We wanted to use a model that would allow clients to better leverage the Encompass platform and it's valuable data.

### **What if we don't use all four Encompass modules: email, events, online giving or membership?**

The CEI model adjusts to the data inputs, meaning the CEI score is still valid, even if you do not have all four data categories of data inputs. The CEI scores are relevant and are a reflection of engagement level based on the inputs.

### **How was the model for the Potential Engagement Index (PEI) determined?**

CEI scores are calculated first, then a profile is modeled of those with the highest CEI scores for your institution. The PEI model rates individuals on their similarity to the highly engaged.

### **What does the PEI score tell me?**

The PEI score is calculated using a combination of Encompass data and external data points to give you a more holistic view of your constituents. The score represents a constituent's likelihood to become engaged online with your organization, as compared to those with higher CEI scores. Each institution will have their specific data analyzed to identify the top 13\* indicators of engagement for your institution. These variables are unique to your institution and are recalibrated annually.

\* The PEI model uses a maximum of 13 variables. This number could be less, if certain variables are determined to not be a statistically relevant indicator of engagement for your institution.

### **How is the Engagement Quadrant calculated?**

Step one: the average CEI score is calculated for those constituents with a score above 0

Step two: the average PEI score is calculated using all records with a PEI value

Step three: each constituent is placed into the appropriate quadrant, based on their CEI and PEI scores, compared to the calculated average CEI and PEI scores.



### **What are the minimum data requirements?**

An Encompass representative will work with you to discuss data requirements and identify any data issues that need resolved before data cleansing and scoring. Required data fields include:

- Gender
- Marital status
- Grad year
- Alumni record flag

### **How long must we use Encompass before we can begin using Actionable Insights?**

A minimum of one year of data from Encompass is needed to provide all three score values. If your organization has less than one year's worth of data, we have the option of creating a PEI score only, based on comparative data from peer institutions. Consult with your Account Manager if you are a new or recent Encompass client to discuss timelines.

## **How is data prepped before the data hygiene, append and scoring process?**

Encompass will merge non-member records in Encompass with member records using the email address as the data key. This process will improve the quality of data used for scoring and reduce costs. In addition, Encompass will:

- Remove invalid records
- Standardize column headers
- Standardize values for certain fields, such as gender and marital status

## **Which records receive a score?**

After going through the data cleansing process, we will score all member records that are flagged as alumni. Any records without name, address, city, state, and zip will NOT receive a PEI score, but will receive a CEI score. Any records with invalid or null email address may not receive a CEI score, but will receive a PEI score (if we have name, address, city, state, zip for that record).

For international alumni records, we have two options. The key factor is PEI scores will be skewed due to a lack of append data. So the two options are to exclude international records from the scoring process, or they can be scored on CEI only.

## **What are some data best practices that will improve the overall quality of data?**

If you aren't already, Encompass recommends using the following functionality available within Encompass.

### Identity Checkpoint

Identity Checkpoint is designed for use on public-facing forms. When enabled on a public-facing form, Identity Checkpoint attempts to match the email address entered on the form with an existing email address associated with a constituent or non-member record that already exists in the Encompass database. If the email address matches an existing constituent record in the Encompass database, a series of confirmation fields will be displayed. If a match is found and confirmed, the non-member record that was created by using the form can later be "merged" into the existing record by a site administrator. Note: If the non-member record created during the user interaction is not marked as "complete", the non-member record and the transaction associated with the public form is deleted from the system during an after-hours, offline process.

### Email auto-populate

This feature allows administrators to send out email marketing communications that will pre-populate member data when recipients use links in the email to come back to a specific event, campaign, or other form. It allows the transaction to be associated with the recipient's constituent record in the Encompass database without requiring the user to be authenticated.

### Manage non-member records

The non-member merge functionality on the Identity Checkpoint page allows your administrators to use a prepared import .csv file to merge non-member and member accounts either missed by Identity Checkpoint or ignored by the member during the Identity Checkpoint process. This functionality also allows your administrators the option to "batch" merge accounts during an overnight import process, without the manual

work of clicking each record in the Member Merge Grid. Your administrators choose if the records should be placed in the Merge Grid for a final review, or if the records should be directly merged into the database during the overnight merge process.

Contact your account manager or application support for more information on data best practices.

### **How often are records scored?**

Each constituent engagement score will be recalculated at a mid-term interval (exact date TBD) and the Engagement Quadrant values will be updated within Encompass at that time. All scores, including the Potential Engagement Index, are recalculated annually, contingent upon active contract status.

