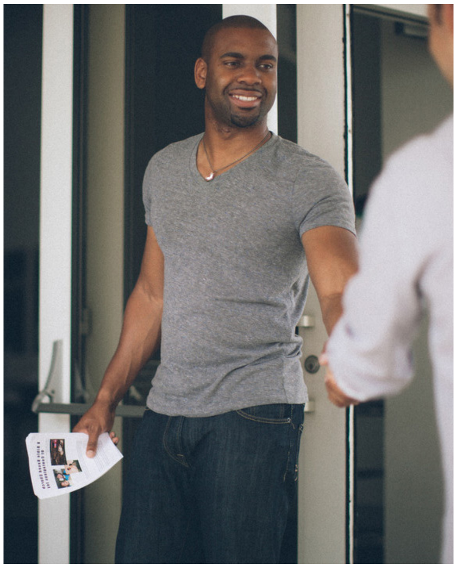
ACTIVE FellowshipOne

SQUEAKY CLEAN DATA: A 6-STEP GUIDE



EXECUTIVE SUMMARY

What is data?

It may be just a tiny bit of information, but it's valuable and in need of protection. It can be easily shared, lost, stolen, corrupted, misunderstood, and ignored. When in conjunction with other bits of information, great resources are required to manage and utilize it well.

Data, however, is not just information. It represents living, breathing people. Therefore, data matters.

If the church consists of people, and data represents people, then data is the smallest building block of church management. Clean, accurate, and accessible data is necessary if you want to:

+ **Manage your church well**
+ **Offer exceptional member care**
+ **Make sure your members are healthy and growing**
+ **Ensure that no one "falls through the crack"**

Data is a keeper of spiritual insights that you must learn to mine.

Without reliable data, you can never tell from just looking at the faces shining out from your pews what's really going on in your members' lives, or how your church is doing at meeting the deep needs of those who enter your doors.

Church leaders need to know how to make the most of their data, and how to keep it clean and maximize its potential for revealing the individual infrastructures that make up the life of your church. As stewards called to "shepherd the flock that is among you," you can't afford not to be equipped to responsibly handle data.

"Bad data is like a good message in a foreign language. Important information is at your fingertips, but it makes no sense."

1. DATA INTEGRITY

PC Magazine defines data integrity as "the quality of correctness, completeness, wholeness, soundness and compliance with the intention of the creators of the data."

It's Greek to Me

"Σκουπίδια, στα σκουπίδια που" is one of the truest messages ever spoken about data integrity, but if you don't know Greek, you probably didn't understand the message: "Garbage in, garbage out." Bad data is like a good message in a foreign language. Important information is at your fingertips, but it makes no sense.

No matter how carefully you try to keep your data clean, it will develop duplications and errors that ultimately threaten the reliability of your communication and metrics. People move, numbers change, families grow and shrink. Unfortunately, member-generated updates tend to be spotty at best. Section 3 (Data Strategy) will address what to do about ever-changing data, but the worst scenario is when churches unwittingly create database corruption.

There are at least three major ways bad data is created:

1. Human error - This can occur at the source and at the point of data entry.

2. Life Happens - People's information is constantly changing.

3. Poor Processes - Failure to follow best practices degrades data quality:

+ **Too many data sources—** Multiple receptacles of the same or overlapping data assures incomplete or incorrect data
+ **Independent decisions and disagreement—** Those who touch the data do not know or agree on established definitions, descriptions and processes
+ **Too many ways to do something—** Multiple choices complicate the process
+ **Lack of accountability—** Who will act on new data—and by what deadline—is not established and enforced

Here we begin to see that data management is not just about the collection and storage of information. *Processes* affect data integrity. It is vital to have a strategy for the processes that will positively affect your data.

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2. DATA STRATEGY

Often, when churches are evaluating and deciding on new technology to manage their databases, data strategy takes a back seat. Without a plan for how data will be used, too much or too little information is gathered. Too much and your process is too complicated. Too little and you have to come back and request more—which you may or may not ever get.

