The Nonprofit Dimensions Planning Workbook:

Dimensions Governance & Maintenance

SPARKROCK

The Nonprofit Dimensions Governance & Maintenance Workbook

Step-by-step exercises to clean up your coding and design dimensions that work.

Who This Is For

This worksheet is for nonprofit finance teams who are setting up or maintaining dimension values — whether you're:

- rolling out dimensions for the first time,
- tightening up who can add or change values, or
- cleaning up a growing list of duplicates, "misc" entries, and one-off fixes.

It's especially useful if you want:

- clear rules for who can create, approve, and retire values,
- naming standards that prevent mystery codes and lookalikes, and
- a simple process for deciding when a new value is worth adding (and when it isn't).

If your dimension list is starting to feel like a junk drawer or you want to prevent it from becoming one — this worksheet is for you.

How to Use This Worksheet

Solo pass (20–30 minutes):

Complete Sections 1–4 with your first honest draft.

Team session (45–60 minutes):

Review Sections 5–7 with your finance team + a program leader if possible.

Commit to next steps (15 minutes):

Identify the top outcomes to improve first and confirm which lenses support it.

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What You'll Get Out of This Worksheet

By the end, you will have:

- ✓ A clear governance model for who can add, edit, and retire dimension values
- ✓ Written naming conventions that prevent mystery codes and duplicates
- ✓ A decision process for adding (or blocking) new values
- ✓ A cleanup and review cadence that keeps your structure lean
- ✓ A 30-day maintenance plan you can actually execute

What to Do With Your Results

Once you've worked through this worksheet, you can use your notes to:

- Define clear ownership and approval rules for dimension values
- Document naming standards your team can actually follow
- Align finance and program leaders on when new values are added (and when they aren't)
- Create a short, shared reference for maintaining dimensions going forward

You don't need to clean everything up at once. Start with the values that affect your most-used report, lock the rules that would prevent today's issues, and build from there.

If you create a standard practice for how values are named and maintained, everything gets simpler and cleaner.

Kinley Graham, Director of Pre-Sales, Sparkrock

SECTION 1 — Governance Snapshot (Quick Assessment)

Don't overthink this — your first instinct is usually right.

Rate each statement:

Scale:
1 = Not true today
2 = Sometimes true
3 = Consistently true

Statement	Rating
We know who is allowed to add or edit dimension values.	
Every value has an owner (not just "finance in general").	
New values follow a defined naming standard.	
We can block/retire values without breaking reporting.	
We regularly review values to clean up duplicates or confusion.	
No one creates "special case values" outside the process.	

SECTION 1 — Quick Self-Assessment (Scorecard)

Don’t overthink this — your first instinct is usually right.

Quick Results

Top governance strengths:

1. _____
2. _____
3. _____

Governance gaps to fix first:

1. _____
2. _____
3. _____

If we fixed ONE thing first, it would be:

1. _____

SECTION 2 — Naming Conventions ("The Librarian Rules")

These rules prevent inconsistent labels, mystery codes, typos, and "Program A / Prog A / PrgmA" chaos.

A) Choose Your Naming Format

□ Program – Location (e.g., Youth Services – North)
□ Location – Program (e.g., North – Youth Services)
□ Code + Name (e.g., 210 – Youth Services)
□ Meaningful Name Only (Youth Services)
□ Other: _____

B) Define Naming Standards

Allowed abbreviations:

_____

Not allowed:

- "temp"
- "test"
- "misc"
- "other" (unless clearly defined)

Required fields for each value (check all that apply):
□ Description / purpose of the value
□ Owner
□ Start date / Active date
□ End date / Inactive date
□ Notes (what it replaced, mapping, restrictions)

SECTION 3 — Value Lifecycle: Who Creates, Approves, Retires

A) Who Can Create New Values?

