

Avoiding the database project from hell

MCN eStrategy in an iWorld

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Step 1: What do you need a database for?

1. *General background:* Two broad categories of databases nonprofits typically use:
 - a. Client management—keeping track of your clients and the services you provide.
 - b. Member/volunteer/donor management—cynical view: getting more money/time/money out of people

Jargon: “CRM database “ is “Customer (or client) Relationship Management. Could refer to either broad category but tends to apply more to the member/volunteer/donor category. (“CMS” is Content Management System—CMS is used for websites.)
2. What do you want the database to do?
 - a. For a client management system:
 - i. What data do your funders want?
 1. E.g. How many clients came from county X? How many client visits were there last month?
 - ii. What information does your staff need to do their job—to help your clients?
 1. E.g. What did I talk with the client about at the last visit? Are they eligible for a specific service?
 - iii. What information do you need to improve the program?
 1. How much time does it take a typical client to get a GED? At what step do we loose the most clients?
 - b. For a Member/Donor/Volunteer management system:
 - i. What information do you need to keep track of these people
 - ii. What are you going to do with the information?
 1. E.g. Donor drives—online or direct mail or phone, Manage volunteer activities, Manage event sign-up
3. How do you decide what you need when you don't know what is possible?
 - a. Talk to other organizations
 - b. Get preliminary information from vendors
 - i. Be clear—you are not yet ready to make a decision.
 - c. www.Techsoup.org
 - d. www.NTEN.org
4. Learning what you are in for—how bad is this going to be?

- a. All the resources in point three are useful but other similar organizations may be your best resource. Don't be afraid to ask:
 - i. What do they use their database for?
 - ii. What do they wish they could do with their database
 - iii. What do they wish they knew before they started the project
 - iv. What worked in implementing it
 - v. What didn't work

- 5. Who in your organization should be involved?
 - a. Depends on your organization but should include a sample of people who will be using the database.
 - b. A project manager—you will need someone to manage this project.

- 6. Decide what do you need, why do you need it. (These decisions must include the people who will use the database.)
 - a. What you need to have it do
 - b. What would like to have it do.
 - c. What is the business purpose of the database

Basic rule—Don't think about the data, think about what you do with the data. Don't think about the individual pieces of information, think about the reports.

 - d. Unless you like endless meetings that go over the same thing, write down all of the above.

- 7. Start paying attention to your internal processes—how you do things. You will likely need to make changes in these processes to get the most benefit from the database.

Part 2: Selecting the database for you.

- 1. Decide on a number of vendors to research; which vendors make sense for you.
 - a. Use your peers, Techsoup and NTEN to pick a few
 - b. Nonprofit TechTalk is another source at this point.

- 2. Select a few to get more information from—the ones that are most likely to meet your needs.
 - a. You will be able to get a lot of information for this decision from websites
 - b. Don't be afraid to call and ask questions.

- 3. Send out Requests for Proposals to a select group. (Formal or informal RFPs)
 - a. What you want to do

- b. What information you want from the vendors
 - c. What you want in the proposal (prices, references)
 - d. Outline your process (date response is due, contact person for questions)
4. Review proposals
- a. No matter how specific you are, they will be like comparing apples and bolts.
 - b. Create a spreadsheet
 - i. Your needs and costs across the top.
 - ii. Vendors down the side.
 - c. Things to pay attention to:
 - i. Does the proposer understand your project?
 - ii. Does the proposer understand your organization?
 - iii. How much support they provide in implementation?
 - 1. Are custom forms included in set-up or an extra cost
 - 2. Are custom reports included or an extra cost
 - 3. Cost of training
 - iv. Cost of customization after implementation (you will want to change things, add reports)
 - v. What changes will you be able to make yourself? What changes will you have to pay the vendor to do?
 - d. Be flexible, you will likely not get everything you want (especially for a price you will be able to pay)
 - e. A good vendor will tell you:
 - i. If you are asking for something they can not do.
 - ii. How long it will take to implement your database
 - 1. Note: even with a good vendor, this estimate will be low!
5. Pick two or three
- i. Check ALL references and find people using the system who are not listed as references. Specifically ask how the vendor dealt with problems.
6. Get formal presentations (may be web/phone based, may be in-person, may be just a demo CD)
- a. Pay attention to how data is entered, reports are generated. This is much more important than pretty colors.
7. Pick one vendor
8. What not to do
- a. Deciding based only on sales pitch from one company or a recommendation from one peer organization.
 - b. Not asking peers.

- c. Not checking references
- d. Asking for a totally customized database—designed just for you.
 - i. You want “customizable’ database.
- e. Designed from scratch by volunteer

Part 3: Implementing your database

1. Agreement with vendor must include what the vendor will do and what your organization will do.

Basic rule—Write it down!

2. If you haven’t yet, assign a project manager
 - a. This is a temporary task—to implement the database
 - b. Give the project manager enough time and with enough authority to do the job.
 - c. Look into getting a volunteer from the Project Management Institute, Minnesota Chapter (www.PMI-MN.org) to mentor your internal project manager.
3. If you haven’t yet, assign a database manager
 - a. Permanent job—to manage the database
 - b. Can be same person as project manager
4. Review your internal processes, how should they be changed to take advantage of the database?
5. Phase it in
 - a. Learn as you go
6. Optional: Create a Project Charter (See outline below).
 - a. A project charter should be changed whenever the project changes—and it will.
7. Schedule regular meetings (phone or in-person) with your vendor.
 - a. Prepare an agenda in advance. Include all outstanding issues from previous meeting
 - b. Summarize all these meetings and send a copy to the vendor (unless you enjoy endlessly repeating conversations with the vendor.)
8. Data conversion
 - a. This will be uglier than you expect.
9. Getting staff buy-in
 - a. This needs to start at the beginning of the project.
 - b. To get buy-in the database needs to be useful to your staff

- c. Watch for “side-systems”—spreadsheets or lists kept by staff that should be in the database. This may indicate:
 - i. Your staff doesn’t know how to do something in the database
 - ii. Your database needs to be improved to provide this information
 - iii. The reports from the database are not useful to the staff

Sample Project Charter Outline:

1. Purpose
2. Background
3. Business Need
4. Scope
5. Goal
6. Sponsor
7. Stakeholders and Customers
8. High-level Deliverables
9. Milestones:
10. Resource Requirements
11. Roles and Responsibilities
12. Critical Success Factors
13. Risks
14. Assumptions
15. Interdependencies
16. Charter Acceptance

Resources

Techsoup database articles:

<http://www.techsoup.org/learningcenter/databases/index.cfm>

Nonprofit Technology Network (NTEN)

<http://www.nten.org/learn>

The Minnesota Chapter of the Project Management Institute (Project Management Coaching) <http://www.pmi-mn.org/>

Nonprofit TechTalk email discussion list at www.MapForNonprofits.org , click on “Subscribe” in the left menu.