A.D.

Letting Data Go: Making data minimization your friend

Do you like to capture as much information as possible about your donors and are worried about missing out on something that could be useful? Do you find it hard to pinpoint what you need information for but don't want to lose it? This sentiment often goes in hand with a fear of what a system can and should do. The misunderstanding leads to a store-it-all just-in-case approach.

The problem is, **the more information you store, the more you have to manage and the more you stand to lose in the event of a data breach.**

Complying with GDPR-like legislation is best done with a lean, clean, tidy approach: **know what you have, why you have it and keep out what you don't need.** As a bonus, leaner and cleaner is usually cheaper: the less you need to store the less you pay to store and maintain it.

How to let it go

When you don't have resources to clean what you have, start by making a conscious switch to how you enter information in your database from this point forwards. Think first, **do we really need this? Would the donor be happy with us storing this? Is it accurate and useful?**

When entering a new record, **always check first to see if the constituent already exists**–use broad search terms like just an email address or partial name. Doing this turns off the tap on surplus information and duplicate records.

When you do have resources to dedicate to cleanup, find your most populated records and audit the information stored. **What is so out of date it serves no useful purpose? What isn't accurate and cannot be relied upon? Of what is left, is there anything you don't need?**

Common pieces of information to remove include:

- dates of birth
- old bank account information for EFT/ACH gifts that are no longer active
- old wealth screening ratings and net worth estimates
- old addresses, phone numbers, work numbers, websites
- old employment information
- notes and attachments (especially things added by former staff years ago)
- relationships links that are incorrect
- surplus information about a spouse (birth date, old employer, old phone numbers)

Once this information has been removed, make sure it doesn't accumulate again. Audit your processes for data input and update them. **Train users to think lean not excess.**

Finally, **schedule quarterly check-ins** on the state of your database to keep on top of volume, identify records and pieces of information that could be deleted and discuss with users any "but what about" scenarios that may have arisen.