

FIVE TIPS TO ENSURE CLEAN DATA

Getting the Most Out of Your Organization's Database

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GETTING THE BENEFITS

Data is an important part of any fundraising strategy, and can help drive decision making. For your organization to really get the benefits of your data, it must be **clean** and **accurate**. That means making sure that you have:

- Examined individual records to make sure they are error-free.
- Removed duplicate entries.
- Checked records to make sure they have been formatted properly.

CHECK YOUR DATA SOURCE

As per **Wikipedia**, data cleaning is “the process of detecting and correcting corrupt or inaccurate records from a record set, table, or database.”

You will never get the full power of your data unless the source is correct. As an organization you need to ensure that there are standards in place so that information is entered correctly in your database, no matter which software you use.



DOES IT REALLY MATTER?

Here's a simple example to think about. Let's say you want to find the total amount of donations for the last six months. But for some reason, when you try to get the total amount, you get an error message. Upon further investigation someone on your team realizes that one of the entries is a text value instead of numeric. The mistake is corrected, and total donations is now available.

This is a simple example; however, these kinds of errors can lead to **larger discrepancies** as your donor database grows. Furthermore, requiring **time** which most small organizations don't have, trying to figure out what the issue is.



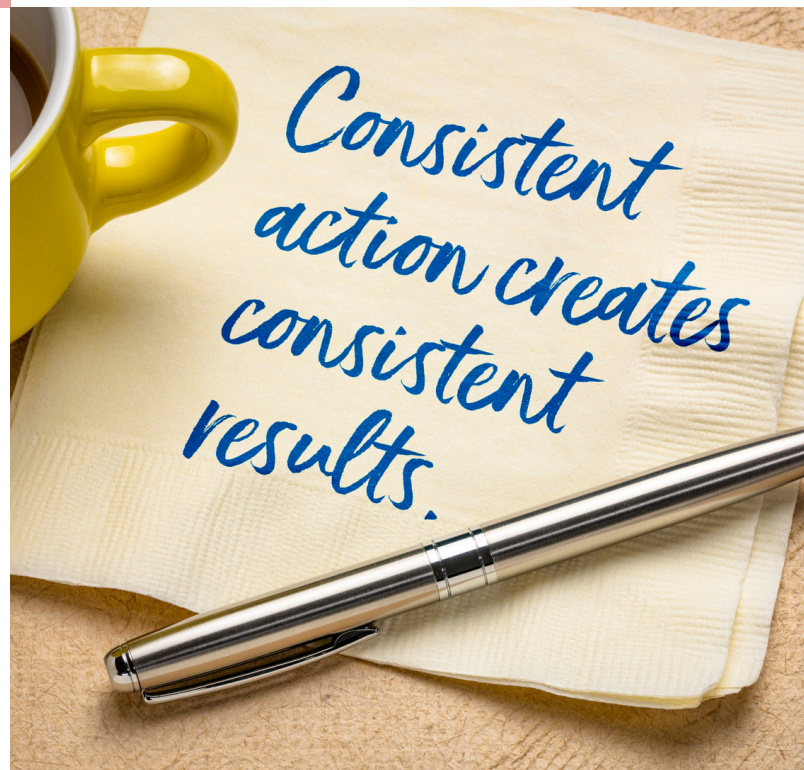
WHERE DO I START?

If you have never cleaned your data simply start with your contact information. Your goal will be to ensure that the data is accurate and makes sense.

Here are a few tips to get started so you can generate error-free reports for your organization, and your stakeholders as well.

TIP ONE: ESTABLISH STANDARDS

Before you start any data cleaning establish **standards** for how the data will be entered. With standards you will have consistency. For example, will postal codes be entered with or without spaces? Will dates be entered month, day, year or year, month, day? Will full city names and provinces be entered or abbreviations? These are just a few things to think of when you are entering data.



TIP TWO: DATA VALIDATION

Once you have established standards it is important that you have a method of **validating** your data.

For example, when entering dates your organization might decide that dates must be in MM-DD-YYYY format. So, if a user enters 31-10-2022 the system will not allow that data entry, and require a proper date format.



TIP THREE: REVIEW & DOUBLE CHECK

If you will be creating reports from your data the numbers have to be **accurate**. If possible, have a second person **double check** the work.

Sometimes you may have been looking at the data for so long you might miss something that someone with fresh eyes can catch instantly.

TIP FOUR: TRAIN STAFF & VOLUNTEERS

If you have a staff member that is comfortable with the data try to take the time to train the other staff and/or volunteers who might also be responsible for entering the data as well.



TIP FIVE: DOCUMENTATION

It's important to have a **document** that can **describe the process** to:

- Someone who is new,
- Needs a refresher,
- And for your long-term succession plan. As with any organization people may leave, and they'll take their knowledge with them.

Your documentation doesn't have to be long, it can outline the basic steps of your processes.



SOME WORK AHEAD

This might seem overwhelming, but it's not. This isn't something that needs to be done in one day. Your organization might have a little work ahead, but know that it is worth it, and it will make your lives easier in the long run.

WE'RE HERE TO HELP

Are you managing your data in excel? We have an affordable solution specifically for small shops to manage relationships with donors and the community. Book a [demo](#) or [contact us](#) for more information.



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