

Low Cost Databases for Nonprofits

The Idealware and N-TEN Software Review Series

February 2007

~ In partnership with ~

Leland Design

lelanddesign.com

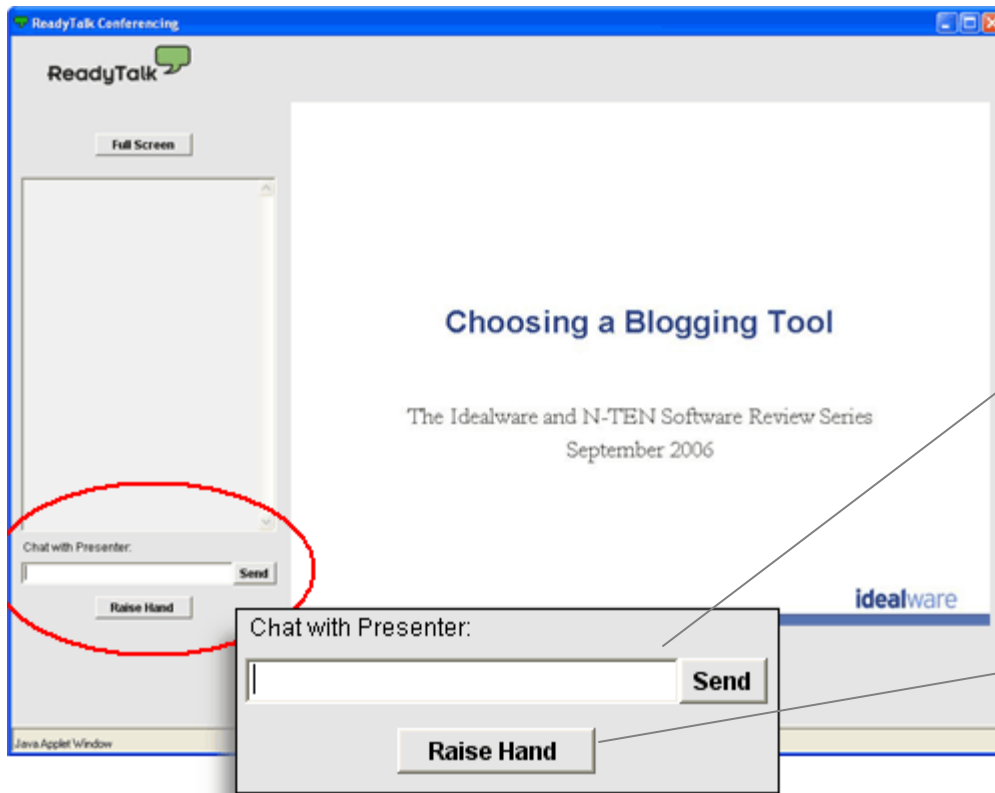
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What We'll Cover

- Managing Information
- Database Planning
- Recommended Tools

Logistics

Ask questions! Otherwise I'm speaking to a black hole!

