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Database Planning Guide

February 2001

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CompuMentor's Database Planning Guide

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Acknowledgement

CompuMentor thanks the Peninsula Community Foundation for their contribution to the production of this Workbook

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This is the “Version 1” of the “Database Guide”. We are providing this guide in the hope that your organization will use it, test it and provide us feedback on how useful it is to them in their database planning process. Based on that feedback we will update this guide and make it an even better resource. New resources will be added and changes will be made based on your thoughts and ideas. Please take a moment after reviewing and using this guide to complete our BRIEF evaluation and send it back our way. Your feedback is critical to making this guide a helpful resource for NPOs.

The information provided in this book “Database Planning Guide” regarding database planning is intended to be used for information purposes only to assist you in your database planning. Use of this Guide is no substitute for professional information technology services. Although CompuMentor has taken reasonable measures to achieve accuracy in the information presented in this Guide, CompuMentor, in compiling this information is completely dependent upon the information provided by the applicable vendors and service providers and must rely on the information provided by such entities. Neither the content of this Guide, nor CompuMentor’s action in providing it constitutes a certification of warranty, expressed or implied, of any kind.

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Introduction
About This Guide

THIS PART CONTAINS

- An Introduction to CompuMentor's Database Planning Guide for Nonprofits
- An Explanation of How to Use this Guide
- An Explanation of What a Database Plan is
- An Explanation of Why it's Helpful to do a Database Development Plan

Introduction

We are…

CompuMentor is a San Francisco-based nonprofit organization dedicated to providing appropriate technical assistance to institutions that serve low-income populations. You can learn more about us on our website at http://www.compumentor.org.

Purpose of this guide…

CompuMentor's Database Planning Guide for Nonprofits is designed to help small and medium-sized nonprofit organizations to develop a database plan, and as a result, purchase or build a database that effectively serves their needs. Our goal has been to develop a simple-to-use and easy-to-understand manual for nonprofit staff members who are making decisions about current and future databases. We believe that if you are informed before purchasing or building a new database, you are more likely to end up with one that does what you need it to do.

Results of the database planning process…

After following the steps in this guide, you will have identified the following:

- the information you currently track
- the information you want or need to track in the future
- the reports you need to produce
- where information "flows" through your agency (who collects it, who enters it, reports produced from the information, etc.)
- which database product most closely matches your needs
- whether to buy an off-the-shelf database or build a custom database

The key outcome of the database planning process is a **Database Plan,** which includes the following:

- Executive Summary
- Implementation Plan
- Hardware/Software Purchase Plan and Needs
- Staffing Recommendations
- Training Recommendations
- Data/Information Flow (where/how data moves through your agency)
- What database you will use, along with who will build it and maintain it

Who is this Guide For?

This guide is designed for small to medium sized non-profit organizations (average operating budget of less than 2 million dollars per year and fewer than 30 staff on site). The guide is written for the person responsible for assessing and determining “the best” way to address your agency’s database needs and solutions.

Although parts of this methodology can be used by larger organizations, we recommend that larger groups consider hiring a database consultant or refer to resources designed to assist larger organizations.

We also do not recommend this guide for:

(1) Organizations that want to continue using already existing custom-built software. If you want to continue with your existing systems we suggest that you contact vendors who develop and offer support for those systems, and work with them to update your database.
(2) Agencies with UNIX, LINUX or mainframe systems.
(3) Agencies with custom accounting packages that work with a limited number of database products. As recommended above, we suggest you contact the vendor and identify consultants who can work with your system.

Guide Sections

The guide provides instructions and worksheets to help you gather and organize needed information during each step of the database planning process. You may want to copy these worksheets or print them out for use in the information-gathering phase of your planning process. This guide also contains templates and forms for organizing and formatting your final database plan.

- **Part One** discusses how to assess your database needs and provides a step-by
- **Part Two** includes tools to help evaluate different database products.
- **Appendices** include worksheets, sample documents, concepts and definitions and additional resources.

Why Is A Database Plan Important?

Creating a database plan will help your organization develop clear ideas and agreement about what kind of database you really need, can afford and are able to support. The database plan will examine your current information and data-tracking systems and identify future needs. To develop an appropriate database, you need to know how information moves throughout your organization.

Why A Database Will Fail

The following are some of the primary reasons databases often fail and some ways to avoid that happening:

Database Problems	How to Avoid These Problems
Leaving out key staff (those who will be using the database) from the planning and design process.	Include staff in the database planning effort. Staff will use the database more and you will have fewer problems if they are involved in planning it.
Ignoring reports	Use your reports to identify the "outcomes" of your database. By doing this you will be able to produce reports and statistics that your funders and staff need.
The database collects too much information or not enough (too broad or too narrow).	Make sure that the database collects only the essential information you need. Remember that someone will need to enter all that data into the database so you want to limit it to information that you must track and reports you must generate.
Not expandable	Funders and reports change. You need to have flexibility to change and modify the database easily. A good designer will know how to do this.
Rushing the time between purchasing your system and using it in your program.	Develop a realistic database planning schedule and remember that launching your database will take some time.
Not testing your new database system before converting all of your data to the new database.	The database developer should test proposed layouts and presentation with test data. This is the time to make your changes to the database design, or make your decision about a different database program.
Providing limited or no training to the staff using the database.	Evaluate staff comfort level with databases and provide them with training and documentation to use it.
Losing continuity in the planning process when staff changes occur.	Include multiple staff in the planning process and do not have just one "keeper of the keys" when it comes to your database.
Not allotting enough staff or consultant time to convert files from your database to the new database.	Develop a realistic database planning schedule and remember that launching your database will take some time.
Lack of commitment to allocating ongoing resources (money and time) to the database project.	Allocate time and resources for the set-up and ongoing management of the database.

Part One:
Assessing Your Database Needs

THIS PART CONTAINS

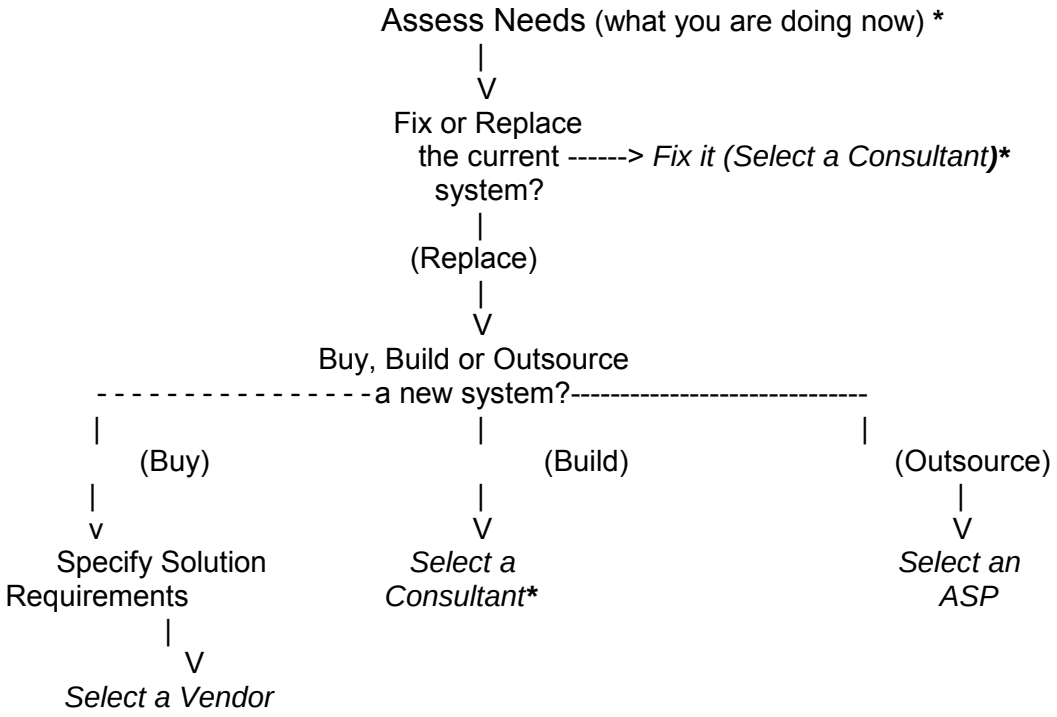
- A summary of the decision making process for buying, building or out-sourcing your database needs
- Planning Process: What it will take to do a database plan
- Steps to make your database plan happen

What Do We Need?

Identifying Whether to Fix, Build, Buy or Outsource Your Database

Some Things To Consider

In deciding whether to build or buy a database, a couple of factors should be taken into account. The decision tree will look something like this:



* If you determine through this process that you will need to hire a consultant to assist you with this effort, go to Appendix Three for more information about recruiting, hiring and working with a database consultant.

Assess Needs

The best to save your agency money, time and resources is to go through the database planning process REGARDLESS of what you will be doing in the future. It is not possible to make an informed decision without first reviewing and determining what your requirements are. For that reason, the first step in all processes is the database plan.

Fix or Replace?

The first decision to be made is whether to fix or replace any existing database. In many cases, you may already have a strong opinion about this decision. However, we suggest that you withhold judgement about the “right” database until you have had a chance to complete your database plan.

Some common reasons to replace an existing database include:

- It depends on an old platform, such as DOS, while other software needs to run on a more current platform, and the vendor or developer of the database is not planning to upgrade to a current platform.
- It is difficult or impossible to find someone to fix bugs or enhance the system. This may become the situation for custom-built systems, or systems developed by vendors who are no longer in business.
- It does not meet volume, capacity or performance requirements, even with platform upgrades.
- It lacks significant features which you require, or the schedule for implementation of those features does not meet your requirements for their availability
- You cannot obtain the reports you require from this database, and the cost of enhancing it to provide those reports is too high.

Based on the information you have obtained during the assessment, you should be able to determine whether your current system should be fixed, or whether it will need to be replaced.

What follows is a summary of some of the pros and cons of building or buying your database. Please note that this is not intended to be a complete list (given that each situation is different) but it should provide some basis for making an informed decision.

Build Your Database

Pros	Cons
1. The database is customized to your agency's specific needs. 2. Good choice if your organization is small and you can't afford the costs of a "packaged" database product. 3. You don't pay for more database functions/features than you need. 4. The software application is something you can use. 5. You have documentation written specifically for your database 6. If the database is developed in "common application" (i.e. Filemaker, Acces) you have a better chance of finding expertise to develop and update it. 7. You are involved in the planning and design of the system so that it can grow with your organization. 8. More personalized training and support 9. Good choice if you need to track information which is not commonly used by other organizations, and cannot be readily added to a standard database. (This situation is probably most common with systems that manage client or service information).	1. "Do it yourself" involves high staff involvement in the design and planning of your database. 2. The cost can be as high and in some cases higher than a "packaged" database product (on average $50 - $150 per hour). 3. Problems with managing consultants. 4. Can create dependency on a single individual – consultant, employee or volunteer – for any database assistance. 5. You need to allocate staff time or hire an experienced database developer for the project 6. Training staff to build and use your database can be expensive. 7. Consultants aren't always around 2-3 years later to troubleshoot their own work. 8. If you do not clearly identify what you want from the beginning of the project you can easily face runaway costs.

Buy a "Pre Packaged" Database

There are a number of "pre-packaged" Software Products (Blackbaud, Ebase, etc.). Here are some pros and cons to buying a pre-packaged database.

Pros	Cons
1. Quick implementation and start up of your database. 2. Ease of use (in most cases). 3. You know what the costs for the database are now and for the immediate future. 4. Documentation is provided 5. Training in the use of the product is available (for a fee). 6. Support is probably more widely available, which reduces dependence on a single individual. 7. Upgrades are available regularly and relatively cheaply. 8. In most cases you can get decent support for the product. 9. Periodic new releases provide new features and support up-to-date platforms.	1. The product is expensive and may provide more than you need. 2. Often there are yearly "updates" you will need to pay for. 3. In most cases you will need to "customize" the product, which will need to be done by a staff person or consultant. 4. Training is expensive. 5. Once specifications are set, it may be difficult to add new features. 6. The database product frequently reduces or defines platform or operating system choices, which in turn reduces the choice of using software that requires a different platform or operating system. 7. System upgrades are at the discretion of a company that probably doesn't place a high priority on the needs of small users. 8. Not all packages will work with both a Macintosh and PC computer. 9. Big financial consequence if it is not the "right" database package.

Out-sourcing Your Database

Here is a summary of some of the pros and cons of out-sourcing your database from an Application Service Provider (ASP). Outsourcing means that you are essentially "renting" an application or service from an outside vendor over the Internet, instead of doing the work in-house.

