

Database assessment and planning is a process to ensure that your database serves the goals of your work instead of making your work harder. To use your database well, you need to answer several key questions:

- **Use** - What do you want your database to be able to do?
- **Information** - What information do you need to track and about whom?
- **Hardware and software**--What program and computers do you need?
- **Training** -What training do staff and members need to use the database?
- **Repair** - How do you fix it when it breaks?
- **Data collection and Maintenance** - How to collect information & who keeps database up to date?
- **Cost** - How much does it cost you to use your database in your work?

Below are suggested steps to assist you in developing a strong database that serves the needs of your work. Many organizations plan differently. Use the following steps as a to develop a planning process that fits your organization.

I) Develop a planning structure

Most organizations need to develop a simple structure to be sure the planning work is complete and involves a range of different perspectives. This can be a committee, a small group of staff or one staff person who gets input from many people in the organization and then shares the draft of a plan with others.

II) Conduct an assessment

Most organizations use some form of an information collection system or database. Some are often files in word processing or spread sheet programs to collect basic contact information. Other complex database systems track thousands of individual donors, funders, members, media contacts, membership data, events, voting histories, etc . . .

To begin your planning process, you need to assess what you currently use. The following are some questions to help you evaluate your current information collection system or database. Large or complex organizations may want to augment these questions. These questions reflect the main categories of information you need to use a database effectively mentioned above:

Use

- What do you use your database to do?
- Can people do what they need to do?
- What do you want your database to do that it cannot do?
- What are the most common reports or outputs you need from your database? (labels, membership reports, etc. . .)
- Are the necessary staff able to use the database?

Information

- What information do you currently track about whom?
- Is that information sufficient? Do you need to be tracking other things you currently do not?

- Do you have more than one database?

Hardware and software

- What software or database program do you use?
- Do all of your computers support the current software?
- Does the database easily give you the reports and information you need?

Training

- Do you currently train staff on your database software?
- Do all the people that need training have access to that training?
- What is your current method for training?

Repair

- When your database stops working, how do fix it?
- Is the repair process difficult?

Data collection and maintenance

- How do you collect information that goes into your database? Is it sufficient?
- Do you need to identify other data collection strategies?
- How is the database maintained?

Cost

- How much does it currently cost you to use your database over a year? (Do not forget software upgrades, cost of training, repairs, etc . . .)

III) Information mapping

Once you get a clear sense of how effective your current database is, the next step is to map your information needs. It is the key to identifying who/what categories you want to track and what information you need to know about them.

- a) Break your organization into definable categories that make sense to you like administration, membership, communications/media, research, campaigns, etc . . .
- b) Ask the following question of each category:
 - Who/what is it important for you to track? (Who are your main audiences/institutional partners/important constituents?)
 - What do you need to know about them to best accomplish your work?
- c) Prioritize your information map based on the priorities of your work and capacity.
- d) Use the map to shape the database by giving it to the database developer (staff or consultant).

IV) Identify skilled technical assistance

Identify a skilled staff person or consultant. This person should be able to bring an organizing and technology perspective to the work. They will help complete the plan and should then be able to help develop or revise the actual database. Often a skilled technology consultant, if you can identify one, is the best route to take if they are willing to take your lead about what you need.

IV) Creating the plan

This is the heart of the database planning process. Use your assessment and information mapping as the base to determine how you want to design and use your database. Now you will need to use those to guide your work with the skilled technical assistance provider to answer these questions:

- **Use**—What do you want your database to be able to do?
- **Hardware and software**—What program and computers do you need?
- **Training**—What training do staff and members need to use the database and how will they get it?
- **Repair**—How do you fix it when it breaks?
- **Data collection and Maintenance**—How to collect information & who keeps database up to date?
- **Cost**—How much will it cost you to use your database in your work?

6) Develop implementation steps

Once you complete the assessment and the plan, you need to identify a time line and budget for creating the database you want. It should also clearly layout who is going to do what.

Things you will need to create a database plan

- **Commitment**—Be sure staff and leaders are committed to creating a better database. The assessment, planning and then the hassle of creating a new database are significant, so it is important folks are ready to stick with it.
- **Time**—Depending on the scope of the database, this planning can take at least 40 hours to complete if not longer. It makes sense to give one staff person the responsibility of coordinating the database planning process, but recognize that others will need to be involved.
- **Expertise**--If you will be building your own database, the 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.
- **Resources**—It clearly takes funding to take the time to create the database plan, hire a consultant, purchase any needed software and equipment and then ensure its proper operation. The actual costs depend on the scope of the database itself and while expensive, they should not be astronomical.