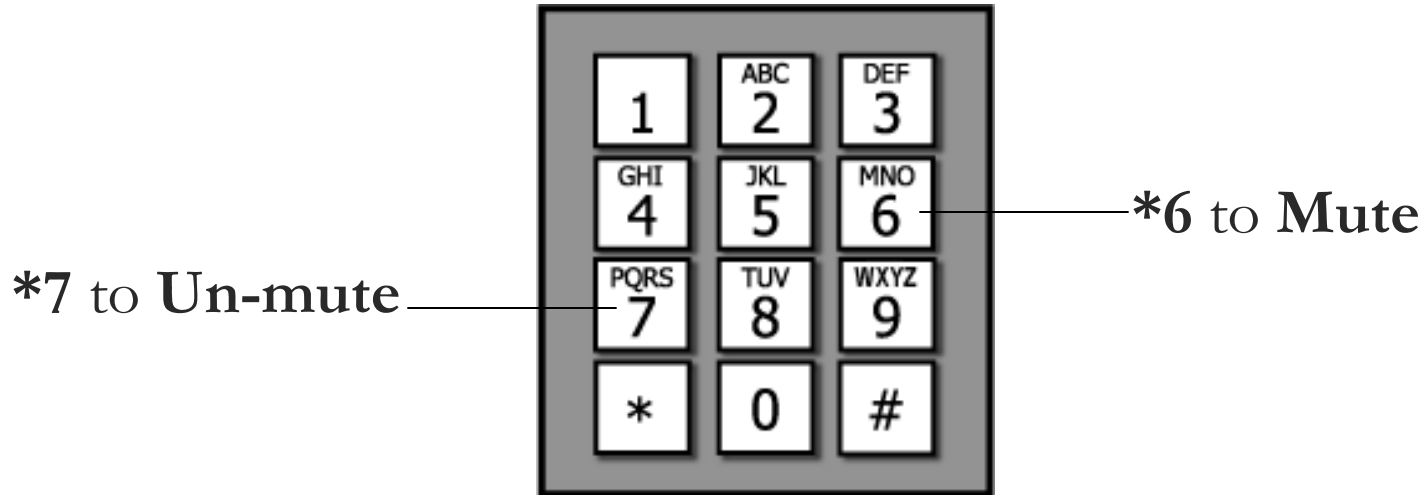


Enter questions into the **Chat with Presenter** box

Use the **Raise Hand** button

Logistics

I'll be doing some wholesale muting and unmuting, but you can do it yourself as well.



Introductions



Eric Leland

Director

Leland Design

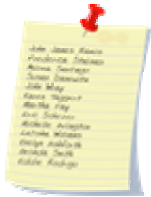
lelanddesign.com

eric@lelanddesign.com

Me!

Databases should be easy

A database is an...



Organized

alphabetically, numerically, hierarchically, relationally, date order, etc

Body

File Cabinet, Rolodex, Shoebox, Inbox, Computer Program



Of Related Information

Not apples and oranges, unless you are a grocer.

**So why do we hate
databases?**

Argg! My database ...