Pros	Cons
1. Quick implementation and start up of your database. 2. Ease of use (in most cases). 3. Documentation is provided. 4. On-line training resource available (for a fee). 5. Upgrades are available regularly and relatively cheaply. 6. Periodic new releases provide new features and support up-to-date platforms. 7. You are not locked into one platform, because you connect to the database through your Internet browser. 8. Can integrate your calendars, information database, etc.	1. Staff must have on-line access to get to the database. 2. Optimal performance requires fairly high speed access at both ends. 3. Support for the product can be spotty or non-existent. 4. The product is expensive and may provide either more or less than you need. 5. You know what the current costs for the database are, but you do not know what the future costs will include. 6. There may be yearly "updates" which you will need to pay for. 7. It may be difficult (or impossible) to add new features. 8. System upgrades are at the discretion of a company that probably doesn't place a high priority on the needs of small users. 9. There are big financial consequences if it is not the "right" database package.

Database Planning Process & Activities Overview

The following table outlines the assessment phase of the database planning process. In order to understand what you need the database to do, all of these steps should be completed before beginning the next phase of evaluating and reviewing software.

Steps	Tasks	Activities / Outcomes	Staff Involved
1.	Agreement to allocate staff time and resources to developing or selecting a database	Commit to resource allocation for this project	**Board Members** **Executive Director (or staff member who has the authority to allocate significant resources to this project)**
2.	Staff the database planning effort	Identify your Database Planning Coordinator Identify Database Planning Staff Team	**Executive Director or other "lead staff "person** **Database Planning Coordinator** **Representative staff from various areas of your agency, including but not limited to your Accounting, Development and Program Staff**
3.	Notify your staff	Send out a message to staff members informing them about the data assessment process and requesting their assistance	**Database Planning Team (produce and send out notice)** **All staff (receive notification)**
4.	Prepare for the Database Planning Kick-Off Meeting	Review the Kick-Off Meeting materials Duplicate all forms for meeting Remind staff of meeting	**Database Planning Coordinator**

Steps	Tasks	Activities / Outcomes	Staff Involved
5.	Kick-Off Meeting	Facilitate 1-hour kick-off meeting to: Establish Roles and responsibilities Distribute Database Planning Worksheets Establish schedule / timelines for completion	**1. Database Planning Coordinator** **2. Database Planning Team**
6.	Collect all forms, reports and questionnaires	Collect completed worksheets and documentation from staff Collect copies of all Reports that need to be generated from the database Collect copies of all Forms that will be used with the database	**1. Database Planning Coordinator**
7.	Summarize/ merge staff information	Compile/summarize staff information and resources, including: Info tracking systems Hardware / software Staff development/ training needs 1 agency-wide summary of data / information flow worksheet 1 agency-wide summary of the database planning questionnaire	**1. Database Planning Coordinator**
8.	Meet to finalize your database priorities	Facilitate meeting to finalize and agree on internal procedures, including: Current data collection and tracking systems Priority tracking areas	**1. Database Planning Coordinator** **2. Database Planning Team**
9.	Write your database project plan	Incorporate information from assessment and inventory into your database project plan Identify next steps	**1. Database Planning Coordinator**

Step 1: Are You Ready?

Before you begin this process, we suggest that you determine your agency's readiness to complete and implement a database plan. Review the checklist below and evaluate whether you have the time and resources to make your database plan useful and feasible.

√ Commitment

You need to have agreement from the executive level of your agency that database planning is a priority. The Executive Director (or comparable role) will need to monitor and support the milestones, dates, and deliverables. He or she should also be prepared to make a statement at one or two staff meetings to inform staff about the project, as well as communicate what support is needed.

√ Time

You need to identify one staff person who will be given the time to coordinate the data collection process and write the database plan. Depending on the size of the organization and the complexity of your needs, this person (the database planning coordinator, or DPC) will need a minimum of 40 hours to complete this project. If you do not have forms, reports, applications, etc. that you are happy with this process can easily take double that amount of time.

You will also need to dedicate staff time for the participants in the database planning team. These individuals will attend two or three meetings of approximately 2 hours each and will require a few hours to review their forms and reports.

√ Resources

- Funding: to complete your database plan, you will need to allocate funds to cover the cost of staff members' time in the database planning process. It makes sense to begin fundraising now (if you haven't already) for the additional upcoming expenses.

- Database Developer: This process requires an experienced database planner/ developer. It is not advisable to do this process without this expertise, as you may not get the database you need and want. If you don't have the in-house expertise, this is the time to hire an experienced consultant. For more information on hiring a technical consultant, please see the resource "Selecting a Consultant" in the appendix section of this guide.

Organization Support Checklist

You are ready to move ahead with this project if your agency agrees to allocate the following resources:

√ staff time for the database planning process
√ funding to develop a database plan
√ funding to build or buy a database
√ funding to staff and manage the database

If you feel confident you have the time and staff to make this happen, you're ready to move on to Step 2, which will bring together a team to work on this project.

Step 2: Staff the Database Planning Effort

An Overview

Now that you have agreement that you will allocate the time, money and resources to develop a database plan, you need to identify individuals to participate in the planning effort. The following guidelines explain who should be involved and what they should be prepared to contribute.

A Database Planning Coordinator who will:	• Facilitate meetings • Interview staff • Coordinate logistics • Communicate with the Planning Team • Write the Database Plan • See the project through from beginning to end
Staff who will:	• Provide information about current data tracking systems • Provide insight into what the future database should include • Identify staff training needs
Executive Director who will:	• Provide visible support to your Database Planning Coordinator • Encourage staff members to cooperate *This role is crucial for providing direction, and for making sure the project progresses to completion as scheduled. Without executive support, the Database Planning Coordinator may encounter resistance and time-consuming issues to do with authority and decision-making.*
A Database Developer who will:	• Design and develop your databases • Answer questions about database options and product strengths and weaknesses • Assist you with making the decision whether to build or buy a database.

Assemble Your Database Planning Team

Identify Your Database Planning Coordinator

The Database Planning Coordinator (DPC) will manage the planning process from start to finish. The DPC must be able to obtain information with the least amount of disturbance to business-as-usual. He or she will develop a communication plan that effectively describes the problem and what is needed from database vendors and staff members.

In order to receive staff member cooperation and to represent the agency to database developers or software vendors, the DPC must be perceived to have a credible presence as someone who is performing a critical function.

The following is a summary of what an in-house or consultant DPC needs in order to coordinate a database planning effort:

Skills/Ability Checklist

√ ***Computer or Technical Skills***
Knowledge of and proficiency in:
- database features and terminology and how databases work (both "off the shelf" products as well as familiarity with database software applications such as Filemaker, Access, etc)
- installation and testing of database software
- summarizing data and integrating it into a plan

√ ***Organizational Skills***
Ability to:
- solicit and summarize relevant information from staff
- coordinate logistics
- summarize the database plan
- manage multiple tasks and timelines

√ ***Interpersonal/Communication Skills***
Ability to:
- facilitate meetings
- interview staff
- communicate with the planning team and management
- work and communicate effectively with staff

Identify Your Database Planning Team

Staff Team Checklist

Staff members participating in the database planning process can be individuals who provide assistance with collecting and tracking information, data entry or filing/storing information. They also should have one or more of the following responsibilities.

√ Collecting agency statistical data (e.g. client data, funding information, etc)
√ Reporting to staff, funders, sponsors or other key supporters
√ Using agency forms that collect client, program or financial data
√ Fiscal accounting
√ Producing mailing lists

Next Steps

Once you have identified your database planning team, send the group a memo regarding what will be happening and what you need from them. An example of a staff memo is located in the appendix section of this guide.

Step 3: Notify Staff Members

Management informs all staff members

You have already identified staff members who will be working with the database as participants in the planning team. In addition, it is crucial to hear from staff members who are collecting relevant information but do not enter data, or query the database. Examples of such staff members may include those handling programs, fundraising, front desk, or payroll, etc. For this reason we suggest that you inform all staff members who use computers (or may use them in the future) that you are beginning to assess and develop a database for your organization.

When notifying staff members about the database assessment project and your need for their cooperation, it's best if the announcement about the data assessment comes from the organization's upper management.

This message should:

(1) **introduce** the project
(2) **explain** why it is happening
(3) **identify** the key players
(4) **describe** the benefits of the database to your organization
(5) **review** what you need from each person to make the project a success (e.g.: checking through their files for forms and reports, forwarding their materials to the DPC on time, etc)

Step 4: Prepare for the Database Planning Kick-off Meeting

Get Prepared

As mentioned in Step 2, the DPC will need to plan meetings and develop a communication strategy. He or she will also need to gain enough knowledge about databases to answer questions and adequately define the options, benefits and shortcomings of various databases to your agency.

Be Clear About the Task At Hand

Remember, as the DPC, your mission is to pull together as much information as needed to assist the staff in making an informed decision regarding your future database. Your first goal is to assess how you currently receive and share information within your organization and with your constituents—the first goal is **not** to identify a database you want to purchase (purchase decisions should be postponed until after you have completed the database plan).

Review Planning Tools and Resources

Review the guide tools and resources, including:
- worksheets in Appendix One
- information resources in Appendix Three
- sample documents in Appendix Four

Identify which Questionnaire you want to use

Please note: there are two Questionnaires in Appendix One; one titled Database Planning Questionnaire and the other titled Database Needs Assessment. Please review each questionnaire and identify which best suits your needs.

If you're not sure, we suggest you use the Database Planning Questionnaire if you are:
- A small NPO with no existing database
- You have limited time and resources for the development of the database
- You need to evaluate your hardware at the same time you evaluate your database
- You feel that this questionnaire best serves your needs, and you are comfortable with the questions

Use the Needs Assessment Questionnaire if you are:
- A medium sized NPO
- Have more than one database
- Have a need to integrate multiple databases and are interested in merging these tools with your accounting systems

Prepare Documents

Make photocopies of the following worksheets from Appendix One:
- Data / Information Flow Worksheet
- Database Planning Questionnaire or Database Needs Assessment Questionnaire

Prepare A Draft Schedule for the Database Planning Process

Using the “Database Planning Goals / Tasks Action Plan” Worksheet, prepare a draft schedule for completing you database plan with a timeline, staff assignments and deadlines for review / discussion at the kickoff meeting.

Notify Your Database Development Team

Notify the database team of time and location at least one week before the kick-off meeting.

Step 5: Kick-off Meeting

Overview

The purpose of this meeting is to establish the staff team responsible for the database assessment. It also provides an opportunity to clarify the assessment purpose, goals, and schedule.

Objectives

(1) Clarify the Database Planning Coordinator's role
(2) Clarify staff members' roles
(3) Gain participants' commitment to the database planning process schedule

Meeting Activities

Review Scope of Database Project:

Goal of your database
- Review assessment process and expected outcomes
- Benefits of having a database
- What might be collected (i.e. Excel spreadsheets with client information, client records/files, etc)

Review the Assessment Process:

Distribute and review all of the Database Assessment Worksheets and discuss what a completed worksheet should include

Establish a Project Schedule:

Define the timeline for collecting all data as well as completing your database plan

Check-List for Completion:

√ Clarified tasks and agreed to completing tasks
√ Identified each staff member's roles/ responsibilities
√ Established a project schedule
√ Identified planning resources (people and documents)

Time Required:

1 hour

Step 6: Collect Forms, Reports and Questionnaires

Now is the time to collect what you want included in your database. Include the following:

Forms

It is important to gather all of the data tracking forms you currently use and will want to include in your future database. Examples include*:*

- *Client Applications*
- *Exit Reports*
- *Tracking forms, etc.*
- *Forms, Reports, applications that will need to be updated*

Reports

Your database's primary function is to help you produce reports. Collect all of the reports that you are required to produce for funders, sponsors, etc. Examples include*:*

- *Client progress reports*
- *Attendance reports, etc.*

Databases

A database is any program or tool that staff currently use to collect and store agency information. It is very helpful to collect examples from staff of any:

- Excel Spreadsheets
- Microsoft Works spreadsheets
- Any database that any one or more staff are using to collect information (e.g.: Filemaker, Access, ACT, Lotus Notes, etc)

Completed Worksheets

The Data /Information Flow Worksheet and Planning Questionnaire should be filled in as completely as possible.

Step 7: Summarize / Merge Documents

After gathering all the above forms and reports, the DPC should combine and summarize the findings from staff members. To do this you will need to:

- Combine/consolidate all agency forms
- Combine/consolidate all agency reports for funders, sponsors, and clients
- Combine/consolidate all data collection tools used, and record which staff members use each one
- Combine/consolidate information from each individual data / information tracking worksheet
- Merge key information from staff questionnaires into one organization-wide Database Planning Template

Step 8: Meet To Finalize Your Database Priorities

Meeting Objectives

- Review / discuss the draft Database Planning Template
- Prioritize and agree on what you want / don't want included in your database
- Prioritize and agree on what you will track and enter into your database

Activity

Discuss, document and finalize the following database priorities:

- What information you must track, enter and maintain
- What forms and reports you need to produce / use
- Identify data you want to track in the future

Check-List for Completion

When you have . . .

√ Finalized the data you will track
√ Finalized how data comes enters and exits your agency
√ Agreed on the forms / reports you will use, and identified what changes, if any, you need to make to those forms / reports...

You are prepared to write a final database plan.