Your data strategy should be as simple as possible so that staff and volunteers can easily enter data, and reports can be trusted. We recommend the following strategies:

A. One Database

If a church doesn't provide a single-source database, ministry leaders often try to get and stay organized by creating their own. Separate Excel spreadsheets or other systems may work at first, but problems will begin to surface. Katie Smith of Cedar Springs Presbyterian Church in Knoxville, Tennessee describes a common scenario:

> Johnny's parents fill out a form for a youth group event showing that their address has changed. They assume that this information will be shared with the front office. If the youth director is keeping his own system, he may fail to communicate this address change.
>
> The front office later receives undelivered mail from Johnny's family (requiring a return postage fee) and has to contact them to learn why. This sends Johnny's parents the message that the church's right hand doesn't know what its left hand is doing.
>
> Or, consider how awkward it would be to send a Small Group letter to Mr. and Mrs. Jones when the church just hosted Mr. Jones's funeral a few weeks ago.

When attendees have spoken to a church leader or even a volunteer, they feel that they have spoken to "The Church." Later, when "The Church" doesn't know about it, a level of trust has been broken. Efficient systems and a centralized database help keep everyone on the same page regarding members, and build confidence that "The Church" cares.

Too often, multiple databases breed data entry errors and discrepancies in family configuration, names that family members go by and changes in the family. Failure between ministries to share the updates they have been given or the life events they have assisted with (such as marriage, divorce, graduation, or having a new baby), keeps other staff members in the dark and unaware of important opportunities to show their concern or offer resources for those life changes.

The right system will integrate all family profile information, ministry engagement, volunteer roles, event attendance and even giving into the same database, allowing staff and leadership to have a full 360° view of the church's attendees.

B. Agreement of Terms

When you are designing your information collection form, a decision will need to be made about how many categories to create. This is where less is definitely more! For example, one of the jobs of your system will be to designate the people who attend your church. Every church has attendees who fall into one of the following categories on the left:

<table>
<tr><td>Community: Unchurched</td><td rowspan="2">Visitors</td></tr>
<tr><td>Crowd: Regular Attenders</td></tr>
<tr><td>Congregation: Members</td><td rowspan="3">Members</td></tr>
<tr><td>Committed: Maturing Members</td></tr>
<tr><td>Core: Lay Ministers</td></tr>
</table>

You should have a general idea of what you want to do with the data of each group. The temptation, however, will be to create a status for each one or even more, such as breaking “visitor” down into “newcomer,” “regular visitor,” and “longtime visitor.” This type of specificity seems brilliantly organized, but it usually just complicates your strategy in the long run. Most churches find that the simplicity of having two statuses—Member and Visitor—is all they need. Unfortunately, this is frequently discovered only after a year of struggling to get all those who touch the system to classify everyone properly into one of their 412 possible statuses.

Within these two statuses, individuals can be assigned as many additional attributes as you want. A good data management system will allow you to run reports to locate individuals with specific attributes such as first-time visitors, second-time visitors, and other delineations. Reporting capabilities allow you to analyze your church’s internal structure and flow of individuals for the sake of knowing how to care for them, so details are important. However, to require that kind of detail at the data entry point is to invite errors and complication.

C. Stated Service-Level Expectations

These are policies you set for handling data. A stated or documented process is required for the handling of data as it comes in, in order to ensure that every bit of data—every person—is cared for. Every possible entry point of information must have a plan, a due date, and a person assigned to act on it and sign off on it. For example, a 5-day window may be allowed for response to a first time visitor contact. Keep the previous guideline in mind: the simpler the process, the easier compliance with it will be!

Don’t Play at Training

An important aspect of clearly conveying expectations to staff is to take the training process seriously. Remember that old game “telephone” or “gossip”? Someone whispered a message into someone else’s ear, who then passed the message to another person, and so on, down a line of players. At the end, it was always funny to see how the message had evolved and been misunderstood. This is not so funny when it comes to training. The same person should do the training, if possible, or a comprehensive training checklist should be followed. Otherwise, subsequent trainings may result in inconsistent instruction on data processing.

> “Data integrity depends upon agreement of terms and processes across all ministries.”

D. Mandatory Buy-In

The circle of data management now broadens. Handling of data is not confined just to office staff, but also includes ministry leaders. As we've stated, if every ministry has a different name for "visitor", complications will occur! Data integrity depends upon agreement of terms and processes across all ministries. This can be a little like stepping on an ant hill and then trying to corral all the ants back into the mound!

A person of authority on staff must endorse the data management process and require cooperation with the person in charge of the central hub of data. Buy-in from everyone is absolutely necessary because data integrity is impacted by everyone. It's like a chain; weak links affect the overall strength of the process.

Typically, when leaders see how much updated data helps them do their jobs, they will not view doing their share of data maintenance as a dirty job.

