

► DATA & POLICY BEST PRACTICES

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Copy of slides will be available after presentation



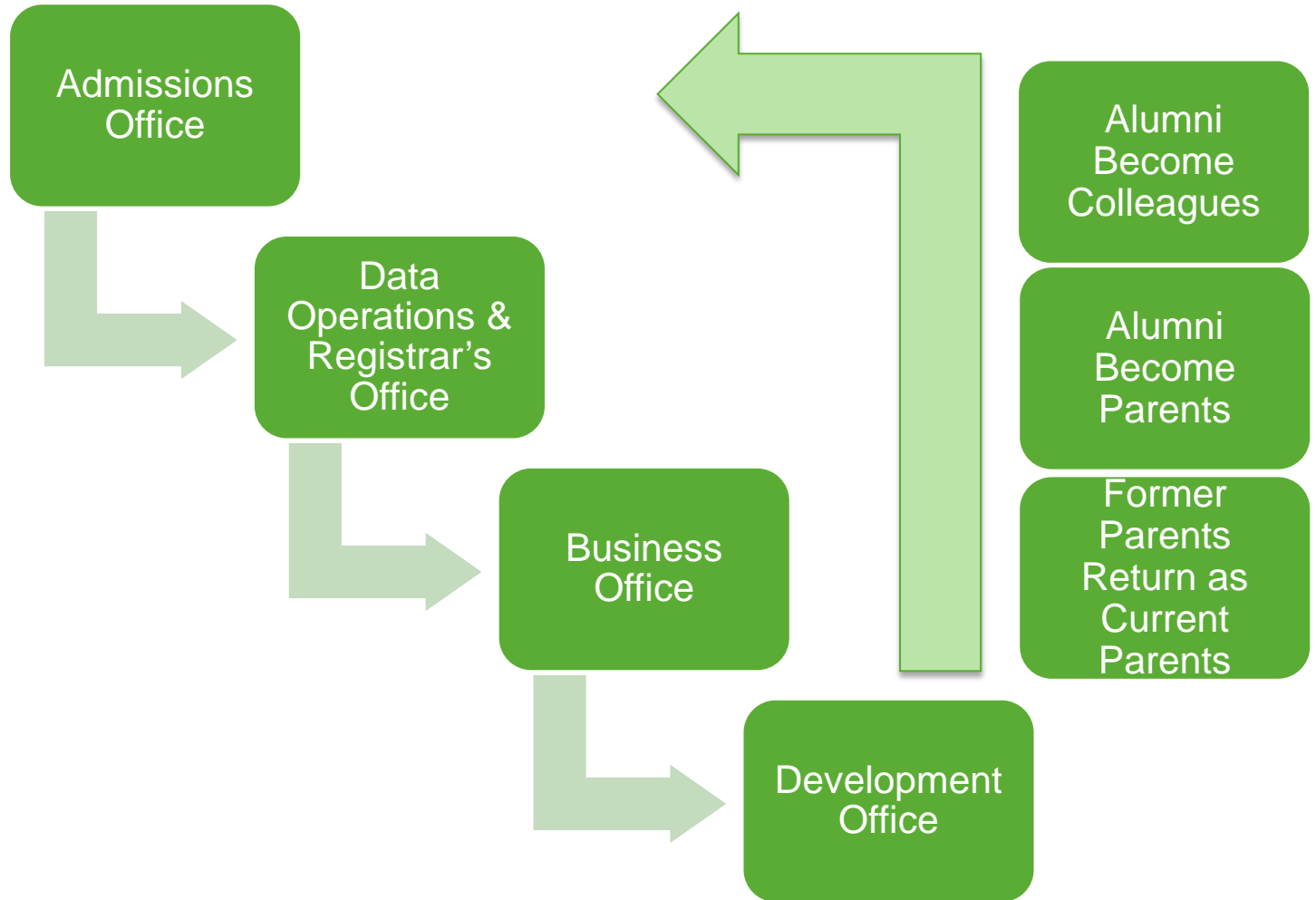
S. Street Man
AP. 171



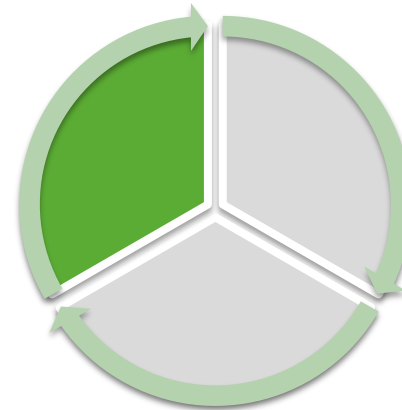
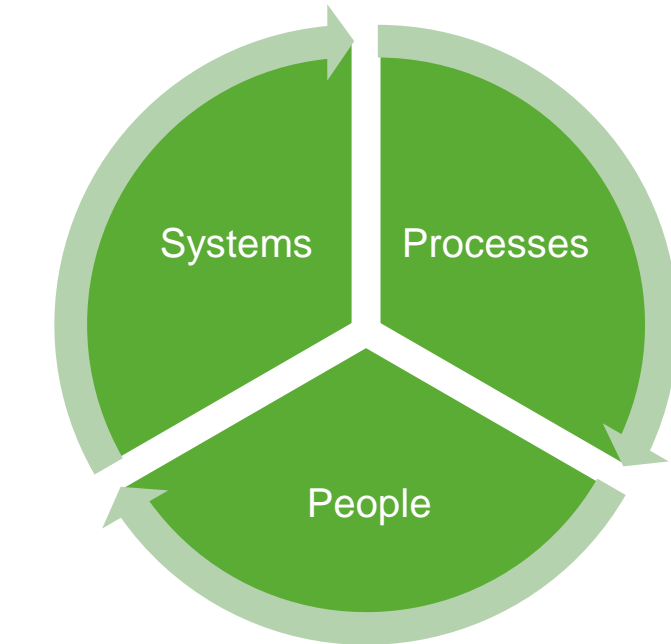
► ESTABLISHING A CULTURE OF DATA
QUALITY



► A SCHOOL'S DATA ASSEMBLY LINE



► 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



► SYSTEMS

► “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)

(*more details next)

► ONLINE DATA ENTRY

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.

Title	First Name	Nick Name	Middle Name	Last Name	Suffix
Ms.	Rachel		Ann	Welsh	

Submit

Employer:	The Shipley School
Title:	Director of Data Operations and Webmaster
Department:	Data Operations
Additional / New Business Information:	Additional Department of Communications
Previous Profession/Position:	
Colleges/Universities Attended:	
City/State of Prior Residence:	
Other cities/states where you have contacts:	
Types of Professional Affiliations:	
Select all that apply:	<input type="checkbox"/> Health Care <input type="checkbox"/> Accounting <input type="checkbox"/> Marketing <input type="checkbox"/> Law <input type="checkbox"/> Consulting <input checked="" type="checkbox"/> Education <input type="checkbox"/> Advertising <input type="checkbox"/> Recruiting

► “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

Role Change	To be processed after July 1	4/8/2014	<input type="checkbox"/>	Department Chair 2014-15
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► ACCURACY & RELIABILITY

Mrs. Ruth S. Steinmeyer

File Edit View Individuals Letter Favorites Tools Help

Save and Close Write a Letter

Bio 1 | Addresses | Addressees/Salutations | Relationships | Attributes | Notes | Media | Actions | History of Changes

Mrs. Ruth S. Steinmeyer

Record ID: IND020 Country: United States

Affiliation: Donor Address:

Gender: SSN:

Nickname: City:

Spouse: Mr. Clyde Steinmeyer State:

User ID: Password:

Birth date: Age: Deceased? ZIP:

Birth country: Contact Type Contact Number Share?

Birth state: Email ruthsteinmeyer@verizon.c...