Step 9: Write Your Database Plan

Using the Database Plan Template (located in Appendix One) you can now write the final version of your database plan. Be sure to incorporate all relevant data, which you collected in your database summary and staff meetings.

Your final Database Plan should include:

(1) **An Executive Summary** – explains why you need a database and what you will accomplish with a database
(2) **Database Design and Information Flow** - identifies what data you will be collecting and what "must haves" your database should include
(3) **Staffing Recommendations** - identifies which staff will be allotted time to manage the database
(4) **Training Recommendations** - identifies staff training needed to use this database
(5) **Hardware/Software Requirements** - identifies Hardware / Software needed to manage / run the database
(6) **Implementation plan** - your schedule/ deadline for getting this database going. The plan should also include a budget for all staff and hardware/software expenses related to the database.
(7) **Appendix** - contains all Reports and Forms that will be included in the database

Part Two: Developing Your Database

THIS PART CONTAINS

- Questions and consideration about buying a database
- Questions and considerations about building a database

If You Are Buying a Database:

Evaluate Software Packages

The goal of this process is to demonstrate and review a variety of database packages and evaluate whether any software package will meet your organization's criteria, as identified in your database plan.

Evaluation Activities

1. Review /Demo Database Software Packages / Programs

Have key decision-makers review the most appropriate databases. Use the software worksheets to evaluate which database has the most functions and features you need.

In order to complete this task you will need:

- *Demo Disks* (request that the distributor provide you with a copy and support documentation)
- The *Software Assessment Checklist* located in Appendix Two
- *Database Comparison Table* located in Appendix Two
- Your completed database plan

2. Determine Which Database You Will Use

- Get agreement on the software you want from all individuals of the database team
- Identify whether you will buy or build your database
- Identify the cost of the database, including software, hardware, staffing, development and training
- Develop a schedule for completing this project

If You Are Building Your Database

Here are some basic steps to follow if you want to build a database:

1. Model Your Database:
Once you have provided the designer with a clear idea of what you want, he or she will design a database model. Once the model is completed, the designer and the database planning team should review the proposed database tables and layouts, using test data. During this important step, any limitations of the database or complications of your reporting needs will become clear. Changes to the database design or decisions about different database programs should be implemented at this stage.

2. Moving Data:
If you've agreed that you want old data from another database to be included in your future database, the developer can import the old data into the new system. Please be aware, however, that moving existing information from one system to another can take anywhere from 30-100+ hours, depending on the size and complexity of information. Developers charge an average of $60 per hour. Therefore it may be better to train a staff person to do this task.

3. Testing:
Once the developer has finished, you need to test the database with an initial data set, troubleshoot problems, and revise any relationships, data and layouts.

4. Documentation:
Be sure to get documentation on using and modifying your new database.

5. Training:
At minimum, two staff members should receive training on how to use and modify your new database and should immediately review the database documentation.

Your database planning process is complete when:

√ You agree on the database software you want to use
√ You know if you will be buying or building your database
√ You have identified who will build / modify your database (consultant or staff)
√ You have a budget for developing, designing and managing the database
√ You have a schedule for completing your database.

Appendix One: Data Tracking / Planning Worksheets

APPENDIX ONE CONTAINS

- Data/Information Flow Worksheet
- Database Needs Assessment Questionaire
- Database Planning Questionaire

Data / Information Flow

Staff _____ Department _____

Report Generated	Personnel Involved	Form(s) Used	Purpose
(Example): Donor List	Admin & Development Director	1. Donor Intake Form 2. Funder Donation Tracking Form 3. Participant Walk-A-Thon Registration Form 4. Member Registration Form	Identifying who the donor is and how much they provide to the agency Identifying and tracking members, donors and participant and tracking donation amounts

Database Needs Assessment Questionnaire

Date: _____
Interviewer(s): _____
Interviewee(s): _____

Notes to interviewer:

In the Needs Assessment, you should look for and identify the following types of key issues:

- Replacing an existing database system with a new one is always very costly, but may also bring major benefits. Would it be possible to fix or work around problems or limitations in the current database system, so that it would not be necessary to replace it with a new one?
- Since a problem with a non-software related issue can prevent the successful implementation of a new or improved database, you should look for any non-software related issues which must be resolved wither before or in tandem with changes to new database software.
- Requirements that might force you to build a custom software solution, rather than purchase a software package.
- Database requirements that will be key differentiators among different software packages. For example: Does it have to run on a Mac? Do you require dial-up or web access? Do several users require simultaneous access?
- Surprises: has the organization anticipated all the costs, changes, impacts and risks implied by a database change? Is the organization prepared for them?
- This questionnaire form is extremely detailed. Focus on getting complete information for key areas and less complete information for non-critical areas, and don't try to fill in the entire questionnaire in complete detail, since you will have a limited time budget for performing the data collection and analysis phase of the project.

General Data

1. What kinds of computers do you use? _____
2. What operating systems do you use? _____
3. What kind of network protocols do you use? _____
4. What peripherals do you use? _____
5. What office applications do you use?_____
6. What telecommunications applications do you use? _____
7. How many computers are you using/supporting?_____
8. What is your primary accounting application? _____
9. What is your primary multimedia/desktop publishing application? _____
10. How does your organization use its computer labs? _____
11. What is the skill level of the people who use your computer systems? _____
12. What are your organization's technical support needs?_____

_____

Project-specific Data

1. What is your primary database application? (Product name and release) _____

   _____

   _____
2. What is your most urgent technical support need? _____

   _____

   _____
3. Are your current needs part of a bigger project or technology plan? _____

   _____
4. What is the time frame for the completion of this project, if any? _____

   _____
5. Do you have a budget established for dealing with your technical support needs? If yes, please elaborate. Please include hardware, software, training, support, maintenance, personnel and operating costs _____

   _____

Current database related issues

Discuss, in detail, any problems or concerns you have about your current database system in the following areas:

1. Organization: do you have cross-department, cross-location or inter-agency problems or issues? _____
   _____
2. Procedures: get copies of any written procedures. Do you have any problems with your current procedures in the any of the following areas:
   2a Maintaining the database system and database _____
   _____
   2b. Inputting data / updating the database _____
   _____
   2c. Browsing / querying the database _____
   _____
   2d. Obtaining reports from the database _____
   _____
   2e. Importing or exporting data to / from the database _____
   _____
3. Integrity: do you have problems related to incorrect or confusing data? _____
   _____
4. Currency: is your software out of date? If so, does this cause problems? _____
   _____
5. Ease of use: does your staff find it hard to use the database? _____
   _____
6. Reliability: is the database down or unusable too often? _____
   _____
7. Year 2000: is your hardware and software infrastructure Year 2000 compliant? Your database schema? Your reports and displays? _____
   _____

General Requirements

Needs	**Current Issues and Problems**	**Current Requirements** (check those which apply)	**Future Requirements** (leave blank if same as current)
Type(s) of data in the database:			
accounting			
clients			
grants			
projects			
information			
members			
donors			
activists			
volunteers			
alumnae/i			
corporations			
foundations			
major prospects			
students			
parents			
friends			
affiliate organizations			
other (specify)			
Database outputs			
Display data on-line			
Display list of results on-line			
Display or print reports			
Display or print graphs			
Print Letters			
Print Labels			
Print Envelopes			
Send Email			
Create HTML display			
Output data to spreadsheet			
Other (please specify)			

System Requirements

Needs	**Current Issues and Problems**	**Current Requirements**	**Future Requirements** (if different from current)
Database host system:			
Computer type:			
Operating system:			
Memory:			
Disk capacity:			
Database client systems:			
Location (same office, other office, ...)			
Network protocol:			
Number:			
Computer type:			
Operating system:			
Performance and capacity			
Size of the database, e.g., records, megabytes, files:			
Update rate (records entered or updated per day/week/month):			
Response time for inserts			
Response time for updates			
Response time for browsing			
Response time for searches			
Turnaround time for reports			

Organization and Staff

Get an organization chart, if available.
For each item, give current status, and planned or desired changes in the future, if any.

Role	Management	Administer	Input Data	Browse / Query	Get Reports
Title					
Who / how many people					
Responsibilities					
Location (dept, city, etc.)					
Skill level					
Training concerns, if any					
What part of the database do they use?					

Interactive displays

Current Issues and Problems	**Current Requirements** (For each display, who uses it, and what data is displayed)	**Future Requirements** (leave blank if no change is expected)

Reports

Current Issues and Problems	**Current Requirements** (For each report, who receives it, how often is it generated, what data is presented, how is it summarized, filtered and organized)	**Future Requirements** (leave blank if no change is expected)

Analyses

Current Issues and Problems	**Current Requirements** (For each analysis, what special calculation or analysis is required, who uses it)	**Future Requirements** (leave blank if no change is expected)

Miscellaneous Requirements

Needs	**Current Issues and Problems**	**Current Requirements**	**Future Requirements** (if different from current)
Data imported from other systems:			
Data/reports exported to other systems:			
What fields do you use for searches, filters or summarizations (e.g., show total donations for all donors in California whose donations are at least $100)?			
What type of vendor support do you require? (e.g. on site, phone, email, 24 hour etc....)			
What parts of the system should have access limited to certain people?			
Customizations to be implemented by your staff			
Customizations to be implemented by the vendor or consultants			

Accounting System Requirements

Needs	**Current Issues and Problems**	**Current Requirements**	**Future Requirements** (Leave blank if no change is expected.)
Do you need to do detailed fund accounting?			
Do you have to report on a funder's fiscal year that is different from yours?			
Do you need to provide audit data meeting FASB guidelines?			
Do you need to do accounting by grant, contributor, location, or program?			
Do you need an audit trail?			

Fundraising System Requirements

Needs	**Current Issues and Problems**	**Current Requirements**	**Future Requirements** (Leave blank if no change is expected.)
Do you need to record pledges and pledge payments?			
Do you manage appeals and solicitation programs?			
Do you manage and report on special events?			
Do you track and report on grants?			
Do you generate and track mailings from the system?			
Do you track purchases?			

Database Planning Questionnaire

Filling out this form provides you with a clearer picture of what your database needs are and what resources you currently have. Please check with your staff and answer the questions as best you can. If you don't know the answer to the question, just leave it blank or just enter "I'm not sure."

This information serves as the foundation of your database plan and will be vital for your database developer.

General Information

1. Describe, in general terms, how computers are used at your agency.

2. How many centers/sites do you have?

3. How many staff are at each of those sites?

4. How are computers being maintained now?

Note:
Use this in the "General Information" section of your Database Project Plan

Hardware/Software Summary

Staff (Staff name, location of workstation)	**System (**ex: Windows 98, NT, 2000, Apple OS V.9)	**RAM (**how many MB of RAM)	**Software** (include all database software as well as spreadsheet software, wordprocessing software, etc)	**Issues / Problems** (what are problems identified by user or the computer manager for your agency)	**Recommendations** (if you have any include them here)

Staff	System	RAM	Software	Issues / Problems	Recommendations

Peripherals

Printer, Scanner and Location of Peripheral	**Connection Point** (network or individual workstation)	**Issues / Problems**	**Recommendations**

Current Database Summary

1. Do you have more than one database? If so, are they on different computers? Can more than one person use the same database? At the same time? Please include files such as address lists in Word, etc.

2. What kind(s) of database software do you use?

3. Does your current database system(s) do what you need it to do easily or with some difficulty?

4. What does your agency use the database(s) for? (specific info on clients, donors, merging letters, labels, reports)

5. Do your computers run the database software adequately?

*** Note:**
Use this information and refer to it when you are evaluating your future database software.

Database Design

1. What program reports are you currently generating?

2. How are you tracking data now and what methods are used?

3. Identify what data you MUST track (i.e. ssn, completion of competencies, etc; more examples would help).

4. What reports do you want to produce?

5. Determine desired database features and functions (wish list; examples).

6. Using the Data Process Flow Worksheet document how information currently moves from where it is collected to where it is stored (i.e. the recruiter collect info on new clients and forwards it to field staff who forward it to personnel, who forwards it to development staff, etc). Identify when forms are used to document this information.

*** Note:**
Refer to this information in the "Database Design and Data Information Flow" section of your Database Project Plan.

Staff Information

1. Select the box that best categorizes the skill level of the people who use your computer systems:

- ❑ Mostly highly skilled users
- ❑ Mostly average skilled users
- ❑ Mostly new or untrained users
- ❑ All of the above

2. How many people on staff with a computer use the database? How many people should be using it?

3. Do staff know how to use the database? How many will need to be trained?

*** Note:**
Use this information in the "Staffing" section and "Training" section of your Database Plan

Database Implementation Plan

1. What is your time frame for the completion of this project?

2. What funding is currently available for implementing your database plan?

Note:
Use this in your "Implementation Plan" section of your Database Project Plan.

