DATA & POLICY BEST PRACTICES

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Copy of slides will be available after presentation
ESTABLISHING A CULTURE OF DATA QUALITY
A SCHOOL’S DATA ASSEMBLY LINE

- Admissions Office
- Data Operations & Registrar’s Office
- Business Office
- Development Office

Alumni Become Colleagues
Alumni Become Parents
Former Parents Return as Current Parents
COMPONENTS OF CULTURE OF DATA QUALITY

**Systems:**
Use technology to automate processes that could create error if done manually and to find existing errors.

**Processes:**
Develop better processes that allow fewer errors, promote correct information, set performance expectations.

**People:**
Build people’s awareness of good processes, skills in using technology to maintain cleaner data and judgment about how to prevent or fix data quality problems.
“AUTOMATE” ENTRY, ACCURACY & REPORTING

- Data Entry
  - Online Inquires
  - Online Application
  - Online Profile Updates
  - Online “Surveys” (via profile updates*)
  - Online Medical Forms
  - Online Event Registration
  - Online ReEnrollment
  - “Future” Record Updates*

- Accuracy & Reliability
  - Quality Control (QC) Queries*
    - Proactively control data accuracy
  - Provide data reliability/comfortably
  - Excel Formulas*
    - not all errors are queryable

- Reporting
  - Dashboards*
  - Automatic Reporting
    - Queue or other schedule tool
(*more details next)
# PARENT AMBASSADORS

## Parent Ambassador Connections

Thank you for your participation in the Shipley Parent Ambassador program. As an Ambassador, you play a vital role in helping us find opportunities to tell the Shipley story in the communities where you work and live. For example, Shipley faculty and administrators could present on relevant topics to various organizations in your network, or the Admissions Department may be looking to make connections for prospective families based on location or professional connections. Of course, any information you provide is totally confidential and we will be in contact with you before taking any additional action. We appreciate you taking the time to complete this brief survey.

<table>
<thead>
<tr>
<th>Title</th>
<th>First Name</th>
<th>Nick Name</th>
<th>Middle Name</th>
<th>Last Name Suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms.</td>
<td>Rachel</td>
<td>Ann</td>
<td>Welsh</td>
<td></td>
</tr>
</tbody>
</table>

## Online Data Entry Form

<table>
<thead>
<tr>
<th>Employer</th>
<th>The Shipley School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Director of Data Operations and Webmaster</td>
</tr>
<tr>
<td>Department</td>
<td>Data Operations</td>
</tr>
</tbody>
</table>

### Additional / New Business Information:

- **Additional Department of Communications**

### Previous Profession/Position:

- Empty

### Colleges/Universities Attended:

- Empty

### City/State of Prior Residence:

- Empty

### Other cities/states where you have contacts:

- Empty

### Types of Professional Affiliations:

- [ ] Health Care
- [ ] Accounting
- [ ] Marketing
- [ ] Law
- [ ] Consulting
- [ ] Education
- [ ] Advertising
- [ ] Recruiting
- [ ] PR

**Select all that apply:**

- [ ] Education
- [ ] Advertising
- [ ] Recruiting
- [ ] PR
“FUTURE” RECORD UPDATES

• Colleagues not returning
• Colleagues who will have a role change for next academic year
• Students not returning for next academic year
• Faculty Name changes

<table>
<thead>
<tr>
<th>Role Change</th>
<th>To be processed after July 1</th>
<th>4/8/2014</th>
<th>Department Chair 2014-15</th>
</tr>
</thead>
</table>

Shipley
ACCURACY & RELIABILITY
QC QUERIES - TO FIND ...

- Problems with Data / Data Conflicts
  - Title = Mr. and Gender = Female
  - Grade Level = 1 and Class of Does Not = 2025 (Etc.)
  - Incorrect Relationships - Reciprocal Relationship = Father and Gender = Female
  - Contact type = Email and number does not contain @
  - Contact type = Email and number contains ,
  - Students with a Business Address
  - Former employees who still have school email addresses
  - Former students who still have school email addresses
  - Former employees with employee status
  - Non-students with an all-school alert contact
  - Families/Parents who can’t view report cards
QC QUERIES - TO FIND ...

