

14 Characteristics of Healthy Database Creation & Upkeep

- 1. Good People + Good Systems = Good Database**

Good system is people who understand the importance of gathering information and of thinking proactively, and who are dedicated to keeping the information up-to-date. Regular data entry and maintenance may significantly change your present organizational procedures.
- 2. Who's In Charge**

If you have fewer than ten staff people, 1-2 persons should input, change or delete information to the database. If more than one person is inputting information, you need to create a category that will track who inputted what. Yet, everyone contributes information.
- 3. Universal Access**

While one person may be in charge of the central database, everyone on staff should have at least limited access to it (to look up phone numbers, generate and print reports, etc.).
- 4. Capture Everyone**

Assess whose information you want to capture and once they call, come to a meeting or event, ask for information, etc. they should be put on the database. Also, it may help to track what projects/programs people are interested in and events they attend. Develop systems that everyone will use to capture this information, and make sure this information is inputted in a timely manner (48 hours).
- 5. Tracking Information (Mapping)**

The value of a database comes from the information that is tracked. Develop your systems of tracking "people" information based on how your staff and leaders want to use information about members, volunteers and potential audiences. The first step in deciding WHAT information you need to track is to find out what you want to do with the database.
- 6. Limit the Number of Databases You Create**

The more databases you have, the messier. In some cases you may need a client/contact database or a donor database. Use the database assessment and plan and try to keep to one database that meets your needs. This will also focus needed training and technical assistance.
- 7. The Information Needed Most**

What information do you need from people now, and what information might you need for the future? Only you can decide what categories of information your organization needs -- just remember that a good database serves all of your organization's parts: program, communications, resource development, volunteer management, etc.
- 8. Be Able to Sort and Search for Information**

A good computerized database allows you to sort and view information in a many ways -- members in a certain zip code, event attendance, donor contributions.
- 9. Frequently Update**

Always give many opportunities for the database to be updated - staff members should review it periodically to make sure information is correct, a well-connected community leader could review a portion of it to make sure everyone who should be on it is, etc.

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10. **Keep Design Ownership In-house**

The person(s) who is going to use the database most (input information, run reports for other staff, etc.) should be involved in the design of your computerized database. If you using an outside consultant, make sure that person trains at least two staff members.

11. **Security**

A computerized database should have security passwords for different levels of use by staff and leaders (for inputting information, for designing screens, for viewing confidential information, etc.). Refrain from having more than one "working" version of your database. Data entry should either occur in one central version, or period file transfer updates should be scheduled if for instance, field organizes are populating their individual version and need to upload it to the central office computer once a month.

12. **Backup Your Information**

If your database is computerized, backup the database at least twice a week. Keep these backup copies in a safe place.

13. **Removing Someone from the Database**

In most cases, you should never remove someone from your database, even if that person requests it; instead, create a category that notes people who do not want to be contacted, or those who are deceased or otherwise inactive.

14. **The better the report that a database generates, the more demands you will receive for additional reports.**

Be prepared for the success of your data tracking and reporting system (in fact, plan for it!) to lead to more tracking and reporting needs. In fact, staff members who may not understand the value of the database will upon seeing the kinds of reports it can generate.