Appendix Two: Worksheets for Comparing Databases

APPENDIX TWO CONTAINS

- Software Assessment Checklist
- Software Assessment Questionaire
- Database Comparison Table

Software Assessment Check List

Name of Staff _____

Name of Database _____

Here are some basic criteria to explore prior to making the final decision on your database. At minimum the database you consider should have the following attributes:

Yes	No	Criteria
		It allows you to sort and view information in a variety of ways.
		It can work with the computers you have (Operating System, RAM, large enough hard drive, etc).
		It can import and export data to and from the most-used software packages for both P.C.s and Macintosh computers (FileMaker Pro, Microsoft Access, Microsoft Excel, etc.). That means that at the very least, it can export data as d-base or text.
		Staff who will be using the software feel it is easy to learn and use.
		It comes with a database overview, sample database structures and documentation on how to use it.
		It allows staff to change existing view screens, and even create new ones (users should be able to change what information they see on screens as needed).
		It allows the user to change, add, or delete fields of information.
		It can be networked (people can access the information from more than one computer, if the computers are networked).
		It allows the database manager to set up security measures (i.e. limited access, limited ability to modify the database, etc).
		It has relational capabilities. (Adding a new record to one portion of the database will add the same record to ALL the other areas of the database where appropriate, and vice-versa).
		Staff can generate personalized reports, letters and mailings.

Software Assessment Questionnaire

1. Will the databases address the needs stated through your assessment?

2. Did you like the look / feel of the database?

3. What assistance will be available with the software you select?

4. Will your staff need training and technical assistance to use this database? How much and what kind?

5. Is there documentation? Can you understand it?

6. On a scale of 1 - 5 (1=lowest; 5=highest) how would you rank this database?

Addresses our needs	1	2	3	4	5
Ease of use	1	2	3	4	5
Look of database	1	2	3	4	5
Documentation	1	2	3	4	5
Technical help available	1	2	3	4	5

Other comment?

Database Comparison Table

Function	MEADOWBASE			
SW/Platform	FileMaker Pro 4.02 for Macs and PCs or standalone (the program runs without software and cannot be modified).			
Purpose	Developed for nonprofits to meet contact, donor tracking, membership tracking needs.			
User Friendly for data entry, finds, modifying the reports, fields, etc.	Good tool for data entry, finds/queries, and reports. Making changes to reports or adding and integrating fields requires advanced knowledge of the software. However, MeadowBase has a simple feature for adding yes/no fields to the database.			
Importing your Previous Data	Data import formats include .dbf and .txt .			

Function	MEADOWBASE			
Integration with accounting systems	Allows excel imports. Integration depends on the accounting system being used.			
Distinct features and what works well	Easy modification by the user especially for adding Yes/No fields. The database has easy query feature (i.e. screen for querying using multiple fields).			
Works for your tracking requirements	Does not.			
Reports	• Contact Report • Donor Report • Member Report			
Meets tracking requirements	Tracks very little client info.			
Documentation	Yes- Included free with the database.			
Training	MeadowBase is not offering consulting services to new customers. The contact page on the website lists the organizations and consultants who are working with MeadowBase and may be willing to provide professional services.			

Function	MEADOWBASE			
Cost for Database	None			
Kind of Software and the cost to run it	Filemaker Pro $200.00 - Single User $900.00 - Server (multiple computers). Can be used with a PC or Macintosh computer.			
Support Cost: Assistance with installation, database management, etc.	A team of software and nonprofit management professionals cooperate to develop, maintain and support this database project. There is also a users email list, with on-going information and discussion about how to make the most of MeadowBase. Support is also available through MeadowBase consultants for a fee.			
Copyright	MeadowBase is free software -- that means that the Filemaker Pro files and a runtime application are both available free for you to use, modify, and redistribute. Any / all changes and modifications are allowed.			

Appendix Three: Resources and Additional Tools

APPENDIX THREE CONTAINS

- Example Database Plan
- Example Request For Proposal (RFP)
- Common Database Types
- Selecting a Consultant
- Database Consultant Questions
- Managing your Database
- Glossary of Terms
- Comparison of Donor Databases

Example Database Plan

Database Plan
For: Nonprofit Organization [Your Agency]
3/15/01

Executive Summary

[Identify why you need a database, what you will accomplish with this database, what kind of database you already have and how will this database assist you in your mission]

[Your Agency] is a 501c3 organization working for social justice in the San Francisco Bay Area. We lobby officials, conduct education and awareness programs, develop outreach materials and provide resources to the public to address social justice concerns.

[Your Agency] is seeking to implement a new database system to address growing shortcomings in the current membership/contact management system. Our current database system (a combination of Access, Outlook contacts and contact lists in Word) does not provide all the staff with one central source for the information required on a daily basis. Much of the existing data is duplicated across different lists, outdated, and updated on an inconsistent basis. The current database system has some technical problems, does not track all the information required, and does not provide all necessary reports.

A new database system will provide all staff access to one central source for our membership/contact information system. Using the database, [Your Agency] staff will be able to track all relevant information pertaining to our membership and organizational contacts, and generate reports for analysis by specific departments and distribution to [Your Agency] funders. Data input will be centralized and simplified to avoid duplicates or separate data lists.

Database Design and Information Flow

[Document all data to be tracked, reports to be produced, all critical functionality or "must haves", and what current data will be introduced into the new database]

Basic Database Features

The database must be multi-user – [Your Agency] currently has five database users on staff, and projects in three years to have 8 database users. All staff are based in one office – however, some staff will occasionally need access to view the database from remote locations. Although the current amount of contact records is approximately 5,000, the database should efficiently handle approximately 10,000 to 15,000 records, as this is its projected size in three years. The database should have the capacity to

import and export all data collected to allow for bulk inclusion of our existing data and for distributing data to mail house vendors with whom we work.

Data to Collect

The new database should track information regarding three primary constituencies – members, donors and general contacts (such as vendors & service resources). Contacts also play a variety of roles within [Your Agency]. Many contacts are included in more than one constituency category, and play more than one roll in [Your Agency]. Complete contact information must be tracked for all contacts (name/organization, addresses, day/evening/cell phone, fax, email/web, preferred contact method) as well as information pertaining to what role they play within [Your Agency], subscriptions to mailing lists and a contact log.

Members include individuals and organizations who have requested information, volunteers, trainers, workshops/training participants, or have subscribed to our newsletters. Roles would include General/Public, trainer, volunteer, event participant, staff. Information that needs to be tracked is the following:

- **Volunteers**: event/task, date, availability, skills, notes
- **Trainers**: resume, cost, availability, skills, notes
- **Event Participant:** event and date
- **Staff:** resume, schedule
- **General/Public**: Information requested, response, date

Donors include individuals and organizations that have given money to [Your Agency]. Information that needs to be tracked is the following:

- **Donor Category**: Individual, Corporate or Foundation Donor
- **Donation history**: Gift type, amount, relevant campaign, date, restrictions, reporting
- **Profile**: Notes on interests, relationships to staff, board, etc

General contacts include individuals and organizations that provide fee for services, or are locations/points of contact for resources. Information that needs to be tracked is the following:

- **Profile information**: Services offered, fee, location, npo discount information, notes

The contact log records a history of communication with each constituent. Information that needs to be tracked is the following:

- **Communication profile**: date/time, subject, results/followup, [Your Agency] staff, notes

Each contact may belong to one or more constituencies, and play a variety of roles within [Your Agency].

Database Search Capacity

The database will provide a mechanism for the user to develop custom searches of collected information. The database should provide the capability for complex searching across multiple fields, and generate reports on these searches. Standard searches such as searching by first name, last name and organization should be provided for all contacts. The database should provide several essential reports that are based on pre-designed searches of the database.

Pre-designed searches of the database are listed below according to the constituent categories listed previously:

- **Members searches**: member role, state, zip, event, skills, availability, information requested with no response, subscribers to mailing lists.
- **Donor searches**: Gifts $1 to $100, $100 to $1000, $1000-$5000, $5000 and greater, donors by category, donors by campaign, donors within a given date range, gifts requiring reporting, gifts with restrictions.
- **General Contacts**: service/resource offered
- **Communications log**: search by date, date range, staff, subject and keyword

A search by date, date range and topic should be provided for the contact log across all constituencies

Reports to Generate

Standard reports across all contact constituencies and roles should include the following:

- **Mailing labels**: Format choices should include Avery 5160 and 5164.
- **Full contact/profile information**: All collected data, can be generated per person or using the pre-designed searches above.
- **Subscribers to publications**: All constituents subscribed per newsletter and their basic contact information.
- **Communication log**: full logs, both per constituent record and across all constituents, by date, date range, staff, subject and keyword

Specific reports for each constituency should include the following:

- **Members**: Brief list of constituency contact information by roles, state, zip. Brief list of volunteer/trainer contact information by skill and availability. Constituents by requests for information and responses/lack of responses.
- **Donors**: Donation history per donor, all donations by gift amount range, date range and campaign

- **General Contacts**: Contacts by service/resource

Staffing Recommendations

[Identify the current technical staff situation and how this will change, i.e. who will be Database Manager, what staff will be using and maintaining the database, how much time staff will spend in these roles, the role of outside consultants, etc]

[Your Agency] currently has five full-time staff. While nobody on staff has formal training or experience with systems or database administration, one staff member has served this role, being the most computer literate (the "accidental techie"). This staff member currently spends about 10 hours per week on computer troubleshooting, database administration and as our Database Planning Coordinator, with the rest of the time spend on regular program responsibilities. We call on outside consultants to help with problems for which we find no solutions in-house.

[Your Agency] requires a full time staff person charged with database and systems administration duties in addition to the current Database Planning Coordinator. This staff person's initial responsibility would primarily fall in the area of database administration as the new database system is selected, developed and installed. Duties would include:

- Assisting the Database Planning Coordinator in evaluating database products and vendors and determining whether to buy or build a database
- Documenting existing databases and other data lists
- Working with staff on data clean-up and data importing into the new system
- Database development, maintenance and administration
- Systems administration, hardware/software support, helpdesk duties
- Staff training on database, software and hardware issues

Training Recommendations

[Describe staff training plan, i.e. who will train staff, which staff will receive training, how will current and future staff be trained, what kind of training & how extensive, etc]

The Database Administrator and the Database Planning Coordinator will be responsible for training existing and new staff on the use of the new database system. Both staff should attend appropriate training programs to provide them the skills required to administer the database in-house and its proper use, and to organize subsequent in-house training for all staff on using the database system. Providing paid training for two staff allows for a more secure support environment within [Your Agency] – in the event one staff is not available for critical database administration tasks, the other staff will fill the role of database administrator.

Hardware/Software Requirements

[Identify the hardware and software upgraded needed to support and run database software]

Currently, there is one computer for each staff. The computers are not networked to share resources such as file space, printers or an Internet connection. The computers are a mixture of Pentium and 486 processors, use either Windows 95 or Windows 98 operating system, and have a range of RAM memory from 16MB to 64MB.

Upgrading or replacing the existing hardware to establish a uniform computing platform for all staff, the installation of a computer network and the implementation of database and file backup procedures are essential preparation for the development and deployment of the new database system. A new computer should be purchased to serve as the database and file/print server to allow all staff to share the database from their workstations. A back-up system should be installed to the network and a regular back-up procedure should be established and carried out by the systems administrator to protect against loss of data and files. The slower 486 processor workstations should be replaced with Pentium systems and all systems standardized with Windows 98 as the operating system.

Implementation Plan

[Chart a schedule for the database implementation, including roles and responsibilities of staff, and the total budget for this project]

Timeline

The new database system should be up and running in seven months. A timeline of the major tasks and their completion dates follows:

Task	Staff	Date	Done?
Gain Organizational Consensus & Commitment	Senior Management, ED leadership	January 15	X
Determine Staff Roles	Senior Management, ED leadership	January 22	X
Notify Staff Members	Senior Management, ED	January 22	X
Database Planning Kick-off Meeting	Prepared and led by DPC, introduced by ED, all staff present	January 29	X
Collect Forms, Reports, Questionaires	DPC	February 12	X
Summarize/Merge Staff information	DPC	February 19	X
Meeting: Finalize Database Priorities	DPC leads, database Planning Team participates	February 26	X
Final Database Plan	DPC	March 15	X
Hire Database/Systems Administrator	DPC	April 15	
Evaluate Database Packages & Custom Solutions	DPC, Database Admin	May 15	

Make "Buy vs. Build" decision and select database solution	DPC, Database Admin	May 30	
Hardware upgrades, purchases, network installation, purchase database software (if choosing the "buy" route)	Database Admin and/or Outside Consultant	June 30	
Install, and Build or Configure database system – test database functionality with real data	Database Admin and/or Outside Consultant	August 30	
Train Database Planning Coordinator and Database Administrator	Outside Consultant	August 30	
Import data from existing databases and lists into new system	Database Admin	November 30	
Train Staff in-house on database use	DPC and Database Admin	December 15	

Budget

The budget required to implement the system with respect to the timeline above is as follows:

Item	Cost
Salary: Database Planning Coordinator ($20/hr x 40hr/month x 7 months)	$5,600
Salary: Database Administrator ($20/hr x 160hr/month x 7 months)	$22,400
Hardware Upgrades (new workstations, new operating system software)	$2,000
Network Hardware/Installation (Server, Network Cards, Wiring, Installation labor)	$4,000
Database software/custom build	$5,000
Training (2 Staff x $500)	$1000

Total Cost: $40,000

Appendix

[Place examples of the forms and reports that you currently use for the existing database systems here, and all tools used to gather information from staff on their database use. Include in this section summaries of all questionnaires completed.]