Birth city: Requests no email

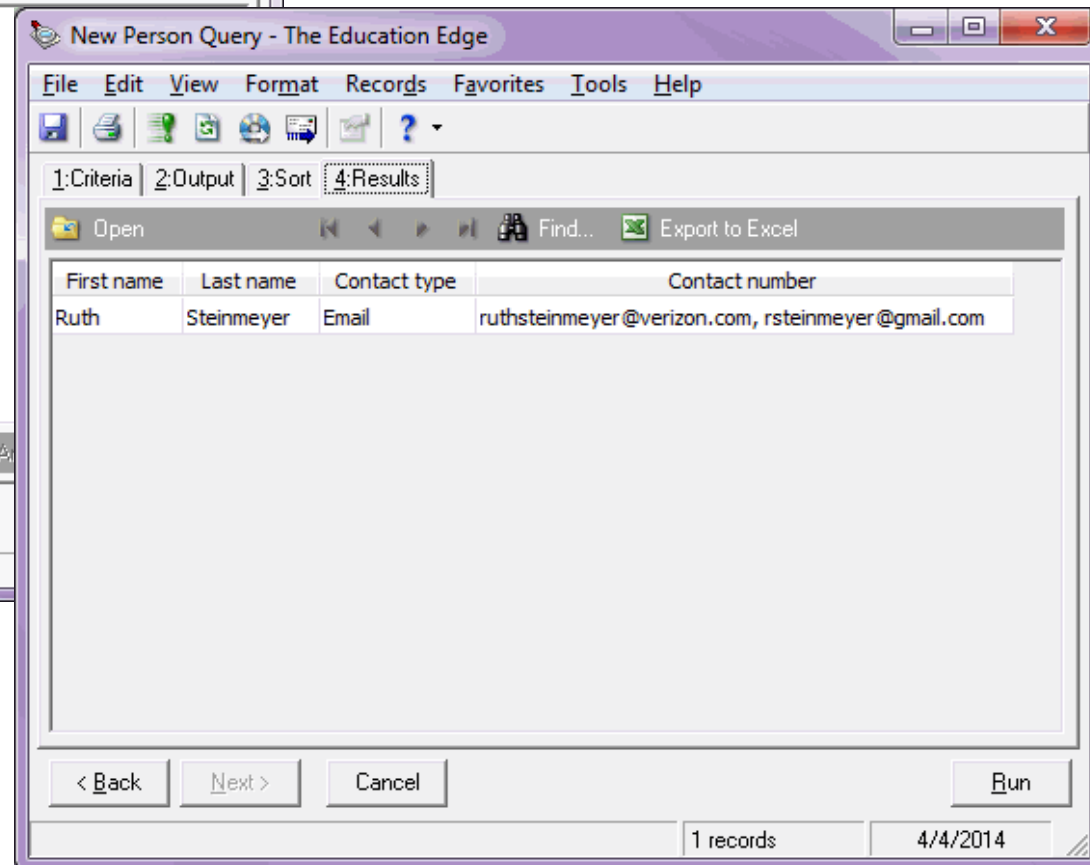
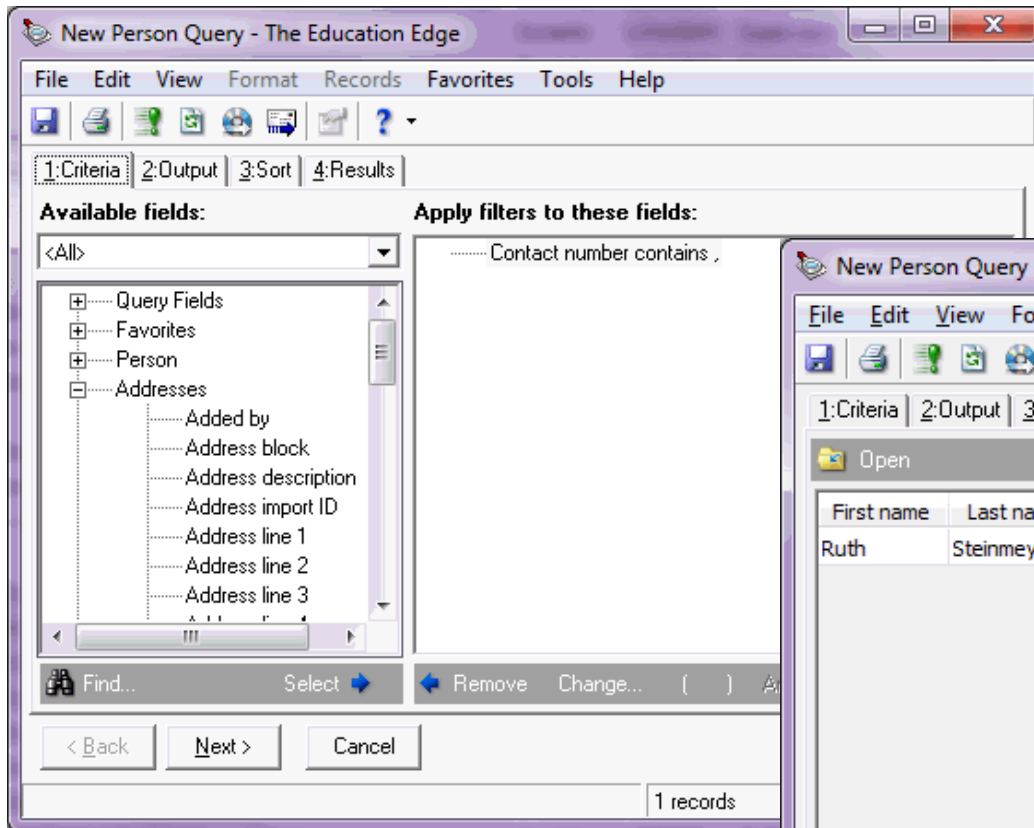
School Info Demographics Business