Value creation owned by: _____

Approval required from: _____

Requests submitted via:
□ Email □ Form □ Helpdesk Ticket
□ Other: _____

Turnaround target:
□ 24 hours □ 3 days □ 1 week
□ Other: _____

B) Criteria for Adding a New Value ("Gatekeeping Rules")

Before approving a new value, confirm:

□ It supports a real reporting or decision need
□ It will be used consistently
□ The name follows the naming standard
□ There is a clear owner
□ It will not duplicate another value
□ It will not require monthly "mapping fixes"

If it's not approved as a value, we will:

□ Document it in a notes field or attachment
□ Capture it in a one-time mapping file
□ Add it to our "exceptions log" for reporting only

Location of our exceptions log:
_____

C) When to Retire or Merge Values

A value should be retired/merged if:
□ It's associated with closed grants or ended programs
□ It is rarely used and not required for audit history
□ It duplicates another value
□ Its meaning has changed (or never was clear)
□ It creates rework in reporting
Retirement owner (role): _____

D) System Notes (Optional)

Some systems (like Sage or older ERPs) charge for new segments/dimensions or require IT/vendor support.

- Changes that require vendor/IT: _____
- Internal contact for system changes: _____
- Extra approvals needed (if any): _____

Additional Notes

_____

_____

_____

_____

_____

SECTION 3 — Messy vs. Clean (Spot-the-Problem Worksheet)

A) Common Trouble Patterns (Check All You See)

- □ Duplicate names
- □ Same name, different meaning
- □ Same meaning, different name
- □ Values created mid-month to “solve a problem”
- □ Old grants/programs never retired
- □ People code differently depending on who trained them
- □ Reports change depending on who runs them
- □ “Misc/Other” is overpopulated
- □ Too many values to manage

B) Your Top 10 Cleanup Candidates

Value Name	What’s Wrong	Preferred Value	Action (Retire, Merge, or Rename)	Owner

B) Your Top 10 Cleanup Candidates, Continued.

Value Name	What's Wrong	Preferred Value	Action (Retire, Merge, or Rename)	Owner

SECTION 5 — Usage Consistency ("Making It Stick")

A) Who Needs to Use These Dimensions?

□ Finance staff
□ Program managers
□ Budget owners
□ Grant managers
□ AP/AR clerks
□ Leadership pulling reports
□ Other: _____

B) What Tools or Supports Will Help Them?

□ Quick reference guide
□ Naming cheat sheet
□ Example transaction screenshots
□ Short training (15 min)
□ A list of "blocked values" to prevent confusion
□ Monthly reminders on changes / new values

C) Where Coding Goes Wrong

What people usually get wrong today:

_____

What rule or training would fix it:

_____

C) Where Coding Goes Wrong, Continued.

Change Communication Snapshot

When we add/retire/rename a value, we will:

□ Notify:

□ Finance team □ Program managers □ Budget owners □ Grant managers

□ Use this channel:

□ Email □ Teams/Slack □ Monthly finance update

□ Other: _____

□ Include:

□ What changed

□ Why it changed

□ When it takes effect

□ How it affects coding/reporting

Additional Notes

_____

_____

_____

_____

_____

SECTION 6 — Review Cadence & Ongoing Governance

Choose your review schedule:
We review dimension values:
□ Monthly □ Quarterly □ Twice per year □ Annually

During each review, we will:
□ Merge duplicates
□ Retire old grants/programs
□ Validate naming consistency
□ Remove “special case” values
□ Check for changes needed based on board/funder reporting

Governance Roles (Assign Owners)

Overall dimension steward: _____

Value creation approver: _____

Monthly/quarterly reviewer: _____

Training owner: _____

SECTION 7 — 30-Day Dimension Maintenance Plan

Week 1 — Identify High-Impact Cleanup

Our “report to fix first” is: _____
Fixing this report requires: _____
Done =
□ Faster □ Fewer manual steps □ More trusted
□ Consistent month-to-month

Week 2 — Clean Values That Affect It Most

Top values to clean/merge/rename:

1. _____
2. _____
3. _____

Owner: _____

Due date: _____

Week 3 — Lock Governance

Naming rules finalized:
□ Yes □ Sort of □ Not yet
Approval process defined:
□ Yes □ Sort of □ Not yet
Dimension owner assigned:
□ Yes □ Sort of □ Not yet

Week 4 — Make It Stick

Quick guide shared with users: □ Yes □ No
Training completed: □ Yes □ No
First review scheduled: □ Yes □ No

One rule we refuse to break going forward:

_____

Additional Notes

_____

_____

_____

_____

_____

READY TO EXPLORE YOUR OPTIONS?

Want to see these dimension ideas in real finance software? Connect with the Sparkrock team to explore options.