Request for Proposal (RFP) Example

Request for Proposals
For: Nonprofit Organization [Your Agency]
Date

Background
[This section contains your mission statement and some background on the project]

[Your Agency] is a 501c3 organization working for social justice in the San Francisco Bay Area. We lobby officials, conduct education and awareness programs, develop outreach materials and provide resources to the public to address social justice concerns.

In [Date], [Your Agency] completed a database planning process which identified the reports and functionality required of our organization's database. From this planning process we have developed a database plan that will serve as the foundation for the future database.

We have secured a grant from [Your favorite foundation] and are now prepared to build a database. To assist potential developers in assessing our needs, we are attaching a copy of our completed database plan to this RFP.

Schedule and Deliverables
[This section describes the due dates for each portion of the project]

The database project proposals are due in [Your Agency] office no later than **5 P.M. on [Date].**
The contract will be awarded on **[Date].**

The Database, specifications, documentation and training will be completed no later than **[Date].**

Budget
[This section contains your budget from the database plan, and a discussion of payment terms]

The total cost of bids for the development of the Database is expected to be under (Your database budget) Bids over this amount will be accepted, provided they are accompanied by a compelling rationale.

Payments on the contract will be made on a schedule to be tied to the client's acceptance of the work. Upon acceptance 50% of the total contract value shall be paid. Upon delivery and acceptance of the Final Database, the remaining 50% of the contracted amount shall be paid.

Submitting a Proposal
[This section contains the requirements for a proposal to be considered]

Proposals are due in the [Your Agency] office no later than **5 P.M. on [Date]** directed to:

Staff Person Contact information:
Name, Title, phone number and email address

Proposals must contain:

1. Background information about the applicant consulting agency

   - Provide contact and address information about the applicant consulting agency.
   - Provide general information about the applicant consulting agency, including years in business, structure (corporation, partnership, sole proprietorship, etc.), and business philosophy.
   - Provide a list of past and current clients.
   - Provide a list of business references.

2. Background information about the applicant consulting agency staff who may work on the database

   - List of staff, including the amount of time each has been an employee of the applicant consulting agency.
   - General and contact information for any subcontracting or outsourcing partnerships engaged in completing this project
   - A document summarizing the qualifications of key staff members and contract employees whom may be working on this project, including resumes.

3. Examples of work

   - A document containing descriptions of databases that your organization has built, and a list of client references.
   - Examples of documentation (user and administrator manuals, online help files, maintenance procedures, database specifications, commented code, etc.) your organization has prepared for previous clients.

4. Billing information

   Please provide a complete and detailed description of your billing policies, including:

   - A summary of deliverables, and the costs associated with each deliverable, which address the needs and requirements identified in this RFP.
   - 4.2 A timeframe for completion of the project,

Selection Process
[This section contains your procedures and timeline for selecting a consultant]

Procedures for applicants

The following procedures will be used to evaluate consultant bidding for this contract:

- Completed proposals reviewed by [Your Agency] staff
- Notification of candidates within (# of days)
- Interviews with [Your Agency] staff
- Final Selection

Database Technical Specifications and Contract Requirements
[This section contains detailed information about the design requirements for successful completion of the contract as described in the Database Design and Information Flow section of the Database Plan]

Proposals submitted to [Your Agency] should either conform to the specifications listed in this document, or a *complete explanation* should be offered as to why deviation from this specification enhances the database.

Goals of the database

It is important that the database fulfill the requirements outlined in our database plan.

Audience and Purpose

The database should present as few technological barriers to users as possible. Therefore, the database should be easy for users with limited database experience and expertise. It should also provide an easy-to-use interface and should provide simple to use reporting capacity. The database should be easy and intuitive to navigate. Users must be able to access the information they desire with a minimal navigation.

Data to Collect

The new database should track information regarding three primary constituencies – members, donors and general contacts (such as vendors & service resources). Contacts also play a variety of roles within [Your Agency]. Many contacts are included in more than one constituency category and play more than one roll in [Your Agency]. Complete contact information must be tracked for all contacts (name/organization, addresses, day/evening/cell phone, fax, email/web, and preferred contact method) as well as information pertaining to what role they play within [Your Agency], subscriptions to mailing lists and a contact log.

Members include individuals and organizations that have requested information, volunteers, trainers, workshops/training participants, or have subscribed to our

newsletters. Roles would include General/Public, trainer, volunteer, event participant, staff. Information that needs to be tracked is the following:

- **Volunteers**: event/task, date, availability, skills, notes
- **Trainers**: resume, cost, availability, skills, notes
- **Event Participant:** event and date
- **Staff:** resume, schedule
- **General/Public**: Information requested, response, date

Donors include individuals and organizations that have given money to [Your Agency]. Information that needs to be tracked is the following:

- **Donor Category**: Individual, Corporate or Foundation Donor
- **Donation history**: Gift type, amount, relevant campaign, date, restrictions, reporting
- **Profile**: Notes on interests, relationships to staff, board, etc

General contacts include individuals and organizations that provide fee for services, or are locations/points of contact for resources. Information that needs to be tracked is the following:

- **Profile information**: Services offered, fee, location, NPO discount information, notes

The contact log records a history of communication with each constituent. Information that needs to be tracked is the following:

- **Communication profile**: date/time, subject, results/follow-up, [Your Agency] staff, notes

Each contact may belong to one or more constituencies, and play a variety of roles within [Your Agency].

Database Search Capacity

The database will provide a mechanism for the user to develop custom searches of collected information. The database should provide the capability for complex searching across multiple fields, and generate reports on these searches. Standard searches such as searching by first name, last name and organization should be provided for all contacts. The database should provide several essential reports that are based on pre-designed searches of the database.

Pre-designed searches of the database are listed below according to the constituent categories listed previously:

- **Members searches**: member role, state, zip, event, skills, availability, information requested with no response, subscribers to mailing lists.
- **Donor searches**: Gifts $1 to $100, $100 to $1000, $1000-$5000, $5000 and greater, donors by category, donors by campaign, donors within a given date range, gifts requiring reporting, gifts with restrictions.
- **General Contacts**: service/resource offered
- **Communications log**: search by date, date range, staff, subject and keyword

A search by date, date range and topic should be provided for the contact log across all constituencies

Reports to Generate

Standard reports across all contact constituencies and roles should include the following:

- **Mailing labels**: Format choices should include Avery 5160 and 5164.
- **Full contact/profile information**: All collected data, can be generated per person or using the pre-designed searches above.
- **Subscribers to publications**: All constituents subscribed per newsletter and their basic contact information.
- **Communication log**: full logs, both per constituent record and across all constituents, by date, date range, staff, subject and keyword

Specific reports for each constituency should include the following:

- **Members**: Brief list of constituency contact information by roles, state, zip. Brief list of volunteer/trainer contact information by skill and availability. Constituents by requests for information and responses/lack of responses.
- **Donors**: Donation history per donor, all donations by gift amount range, date range and campaign
- **General Contacts**: Contacts by service/resource

Development Tasks and Milestones

The new database system should be up and running in seven months. A timeline of the major tasks and their completion dates follows:

Task	Completion Date
Select a database consultant	April 1
Receive a work plan for the development of the database	April 15
Install, and Build or Configure database example	August 1
Test Database functionality with real data	August 1-15
Produce Final Database	August 15-31
Import data from existing databases and lists into new system	September 7
Receive Database Documentation	September 15
Train Staff in-house on database use	September 22

Interview Question Examples

The following list of questions is an example of questions that may be asked at the applicant interview. Applicants may answer all or some of these questions in writing in advance of their interview.

1. Which members of your consulting staff will be assigned to (Your Agency)?

2. How would you propose to divide up the tasks among your staff?

3. When is your staff available to work on our systems, during the business day and otherwise?

4. Do you sell computer hardware and software?

5. Is it part of your contract with your clients that they must buy their hardware or software through you?

6. Describe a technical challenge with an existing system that you have faced recently with a client and describe how you addressed the situation? How was the issue presented to the client?

7. Describe the process your agency uses when a client requests database services? Please provide at least one example of how your agency has handled a particular client request.

8. What level of technical management/competence do you expect from your clients? Specifically, describe your expectations of (Your Agency).

9. Describe how your agency provides training for client staff members who work on or manage networks/computers that you support?

10. How does your agency manage communications between your staff and your clients?

11. What is the procedure if the project runs over budget, or the project fails?

Common Database Types

Information and Referral Database

An Information and Referral database serves as a library list of organizations that offer a broad range of information and services. A client or member of the public may request a referral, and services or organizations matching their criteria can be retrieved from the I&R database.

For example, a client may inquire about local drug abuse support groups, and the I&R database could retrieve listings of those groups offered in a particular zip code or a designated city.

In order for this type of database to be useful and effective, it is crucial that the most current and most complete list of services and service providers be maintained. This involves continually updating the information, because outdated information or misinformation is frustrating or useless to the client, and potentially can be life-threatening.

Due to the sometimes private and sensitive nature of clients' requests for information, some I&R databases request client data that the clients, understandably, may be reluctant to provide. Creating a database that can protect the clients' privacy is a difficult and sensitive issue, particularly if government or funding agencies request demographics or other data about the population requesting information from the I&R database service.

Information and Referral databases are relatively straightforward in design, but need the investment of considerable staff time to keep current. In order for an information and referral service to operate efficiently, a fast machine and a network are necessary, as this service often entails several people simultaneously needing access to the database to match requests for information.

Donation Databases (Donorbase)

Most nonprofit organizations rely on fundraising as an important source of income; donor databases, or *donorbases,* track information about potential donors, actual donors and all donations. Because donors and federal tracking agencies usually require accurate reports of the destination and/or sources of donated funds, a donorbase to track this data can become complex, depending on tracking and reporting demands.

At minimum a donorbase should be able to do the following:

- Generate donation reports
- Allow you to sort your donors in a variety of ways
- Record multiple donation/donor details
- Create and sort lists of potential and current donors
- Print letters and labels and a variety of reports

Name, address and other contact information can be straightforward, but donor and donation information is more involved. For example, an organization may need to track donations from one individual over time, so as to be able to accurately refer to the donor's giving history when soliciting a new donation. Similarly, an organization may wish to analyze the success of a fundraising campaign to a new target population, to which end some method of tracking the original solicitation would be crucial. For accounting purposes, a donorbase may need to generate monthly totals, quarterly totals and year-end totals, and be able to designate multiple destinations for a single donation.

For reporting and mailing purposes a donorbase should be able to sort and select records based on many different criteria. For example, an organization may wish to send a report or newsletter to one category of donors and a different newsletter to others.

When planning a donorbase, it is a good idea to consider connecting it with the accounting system and to other databases, such as a membership or client database, and to anticipate fundraising growth and programmatic changes in its design.

Contact/Client Database

Contact/ Client Management databases are one of the most common kinds of databases that are used in organizations. They can range from simple mailing address lists or volunteer tracking systems to complex social service caseload databases. For organizations that work with a large number of individuals who need to be tracked, a Contact/Client Management database is an essential tool.

Client/Contact Management Databases can range from the very simple to the very complex. Beyond just basic contact information, organizations sometimes require additional information regarding people preferences and schedules. Examples of such information might include when it is a good time to call a person, or whether a volunteer is available only on Saturdays. Sometime such tracking can be done using a regular comments field, but might require a structured weekly or monthly system with check off options for certain criteria.

The database may also require sorting options. For example, the organization may need to sort people by events, or services provided, or by school, or may need a daily checklist of people staff need to contact. Some databases have special functions that automatically generate reminders to contact people, or check to see if a subscription is overdue.

Organizations may also wish to track information about donors or clients that simply can't be standardized. Broad categories - like donation events - are often built into pre-designed packages, but small details are not. Finally, organizations may want to link their database to forms developed in other software, such as Word, in order to conduct mail merges.