Press F7 to zoom 4/4/2014

Contact Type	Contact Number	Share?
<input type="checkbox"/> Email	verizon.com, rsteinmeyer@gr	

Contact Type	Contact Number	Share?
<input type="checkbox"/> Email	ruthsteinmeyer@verizon.c...	

► QC QUERIES



► 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

► QC QUERIES

Name
QC - AO - accept/enrolled - birth or gender = blank
QC - AO - accept/enrolled - class of = blank
QC - AO - accept/enrolled - District = Blank
QC - AO - accept/enrolled - education information blank
QC - AO - accept/enrolled - ethnicity = blank
QC - AO - accept/enrolled - inquiry date = blank
QC - AO - accept/enrolled - issue Gender or relationship
QC - AO - accept/enrolled - Nickname = Not Blank
QC - AO - accept/enrolled - online missing app or inq date
QC - AO - accept/enrolled - Primary Add or Sal = Blank
QC - AO - accept/enrolled - relationship is deceased
QC - AO - accept/enrolled - relationships = blank
QC - AO - accept/enrolled - status date = blank
QC - AO - accept/enrolled - with business address
QC - AO - any record with blank name or "unknown" in name
QC - AO - app/inq - birth or gender = blank
QC - AO - app/inq - Director is BLANK
QC - AO - app/inq - district = blank
QC - AO - app/inq - education information blank
QC - AO - app/inq - ethnicity = blank
QC - AO - app/inq - inquiry date or status date = blank
QC - AO - app/inq - issue Gender or relationship
QC - AO - app/inq - online missing app or inq date
QC - AO - app/inq - Primary Add or Sal = Blank
QC - AO - app/inq - relationship is deceased
QC - AO - app/inq - relationships = blank
QC - AO - app/inq - with business address
QC - AO - relationship - incorrect gender
QC - AO - relationship - missing primary ad or sal
QC - need to be integrated