Is Disorganized

can't filter or group information, inconsistent input, data not trustworthy

Has a Shoddy Body

too big/small, breaks down, hard to use, too many places to look



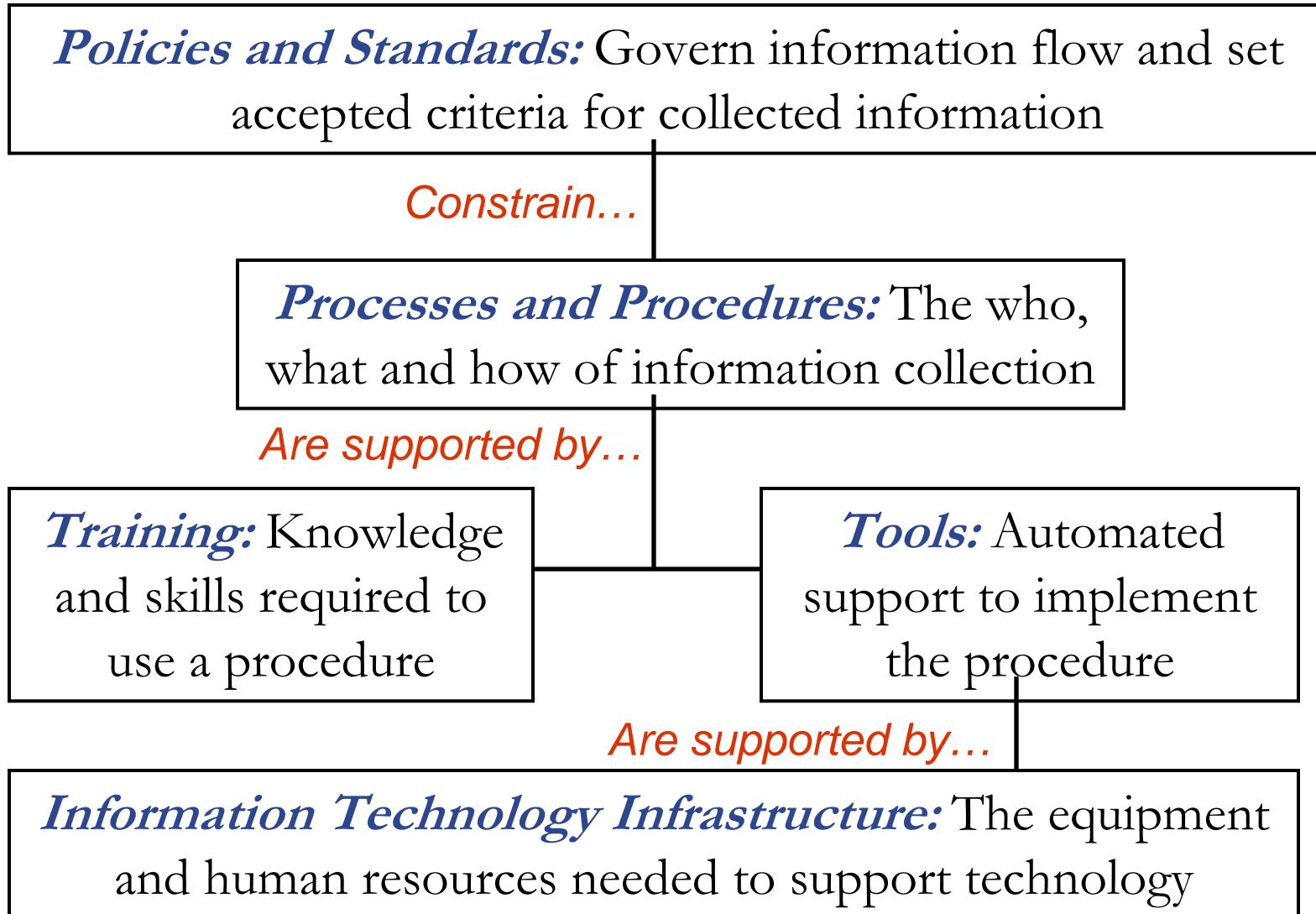
Contains Unrelated Information

related data disconnected, difficult comparison & analysis.



**Share your database
horror stories!**

Fit and Sociable Information



**So what do nonprofits
track in their databases?**

Power to the People

Nonprofits manage
information about
people



- **Donors:** individual, corporate, foundation
- **Members:** Levels, profile, interests, demographics
- **Volunteers:** Skills, interests, availability.
- **Clients:** Personal histories, needs, demographics
- **Supporters:** Roles, affiliation, resources
- **Service Providers:** Skills, services offered, contracts

People's contact information
is often the core

Working with People

Nonprofits manage information about their **interactions** with people



- **Donations:** \$ and in-kind gifts, pledges, dues, sponsorships, time
- **Participation:** Conferences, workshops, advocacy, surveys, memberships
- **Subscriptions:** Enewsletters, publications
- **Services:** Counseling, referrals, consulting, facilitations, trainings
- **Governance:** Board, planning roles, advisors

Activity involvement links to people

Managing the Office

Nonprofits manage information about their **internal business processes**

- **Inventory:** Hardware, software, publications
- **Human Resources:** Staff, payroll, benefits, consultants, access and security
- **Accounting:** Cash flow, budgets, timesheets
- **Project Management:** Project participants, roles, objectives, tasks, milestones.



Critical internal work for many nonprofits

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**Ok now my brain hurts.
How do I know what I
need?**

You Need: A Plan

- **More, Faster, Better:** What will the new database do for you?
- **Resources:** What \$, technology and staffing support do you have?
- **Discovery:** How do you do your work? What are folks griping about?
- **Process:** What steps should you follow to complete your projects?
- **Give and Get:** What information do you need to input and view from each step in your processes?
- **Priorities:** What is most important to accomplish – think “phases”.



~ Key Resource ~

TechSoup Database Planning

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

**I don't have time or
money to plan, I just want
a low cost database...**

You Need: Commitment to Planning



- Planning helps you choose software that more closely matches your needs
- Planning helps you improve your work processes.
- Planning saves you more resources than it costs.
- Planning will increase your lifespan, really it will...

