PROGRESSIVE TECHNOLOGY PROJECT

Building Organizational Trust in Your Data

- Do people who use your PowerBase trust the data?
- Why? Why not?
- What percentage of your data has to be good so that everyone really trusts it?
- Do folks have to make assumptions about what things mean in the database, or is it clear?
- How do you get it to where you trust it more?

Stories

- Get rid of the bad
  - Regular process for deleting duplicates
  - Does everyone update when they get new information via conversation with contact/donor, email update, etc?
  - Avoid shortcuts, i.e. “This doesn’t really mean what it says” or “That contribution is really still pending but it says completed because…”
  - Things should mean what they’re called in your database:
  - Pending actually means “pending” & the org agrees on what “pending” means
  - Attended = attended
  - If the statuses that exist don’t work, change ‘em and use ‘em!

- Add the good
  - Hold your own trainings/meetings (NPA, Iowa CCI)
  - Standardize data entry
  - Have multiple “checkpoints” where you know different people are monitoring/touching data
  - Use naming protocols

- What we've already mentioned, aka the "easy" stuff:
  - Clean up the garbage
  - Merge duplicates regularly (know what dupes are created regularly)
  - Standardize
  - Use naming protocols
    - Groups
    - Labels/fields

- The not so easy, but still DOABLE stuff:
  - Have CONVERSATIONS as an organization
  - Get buy-in from leadership/director(s)
  - Bring PB work into staff meetings
  - Build buy-in of organizers
    - Who has done this?
    - What works?
    - Homework – examples
    - Other incentives