Name
QC - courses not marked print on transcript
QC - Courses with All As - MS- Sem 1 Performance
QC - Current Employee - w/FA-Returning Next Year = No
QC - Current Parent Status - Incorrect
QC - Current Parent w/applicant relationships
QC - Current Parent with blank home number
QC - Current parents - output for requests no email
QC - Current Parents w/Business Addr. not Org. Record
QC - Current Parents w/o ' As of attribute'
QC - email check
QC - Email Maintenance
QC - Enrolled Students Data Forms
QC - Enrolled Students Missing School District
QC - Enrolled students with email addresses
QC - EOYP - Enrolled/New Parents with blank affiliation
QC - F/S with blank home number
QC - Faculty - Education-Incomplete
QC - Faculty - without Emergency Email 1
QC - Faculty - without Emergency Phone 1
QC - Faculty Display=yes ,
QC - Faculty missing date hired
QC - Faculty missing marital status
QC - Faculty Not Returning Next Year-dc
QC - Faculty Returning Next Year = No
QC - Faculty Returning Next Year = Yes
QC - Faculty w/blank relationships
QC - faculty w/o Shipley Email
QC - Faculty w/Role changes 2013
QC - Faculty with Add or Sal Issues
QC - faculty with blank ethnicity
QC - Faculty with incorrect relationships
QC - faculty with records ids without FAC
QC - faculty without affiliation
QC - Faculty without online user ID
QC - Faculty/Staff Records without an address
QC - Former Colleagues - PP
QC - Former Colleagues w/affiliations

▶ EXCEL

Community Services Inc.
2000 Daniel Island Drive
Charleston, SC 29492

Mr. and Mrs. Clyde Steinmeyer
301 Pulaski Dr
Hampton, SC 29924

Community Services Inc.
2000 Daniel Island Drive
Charleston, SC 29492

Mrs. and Mr. Steinmeyer
301 Pulaski Dr
Hampton, SC 29924

► EXCEL – SIMPLE FORMULAS

The screenshot shows the Microsoft Excel interface with the following data in the worksheet:

	A	B	C	D	E	F
1	IndsInd_Primaryaddressee	IndsInd_Primarysalutation	IndsIndSpse_Primaryaddressee	IndsIndSpse_Primarysalutation	Primary Ad	Primary Sal
2	Mr. and Mrs. Clyde Steinmeyer	Mr. and Mrs. Steinmeyer	Mrs. and Mr. Steinmeyer	Mr. and Mrs. Steinmeyer	FALSE	TRUE
3	Mrs. and Mr. Steinmeyer	Mr. and Mrs. Steinmeyer	Mr. and Mrs. Clyde Steinmeyer	Mr. and Mrs. Steinmeyer	FALSE	TRUE
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						

Formulas shown in red boxes:

- `=EXACT(A2,C2)` (points to cell E2)
- `=EXACT(B2,D2)` (points to cell F2)

=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.

Mrs. Ruth S. Steinmeyer

File Edit View Individuals Letter Favorites Tools Help

Save and Close Write a Letter

Bio 1 | Addresses | Addressees/Salutations | Relationships | Attributes | Notes | Media | Actions | History of Changes

Mrs. Ruth S. Steinmeyer Edit

Record ID: IND020 Country: United States

Affiliation: Donor Address: 301 Pulaski Dr

Gender: SSN:

Nickname: City: Hampton

Spouse: Mr. Clyde Steinmeyer State: SC

User ID: Password: ZIP: 29924

Birth date: Age: Deceased?

Birth country:

Birth state:

Birth city:

Contact Type

Home Email

Requests no email

School Info

Education Edge

Ruth Steinmeyer

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Actions Prospect Events NetCommunity

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts Attributes Media

Biographical

Last name: Steinmeyer Aliases

First name: Ruth

Middle name: S.

Titles: Suffixes: Nickname: Maiden name: ID: 9433776

Gender: Unknown SSN: Birth date: Age: Deceased? Date: Marital status: Spouse: Solicit code:

Preferred Address : Home

Country: USA Address lines: 301 Pulaski Drive City: Hampton State: SC South Carolina ZIP: 29924 DPC:

Phones/Email/Links

DNC	Type	Number/Email Address
<input type="checkbox"/>	Email	rutsteinmeyer@verizon.com, rsteinmeyer@qmai...