*Please, just plan, ok?
Promise?*

**Ok I promise to plan, so
tell me about inexpensive
databases!**

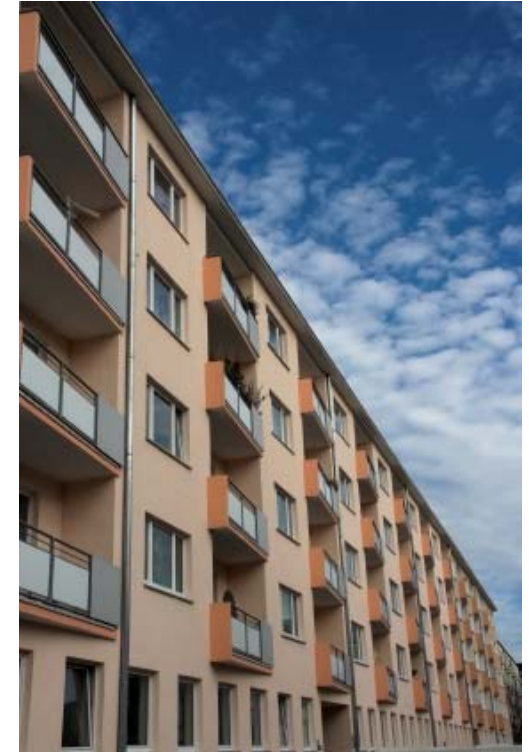
When inexpensive means “cheap”

- There is no documentation.
- You cannot demo it.
- There is no evidence that anyone else uses it.
- Everyone who does use it hates it.
- Nobody is supporting its continued growth and development.
- It does not meet the needs in your database plan.



Databases are like homes

- **Rent-a-DB:** Online databases. No installation required. Runs through your web browser. Someone else keeps it running. You are one apartment in the building, renovations are limited.
- **Buy-a-DB:** You install it. Could be locally installed or online. You keep it running. Its your house, on your land, but renovations are still limited.
- **Build-a-DB:** You build and install it. Could be locally installed or online. You keep it running. Its your house, on your land, unlimited renovations are possible. **COSTLY.**



Be Strategic: A Database for What?



Remember your priorities:

Inexpensive databases are often specialized to support particular work processes, such as contact management, fundraising, events, etc.

Use Existing Working Tools:

Sometimes Excel, Word, even a notebook is a fine solution.

Fancy Databases <> Better.

A Few Good Database Tools

GiftWorks: How does it stack up?

- **Specialties:** Donors, Contacts, Volunteers
- **Installation:** Local “Buy-a-DB”
- **Start-up Time:** Fast
- **Platform:** PC only
- **Base Cost:** \$299 per license
- **Vendor Support:** Optional
- **Online User Community:** Yes
- **Intuitiveness:** High
- **Flexibility:** Moderate
- **Url:** missionresearch.com



GiftWorks: A Glimpse Inside

The screenshot shows the GiftWorks - Sample Database web application. The interface includes a navigation bar with icons for Back, Forward, Home, Donors, Donations, SmartLists, Mailings, Reports, Settings, and Help. Below this is a green header for the 'DONORS' section with the text 'Maintain your donor relationships with these powerful yet simple tools'. On the left, there are two task lists: 'RELATED TASKS' (Add a Donor, Find a Donor, Add a Task, Add a Note) and 'OTHER TASKS' (View Task Calendar, Manage Donor Groups). A search box for 'Find Donor:' is also present. The main content area is titled 'VIEW AND MANAGE DONORS' and contains instructions on how to view donor details. Below this is a table for 'VIEW RECENTLY ADDED DONORS' with columns for Name, City, State, Phone, Email, Last Donation, and Added On. The table lists four donors: Taylor Foundation, Feed The Nations, McVee, Paul, and Mills, Jennifer. A 'Print' link is available for the table. Below the table, it states 'Total Donors: 115'. At the bottom, there are sections for 'MY FAVORITE SMARTLISTS' (with a 'MANAGE' button) and 'NEW DONORS'. The 'NEW DONORS' section features a bar chart showing the number of new donors for August 2005 (0), September 2005 (112), and October 2005 (3). The footer includes 'Online' and 'Internet Updates' links.

GiftWorks - Sample Database

File Help Make A Suggestion...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

DONORS

Maintain your donor relationships with these powerful yet simple tools

RELATED TASKS

- Add a Donor
- Find a Donor
- Add a Task
- Add a Note

OTHER TASKS

- View Task Calendar
- Manage Donor Groups

Find Donor: [Advanced Search](#)

VIEW AND MANAGE DONORS

Click on the menu arrow just below to select different views of your donors. To see a donor's details, double-click anywhere on that donor's row.

VIEW RECENTLY ADDED DONORS [Print](#)

Name	City, State	Phone	Email	Last Donation	Added On
Taylor Foundation	San Francisco, CA	(415) 673-7900	help@taylor.org		9/23/2005 ...
Feed The Nations	San Francisco, CA	(415) 431-3892			9/22/2005 ...
McVee, Paul	San Francisco, CA				9/22/2005 ...
Mills, Jennifer	San Francisco, CA				9/22/2005 ...

