Data Integrity Checklist

☐ **Set clear data standards for names, addresses, dates, and emails.**

Consistent formatting ensures accurate receipting, reduces duplicates, and improves mail delivery. This protects donor trust and lowers costs.

☐ **Document your processes and revisit them annually.**

Staff turnover is common across United Ways. Documented workflows preserve institutional knowledge and maintain continuity year over year.

☐ **Use Excel as your first cleanup tool (formulas, text-to-columns, conditional formatting).**

Many cleanup issues are faster to fix in Excel before importing. This reduces manual edits in Andar/360 and prevents invalid data from entering the system.

☐ **Use Data Mining Operations (DMOs) to extract only the data you need to review or fix.**

Targeted queries save staff time and help isolate issues such as missing emails, invalid codes, or outdated employer information.

☐ **Use Andar Connector for safe, repeatable bulk updates.**

Connector allows high-volume changes with safeguards, reducing manual entry and lowering the risk of errors during large cleanup efforts.

☐ **Leverage Executive Plus to automate cleanup and monitor data health.**

Automation can catch issues before they spread. This saves hours of staff time and enables proactive stewardship and reporting.

☐ **Clean outside data first before importing anything into Andar/360.**

Cleaning HR files, payroll reports, and external lists before import prevents duplicates, invalid codes, and misaligned giving information from entering your CRM.

☐ **Train staff to search before creating new accounts to prevent duplicates.**

Duplicate donor and company accounts cause stewardship errors, incorrect receipts, inaccurate workplace results, and reconciliation challenges.

☐ **Assign a duplicate-review owner and run the tool regularly.**

Making someone responsible to maintain a reviewing schedule keeps donor files clean and ensures financial and campaign data remains trustworthy.

☐ **Don't ignore smaller data areas (UDFs, affinity tags, web domains, e-Community notes).**

These fields support segmentation, stewardship, digital engagement, and reporting. Even small inconsistencies can weaken campaign insights and donor journeys.

☐ **Validate email syntax and domain accuracy at least once a year.**

Clean emails reduce bounce rates, improve deliverability, and ensure donors receive confirmations, receipts, and stewardship messages.

☐ **Standardize and audit dates (campaign periods, acknowledgments, expiries).**

Accurate dates support proper reporting cycles, pledge tracking, and audit readiness. This is important for financial stewardship and compliance.

☐ **Use a campaign wrap-up checklist to close out each year cleanly.**

A structured wrap-up ensures pledges, designations, payments, and company information are aligned before year-end processing and receipting.

☐ **Schedule routine data audits monthly or quarterly.**

Smaller, more frequent checks prevent large data issues from accumulating, saving time and ensuring data is reliable for reporting.

☐ **Remember the ROI**: Clean data = less rework, faster reporting, better donor stewardship.

Data integrity isn't just a technical task, it directly affects donor satisfaction, operational efficiency, campaign results, and community impact reporting.