This constituent

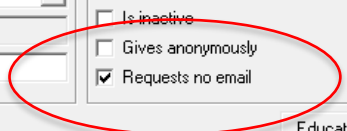
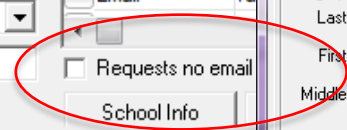
Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

Requests no email

Education Business Bank

No score 4/4/2014



Raiser's Edge

➤ EXCEL – VLOOKUP (MORE COMPLEX)

ee requests no email.XLS [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F
1	Last Name	First Name	Request No Email - EE	Email Address - EE	Requests no email - RE?	Same?
2	Steinmeyer	Ruth	No	ruthsteinmeyer@verizon.com, rsteinmeyer@gmail.com	Yes	FALSE
3	Welsh	Rachel	No	rwelsh@shipleyschool.org	Yes	FALSE
4	Doe	Jane	Yes	jdoe@shipleyschool.org	Yes	TRUE
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

Pulling data from another spreadsheet with data from another database
 =VLOOKUP(E2,'[re requests no email.xls]re_requests_no_email'!\$C\$2:\$D\$23,2, FALSE)

Conditional Formatting colors the cell to show errors

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

QC - Admissions Applicants ▾ Customize New Select Existing Dashboard Save As... Delete... Cancel Refresh Sharing

QC - AO - accept/enrolled - birth or gender = blank

Last refreshed 4/1/2014 5:01:42 PM

Row	Full name	Current status	Current grade	Status date	Birth date	Gender
1	Jane Doe	Accept	Grade 5	4/1/2014		Female

QC - AO - accept/enrolled - class of = blank

Last refreshed 4/1/2014 5:01:43 PM

Row	Last name	First name	Class of	Current grade	Current status	Active application
1	Doe	Jane		Grade 5	Accept	Yes