• Missing Data (Is Blank)
  - Gender
  - Date of Birth
  - Title
  - Address
  - Affiliation
  - Marital Status
  - School District
  - Class of
  - Primary Addressee or Salutation
  - Students missing status dates
  - Faculty missing date hired
  - Faculty without a Shipley email address

Any field not marked required in the database that you want to be recorded
<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>QC - courses not marked print on transcript</td>
</tr>
<tr>
<td>QC - Courses with All As - MS - Sem 1 Performance</td>
</tr>
<tr>
<td>QC - Current Employee - w/FA-Returning Next Year = No</td>
</tr>
<tr>
<td>QC - Current Parent Status - Incorrect</td>
</tr>
<tr>
<td>QC - Current Parent w/applicant relationships</td>
</tr>
<tr>
<td>QC - Current Parent with blank home number</td>
</tr>
<tr>
<td>QC - Current parents - output for requests no email</td>
</tr>
<tr>
<td>QC - Current Parents w/Business Addr. not Org. Record</td>
</tr>
<tr>
<td>QC - Current Parents w/o 'As of attribute'</td>
</tr>
<tr>
<td>QC - email check</td>
</tr>
<tr>
<td>QC - Email Maintenance</td>
</tr>
<tr>
<td>QC - Enrolled Students Data Forms</td>
</tr>
<tr>
<td>QC - Enrolled Students Missing School District</td>
</tr>
<tr>
<td>QC - Enrolled students with email addresses</td>
</tr>
<tr>
<td>QC - EQEP - Enrolled/New Parents w/blank affiliation</td>
</tr>
<tr>
<td>QC - F/S with blank home number</td>
</tr>
<tr>
<td>QC - Faculty - Education=Incomplete</td>
</tr>
<tr>
<td>QC - Faculty - without Emergency Email 1</td>
</tr>
<tr>
<td>QC - Faculty - without Emergency Phone 1</td>
</tr>
<tr>
<td>QC - Faculty Display=yes ,</td>
</tr>
<tr>
<td>QC - Faculty missing date hired</td>
</tr>
<tr>
<td>QC - Faculty missing marital status</td>
</tr>
<tr>
<td>QC - Faculty Not Returning Next Year-dc</td>
</tr>
<tr>
<td>QC - Faculty Returning Next Year = No</td>
</tr>
<tr>
<td>QC - Faculty Returning Next Year = Yes</td>
</tr>
<tr>
<td>QC - Faculty w/blank relationships</td>
</tr>
<tr>
<td>QC - faculty w/o Shipley Email</td>
</tr>
<tr>
<td>QC - Faculty w/Role changes 2013</td>
</tr>
<tr>
<td>QC - Faculty with Add or Sal Issues</td>
</tr>
<tr>
<td>QC - faculty with blank ethnicity</td>
</tr>
<tr>
<td>QC - Faculty with incorrect relationships</td>
</tr>
<tr>
<td>QC - faculty with records ids without FAC</td>
</tr>
<tr>
<td>QC - faculty without affiliation</td>
</tr>
<tr>
<td>QC - Faculty without online user ID</td>
</tr>
<tr>
<td>QC - Faculty/Staff Records without an address</td>
</tr>
<tr>
<td>QC - Former Coleagues - PP</td>
</tr>
<tr>
<td>QC - Former Coleagues w/affiliations</td>
</tr>
</tbody>
</table>
**EXCEL – SIMPLE FORMULAS**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>IndsInd_Primaryaddressee</td>
<td>IndsInd_Primarysalutation</td>
<td>IndsIndSpse_Primaryaddressee</td>
<td>IndsIndSpse_Primarysalutation</td>
<td>FALSE</td>
<td>TRUE</td>
</tr>
<tr>
<td>2</td>
<td>Mr. and Mrs. Clyde Steinmeyer</td>
<td>Mr. and Mrs. Steinmeyer</td>
<td>Mrs. and Mr. Steinmeyer</td>
<td>Mr. and Mrs. Steinmeyer</td>
<td>FALSE</td>
<td>TRUE</td>
</tr>
<tr>
<td>3</td>
<td>Mrs. and Mr. Steinmeyer</td>
<td>Mr. and Mrs. Steinmeyer</td>
<td>Mr. and Mrs. Clyde Steinmeyer</td>
<td>Mr. and Mrs. Steinmeyer</td>
<td>FALSE</td>
<td>TRUE</td>
</tr>
</tbody>
</table>