Fundraising Databases Comparison

	Meadow Base	ebase	Raiser's Edge	Donor2	Donor Perfect	Donor Records	Donor Works
Program							
Version			7		Visual Edition - 32 bit		6
Bit			32	32	32	32	32
Database Type	Filemaker Pro	Filemaker Pro	?	Enterprise Ed. - MS SQL Server 7	FoxPro	Access	?
Constituents:							
Members	x	x	x	x		x	
Donors		x		x		x	x
Activists		x		?		x	
Volunteers	x	x	x	x		x	x
Clients				?		?	
Alumnae/I			x	x		x	x
Corporations			x	x		x	
Foundations			x	x		x	
Major prospects			x	x		x	x
Transactions:							
Gifts			x	x		x	x
Donations	x	x		x		x	
Non-cash Donations	x			x		x	
Grants	?	?	?	x		x	
Pledges	x	x	x	x		x	x
Billing	x		x			Add-on Accounting packages	
Purchases	x						
Expenditures			x				

	Meadow Base	ebase	Raiser's Edge	Donor2	Donor Perfect	Donor Records	Donor Works
Programs:							
Multiple funds			x	x		x	x
Events	x		x	Add-on		?	x
Programs	x			x		?	?
Campaigns		x	x	x		x	x
Appeals / solicitations			x	x		x	x
Tributes / memorials			x	x		x	x
Mailings	x			x		x	x
Emailings		x		x			x
Accounting			x	x	$495 interface to accounting programs that have import ability	several add-on options available	
Data:							
Multiple names per household	x	x		?		x	?
Multiple addresses per person	x	x		?		x	x
Education			x	x		X	?
Employment			x	x		X	x
Multimedia data			x	?		?	pictures
Affiliations			x	x		X	
Supplemental databases:							
Company matching gifts			x	x			x
Postal discount			x	?			?
Interfaces:							
Export data	x	x	x	?		x; Optional Access DB or FASS Export	x
Online Giving							
Electronic Funds Transfer			x		x	?	

	Meadow Base	ebase	Raiser's Edge	Donor2	Donor Perfect	Donor Records	Donor Works
Reports:							
Total Built-in Reports	?	20	100	300	? Hundreds	40	300
cost per dollar raised			x				?
cash flow			x			x	x
pledge			x			x	x
constituent profile	x		x			x	x
check list, contact list	?	?	?			x	x
Maintenance:							
Duplicate elimination	x	x				x	x
Archiving - inactive records	x					x	?
Security:							
Change Log	x					?	
Access control / passwords	x	x	x			x	x
Ease of Use:							
Print preview	x					?	?
Rolodex view	x	x				printable	?
online help			x			x	?
multiple search criteria	x	x	?			x	x
Networking:							
web access		x	x				
client server		x	x			x	
Customizations:							
tags	x						x
value lists		x					
fields		x				x	x
layouts		x	x				
reports		x	x			x	x
source code		x					

	Meadow Base	ebase	Raiser's Edge	Donor2	Donor Perfect	Donor Records	Donor Works
Company factors							
Type of business	Cooperative project among different NPOs	Nonprofit organization	Private corporation	Private Corporation	Private Corporation	Private Corporation	Private Corporation
Age of business	2	2.5	19	13	19	17	7
Number of installations	?	9,000	9,000		4,500	2,000	
References		x	x		x		
Web site		www.ebase.org	www.blackbaud.com	www.donor2.com	www.donorperfect.com	www.execdata.com	www.donorworks.com
Fully Functional Demo Available	x	x			x	x	x
Training							
Periodic classes		x	x		x	x	
Trainers availability		x	x		onsite offered	x	
Support							
Q & A online	x	x	x				
Listserver		x	x			x	
one-on-one (in person or by the phone)			x		x; with service contract…	x; with service contract…	
Requirements							
Hardware (minimum)	Intel-compatible 486/33 8 MB RAM;Macintosh, Power Macintosh, or compatible, 4 MB RAM	Intel-compatible 486/33 8 MB RAM;Macintosh, Power Macintosh, or compatible, 4 MB RAM	Pentium 233, 64-128 MB RAM, 200 MB hard drive, color VGA monitor	Pentium processor 32MB RAM, 1 GB Hard drive	32MB RAM (64 MB recommended), 15MB Hard Disk + 1MB/2,500 records	20-100MB free hard drive space	Windows: 486+, 8 MB minimum; Pentium 16 MB recommended Macintosh: 68030, 8 MB minimum, Power Mac, 16 MB recommended
Software (minimum)	Runtime versions Mac OS and Windows	Windows 3.1 or Windows for Workgroups 3.11 (with additional software), Windows 95, 98 or NT; Mac OS 7.1	Microsoft Windows 98 (Windows 2000 is recommended), Microsoft Windows NT 4.0, Novell Netware 4.2	Windows 95/98/2000 or NT 3.51 or Higher	Windows 95, 98, NT, 2000	Windows 95/98/NT	

	Meadow Base	ebase	Raiser's Edge	Donor2	Donor Perfect	Donor Records	Donor Works
List Prices							
License	free	free for single use (FileMaker Pro required for most customizations - $400 per license)	Cost for single user is $6,000; 2-4 users is $9,000; 5-7 users is $12,500; 8-10 users is $16,000 and each block of 5 additional users is $7,500	Single user begins at $6,000	$2,995 Single User $4,495 2 user Network version +$500/ concurrent user	Donor Records: Single $1500 Network (unlimited users) $2300 **Access DB:** $600 ($900 Network) **FASS Export:** $400	Single User $2,495
Training	-	$150/person for 2 full days	Free 90-day telephone support. Unlimited toll-free and internet support available through maintenance agreement		$695/day + expenses - onsite $395 - 4 hour Phone Training	$595/person 3-Day training course in Marietta, GA	
Support	Online pages free	Online pages free			$695 - Basic $945 - Premium	30 days Free Phone support	
1 year costs (fill in)							
licenses	0	0	From $6,000				
data conversion					available	Quotes available	
support			20% of retail cost		$695+ includes unlimited phone support, upgrades, newsletter, discounts on training	$350	
training						?$	

Fundraising Databases Comparison (Continued)

	Resource Development System	JSI Fundraising System: Paradigm	JSI Fundraising System: Millenium	MetaFile Results/Plus	Team Approach	TRAC Exceed!	Champagne GiftMaker Pro
Program							
Version	4.2K.1.18			5		3.1	
Bit	16 & 32	16	32	16 & 32	32	32?	
Database Type	Access; VB front end	Paradigm	Oracle or MS SQL		Oracle	FoxPro	
Constituents:							
Members	x				x		x - Basic included Advanced module $995
Donors	x				x		x
Activists	x						x
Volunteers	x				x	Module - $795	Module Single user: $495
Clients							x
Alumnae/I	x						x
Corporations	x				x		x
Foundations	x				x		x
Major prospects	x				x		x
Transactions:							
Gifts	x					x	x
Donations	x					x	x
Non-cash Donations	x						x
Grants	x						x
Pledges	x					x	x
Billing							
Purchases							
Expenditures							

	Resource Development System	JSI Fundraising System: Paradigm	JSI Fundraising System: Millenium	MetaFile Results/Plus	Team Approach	TRAC Exceed!	Champagne GiftMaker Pro
Programs:							
Multiple funds	x				x	x	
Events	x				x		Module Single user:$795
Programs	x				x		
Campaigns	x				x	x	x
Appeals / solicitations	x				x		x
Tributes / memorials	x					x	x
Mailings	x				x		x
Emailings							x
Accounting	Export					Interfaces to MIP and Quickbooks	Export bridge - $495
Data:							
Multiple names per household	x				x	x	x
Multiple addresses per person	x				x	x	x
Education	x				x		
Employment	x				x		
Multimedia data							x
Affiliations							x
Supplemental databases:							
Company matching gifts	x				x		x
Postal discount							module - $695
Interfaces:							
Export data	x			x	x	x	
Online Giving	x - Giving Capital					x - Begins at $500	
Electronic Funds Transfer						x - Add $595	

	Resource Development System	JSI Fundraising System: Paradigm	JSI Fundraising System: Millenium	MetaFile Results/Plus	Team Approach	TRAC Exceed!	Champagne GiftMaker Pro
Reports:							
Total Built-in Reports	200				250		
cost per dollar raised					?		
cash flow	x				?		
pledge	x				?		
constituent profile	x				?		x
check list, contact list	x				x		x
Maintenance:							
Duplicate elimination	x			x	x		
Archiving - inactive records	x						
Security:							
Change Log	x						
Access control / passwords	x			x	x		
Ease of Use:							
Print preview	x						
Rolodex view							
online help	x						
multiple search criteria	x				x		
Networking:							
web access							
client server	x						
Customizations:							
tags							
value lists	x						x
fields	x				x		x
layouts							
reports	x				x		x
source code	x						

	Resource Development System	JSI Fundraising System: Paradigm	JSI Fundraising System: Millenium	MetaFile Results/Plus	Team Approach	TRAC Exceed!	Champagne GiftMaker Pro
Company factors							
Type of business	Private Corporation with Non-profit Consulting arm					Private Corporation	Private Corporation
Age of business	12	21			8	14	13
Number of installations	176	2,000					3000
References	x						
Web site	www.ciconte.com	www.jsi.com/frs	http://www.jsifrs.com/	http://rp.metafile.com/	www.targetsite.com	www.tracworld.com	www.campagne.com
Fully Functional Demo Available	x					x	x
Training							
Periodic classes	x				x		x
Trainers availability	x				x		x
Support							
Q & A online	x						
Listserver							
one-on-one (in person or by the phone)	x						
Requirements							
Hardware (minimum)	486 or Pentium computer and a minimum of 16MB RAM	486 or a Pentium processor; 16MB of RAM required	http://www.jsifrs.com/Millennium/HdwreRecs.htm	486 or greater (Pentium recommended), 16 MB of RAM, 45 MB Hard drive available	Oracle DB Server may be required! Workstations: 32MB RAM		**Windows**: 486+ 16MB RAM **Mac:** 68040+ 16MB RAM
Software (minimum)	**Windows 3.1/95/98 or NT. Multi-user systems available**	Windows 3.1 or Windows 95. Multi-user systems available for Windows 3.1.1, Windows 95, Novell and Windows NT		**16 bit:** Windows 3.1 or later **32 bit:** Windows 95 or NT	Workstations: Windows 95, 98 or NT		Windows 3.1/95/98/NT

	Resource Development System	JSI Fundraising System: Paradigm	JSI Fundraising System: Millenium	MetaFile Results/Plus	Team Approach	TRAC Exceed!	Champagne GiftMaker Pro
List Prices							
License	$2,495 for single or multi-user		$20,000 - $250,000 depending on size, database type and number of users		?	Single: $3,095 Network (3 users): $4,095 + $500/ additional user	Single User: $2,990 Network Version: 2-3 $3,990 4-6 $4,990 7-10 $6,290
Training					?	Classroom Training $300 with Support Contract $450 without Support Contract	Single User: $625 Network Version: 2-3 $700 4-6 $865 7-10 $1,095
Support		90 days			?	Free for 90 days	$700
1 year costs (fill in)							
licenses					?		
data conversion	$65/hour	Conversion options include system's import utility, gifts only conversion and customized conversion options.			?	available	Standard - $350 Advanced - $995 Custom - $110/hr
support	$500 (Optional) includes phone support, email support and upgrades	support available on a contract or time and materials basis			?	Single User: $595 Network: Based on # of licenses	
training	650/day in Washington DC	Regional and on-site training offered			?	Classroom Training $300 with Support Contract $450 without Support Contract	

Selecting a Consultant

We suggest that you hire a consultant to assist you through this process if you do not have a staff person with the following skills, experience and knowledge:

- Knowledge of structure and design of a database, including data tables, indices, queries, reports, scripting, and how to sort, develop and create reports
- Understanding of what makes a good database design (and what the differences are)
- Someone who has built a database in the past and can provide you with examples of their work
- Fluency in "database terminology"
- Knows and can explain the benefits and disadvantages of building, buying and out-sourcing your database. They should also be well versed in the pros and cons of various "off the shelf" products (i.e. Access, Filemaker) as well as understanding the strengths and weaknesses of various "pre-packaged" software products (Blackbaud, Ebase, etc) and ASP options.

Before You Hire A Consultant

Be as clear as possible about what you want done, including:

- the goal of the work
- skills and experience needed
- critical timelines

Suggestions For Recruiting A Consultant

- Word of mouth
- Technical assistance providers
- User groups
- Professional associations
- Advertisements

Getting Ready to Interview Potential Candidates

Things to remember

- Your ability to work well with the consultant is one of the most critical factors in being satisfied with the product.
- It is an important job; it is worth shopping around and interviewing several candidates.
- Unless the work is exclusively technical, make sure his or her values are compatible with yours and with what is needed to do the job well.

Database Consultant Questions

General Questions

- Does the consultant understand the hardware, operating system and software that your organization uses or is likely to use?
- Does the consultant understand your agency?
- What is the consultant's background? (*Look at the consultant's education and actual experience, and check references carefully)*
- Does the consultant's technical experience and skill match your needs?
- Do you feel comfortable communicating with the consultant?
- Can you ask "dumb" questions?
- Is the consultant selling anything?
- Does the consultant represent any software or hardware companies?
- Is the consultant a sole proprietor or a member of a larger organization?
- How busy is the consultant?
- Does the consultant have other assignments during the time you will need him or her?
- Is the consultant clear about his or her role, responsibility and contribution to the project?
- Are you prepared to work with the consultant?