Total Donors: 115

MY FAVORITE SMARTLISTS

- [Open Tasks](#)
- [Unacknowledged Donations](#)
- [All Donations](#)
- [All Individuals](#)
- [All Organizations](#)

NEW DONORS

Month	New Donors
Aug 2005	0
Sep 2005	112
Oct 2005	3

Online

eTapestry: How does it stack up?

- **Specialty:** Donors
- **Installation:** Online “Rent-a-DB”
- **Start-up Time:** Very Fast
- **Platform:** PC, Mac with Internet Connection
- **Base Cost:** 500 constituents free, \$35/month for up to 1000, etc.
- **Vendor Support:** Web Support included, optional support packages available
- **Online User Community:** No
- **Intuitiveness:** High
- **Flexibility:** Low
- **Url:** etapestry.com



eTapestry: A Glimpse Inside

The screenshot shows the eTapestry web application interface. The browser title is "eTapestry - Eric Leland - Leland Design - Microsoft Internet Explorer". The address bar shows the URL: <https://app.etapestry.com/prod/Main.jsp?passwordChanged=true>. The page has a yellow navigation bar with links: [Welcome](#), [Print](#), [Help](#), [Email Support](#), [Site Map](#), and [Logout](#). Below this is the eTapestry logo and tagline: "Revolutionizing the Charity World via Technology and Service". A blue navigation bar contains tabs: [Main](#), [Communicate](#), [Mass Update](#), [Reporting](#), [Manage](#), and [Help](#). Underneath are sub-links: [Find Account](#), [Add Account](#), [Quick Gift Entry](#), [Query](#), [Report/Export](#), [Wizards](#), [My User](#), [Welcome](#), and [Logout](#).

New Account

Tasks

Save And

Roles

Donor Only applicable to the User role?
 Tribute
 User

Login Id
Password
Confirm Password
Login Enabled Until
Time Zone

Name and Recognition

Name
Sort Name
Recognition Name
Recognition Type

Persona Info

Persona
In Effect From to
Address
City
State / Province
Postal Code
Country
Country

Account Name: This field must be completed prior to saving.

Democracy in Action: How does it stack up?

- **Specialty:** Advocacy, Enewsletters, Donors, Content Management.
- **Installation:** Online “Rent-a-DB”
- **Start-up Time:** Average
- **Platform:** PC, Mac with Internet Connection
- **Base Cost:** Min \$500 setup, \$100 monthly
- **Vendor Support:** Web Support included, optional support packages available
- **Online User Community:** Yes
- **Intuitiveness:** Average
- **Flexibility:** High
- **Url:** democracyinaction.org



Democracy in Action: A Glimpse Inside

The screenshot shows a Mozilla Firefox browser window displaying the Democracy in Action Headquarters website. The address bar shows the URL: <http://www.democracyinaction.org/ide/hq/yourList.jsp>. The page title is "Headquarters - Mozilla Firefox".

The website header includes the "democracy in ACTION HEADQUARTERS" logo and navigation links: "Our Nation's Capital", "Home", "FAQ", "Tickets", and "Logout". A secondary navigation bar contains: "Your List", "Email", "Donations", "Reports", "Campaigns", "Media", "Events", "Webinars", "Templates", "Background", "Updates", "Volunteers", and "Configuration".

The main content area is titled "Manage your list of supporters" and features a "Basic Search" section with the following fields:

- Standard search: First Name, Last Name, Email, Phone, Street, City, State, Zip
- Search using: Email (selected), Start with: [text box]
- Search button

Below the basic search is an "Advanced Search" section with a "Create New Query" button.

The "Quick Add" section includes the following fields:

- Title: Select Title
- First Name, Last Name, Email, Phone, Street, Street 2, City, State/Region: Select One, Zip/Postal Code, Organization

On the left side, there are several menu sections:

- Lead Manager**
 - Add Supporter
 - List or Find Supporters
 - Manage Groups
 - Recapitulate
 - Custom Fields
 - Imports
 - All contact history items
 - Unsubscribe
- Queries**
 - Create a new Query
 - Run an existing Query
 - Export Data
- Import Data**
 - Import Supporter List
 - Your Import Status
 - Upload request details
- Add Supporter**
 - First Name, Last Name, Email, Phone
 - Save button
- Lead Modified**
 - Custom item 1305, Contact Item 1304, Custom item 1304, Contact Item 1305, Custom item 1305, Contact Item 1304, Custom item 1304

The Windows taskbar at the bottom shows the Start button and several open applications: "Inbox for elissa@den...", "Mozilla Calendar", "DIA Administration", "Headquarters - Mozill...", and "GettingStartedGuide...". The system clock shows 2:02 PM.

