

Implementing a Donor Database

Nonprofit 911 Series
Network for Good

Introductions



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Me!

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

- (0) Plans before tools
- (1) Know your users
- (2) Sustainability before features
- (3) Data rules
- (4) 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!

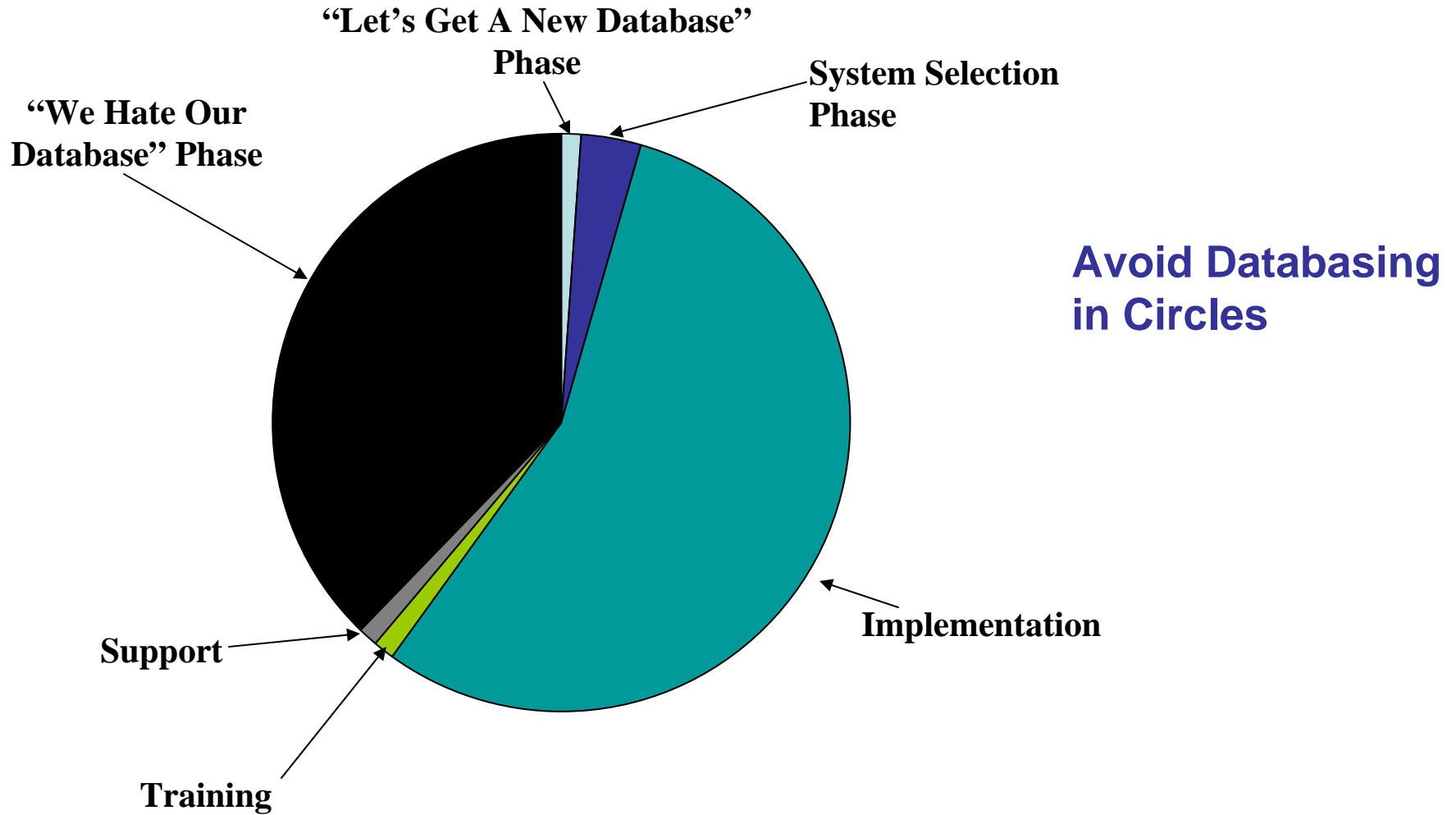
- Get only what you need
- Simple is powerful
- Follow your work processes
- Dark text on light backgrounds
- Documentation that really works