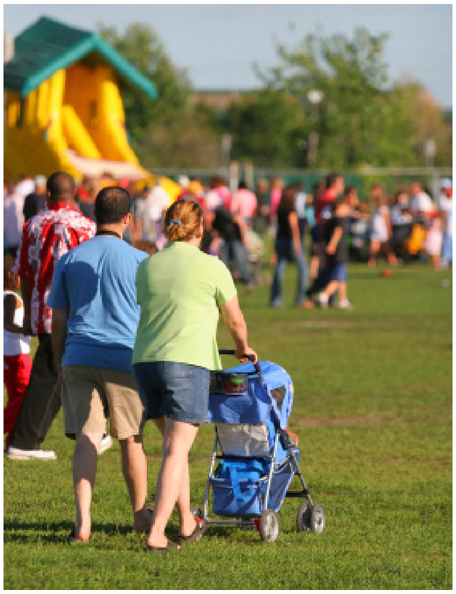
Because communication across departments can be a challenge, experience has taught us that the best way to achieve agreement of terms and processes is to create a team dedicated to data integrity.

E. Data Integrity Team

The ideal data integrity team begins with a leader who owns the job of database oversight. However, one person trying to align multiple, independent, uncooperative ministry leaders' information is a recipe for whole-church inefficiency.

The team should be comprised of a representative from each ministry and should meet regularly (perhaps once a month). They can discuss individuals for whom there is concern. They can share what they know and create checks and balances for action that is required for inactive members.

A data integrity team provides the communication, agreement, alignment and regular updating required for a clean database. This kind of contribution to your data management cannot help but benefit a church's operations and its ability to offer exceptional member care!



3. DATA COLLECTION

Now it's time to gather information! This is not always easy, as many people resist our requests for information. Leaders need to understand that it's up to them to take their relationships with members and visitors to the next level. Leadership is, after all, the process of moving people from one place to another.

It's a sad fact of life that people will happily take what you offer and stay on the fringes without ever connecting. Yet, a person's very presence at your church service or event indicates "permission" to make a connection. Outreach trendsetters have been telling leaders that connection efforts will yield better results if we offer something of value in exchange for personal information, and this is true.

Allen Ratta writes in his ebook, The Optimized Church:

> There is a zero connection between neighborhood kids jumping in bouncy houses in our parking lot at our Harvest Festival on a Wednesday night and their parents experiencing a felt need to attend church on a Sunday morning. People will take everything we give them for free and then go happily on their way. They will attend our productions and applaud. They will take our candy and collect our eggs. The next Sunday we wonder, "Where did they all go?"
>
> Events can be a tremendous investment towards fulfilling Christ's purposes for His Church. We just need to be sure we link the event with our purpose, and we do that by making sure we get their information. Rather than "give away the store," get creative. Solicit prizes from local businesses and hold drawings that require completed entry forms. Now you have a private "fishing pond" from which to invite them to attend events where they can be introduced in a meaningful way to the gospel.

Nothing beats the "bang-for-your-buck" like a $5 Starbucks™ card along with your welcome packet in exchange for a completed visitor card. Or you can offer online giving, ticketing, and event registration and payment, which enables you to collect information at the time of transaction. This is probably the most non-threatening way churches can collect information.

It should go without saying that care must be taken not to abuse the privilege of being given personal data. Also, once they know you have their data, you must be diligent to be in touch, as Dana Vogel of Lewisville, Texas explains:

> My boyfriend and I started attending our new church on the same weekend. We both filled out connection cards with our separate addresses. Within a couple of weeks, he had received several pieces of mail from the church, but I had received none! I finally filled out a new card and checked the box next to "new address." I guess that's when they discovered I somehow hadn't made it into their database, because after that, I got my welcome packet and a 'thank-youfor- visiting card.'

Not all visitors are this tenacious. This church got a do-over, but many would immediately write off a church that "welcomed" them in this manner.

"We maintain data about individual and family participation and engagement so we can know more about the life changes people are stepping through. Tracking those steps and offering assistance along the way is the point and purpose of data collection, storage and analysis."

4. DATA REFRESHING

As stated earlier, even when every effort is made to keep data clean, it will lose integrity. People move, change numbers, leave the church, have children, get married, get divorced—all without updating their information.

