Being Good to Your Database

By Bill Connors, CFRE

What can you consistently do to make your fundraising database an asset rather than a headache? While the following ideas may seem obvious, most organizations do not take the time to do them. Will you?

1. Make absolutely sure your information technology (IT) department is properly backing up the database. This includes testing the backup. Ask your database administrator when was the last time he or she tested a restore of the database backup, and insist it is done quarterly.

2. Enforce good database security. You do not want to read in the newspapers that your organization's data was stolen, and it now must pay for credit reports for your constituents. Make your staff use their own login names and good passwords that cannot be guessed and are not written down anywhere obvious. Make sure your database administrator limits what each person can see and do in the database. Ensure the server with the data is in a locked room with limited access. Do not allow large exports of data to be stored with other files, on laptops or emailed. Also, use technologies more secure than email to send lists to mail houses.

3. Provide training. Your fundraising database is more complex than Microsoft Word or surfing the Internet. There is simply no good alternative to providing your staff with appropriate training to learn how to use your fundraising database properly. It is unreasonable to expect fast and accurate results from staff members who are told to just "read the manual."

4. Require policy and procedure documentation. Put such information in the annual review of your database administrator. Model best practices by participating in conversations about coding and procedures and writing them down as you discuss them. However, do not expect the manual to be written in one large project. Let it grow naturally as new issues arise, but not as "time allows." You need to make the necessary time for policies and documentation. Focus on three areas:

- data entry procedures
- data output processes
- notes on how and why your database has been set up as it has

Do not rewrite the vendor's software manual. Rather, focus on what is specific to your organization's requirements and use. Lastly, while screen shots can be valuable, encourage staff to focus on content, not format.

Note that these items focus more on people than technology. That is how you get your database to perform the best.

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