Data Integrity

One Family – One Record

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About the Diocese of La Crosse

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162 Parishes – 15,078 square miles

55 Urban Parishes with 41,597 families – Largest has 2,000 families

109 Rural Parishes with 27,826 families - Smallest has >50 families

Average parish – 429 families

Pastoral Center – La Crosse, WI

Bishop Callahan – 10th Bishop
Promise of a diocesan synchronized database

- Accurate and immediate census counts and lists for every parish
- Access to accurate lists of parishioners and parish staff for use by curia offices
- Ability to append data from disassociated databases
- Ability to mine data for trending and profiling
Problems of a diocesan synchronized database

- Inaccurate census counts and lists for every parish
- Access to inaccurate lists of parishioners and parish staff for use by curia offices
- Inability to append data from disassociated databases
- Inability to mine data for trending and profiling
Background sources for the duplicates

- Initial synchronization of 165 parishes into a central database in 2007
- Previous separate parish databases were never pre-merged so the initial combined database contained duplicate families with various permutations of names and addresses and other demographic information
Background sources for the duplicates

- Users were not searching or using good search techniques when adding new records
- Incorrect handling of families moving between parishes
- Multiple active registrations for a single family
- Parishes not using parish merge tool
- Curia offices not using diocesan merge tool
Situations to be considered

- Adult children living with parents or grandparents
- Adult children away at school within our diocese
- Adult children getting married
- Married adult children returning home to live with parents
Goals for cleaning up the duplicates

- One Family, One Record
- Using the synchronized database for diocesan mailings such as Annual Appeal, diocesan newspaper and other diocesan special appeals.
- Using the synchronized database for specialized mailings based on demographic selects such as age, profession, region, affinities, or sacraments received.
Approach for reviewing the scope of duplicates

- Used the PS Duplicate Checker
- Noticed that various permutations were not logical so the checker would skip some duplicates
- Downloaded entire database to MS Excel to perform more detailed analysis and tagging of likely duplicates
- 100,000 records evaluated – 20,000 suspect records
Process for reviewing the identified duplicates

- Who was involved – Office of Stewardship as they have the best knowledge of list management
- Two individuals doing data analysis and entry
- One started at one end of the list and the other started at the other end and are working their way to the middle
- Recommendation: start with Registered / Registered to clean up census count errors first
Process for merging records

- Office of Stewardship would research identified duplicates
- Oftentimes the office would contact the parishes showing ownership of the records in question
- If the records test duplicate positive, the office would use the merge tool
How to identify and resolve future duplicates?

- Data hygiene reporting
- Review all new records created to make sure required fields are complete
- Verify that new duplicates are not being created
- Trend data errors by user or parish to identify gaps in practice
- Train users/parishes where confusion exists or policies are not being followed
How we educate our users

- Regional training to explain data integrity
- WebEx™ follow up training
- Procedure manual with SOP for common parish data related activities
Best Practice
Initial Cleanup Process

- Set benchmark & monitor progress regularly
- Offering merging as service to parishes
- Empower & educate parishes willing to do the work
- Structure cleanup to get max ROI in early stages
  - Reg/Reg
- Engage data experts to evaluate potential duplicates
Avoid Future Duplicates

- Establish maintenance plan
- S.O.P/Best Practices
  - Add new & shared families
  - Search methods
- AIM IQ data check queries
- Educate new & existing users
- Regular user groups
- Assign diocesan data monitoring teams
  - By region/vicariate
  - By data type
Sync Considerations

- Still in the process of synchronizing parishes?
  - Have parish run parish tool before sync
  - If data already in AIM prior to sync, sync into production (SIP) now available
  - Evaluate and merge cross parish duplicates as new parish brought on through sync