An annual drive to refresh your data can keep your database up-to-date. Errors will go back no further than one year and will not accumulate with this briefly intense, but effective strategy:

+ **Choose 3 consecutive weekends** that are not overlapping major holidays or events. Why three? Data shows that regular attenders only make it to services every other week, so three weekends will make sure you have the opportunity to receive at least one form from the maximum number of attendees.
+ **Name and advertise the drive** for several weeks in advance in a way that invites curiosity.
+ **Create a survey** that asks for basic contact information and contains several questions, such as "How many minutes is your drive to church?" or "Which staff member would be Most-Likely-to-be-a-Victim-of-Autocorrect or Drop-Their-iPhone-in-the-Toilet?" The questions can be random and for fun, and different each week, or they could mine for new data for a possible initiative, such as a second campus.

  (Note: the real reason for the questions is to induce those who will insist that their data has not changed that they still need to fill out the form three times.)
+ **Ask for the entire church's indulgence:** Have a person of authority announce that "We know lots of you have the same contact information, but humor us."
+ **Request that every household fill out the form** all three weekends during the worship time.
+ **Increase volunteers** for several weeks to process the new data sheets, ensuring that they undergo unified training with clear communication of processes.
+ **Create an "unsubscribe" opportunity** by running a report to see who was missed. Mass email them the form with a message that says:
    - "We're updating your records and want to make sure that your information in our database is correct."
    - "We don't want to flood you with communications if you're no longer interested in being in the database."
    - "Your profile will be deleted by (a certain date) if not updated."
+ **Delete any un-updated files**
+ **Keep it fun.** We recommend that you make this as light-hearted as possible. Hold a drawing of the forms each weekend at each service and give away a prize. Or actually award certificates to the staff members who were voted "Most Likely To...".

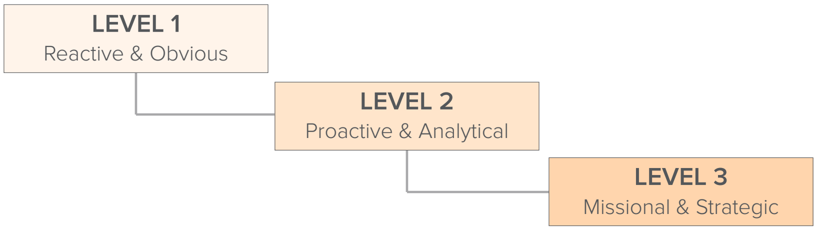
5. DATA MINING

When asked what they plan to do with the data they spend countless hours maintaining, some keepers-of-the-data seem confused. Churches are only just beginning to realize that a Church Management System (ChMS), is far more than a glorified Rol-a-Dex. The right ChMS is a powerful tool.

Data is only truly valuable when we use it to meet our people at all the points where transformation could happen. We maintain data about individual and family participation and engagement so we can know more about the life changes people are stepping through. Tracking those steps and offering assistance along the way is the point and purpose of data collection, storage and analysis.

The Stair-Step Process of Mining Data

If data such as attendance, volunteer engagement, ministry involvement, Small Group participation and giving are being tracked and measured, what is being done with those metrics?



Level 1

Metrics tracking is a process all its own. Leaders instinctively implement a Level 1 style of scoping out their processes, which is to see the obvious and react.

For instance, your church offers a ‘Preparation for Parenting Class’ and reports that 42 people attended. Those attendance records will help you plan how many infant nursery rooms you will need 6-9 months from now.

Level 1 is a good start, but if leaders don’t progress in their data mining approach, they may just end up tracking for the sake of tracking. They’re missing many opportunities to grow a healthy church.

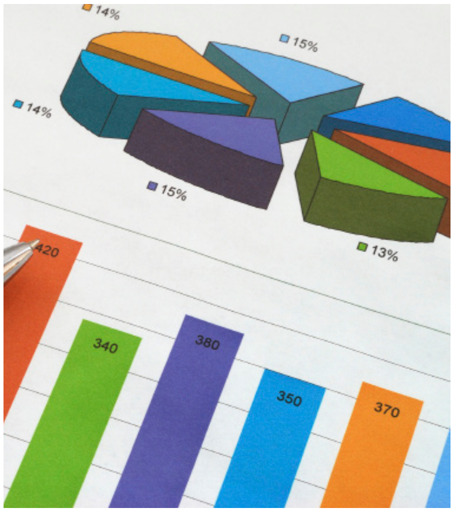
Level 2

Leaders need to progress to a Level 2 approach of being proactive and analytical, searching their metrics for less obvious trends and opportunities to connect.