From a strategic perspective, the scores should be used with both short-term and long-term engagement goals and strategies in mind. While an individual's scores could change over the course of a few months, the impact on overall engagement strategies is negligible within that time frame. We recommend using the scores as part of your overall engagement strategy and focus on iterative improvement over the course of several years.

### **Can we have records re-scored more frequently?**

For PEI scores, that is not an option. However, we can provide the option of re-scoring CEI more frequently, at an additional fee.

### **Do new records get scored?**

Any new records added to your Encompass database after initial scoring will not be scored separately as part of the standard product offering. Note that new records added after initial or annual re-scoring, would be included in the next annual re-score period.

### **Can we add our own offline engagement data into the CEI model?**

At this time, no. However, we encourage the use of any offline data points in the data analysis process to provide deeper insights.

### **Does Encompass plan to add other engagement data into the CEI model?**

Yes, but a specific time frame has not been established. We need to analyze use of the baseline model first, then will look to expand data inputs in a way that will maximize value of the engagement product.

### **Does Encompass plan to add data variables to the PEI model?**

As a course of standard business, through ongoing data analysis, Encompass will constantly evaluate data variables that make up the PEI model. During this process, if a new data variable, or variables, begin to show as predictive in nature, the new variable(s) will be added to the model.

### **Is our PEI model evaluated year to year?**

Your customized PEI model will be recalibrated annually. This process will reevaluate each data value that is a part of the model to determine if any of those values (indicators of engagement) have changed. If so, the scoring model will be updated accordingly. As previously noted, as a part of standard business processes, we will constantly evaluate external data to determine if new and additional variables need to be added to the base PEI model.

### **Can we calculate scores at the sub-community level?**

Yes, for an additional fee.

### **How will we measure results?**

Results will be measured in multiple ways depending upon your unique goals and strategies. The overall goal is to measure and track results across different time frames and metrics, with an emphasis on long term gains.

In the short term, we will measure specific campaign metrics such as email open rates, event registrations, giving to a campaign, survey responses, and other key performance indicators (KPI's), when applicable.

Over the long term, we will look at metrics pertaining to overall membership, email, events, and giving activity, if applicable, to measure utilization of the Encompass platform. We will also provide key metrics from the Actionable Insights data set, such as average CEI scores and other scoring variables that show engagement levels over time.

The key will be to not only provide measurement around specific campaigns, but more importantly, put context around overall online engagement levels and how those change over time.

### **Can we download the scores from Encompass?**

Yes.

### **What strategic services are included in the standard product offering?**

1. Initial consult on any data prep
2. Interpretation of the scores, recommendations on use of the data based on your strategic objectives and setting of specific goals
3. Review of deployment plans and confirmation on moving forward with those plans, or revise as necessary

4. Measurement of results, which would have included establishment and capture of baseline performance and ultimately reporting of results

**Can we get additional services/consult time?**

Yes, for an additional fee. Please contact your Account Manager for more information.

**Can Canadian clients purchase the engagement product?**

Yes, but there are special considerations due to data privacy laws. Please contact your Account Manager for information.

**Can the score values be used via roles?**

Yes. Contact your Account Manager or application support if you need assistance setting up roles.

**Can we score parent, student, or other non-alumni records?**

Not at this time. We will score alumni member records only.

**What is the timeline for getting records scored and into Encompass?**

From the time a contract is signed, the data prep, cleansing, and scoring process will normally take 6-8 weeks. At that point, scores will be imported into Encompass.

**Who has administrative rights for Actionable Insights?**

By default, Super Admin's will have access to the Actionable Insights navigation tab and homepage. Super Admin's will also have access to the Actionable Insights tab within the Member Record, where constituent engagement scores are displayed. Within the Actionable Insights tab, Super Admin's can add additional admin access to the AI tab and score data.

**Where will Actionable Insights stats and scores display?**

Actionable Insights scores at the GID1 level will be displayed on the GID1 (top level) site, which would include the AI homepage and alumni constituent scores within the Member Record. Top level scores can be displayed within the Member Record of a sub-community that has not scored their alumni separately.

Actionable Insight scores calculated for a sub-community will be displayed within that sub-community, but not at the top level site, or within another sub-community. The Actionable Insights homepage and aggregate statistics will be displayed only within the scored community.

### **How much does the engagement product cost?**

The cost of the engagement product is based on several factors, including the size of your database. Please contact your Account Manager to discuss pricing and options.

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#### **KB Product**

Encompass

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