Building/Buying/Outsourcing

If you have already made up your mind that you will be buying, building or out-sourcing a database, here are some questions to review:

Building

- How long have you been building /developing or evaluating databases?
- Which database applications can you write in? (i.e. Access, Filemaker, Dbase, etc)
- Which organizations / businesses have you worked with in the past? Are those organizations still using that database?
- Do you have database examples we can review?
- Do you have examples of the kind of documentation you provide for the databases?
- What kind of support do you offer after the database is built / identified?
- Will you transfer data from our existing database into our new one?
- What deliverables (a database plan, assistance with identifying database products, database specifications, documentation, etc) will you provide?
- Will you provide us with a timeline for this project?

Buying

1. What database applications are you familiar with? (i.e. Access, Filemaker, Dbase, etc)
2. How long have you been building /developing or evaluating databases?
3. What "packaged database products" are you familiar with? When/where have you recommended those products?
4. Do you have any references we can contact?
5. What kind of support do you offer after the database is built / identified?
6. Will you transfer data from our existing database into our new one?
7. What deliverables (a database plan, assistance with identifying database products, database specifications, documentation, etc) will you provide?

Outsourcing

1. What kind of support do you offer after the database is built / identified?
2. How long have you been working with clients using ASP databases?
3. How long have you been building /developing or evaluating databases?
4. What database applications are you familiar with? (i.e. Access, Filemaker, Dbase, etc)
5. What "packaged database products" are you familiar with? When/where have you recommended those products?
6. What organizations / businesses have you worked with in the past? Are those organizations still using that database?
7. Do you have any references we can contact?
8. Do you have database examples we can review?
9. Do you have examples of the kind of documentation you provide for the databases?
10. What kind of support do you offer after the database is built / identified?
11. Will you transfer data from our existing database into our new one?
12. What deliverables (a database plan, assistance with identifying database products, database specifications, documentation, etc) will you provide?
13. Will you provide us with a timeline for this project?

Get A Work Plan or Proposal

In order to make sure everyone is clear about expectations and timelines, it is very important to have the consultant write a work plan or proposal detailing what she or he will do and when. This can be incorporated into a contract.

Get a Contract that includes:

- **Project Description:** the scope of work to be accomplished and what the goals of the project are
- **Project Objectives:** any products (called "deliverables" in the trade)

- **Consultant's Responsibilities**: identifies everything the consultant will do to complete the project
- **NPO's Responsibilities:** identifies everything the client will do to complete the project
- **Fees:** It may be helpful to arrange a fixed price rather than an hourly rate. This section should also identify payment times and terms
- **Time Schedule**: This section identifies the phases of the project. Includes starting times, any intermediate benchmarks and anticipated completion dates.
- **Legal Terms:** Consultant's non-employee status; confidentiality; the ownership by the agency of products developed under the contract; a bar on subcontracting if applicable, and clarification of conditions under which the contract may be canceled by the parties.
- **Copyright:** Be sure to define which party has the copyright for anything developed throughout this project.
- **Remember!!** Both parties must sign the contract

Working With A Volunteer Consultant

Buying or Out-sourcing

If you have an individual who is well versed in a variety of database products, and you are considering purchasing a "pre-packaged" product, then a volunteer can assist you very effectively. Also if the individual is well versed in ASP options and costs they can be very helpful.

Building

We recommend that you do not use a volunteer to build your database. These tend to be long projects and we have found that volunteers are best used with technical projects where the scope of work is shorter term. Database development can be a slow and long-term process that does not lend itself well to a volunteer effort. However, you could consider a volunteer to fix you database *if* you have clearly identified your needs and you require small changes (changing field names, developing a script, etc) for the future database.

Obtaining Donated Database Software

Some software manufacturers have corporate philanthropy programs through which they give away software to nonprofit organizations, either at no cost, or for a relatively small shipping and handling fee. This document contains some contact information for software donation programs:

1. Microsoft
Access and Microsoft Office 2000
For information on software donations outside of Washington State, contact either
CompuMentor
http://www.compumentor.org
800.659.3579 or
415.512.7784

Gifts In Kind America
700 North Fairfax St.,
Suite 300
Alexandria, VA 22314 (703)836-2121
http://www.giftsinkind.org

Washington State organizations can receive donations directly from Microsoft. See http://www.microsoft.com/giving/np_tsolu.htm#3>http://www.microsoft.com/giving/np_tsolu.htm#3

2. FileMaker Pro
FileMaker Pro 5.0, FileMaker Server. If your organization purchases a copy of FileMaker Pro, FileMaker will donate your additional licenses (you need multiple licenses in order to have multiple simultaneous users of ebase).
Complete donation information can be found on http://www.filemaker.com/about/donations.html>the FileMaker Web site.

3. Lotus
cc:Mail, Notes, Domino, etc
Sharon Glassman, Product Donations Manager
Lotus Development Corporation
55 Cambridge Parkway
Cambridge, Massachusetts 02142
(617) 577-8500.
Generally, they have an evaluation form, which a group fills out. Then, if this preliminary handshake passes muster, Lotus contacts the group to try to help determine what software they need - package, number of seats, etc.

Source: ONE/Northwest: Online Networking for the Environment, Nickerson Marina Building 1080 W Ewing Pl, Suite 301, Seattle, WA 98119-1422 .286.1235
http://www.onenw.org/copyright.html>©1995-2000, ONE/Northwest

Managing Your Database

Who's In Charge?

Through your planning process you will have answered this question (right?) and have assigned a person to be your Database Manager. That does not mean this person is the queen or king of everything going on with your database. However, this is the person who checks in with staff and makes sure the database is working for them, that information is getting entered in the way that was agreed upon, and that staff know the ins and outs of the database system. If more than one person is entering data, you need to create a category that will track who entered what.

It’s Not My Job

One of the pitfalls with managing a database is there can be an assumption from staff not responsible for managing the database that the person or people assigned to be “in charge” of the database can do this alone. It can be viewed as their headache alone to keep it updated. However, EVERYONE collecting and documenting information on clients should contribute to the information that will be included in the database. All staff members have a responsibility to provide accurate and timely Agency member information changes, etc. for the database. The Database Manager cannot do his or her job without this information. So, keep them (and your data) happy and remind other staff that the database is worthless without the data.

Security

While one person may be in charge of the database, it is helpful if Agency staff can have at least limited access to client information (i.e. looking up phone numbers, generating and printing reports, etc.). To keep your information “safe”, a computerized database should have security passwords for different levels of use (one for entering information, one for designing screens, one for viewing confidential information, etc.). This ensures confidentiality as needed, and prevents staff members ho don't know how to use the system from making unintentional mistakes.

Glossary of Terms

Access

A relational database running under Microsoft Windows. Data is stored as a number of "tables", e.g. "Stock". Each table consists of a number of "records" (e.g. for different items) and each record contains a number of "fields", e.g. "Product code", "Supplier", "Quantity in stock."

Access allows the user to create "forms" and "reports". A form shows one record in a user-designed format and allows the user to step through records one at a time. A report shows selected records in a user-designed format, possibly grouped into sections with different kinds of total (including sum, minimum, maximum, average).

There are also facilities to use links ("joins") between tables which share a common field and to filter records according to certain criteria or search for particular field values.

Application

The term application is a shorter form of application program. An application program is a program designed to perform a specific function directly for the user or, in some cases, for another application program. Examples of applications include word processors, database programs, Web browsers, development tools, drawing, paint, and image editing programs, and communication programs.

Application Service Providers (ASPs)

A relatively new phenomenon, application service providers (ASPs) are web-based programs that provide specific functionality (i.e. e-mail, calender, file storage, etc.) over the Internet.

Back-end

The back-end is the part of a computer application that performs an essential task not apparent to the user. Its opposite is front-end, the part of the application that the user interacts with. The back-end and front-end may be located on the same computer, or they may be linked across a network or the Internet. Relative to a client/server network, the back-end is likely to be the server and the front-end is likely to be the client. Relative to a database, the back-end might be the advanced code that drives the database, and the front-end might be the form where the user enters data or pushes a button to generate a report.

Backup

Backup is the process of preserving copies of files on a different drive, directory, or media (often floppy disks or tape) to protect against the destruction or loss of the original files in the event of hardware or system failure. Two backups are often recommended: one onsite and another offsite.

Backwards Compatible

A system is backward compatible if it is compatible with (e.g. can share data with) earlier versions of itself, or sometimes other earlier systems, particularly systems it intends to supplant. For example, WordPerfect 6.0 can read WordPerfect 5.1 files, so it is backward compatible.

Bandwidth

Bandwidth is the maximum amount of data that can travel a communications path in a given time, usually measured in seconds. If you think of the communications path as a pipe, then bandwidth represents the width of the pipe that determines how much data can flow through it all at once.

Beta

A beta release of a software package is a preliminary version put out before the final release onto the marketplace. Beta versions are sometimes publicly available and sometimes available only to a select group of user who test the software. Beta versions usually have more bugs than the official release.

Boolean Operators

Most search engines allow you to limit your search or make it more specific by using words like "And," "Or," and "Not." These words are known as boolean operators because of their origin as terms in logic. For example, if you do a search on "Nonprofits AND Technology," TechSoup.org should show up in the results.

Browser

A software program that allows you to surf the Web. The most popular web browsers right now are Netscape Navigator and Internet Explorer.

Bug

An unwanted and unintended property of a program or piece of hardware, especially one that causes it to malfunction. For example, "There's a bug in the editor: it writes things out backwards."

Client/Contact Management Databases (CCM Databases)

Many organizations work with a large number of individuals who need to be tracked - i.e. clients in social services programs, special education students, or even volunteers. Client/ Contact Management Databases can range from simple mailing address lists, to volunteer tracking systems, to complex social service caseload databases.

CD-ROM

CD-ROM stands for Compact Disk-Read Only Memory. A CD-ROM can contain a software application, a library of data or your favorite album. You cannot modify the contents of a CD-ROM; if you need to write to a compact disk, use a CD-R or a CD-RW.

Client

A client is a program that uses the services of another program. The client program is used to contact and obtain data or request a service from the server.

Cold Fusion

Allaire Corporation's commercial database application development tool that allows databases to have a World-Wide Web interface, so a database can be queried and updated using a web browser. Examples of ColdFusion applications include order entry, event registration, catalogue search, directories, calendars, and interactive training.

Configuration

A configuration is a setting that customizes software or hardware to your needs. For instance, you might configure a network to allow all users to make changes to shared files. Or, you might configure your email program to check mail from two different accounts.

Cross Platform

A term that describes a language, software application or hardware device that works on more than one system platform (e.g. Unix, Microsoft Windows, Macintosh). E.g. Netscape Navigator, Java.

Data

Numbers, characters, images, or other method of recording, in a form which can be assessed by a human or (especially) input into a computer, stored and processed there, or transmitted on some digital channel.

Data Migration

The process of translating data from one format to another. Data migration is necessary when an organization decides to use a new computing systems or database management system that is incompatible with the current system.

Data Warehousing

A generic term for a system for storing, retrieving and managing large amounts of any type of data. Data warehouse software often includes sophisticated compression and hashing techniques for fast searches, as well as advanced filtering.

Database

A database is a set of information that is structured in a specific way. A database is associated with software used to retrieve, sort and perform calculations on the data, among other tasks. FileMaker Pro and Microsoft Access are two examples of common database programs.

Database Planning Coordinator (DPC)

The person responsible for facilitating the database planning process from beginning to end and is an active member of the Database Planning team. A DPC's duties include meeting facilitation, staff interviewing, software/vendor evaluation, logistics and writing the database plan. In order to receive staff member cooperation and to represent the agency to database developers or software vendors, the DPC must be perceived to have a credible presence as someone who is performing a critical function.

Database Planning Team

The persons responsible for executing the database project from planning to implementation and training. A Database Planning Team includes a Database Planning Coordinator responsible for facilitating the planning process, staff who can provide information about current data tracking systems and provide information on future database/training needs, and executive leadership (Executive Director for example) to provide support, momentum and direction for the project.

Database Server

A database server is the computer on a network that houses and manages a database. When other users on the network want to search or input data into the database, they do so through the database server. This is different from a file server model where a part of the database would be copied to the user's computer, and s/he would perform the search there.

Database Driven

A basic website is a collection of HTML files. When you click on a link to one of the files, the file comes up exactly as it is coded. "Database-driven" refers to a website where pages are not pre-existing, separate files. On a database-driven site, a web page is put together drawing on different fields in a database. Since the pages are generated again each time the user clicks on the link to go to them, a database-driven site is dynamic as opposed to static. Very large sites and sites which change frequently are best managed if they run off of a database. A database-driven site requires extensive programming by a web developer.

Direct Connection

A direct connection to the Internet is a connection that can be kept on constantly, and that does not require you to dial in over a regular telephone line using a modem. Connections through ISDN, DSL, cable modems or T1 or T3 technology are examples of direct connections to the Internet.

Donor Management Database (Donorbase)

Many organizations, nonprofits especially, rely on fundraising as an important source of income. Often, federal tracking agencies as well and donors themselves need accurate reports of where the money came from and where it is going. Generally, donorbases track who gave money to the organization, but this can get very complicated depending on the tracking and reporting needs.