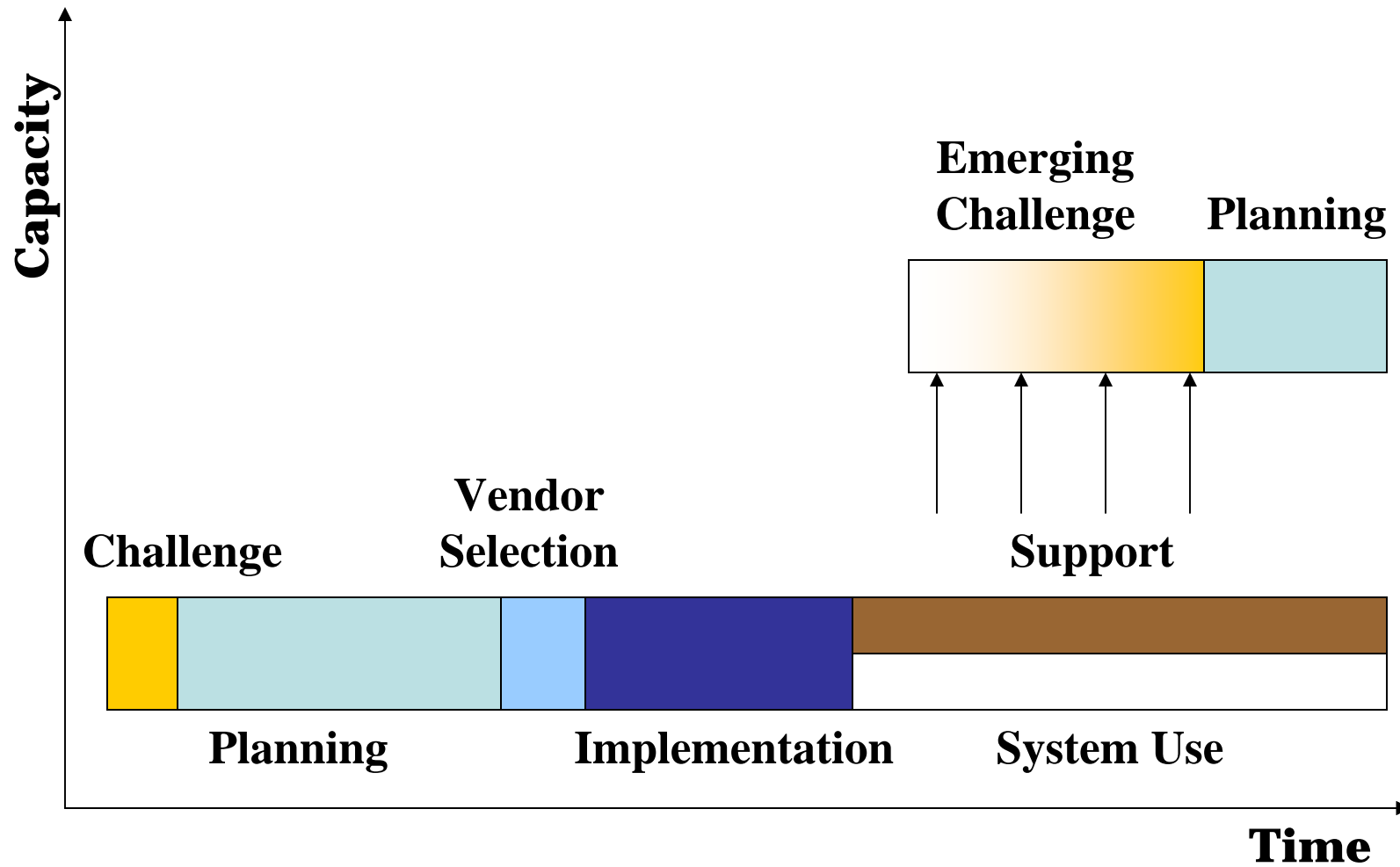
The Implementation Roadmap

- System Selection
- Agreement
- Testing and Feedback
- Data Migration
- General Training
- Support

Databusted



Databasing Effectively



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?

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