

# Databases – Why Bother?

November 5<sup>th</sup>, 2014

## Notes from the session:

Intro – What are your dreams and nightmares with databases?

Dreams	Nightmares
<ul style="list-style-type: none"><li>- 5pt best practice “go to” guide re: data</li><li>- True useful database for small organization</li><li>- Find the best fit for an individual organization</li><li>- +/- of a solution that fits</li><li>- Archives management (ex: 30 years of video)</li><li>- Where to go now?</li><li>- Not sorted finely enough and too slow/messy</li><li>- Make something work for you/advantage</li><li>- All staff understand and use the system</li><li>- How to collect useable data to leverage for extended applications (events fundraising)</li><li>- Work here leverages long term value - legacy</li></ul>	<ul style="list-style-type: none"><li>- Push back &amp; afraid to ask for info which would be useful (ex: when someone donates food, asking them for contact info)</li><li>- Unsearchable databases</li><li>- Hoodwinked/sold useless tools</li><li>- Blindness of organization to the value of investing in what they really need</li><li>- Security issues</li><li>- “Secret” holder – no legacy for organization</li><li>- Wrong tool for the job</li><li>- Not enough expertise to choose the right tool</li><li>- Invested time in the wrong system</li><li>- Inconsistency</li><li>- Finding time to be trained</li><li>- We don’t give data management appropriate attention</li></ul>

## List of databases (select):

- Access
- Sumac
- Salesforce
- Tapestry
- Raiser’s edge
- Filemaker pro
- UNX vision
- Techsoup Canada
- ADVANCE
- Excel
- Enterprise
- Sugar?

## When deciding on a database:

- Interview other organizations that do similar work
  - – What are they using?
  - What obstacles/hurdles did they encounter?
  - How long did it take?
  - Are you satisfied with the database
- Make a survey (survey monkey)
- Questions you need to ask:

- What are my needs
  - o How many people will be using it?
  - o What capacity do we need? (based on number of constituents and what it will be used for)
- What is my budget?
- What are the steps to implement a database?
- What kind of training is required?
- What accessibility is there? (Can I call them when I need them; good tech support team; etc.)

### **Notes from discussions and boards:**

We need to make the case, and it needs to be compelling. You can use data to explain this to donors, funders, and audiences.

We want information to be useful/easily useable. With every database, you will have a challenge extracting data. At a one or two-person office, you need to get this info out of your head and be able to pass it on/share it. If there isn't other staff, use volunteers. Databases can allow you to use volunteers (if you have a membership list, etc.)

Make sure to backup your data.

From a research point of view, there is tons of information online (think sunshine list, housing, etc.). Use available free info (publically accessible). Postal codes tell you a lot about the giving capacity of a potential donor. Lastly, if you don't ask, then you don't know (ex: ask for an address). What's the worst that can happen? They will say no.

Diminish your challenges

- Training
- Consistency
- Type of data
- Extracting data

Documentation

- Create a manual
- Put visuals
- Video training?
- This can help up consistency

3 things to look for

- Capacity (money)
- Affinity (warmth level/compatibility)
- Readiness to give (fundraising/funders)

Capacity is usually the easiest, affinity is tough...but in a database you have people who have already made a connection with you in some way. If you have an email address, it's a high affinity. As for readiness, you have to talk to them.

Email/electronic has taken over (compared to phone, snail mail)

Communication style – how do they prefer you communicate with them and what is going to be more effective.

Young people – Facebook/twitter – kids change emails/addresses/phones, etc.

How can we work better together as a community?

- Possible Hive – work collaboratively to create support materials for organizations to refer to when looking for a database
  - o Create a master list of questions organizations should ask themselves when determining if they need a database and what kind is the best fit
  - o Divide the list of possible databases between a few people and each person researching 2- 3 databases, then the group exchanges notes
  - o Hive work minimizing the time each person is investing overall, and yields more results