QC - AO - accept/enrolled - District = Blank

QC - AO - accept/enrolled - ethnicity = blank

QC - AO - accept/enrolled - issue Gender or relationship

QC - AO - accept/enrolled - online missing app or inq date

QC - AO - accept/enrolled - relationship is deceased

QC - AO - accept/enrolled - status date = blank

QC - AO - any record with blank name or "unknown" in name

QC - AO - relationship - missing primary ad or sal

QC - AO - accept/enrolled - education information blank

QC - AO - accept/enrolled - inquiry date = blank

QC - AO - accept/enrolled - Nickname = Not Blank

QC - AO - accept/enrolled - Primary Add or Sal = Blank

QC - AO - accept/enrolled - relationships = blank

QC - AO - accept/enrolled - with business address

QC - AO - relationship - incorrect gender

► AUTOMATE REPORTING

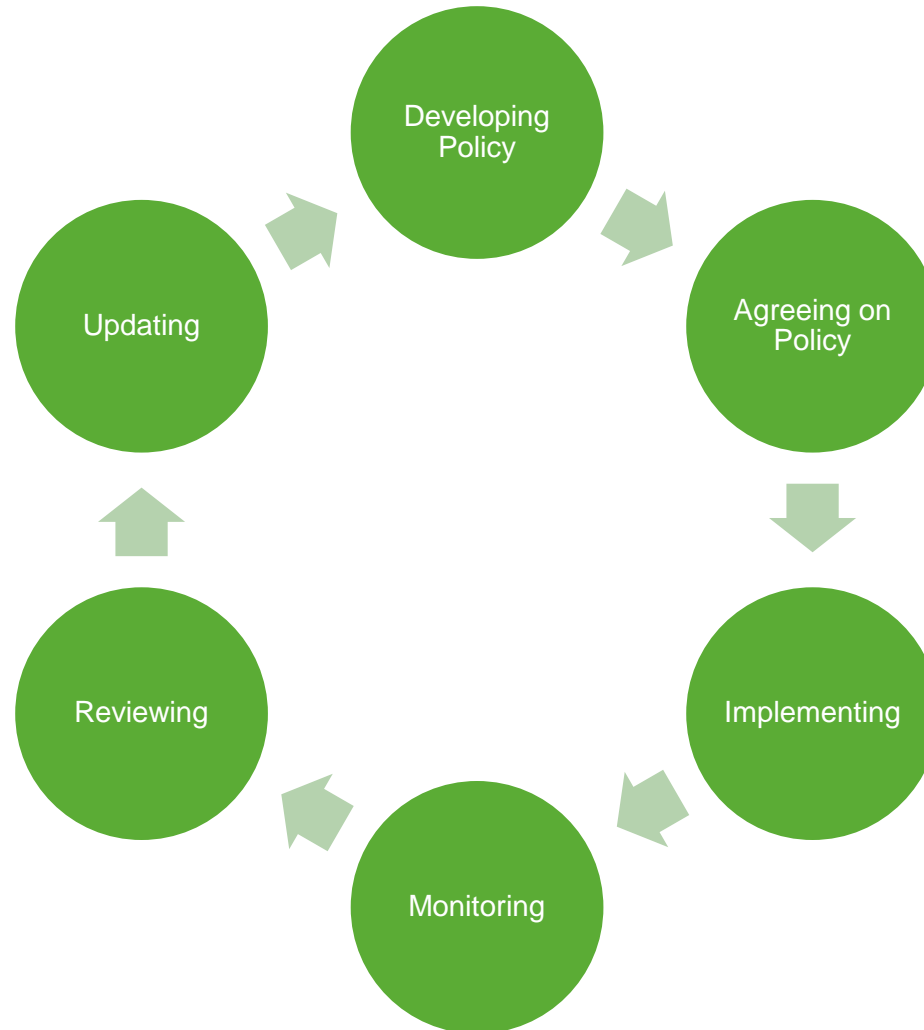
- Queue – AO reports for development
- Queue – Colleagues not returning next year
- Queue – Students not returning next year
- Queue – New Hires



► PROCESSES









































► POLICES & PROCEDURES (P&PS)



► VIEW OF P&P LIST – EXAMPLES

Name

-  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 Proceses-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 w-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

- <https://www.dropbox.com/s/m1qnyozcr33sklv/Enrollment%20-%20Post%20Enrollment%20Procedures.pdf>

- Request No Email

- <https://www.dropbox.com/s/fmrrs5atpr3rpem/Requests%20No%20Email%20-%20redacted.pdf>

- 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

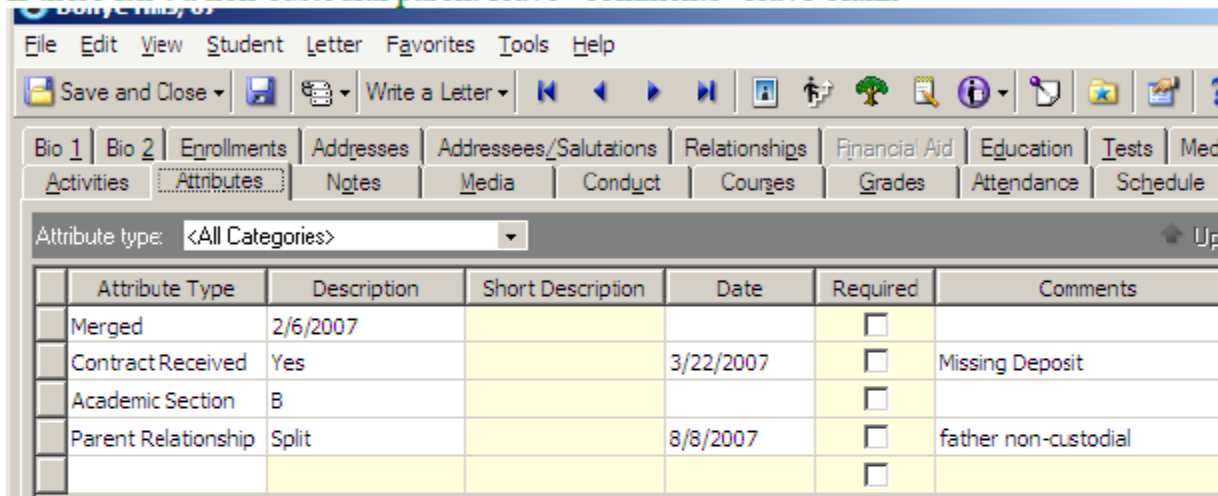
1. Affects Addressee& Salutations and Addresses in each system
2. Affects constituent/non-constituent set-up in RE