=EXACT(A2,C2)

=EXACT(B2,D2)

=Exact Formula: Compares two text strings and returns TRUE if they are exactly the same, FALSE otherwise. EXACT is case-sensitive but ignores formatting differences.
In Excel, use the function, VLookup, to lookup a value in one place and insert it into another.

Blackbaud User Resources:
BB497426: What is VLookup in Excel and when would you use it?  
BB 496418: How to use VLookup in Microsoft Excel  
BB 497427: How to troubleshoot VLookup in Microsoft Excel
DASHBOARDS
AUTOMATE REPORTING

- Queue – AO reports for development
- Queue – Colleagues not returning next year
- Queue – Students not returning next year
- Queue – New Hires
PROCESSES
POLICIES & PROCEDURES (P&PS)

- Developing Policy
- Agreeing on Policy
- Implementing
- Monitoring
- Reviewing
- Updating
VIEW OF P&P LIST – EXAMPLES

- Activities - Maintaining Data.doc
- Activities - process of determining set-up.doc
- Activities Export-Import - Courses to Activities.docx
- Activities.doc
- Address - Invalid or Requests no Mail.doc
- Address Change Procedures.doc
- address formatting standards.doc
- Addressees and Salutations - EE.doc
- Affiliations.doc
- applicant-student - Statuses.docx
- Business Information - tracking for parents.doc
- CIS - Student - Instructions - Export and Merge.doc
- CIS and ShipleyNet Email Communication Process.docx
- Communicating Data Changes between EE and RE.doc
- Communicating Data Changes between RE & EE.doc
- Deceased Procedures - Faculty.docx
- Deceased Procedures - Individuals.doc
- Deceased Procedures - Students.doc
- Divorce - Separation procedures.doc
- Education - Student Record - Maintaining Data.doc
- Education Edge - Repurposed Fields.doc
- EE Online Colleague Directory.docx
- Email Current Parents & other individuals.doc
- Enrollment - EE Enrollment tab.doc
- Enrollment - Enrolled-New Students.doc
- Enrollment - Post Enrollment Procedures.doc
- Enrollment - Returning Student-.doc
- Enrollment Wizard AO-RO steps and policies.doc
- EOYP - End of Year Processes-complete - dc.doc
- EOYP - End of Year Processes - RW 2009 Screenshots.docx
- EOYP - End of Year Processes - RW notes.doc
- EOYP - End of Year Processes - Student v-Guardians.doc
- EOYP - Parents - Affiliation.doc
- EOYP - present pk-11 - RW Screenshots.doc
- EOYP - Seniors - RW Screenshots.doc
- Faculty - affiliations.doc
- Faculty - Bio 2 - page 2.doc
- Faculty - Bio 2.doc
3 FREQUENTLY USED SHIPLEY P&PS

• Post Enrollment Procedures

• Request No Email

• Divorce
  - https://www.dropbox.com/s/7q8h5e4svdw0nzi/Divorce%20-%20Separation%20procedures.pdf
Divorce - Separation Procedures EE

See “Mapped Fields” for a complete list of mapped fields.