This is where leaders discover that the real ministry opportunities are with people who are not there, rather than those who are. Following the example above, how many of those couples who took the ‘Preparation for Parenting Class’ have not enrolled a child in the nursery six months later? This provides an opportunity for you to discover who may be struggling with the new demands of parenting and reach out to them.

Other examples include:

+ Who is not in a small group?
+ Who took Membership 101 but not 201?
+ Are all the couples who went through premarital counseling last year now in the Marriage class?



Level 3
Finally, leaders must reach a Level 3 response of being missional and strategic:

> Level 3 metrics are mission-impacting measurements. They hold the church accountable to its mission, vision and strategy. They are sometimes external in nature and require some effort in obtaining. These metrics encourage the right behaviors and measure community impact of the church and its mission. They help validate the existence of your church and are strategic in nature. (Reggie McNeil, Missional Renaissance)

In Level 3, influencers ask questions not just of economy and efficiency, but also of effectiveness: “How is this process helping us meet our goals?”

Examples of Level 3 metrics would be the discovery of a sizeable number of struggling new parents, which might spawn a support group or a ministry for older women to assist young mothers. Or, you might mine for:

+ The number of hours of external community service members are engaging in
+ How many new members are growing out of the Small Group ministry (if they are designed to be growth engines)
+ How many new believers have resulted from relationship with members who have attended Discipleship class

Taking Care in Data Analysis
Most people are aware that data and statistics can be skewed to say just about anything. This is not always intentional, so it is a good idea to be aware of the most common traps in data analysis, as journalist Erik Sherman explains:

1) Size of Finding – your results only count to the degree that your sample is representative of the larger group you study, so make sure you’re looking at a large enough sample (i.e. period of time, number of people, etc.)

2) Things Change – periodically validate what you think you know

3) Fallibility and Bias – data can contain errors, and interpretations can be based on expectation or unconsciously biased selection of criteria to support a desired thesis.

Sherman recommends that you “never bet the [church] on one analysis,” and “always test to see if your new knowledge works.”

6. DATA SECURITY

If all your data was in a paper system, your security risk threshold would be low. Members' contact information could be vulnerable to salesmen who join the church to "network" via the directory. Or giving records stored in the filing cabinet could be stolen or destroyed by fire. However, the big, bad world of cyber hacking and identify theft is most likely looking for churches who have gone online.

Partial efforts to modernize actually open the door to greater risk. If you offer online giving and event registration and payment, your attendees' bank and credit card information is potentially at risk. If you are trying to store such sensitive information on your own network, you become liable for the protection of that information.

Online giving and event payment through a 100% web-based ChMS that is in compliance with the Payment Card Industry (PCI) Data Security Standards (DSS) is actually safer than donating with cash or checks. Cash transactions have always been subject to loss and theft, and checks contain personal information that can be used to access your members' resources.

In-house database storage requires an extensive, knowledgeable IT staff and rarely affords the kind of cyber security that is needed. Many churches have turned to the cloud to find the flexibility, power and security that ChMS offer.

Questions to Ask

A good ChMS provider knows that its reputation depends on the security of your data and takes your church's safety very seriously. Though data security is very technical, the following questions can help you begin your research and compare products:

+ Is the vendor's product Cloud-based, or does your data reside on your own site or the vendor's site?
+ What internal controls exist in the software to protect sensitive data?
+ Does the company meet minimum PCI-compliance levels for credit card usage?
+ Where does the vendor store the data?
+ What are the vendor's precautions for physical security, network security and data security?
+ What are the vendor's practices for:
    - Testing
    - Monitoring and response
    - Data back up and redundancy (how many separate locations are used)
    - Number of days the datacenter can function in a regional blackout
    - Expected amount of downtime, due to scheduled maintenance
    - Actual amount of downtime
+ Does the vendor provide:
    - A Service Level Agreement (SLA) to specify policies with regard to liability for data safety? (This is required by law)
    - Reasonable documentation of intent to comply with standard auditing practices
    - The datacenter's security standards certification

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CONCLUSION

From start to finish, whether we're collecting, managing, refreshing, mining or protecting data, we must never forget that data management is not the end. It is the means to the end of shepherding those whom God brings into our span of care.

May we exercise exceptional stewardship over those souls and their data.

LEARN HOW

Fellowship One revolutionizes your approach to data integrity.

888.820.5808
Faith@ACTIVENetwork.com
FellowshipOne.com