Organizers DB: How does it stack up?

- **Specialty:** Donors, Contacts, Advocacy
- **Installation:** Local, “Buy-a-DB”
- **Start-up Time:** Average
- **Platform:** PC Only
- **Base Cost:** Freeware
- **Vendor Support:** Limited
- **Online User Community:** Yes
- **Intuitiveness:** Low
- **Flexibility:** Low
- **Url:** organizersdb.org



Organizers DB: A Glimpse Inside

The screenshot shows a web application window titled "Parents for Better Schools (odb 1.0.1)". The interface is divided into several sections:

- Left Sidebar:** Contains the title "Parent Organizing Database" and a vertical menu of buttons: "New", "Edit", "Clone", "Advanced Search...", "Copy Emails", "Print...", "New Payment", "New Pledge", "New Note", "View History", "Import/Export", and "Mass Action".
- Search Area:** Features radio buttons for "People" (selected) and "Groups", a search input field containing "Tutone", and a "Search" button. Below this is a text prompt: "Enter last name, partial email, zip code, phone# with dashes, or comma-then-first-name."
- Search Results:** A table with one row:

Jenny Tutone	01841	70 Baker Bridge Road
--------------	-------	----------------------
- Details Panel:** Located at the bottom right, it displays contact information for Jenny Tutone: "Jenny Tutone", "70 Baker Bridge Road", "Lawrence, MA 01841", "h: 617-867-5309", "w: cet", and "cet" with a link to "tutone@tommyheath.com".
- Status:** At the bottom left of the sidebar, it indicates "741 People in the database. Browsing item 1 of 1."

Metrix: How does it stack up?

- **Specialty:** Contacts, Donors
- **Installation:** Local, “Buy-a-DB”
- **Start-up Time:** Slow
- **Platform:** PC Only
- **Base Cost:** Freeware
- **Vendor Support:** Limited
- **Online User Community:** Yes
- **Intuitiveness:** Low
- **Flexibility:** High
- **Url:** metrix.fcny.org



Metrix: A Glimpse Inside

Microsoft Access - [Contact Overview]

File Edit Open Records Tools Window Help

Type a question for help

Contacts Interactions Go To... Filter ... [Un]Delete

Overview information for Mr. Orlando Smith

Prefix Mr. **First Name** Orlando **Middle Name** **Last Name** Smith **Suffix** **Nickname**

Contact # 7859 **Mobile** **Add Time** 12/15/2003 4:24 PM **Do Not Contact**

Location Home **Primary Location?** **Organization**

Address 88 West 128th Street, Apt 5923, New York NY 10012

Country United States **Borough/County**

Phone 212-555-8632 **Fax** **Email** MetrixTest@FCNY.org

Record: 1 of 2

Custom Text **Custom List**

Planned Tasks [Add new...](#)

11/10/2004 9:00 AM Interview for article in the N

Connections [Add new...](#)

[Mr. Bob Dobolina](#) Employee [Edit](#)

Interactions Portal [Add new...](#)

All Volunteer Fundraising Organizational Payments New Tab 6 New Tab 7

Del	Title	Item Amount	Add Date	
	Donor		1/14/2004	>Lorem ipsum dolor sit amet, consectetur adipiscing elit
	Volunteer Assignment		9/8/2004	>Lorem ipsum dolor sit amet, consectetur adipiscing elit
	Volunteer Profile		9/13/2004	>Lorem ipsum dolor sit amet, consectetur adipiscing elit
	Volunteer Availability		9/13/2004	>Lorem ipsum dolor sit amet, consectetur adipiscing elit

Record: 1 of 8

Record: 1 of 50

Notes

SCRL

Salesforce.com: How does it stack up?