E-Commerce

E-commerce (electronic commerce or EC) is the buying and selling of goods and services on the Internet, especially the World Wide Web. In practice, this term and a new term, "e-business," are often used interchangeably.

E-base

Ebase is a free, interactive database specifically designed for nonprofits. Ebase allows you to keep all your organization's data -- memberships, donations, activist information -- in one place. Ebase is based on Filemaker, and can be customized for your agency. Visit http://www.ebase.org for more information.

Export

To export data is to format it differently so that it can be read by a different application. For instance, if you were changing from a Filemaker to an Access database, you would want to export your data from Filemaker, and import it into Access.

Field

An area of a database record into which a particular item of data is entered. Example usage: "The telephone number field is not really a numerical field", "Why do we need a four-digit field for the year?"

File Sharing

File sharing is the public or private sharing of computer data or space in a network with various levels of access privilege. While files can easily be shared outside a network (for example, simply by handing or mailing someone your file on a diskette), the term file sharing almost always means sharing files in a network, even if in a small local area network. File sharing allows a number of people to use the same file or file by some combination of being able to read or view it, write to or modify it, copy it, or print it. Typically, a file sharing system has one or more administrators. Users may all have the same or may have different levels of access privilege. File sharing can also mean having an allocated amount of personal file storage in a common file system.

FileMaker

A cross platform relational database application less difficult to set up an learn for smaller database projects, but more difficult to develop advanced functionality. FileMaker allows for easy setup as a web application, as it has built in middleware required to communicate between web pages and the database.

Flat File Database

A relatively simple database system in which each database is contained in a single table. In contrast, relational database systems can use multiple tables to store information, providing the ability to relate information between tables.

Forms

An user interface that provides blank fields that users can input with data. Text fields, check boxes, radio buttons and select lists are examples of elements used for data input on forms.

Front-End

The front-end is the part of the application that the user interacts with. Its opposite is back-end, the part of a computer application that performs an essential task not apparent to the user. The back-end and front-end may be located on the same computer, or they may be linked across a network or the Internet. Relative to a client/server network, the back-end is likely to be the server and the front-end is likely to be the client. Relative to a database, the back-end might be the advanced code that drives the database, and the front-end might be the form where the user enters data or pushes a button to generate a report.

Graphical User Interface (GUI)

Commonly referred to as a GUI. Basically, a GUI acts as a more user-friendly (hopefully) face for an operating system or application. Microsoft and Apple both incorporate a GUI into their operating systems. Xerox researchers first introduced the GUI in the 1970's, but it didn't gain popularity in PC circles until the early 1980's - when the first Apple Macintosh rolled out.

Hard Drive

The hard disk drive (HDD) of the computer is where permanent information is stored. Documents, databases, spreadsheets, and programs are all stored on the hard disk. The larger the hard disk, the more you can fit on the drive. The size of the HDD does not affect the speed at which a program can run, but the HDD speed can affect how fast you can access your files.

Host

A host is any computer directly connected to a network that acts as a repository for services (such as e-mail, Usenet newsgroups, FTP, or the World Wide Web) available for other computers on the network.

Information and Referral Databases (I & R Databases)

Information and Referral databases are generally a service provided to clients that refer the client to an organization or a group of individuals who can meet a particular need. To find out about local drug abuse support groups, a client could inquire about what services were offered within a community, region, state, or some other geographical location. The information and referral database would match the client's needs to the availability of those needs.

Import

To import data is to use data that was produced in another application. For instance, if you were changing from a Filemaker to an Access database, you would want to export your data from Filemaker, and import it into Access.

Input Device

An input device is a peripheral that allows you to communicate with your computer and enter data. Examples of input devices include keyboards, mice, touch screens, or microphones.

Interface

Part of a computer, program, or peripheral that communicates with other components. Interface also refers to the user interface.

Internet Service Provider (ISP)

An Internet Service Provider, or ISP, is a company that provides access to the Internet. Internet Service Providers will set you up with a user name and password. You can then access the Internet by logging on to the ISP's system using a modem or other connection, such as DSL. Some ISPs, such as America Online, provide their own software for receiving email and browsing the Web. Many provide web hosting and web development services in addition to Internet access. Internet Service Providers are also sometimes called Internet Access Providers.

LAN

A local area network or LAN is a group of computers linked together in the same building or nearby buildings. A LAN enables different users to share files, printers, an Internet connection, a database, applications and other resources. The LAN may have a peer-to-peer or client/server configuration. LANs are becoming increasingly standard in small and large organizations alike.

License

A license grants permission to an individual or group to use a software application. The license is both printed on the box and considered to be in effect as soon as you open the box. It may also show up on one of the early screens when you install the program. In either case, the license dictates restrictions on how the software can be copied, modified, and distributed. Some generally accepted classifications of licenses include proprietary, EULA, freeware, site licenses and copyleft.

Look and Feel

The appearance and function of a program or website's user interface. Look and feel includes such things as the icons used to represent certain functions such as opening and closing files, directories and application programs and changing the size and position of windows; conventions for the meaning of different buttons on a mouse and keys on the keyboard; and the appearance and operation of menus. A user interface with a consistent look and feel is considered by many to be an important factor in the ease of use of a computer system.

Mail Merge

Mail merge is a function in most word processors that allows you to create form letters and address labels. You provide data from a document, spreadsheet or database that lists information like names and addresses. The word processor inputs this data into the form you provide, so you can print individualized letters, reports or other documents to a list of people.

Memory

A temporary storage area for information and applications. RAM, ROM, conventional memory, expanded memory, and extended memory are all different types of memory. RAM and hard disk space should not be confused. RAM is temporary data storage while the hard disk offers semi-permanent storage.

Network

A network is two or more computers connected to each other so they can share resources. The Internet is a "network of networks," whereby anyone -- from an individual at a home with a PC to a large corporate multidepartment system -- can freely and easily exchange information.

ODBC

Open Database Connectivity (ODBC) is a standard or open application programming interface (API) for accessing a database. By using ODBC statements in a program, you can access files in a number of different databases, including Access, dBase, DB2, Excel, and Text. In addition to the ODBC software, a separate module or driver is needed for each database to be accessed. The main proponent and supplier of ODBC programming support is Microsoft.

Off-the-Shelf

Off-the-shelf refers to an existing, standardized database or software package available for purchase, as opposed to a custom-built database or application. Off-the-shelf products for nonprofits include fund accounting, donor management, and client tracking databases.

Open Source

Open source software can be distributed freely and users are free to make changes to the source code and modify (or screw up) the program as they please. Many open source software projects, such as Linux, Apache, and FreeBSD, are the work of a team of individuals from around the world.

Operating System

An operating system, or OS, is the software that manages all the computer's processes and runs applications. Your operating system shows you the desktop and allows you to manage your files. Different operating systems have very different look and feels.

Patch

A patch (sometimes called a "fix") is a quick-repair job for a piece of programming. During a software product's beta distribution or try-out period and later after the product is formally released, problems (called bugs) will almost invariably be found.

Platform

With reference to computers, a platform is an underlying computer system on which application programs can run. On personal computers, Windows 95 and the Macintosh are examples of two different platforms.

Processor

The processor is the brain behind your computer. It is responsible for performing calculations and tasks that make programs work. The faster the processor, the quicker programs can process computations. Processor speed is measured in Megahertz. “Processor,” “Chip” and “CPU” are sometimes used interchangeably.

Proprietary

Most commercial software today is proprietary. Proprietary software generally costs money, and its distribution and modification are prohibited.

Query

A request for information from a database. There are three general methods for posing queries:

- choosing parameters from a menu: In this method, the database system presents a list of parameters from which you can choose. This is perhaps the easiest way to pose a query because the menus guide you, but it is also the least flexible.
- query by example (QBE): In this method, the system presents a blank record and lets you specify the fields and values that define the query (commonly used in FileMaker databases).
- query language: Many database systems require you to make requests for information in the form of a stylized query that must be written in a special *query language*. This is the most complex method because it forces you to learn a specialized language, but it is also the most powerful.

RAM

A fast CPU is useless without an adequate amount of RAM (stands for Random Access Memory). RAM is usually referred to as a computer's "memory" - meaning that it stores information that is used by running programs and applications. More memory lets you run more applications at the same time without degrading your system's performance.

Record

In a database, a record is a set of information that belongs together. A record is made up of different pieces of information, known as fields. For instance, the contact information for one organization would be stored in one record in the database. The fields of that record might include the contact person, phone number, fax and email.

Relational Database, Relational Database Management System (RDMS)

A relational database, or relational database management system, is a database where information is organized in tables. Information in one table can be linked to another table through a field they have in common. For instance, a database might have one table that stores contact information about clients, and another table that stores information about services provided to clients. The two tables would be related so that a user could find out the addresses of all clients who used a certain service. Relational databases are easier to extend than flat-file databases, since it is possible to add a table that stores a new type of information without changing the rest of the database. The standard interface for relational databases is SQL, or Structured Query Language. Microsoft Access is relational, and recent versions of Filemaker have relational capabilities.

Request for Proposal (RFP)

A proposal document submitted to vendors and consultants to solicit bids on a project. An RFP will include a clear description of the scope and requirements for a project. An RFP is best developed out of the project/database planning process using the final database plan as the basis for determining the scope and requirements for the project

Report

A report is a formatted presentation of data or calculated results from a database. When you want to print out information from a database, you generate a report.

Server

A server is a computer that handles requests for data, e-mail, file transfers, and other network services from other computers (i.e., clients).

Service Pack

A service pack is a software update package that might include multiple fixes or patches. For example, Windows NT has several different service packs available for free download which correct errors and extend functionality.

Source Code

The form in which a computer program is written by the programmer. Because of licensing restrictions, users cannot generally access the source code for an application, unless it is designated Open Source. Source code is written in a programming language such as C, C++, Java or Perl.

SQL

An industry-standard language for creating, updating and querying relational database management systems.

SQL Server

Any database management system (DBMS) that can respond to queries from clients formatted in the SQL language.

System Administrator (Sys Admin)

A system administrator is a supreme being who maintains and troubleshoots your computer systems. A system administrator's responsibilities may include supporting and training staff, troubleshooting problems, installing and maintaining hardware and software, managing the network and databases and documenting your technology resources and problems. Depending on the size of your organization and the complexity of your technology, a system administrator's job can range from a few hours per week to full-time.

Technology Plan

A technology plan is a document describing how your organization will use technology to further your mission. A technology plan describes the current technology practices and resources in your organization, and describes how you will upgrade those systems over time to fully meet your needs. The process of technology planning involves assessing your existing resources, defining your needs, and exploring solutions. A successful planning process will draw on management support and the leadership of a technology team made up of a range of staff members to provide input. It will help you budget for technology and make cost-effective purchases. A technology plan is also a key tool to advocate for technology funding.

Uninterruptible Power Supply (UPS)

A backup power unit that provides continuous power when the normal power supply is interrupted. UPS systems can be stand-by (only supplying power when the regular supply is interrupted) or fulltime (relying on regular power and/or batteries for power while it supplies power to the protected device). A UPS is not absolutely necessary on all computer systems, but can be important on systems must run 24 hours a day without any problems generated by power outages.

UNIX

An operating system which features multi-tasking, support for multiple users, and networking capabilities. Unix is the operating system of choice for high-end workstations. By itself, Unix is a system where everything is accomplished by entering commands at the prompt, however many graphical user interfaces exist which can make it easier to use. Many different versions of Unix are available.

User Interface

The aspect of a computer or program that that gives and accepts information. Database screens that allow users to enter in information to a database are examples of user interfaces.

Wizard

An interactive help utility that guides the user through a potentially complex task, such as configuring a PPP driver to work with a new modem. Wizards are often implemented as a sequence of dialog boxes which the user can move forwards and backwards through, filling in the details required. The implication is that the expertise of a human wizard is encapsulated in the software wizard, allowing the average user to perform expertly.

Workstation

A general-purpose computer designed to be used by one person at a time and which offers higher performance than normally found in a personal computer, especially with respect to graphics, processing power and the ability to carry out several tasks at the same time.

Appendix Four: Evaluation

APPENDIX FOUR CONTAINS

- Database Planning Guide Evaluation

Database Planning Guide Evaluation

- What three elements of the guide were the most helpful to your planning process?

- After reviewing this guide did you understand what needed to be included in the database plan?

_____ yes
_____ no

- Will you need a database consultant to help you finish the Database Plan?

_____ yes
_____ no
What kind of help will they provide?

- Do you now know whether you will buy, build or fix your database?

_____ yes
_____ no

- What are your next steps towards developing your database?

- What portions of the guide could be improved? In what way?

- What were the least helpful aspects of the guide?

- What topics do you feel needed more guidance or coverage in the guide?

- Do you feel there are topics that should be added to the guide? If so, which?

- Other comments and suggestions are WELCOME

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