Implementing a Donor Database

Nonprofit 911 Series
Network for Good
Introductions

Me!

Eric Leland
Director
Leland Design
lelanddesign.com
eric@lelanddesign.com
The Promise of Technology

**THEN:** In 3700 BC, the Sumerians invented the ploughshare, increasing agricultural production.  
**NOW:** More than 840 million go to bed hungry.

**THEN:** In 1796, Edward Jenner conducted the first vaccine inoculation.  
**NOW:** 34 million infants born annually are not protected against diseases

*Source: practicalaction.org*
Our Focus Today

Launching a New Donor Database

Planning - Management - Development - Migration
- Training - Sustaining - Scaling

Components of our conversation:

• Readiness
• Implementation Phases & Strategies
Deciding how to start

Scenario:
You were just hired. Your executive director wants to increase the # of individual donors by 500% in the next fiscal year. She has just signed a contract for a brand new Donor Database. You are put in charge of the implementation.

What do you do next?
Getting Ready...

When adopting new databases, remember these principals

- Plans before tools
- Know your users
- Sustainability before features
- Data rules
- Implement for accessibility
Plans before tools

Planning – explain yourself!

• clearly articulate mission and goals
• explain strategies for achieving goals
• define success and its measurements
Plans before tools

The power of planning

- limits the scope of projects
- helps to set reasonable expectations
- helps to avoid unnecessary cost
- strengthens teams
- reduces stress
- adds years to your life
Know your users

Who are they?
What do they want?
How do they want to get it?
Why do/don’t they love databases?
Sustainability Before Features

How much database can you afford?

• Budget for the database system
• Technology staffing and support
• Implementation and ongoing costs
• Obsolescence
Data is king

Outputs lead to inputs

• Where is your data?
• What information do you report?
• What information should you report?
• What information do you need to track?
Implement for Accessibility

Databases should be usable, by you!

• Get only what you need
• Simple is powerful
• Follow your work processes
• Dark text on light backgrounds
• Documentation that really works
The Implementation Roadmap

• System Selection
• Agreement
• Testing and Feedback
• Data Migration
• General Training
• Support
Databusted

“Let’s Get A New Database” Phase
“We Hate Our Database” Phase
Support
Training
System Selection Phase
Implementation

Avoid Databasing in Circles
Databasing Effectively

Implementation Phases

- Planning
- Vendor Selection
- Challenge
- Support
- Emerging
- Planning

Time

Capacity
System Selection

Choose what works for you!

• Share your requirements
• Engage demonstrations
• Test functionality
• Seek out hidden costs
• Understand resource requirements
Agreement

Build a strong partnership!

• Engage in contracting decisions
• Include a detailed workplan
• Clarify expectations of all parties
• Manage the project
• Include data migration
• Stay involved in every project phase
• Identify multiple review periods
Testing and Feedback

You are key to building this system!

• Try the system early, and often
• Feedback changes and challenges
• Engage multiple staff users
• Use your workplan - stay on target
Data Migration

Sometimes the first fit is not the best!

• Follow your vendor methodology
• Define your data fields to import
• Run a limited test import
• Explore potential workarounds
• Preserve old system
• Use the new system to clean your data
Training

Learn throughout implementation!

• Use testing as learning opportunities
• Develop “practical” documentation
• Explore benefits/limits of vendor support
• Replicate competency in-house
Support

Anticipate challenges!

• Maintain vendor partnership
• Centralize support process internally
• Document challenges of scale
• Discuss system changes regularly
• Project ongoing support requirements
Strategies for success

• Plan
• Share learnings with your peers
• Try before you buy
• Avoid reinventing the wheel
• Start small, achieve success, then scale
Questions?

Eric Leland
Director
Leland Design
lelanddesign.com
eric@lelanddesign.com