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



The screenshot shows a software window with a menu bar (File, Edit, View, Student, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Bio 1, Bio 2, Enrollments, Addresses, Addressees/Salutations, Relationships, Financial Aid, Education, Tests, Med, Activities, Attributes (selected), Notes, Media, Conduct, Courses, Grades, Attendance, and Schedule. Below the tabs is a dropdown menu for 'Attribute type' set to '<All Categories>'. Below that is a table with the following data:

Attribute Type	Description	Short Description	Date	Required	Comments
Merged	2/6/2007			<input type="checkbox"/>	
Contract Received	Yes		3/22/2007	<input type="checkbox"/>	Missing Deposit
Academic Section	B			<input type="checkbox"/>	
Parent Relationship	Split		8/8/2007	<input type="checkbox"/>	father non-custodial
				<input type="checkbox"/>	

2. Relationships - Order of relationships on student records is crucial when synching from EE to RE:
 - a. 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

<input type="checkbox"/> Business/Grandparent Form	No			<input type="checkbox"/>	
<input type="checkbox"/> CIS Returned	No			<input type="checkbox"/>	
<input type="checkbox"/> Policy & Procedure Checked	Enrollment - New Student Procedures		2/26/2014	<input type="checkbox"/>	dc





► PEOPLE



► REINFORCING ACCOUNTABILITY



► 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

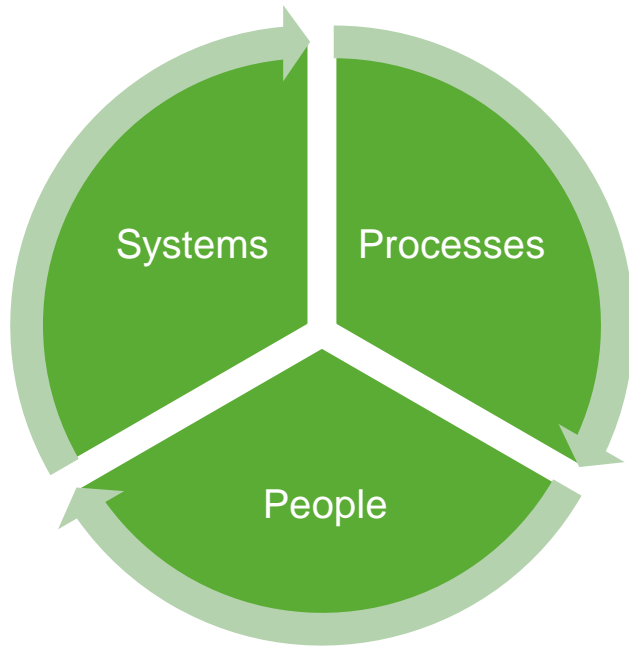


- “Go forth and prosper”



- 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 - <https://www.dropbox.com/s/m1qnyozcr33sklv/Enrollment%20-%20Post%20Enrollment%20Procedures.pdf>
 - Request No Email - <https://www.dropbox.com/s/fmrrs5atpr3rpem/Requests%20No%20Email%20-%20redacted.pdf>
 - Divorce - <https://www.dropbox.com/s/7q8h5e4svdw0nzi/Divorce%20-%20Separation%20procedures.pdf>
- Community
 - Blackbaud Forums - <http://forums.blackbaud.com/>
 - Blackbaud User Group - <https://groups.google.com/d/forum/blackbaudusers>
- Technical:
 - <http://office.microsoft.com/en-us/excel-help/exact-HP005209081.aspx>
 - <http://office.microsoft.com/en-us/excel-help/vlookup-HP005209335.aspx>