



# **BIRTH, CARE AND FEEDING OF A DATABASE... AND SOME HELPFUL HINTS FOR AILING DATABASES.**

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## INTRODUCTIONS

Kate Schandler is the Principal Consultant and owner of Schandler Database Administration, LLC, a Pittsburgh based consulting firm that works with nonprofits to capitalize on their donor accounting software to increase their donor participation and giving.

Kate has 15 years experience with the Blackbaud suite of products, and has done extensive work with several other database products. Her 15 years experience includes 2 years working for Blackbaud as an Instructor, 18 months working in a healthcare foundation, and 7.5 years working as a Database Administrator in a private school setting. For many of her clients she functions as a part time Database Administrator.



# LIFECYCLE OF A DATABASE

- Why do you need a database?
- How do you find the right database?
  - How to choose a software
  - Available software options
- Plan for implementation!
- How do you keep and feed a database?
  - Importance of Clean Data
  - Important Data to Collect
- What to do when your database gets sick
  - Fix the problem
  - Maintain good health



# WHY DO YOU NEED A DATABASE?

- Data allows you to know your donors and connect with them on an increasingly personal level.
  - Donors can be offended if a non-profit organization is not aware of their information.
- A database allows for centralized, accessible information for all of the people in your organization.
- A database also allows you to focus on and enforce data conventions, ensuring all people in your organization see the same data.
  - This also allows your organization use correct, verified data.



# HOW DO YOU FIND THE RIGHT DATABASE?

- User Needs
  - What do you need it to do?
- Price
  - How much can you spend?
- Internal User Resources
  - Do you have people who can run it?
- User Friendliness
  - Is it easy to use for the users who will be using it?
- Ability to Grow
  - Can you scale up either Donors or Outreach? Is there a cost?
- Internally Hosted vs. Cloud Based
  - Do you have the internal tech resources?
  - Do you need access anywhere?



# TYPES OF SOFTWARE USED TO COLLECT DATA

## Basics

- Types of Databases:
  - Spreadsheets
  - Internally Hosted Databases
  - SaaS databases
    - Software-as-a-Service
  - Online CMS
    - Donor databases wrapped into a website for online donations, participation, etc.

## Software

- Blackbaud: Raiser's Edge, eTapestry, and the CRMs
- Abila Elevate
- Bloomerang
- Salsa Labs CRM
- Several others...



# PLAN FOR IMPLEMENTATION!

- Whatever software you choose, the company behind that software will have an implementation timeline or blueprint.
- **IMPORTANT THINGS TO REMEMBER:**
  - **This will ALWAYS take more time than allowed.**
  - **This will ALWAYS be harder than expected.**
  - **You (and your organization) CAN DO THIS!**
    - **You will be amazed at the rewards after a successful implementation! There is a light at the end of the tunnel!**



# A PLAN FOR IMPLEMENTATION!

- Be your own advocate.
  - Most companies will want you to comply with their software; remember to:
    - Ask the questions as they arise, and get answers!
    - Seek help when you need it.
    - Keep a list of what is important to your organization, on both the personnel side and the data side; make sure all of those items are met.
- Do not forget the training!
  - Training will be the difference between a successful implementation and failure.
    - Happy users are educated users.
    - Continuing training or a plan for re-training is a smart investment.





# KEEPING AND FEEDING: THE IMPORTANCE OF CLEAN DATA

- Clean data is:
  - Tracked in as few places as possible
    - Database as opposed to spreadsheets
  - Accessible to those who need it
    - With the proper security provisions for those users
  - Backed up or otherwise safeguarded.
- Clean data is **NOT**:
  - Duplicated
  - Tracked incorrectly
    - Data conventions are followed and documented.
  - Overly complex
    - “Label” fields should be as succinct as possible.
    - Fields should hold ONE piece of information.



# KEEPING AND FEEDING: IMPORTANT DATA TO COLLECT CORRECTLY AND COMPLETELY

## ○ Biographical Information

- Name (all relevant fields)
- Address, and possible multiple addresses
- Contact numbers, including phone and digital contacts.
- “Label” fields, to track their relationship to you

## ○ Relationship Information

- Biographical Information listed above for those people and groups close to your donor: spouse, employer, adult children, neighbors, etc.
- Your donor’s relationship to those people and groups.
  - This becomes a base for you to begin outreach.



# KEEPING AND FEEDING: IMPORTANT DATA TO COLLECT CORRECTLY AND COMPLETELY

## ○ Gift Information

- Basic Financial information
- Gift Purpose
  - The wider gift usage information
- Acknowledgment information
- Multiple Gifts

## ○ Contact with the Donor Information

- Notes on meetings and phone calls
- Plans for such meetings and phone calls



# KEEPING AND FEEDING: IMPORTANT DATA TO COLLECT CORRECTLY AND COMPLETELY

- Wider possibilities for such information
  - How you solicited them
  - Major Giving plans
  - Gifts made in Honor or Memory of
  - Additional Multimedia files
  - Volunteer participation



# KEEPING AND FEEDING: DATA ENTRY PROCEDURES AND CONVENTIONS

## ○ Data Entry Procedures

- Data will be entered in format dictated by your mission
- Data will be entered routinely
- Data will then be useable and searchable for everyone at your organization.

## ○ Data Conventions

- Data Conventions require all personnel to enter data in agreed upon format
- Allow users to then view and use data that is uniform and easy to understand



# WHEN YOUR DATABASE IS SICK...

- Identify the problem:
  - Duplicate records?
  - Duplicate/ confusing/ incorrect table entries?
  - Inefficient Processes and Procedures?
  - Incorrect or unenforced data conventions?
  - Something else?
- Find help!
  - Is there a dedicated data person on staff?
  - Do you need to hire a consultant?
  - Can the software company help?
- Budget for these issues
  - They will arise, and having funding eliminates stress



# MAINTAINING HEALTH

- The data is clean and healthy!
  - Create written, digital Processes and Procedures to maintain data health.
    - Processes and Procedures should be living documents; digital format makes it easier to update as needed and distribute to staff.
  - Police use of the new Processes and Procedures
    - Set up periodic checkups to ensure new Processes and Procedures are followed; enforce if necessary.
    - This is needed in the early adoption phase; while still important to check, once the new system is adopted there will be significantly less deviations.



## TO FINALIZE

- If you do not have a database, consider getting one.
- Plan for implementation
- Insure that your database is clean and efficient.
  - Also make sure you are tracking the information you wish to track.
  - Create written Policies and Procedures and follow them.
- Seek help when something goes wrong.





# THANK YOU FOR YOUR INTEREST!



If you have any questions,  
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I look forward to speaking with  
you!