- **Specialty:** Contacts, “Modularity”
- **Installation:** Online, “Rent-a-DB”
- **Start-up Time:** Average
- **Platform:** PC, Mac
- **Base Cost:** Free for NPOs up to 10 Licenses
- **Vendor Support:** Limited, optional packages
- **Online User Community:** Yes
- **Intuitiveness:** Low
- **Flexibility:** High
- **Url:** [salesforce.com](https://www.salesforce.com)



Salesforce.com: A Glimpse Inside

The screenshot shows the Salesforce.com user interface. At the top, the browser title is "http://www.salesforce.com - Salesforce Simulation launch page - Microsoft Internet Explorer". The page header includes the Salesforce logo, navigation tabs (Home, Accounts, Contacts, Opportunities, Leads, Reports, Dashboards, Forecasts, Campaigns, Cases, Solutions, Documents, Map Search), and a user profile for "Sales".

The main content area is divided into several sections:

- Admin User at Universal Containers**: Tuesday 13 December 2005
- Interactive Sentences**: A section for managing sentences.
- Calendar**: A calendar view for December 2005. The current date is Friday, 12/16/2005. Events include:
 - 7:00 AM - 8:00 AM [Call: Josh Davies](#)
 - 10:00 AM - 11:00 AM [Send Letter/Quote: Andy Young](#)
 - 2:00 PM - 3:00 PM [Review latest proposal \(Gene Point Office\): Enda Frank](#)Saturday, 12/17/2005 events include:
 - 9:00 AM - 10:00 AM [United Account Review \(Lokahi conf. room\): United Partners](#)
 - 11:00 AM - 12:00 PM [Meeting \(Hyatt Columbus\): Tim Barr](#)
 - 6:00 PM - 7:00 PM [Dinner with Amy and Michael \(Metropolitan Grill\)](#)
- Dashboard**: A section for monitoring system activity. It shows "As of 05/10/2004 11:26".
- Login / Usage**: A bar chart showing usage for 22/09/2...
- System Activity**: A table showing system activity metrics:

Total # Opportunities:	0
Total # Activities:	0

The sidebar on the left contains a "Create" section with a "New..." dropdown, a "Messages and Alerts" section with "NEW EMAIL TEMPLATES" and a "New Product Webinar Invitation", a "Search" section with a search box and "Go!" button, a "Find Documents" section with a search box and "Go!" button, and a "Custom Links" section with a "Home Overview" link.

At the bottom of the page, there is a "FREE TRIAL" button with the text "FREE 30-day trial >".

Other Low-Cost Databases

- **Ebase:** Freeware, similar to Metrix but runs on PC and Mac. Future of the project is uncertain. <http://www.ebase.org>.
- **CiviCRM:** Freeware, and Online “Rent-a-DB”. Half way between Salesforce.com and Democracy in Action. <http://www.civicrm.org>.



**But what about the “Build-a-
Database” option?**

Heed these warnings...

- **Megalodatabasiac Syndrome:** You have all the power when you build, and get to claim credit for all the magnificence, bizarre and downright ugly. Scope small. Don't let the power go to your head!
- **Reinventing the wheel:** Many database problems have already been solved and are available. Research carefully available solutions before developing your own.
- **Beware the Salty Snacks:** Often what seems difficult to build to the average user is simple, and vice versa. Beware of setting expectations too high, making people thirst for too much.



Build-a-Database Tools

- **Microsoft Access / FileMaker Pro:** Easier to learn than most. FileMaker works on Mac & PC, Access is more flexible and and somewhat more complex. Great for locally installed systems.
- **MySQL and Relatives:** More robust, “enterprise” level tools. Requires more sophisticated database skills, higher labor costs. Great for web based database development.
- **DabbleDB.com:** It’s a “Rent-a-DB”, only you build it. Very new, very easy to use. More limited than the other choices.



Questions?

More Online!

See more at www.idealware.org

- **A Few Good Low-Cost Database Tools**
http://www.idealware.org/articles/fgt_low_cost_dbs.php
- **Selecting an Online Donation Tool**
<http://www.idealware.org/donations/intro.php>
- **Idealware Database Articles**
http://www.idealware.org/articles/constituent_databases.php
- **Four Steps to Selecting Donor Management Software**
http://npowerseattle.org/education/resources/donor_toolkit.htm
- **TechSoup Stock: Buy your software here!**
http://www.idealware.org/articles/constituent_databases.php

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