Divorce
1. Affects Addressee & Salutations and Addresses in each system
2. Affects constituent/non-constituent set-up in RE

Individuals
1. Uncheck “spouse” on the relationship tab
   a. This field is reciprocal so it only needs to be unchecked on 1 record
2. Change relationship “Spouse” to either “Separated Spouse” or “Former Spouse”
3. Stop sharing the address between separated/former spouses
   a. Update either or both records with new addresses
   b. Address – Details should be either Household 1 or Household 2. If parents are still residing at the same address
      i. Separate address for each but each shared with children
4. Demographics > Marital Status > update each individual record
5. Addressees/ Salutations each individual record should be updated, including secondary ad/sals
6. Relationship Tab
   1. “Lives With”….Policy for printed directory purposes – default = mother appears first in printed directory unless notified and documentation provided
      i. Always enter check in “lives with” box of mother
      ii. Do not enter a check in “lives with” box for father
      iii. Upon notification/documentation of the father being primary then change accordingly
Students

1. “Present” and “New” students that are children of divorced parents get Affiliation “Split”
   a. Indicate in “Comments” non-custodial parent if known – see print screen below
      i. Determined when either parent has an invalid address - refer to “invalid address P & P
   b. If there isn’t a non-custodial parent leave “comments” leave blank

   ![Print screen]

   ![Attribute type: <All Categories>]

   Attribute Type | Description | Short Description | Date       | Required | Comments
   ---------------|-------------|-------------------|------------|----------|----------
   Merged         | 2/6/2007    |                   |            |          |          
   Contract Received | Yes | 3/22/2007 |          |          | Missing Deposit
   Academic Section | B |           |          |          |          
   Parent Relationship | Split | 8/8/2007 |          |          | father non-custodial

2. Relationships - Order of relationships on student records is crucial when synching from EE to RE:
   c. Father, mother, stepfather, stepmother, guardian
3. Emergency emails/phones update accordingly with any new numbers

Faculty/Staff

1. Follow steps 1-5 for Individuals (above)
2. If spouse was “Emergency Contact” need name of new emergency contact

X:\Blackbaud\Policies & Procedures (EE)\Divorce - Separation procedures.doc
ARE YOU USING YOUR P&PS?

- Students – New & Withdrawing

<table>
<thead>
<tr>
<th>Business/Grandparent Form</th>
<th>No</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CIS Returned</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy &amp; Procedure Checked</td>
<td>Enrollment - New Student Procedures</td>
<td>2/26/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Quality Control Approved
PEOPLE
REINFORCING ACCOUNTABILITY

React
Proactive
SET CLEAR-CUT GOALS

- The database will be 100% clean tomorrow and always accurate all the time
- We will never make mistakes

- The database will be a reliable source of data for students, parents, alumni, staff
- The database will be quality control checked regularly
- We will write P&Ps to help ensure data accuracy and to find mistakes before others do
SET CLEAR-CUT ACTION PLANS

- “Go forth and prosper”

- By the end of April we will find ‘all’ errors in records regarding gender.

- Responsibility:
  - Admissions – Applicants & Applicant Families
  - Data Operations – Current Families & Students, Colleagues
  - Alumni Office – Alumni

- When – end of month deadline, mid-month status update due
CULTURE OF DATA QUALITY

- 3 components rely on each other
- Takes time to build QC queries … but saves time in use and reporting
- Built correctly, processes are repeatable
- Achievable – but will not happen overnight
- Set goals to build the culture
  - Deadlines to address issue, create docs & queries
- Include the right group of people. This cannot be achieved from a solely top-down process
RESOURCES

• Shipley P&P Examples
  - Post Enrollment Procedures -
  - Request No Email -
    https://www.dropbox.com/s/fmrrs5atpr3rpm/Requests%20No%20Email%20-%20redacted.pdf
  - Divorce - https://www.dropbox.com/s/7q8h5e4svdw0nzi/Divorce%20-%20Separation%20procedures.pdf

• Community
  - Blackbaud User Group - https://groups.google.com/d/forum/blackbaudusers

• Technical: