# TAKE CONTROL OF YOUR ORGANIZATION'S DATA

Decentralized data entry is efficient and is the only practical approach at some organizations. But the more people you have entering data the more problems you'll have with quality control. If no one's in charge of quality control, you're going to have a database full of garbage.

It's a tough problem. Here are a few approaches (other than locking down data entry):

**1 Policies.** You need clear data entry standards. For instance, do you spell out "Boulevard" or abbreviate it as "Bl" or Blvd"? Do you use punctuation (N Main St or N. Main St.)? If your database has a separate "sort name," what are the rules (does The William and Flora Hewlett Foundation get sorted under Hewlett or Foundation or...)?

Some of those standards should be managed by your database. For example,  it shouldn't allow AA as a U.S. state code or let you make up titles for people (e.g., it should allow "Mr." but not "Mister"). You can find sample data entry policies online here or by doing a web search like "data entry manual".

**2 Security.** You need to control who can make changes and what they can change. Who can change a mailing address? A phone number? An email address? (And no one should be able to modify or delete a gift after it's been posted.)

**3 Training.** No one gets access to change data without training on your policies. Training should be targeted to role. You don't need a week of training to enter a contact report.

**4 Monitoring.** Someone (or multiple someones) needs to review new and changed entries.

**5 Retraining.** When people make mistakes, bring it to their attention. Some organizations make that person fix the mistake. If they continue to make mistakes, you need to retrain them and be prepared to take away their data entry access.

**6 Automation**. You should at least run reports regularly to look for errors. You may be able to automate some fixes. You might also use vendors to perform cleanups like merge/purges on duplicates.

**7 Acceptance.** Some things have to be fixed by your office or by Development Services. No one is going to fire an effective fundraiser because she's bad at data entry (although they might get her an assistant who will handle the entry). Also, don't forget that some things are out of your control: donors will give online and misspell their own names, or leave the caps lock on.

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