#SmallsForSmalls

Choosing and implementing a database: tips and toolkit

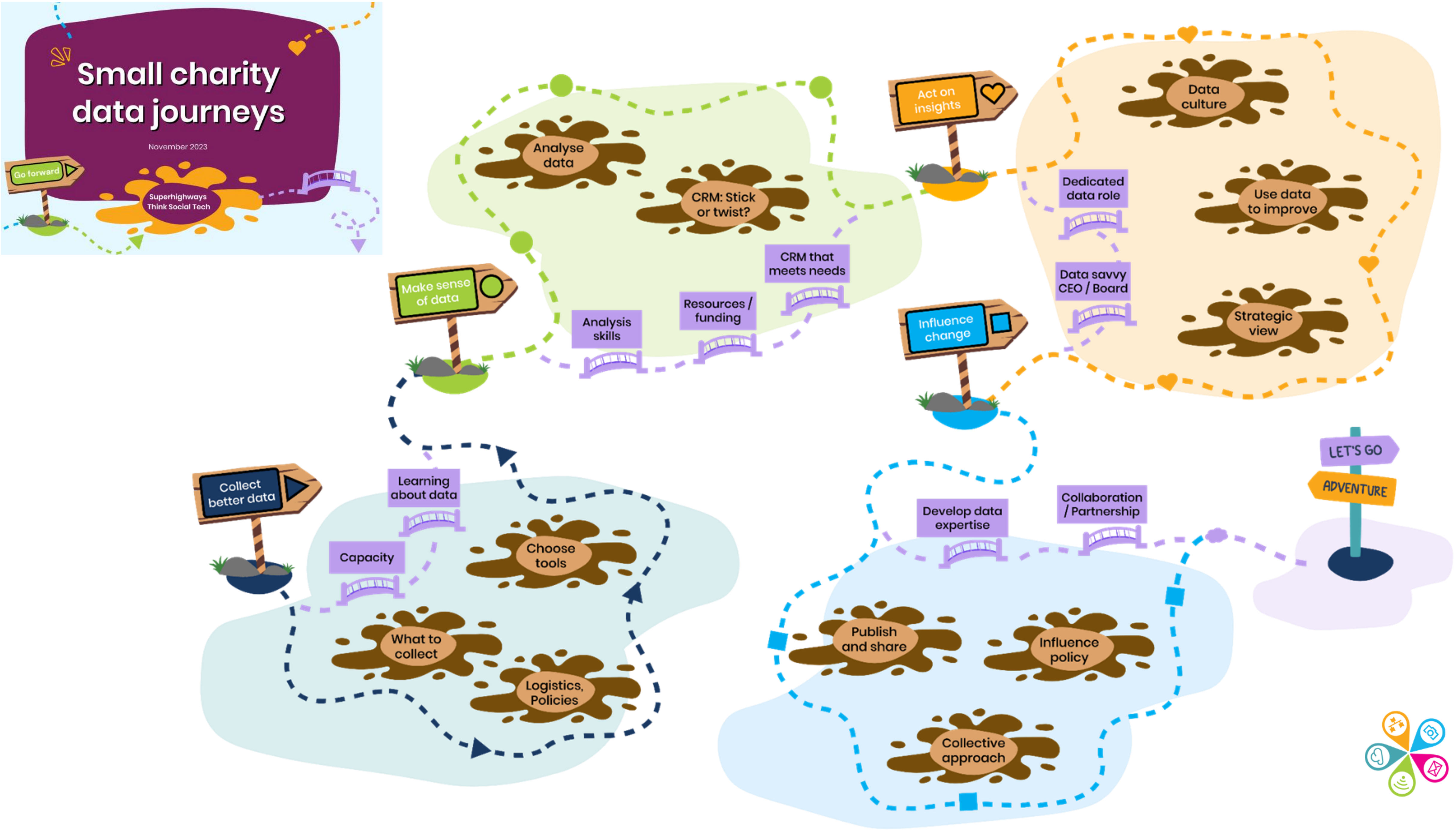
superhighways
harnessing technology for community benefit

What does Superhighways do?

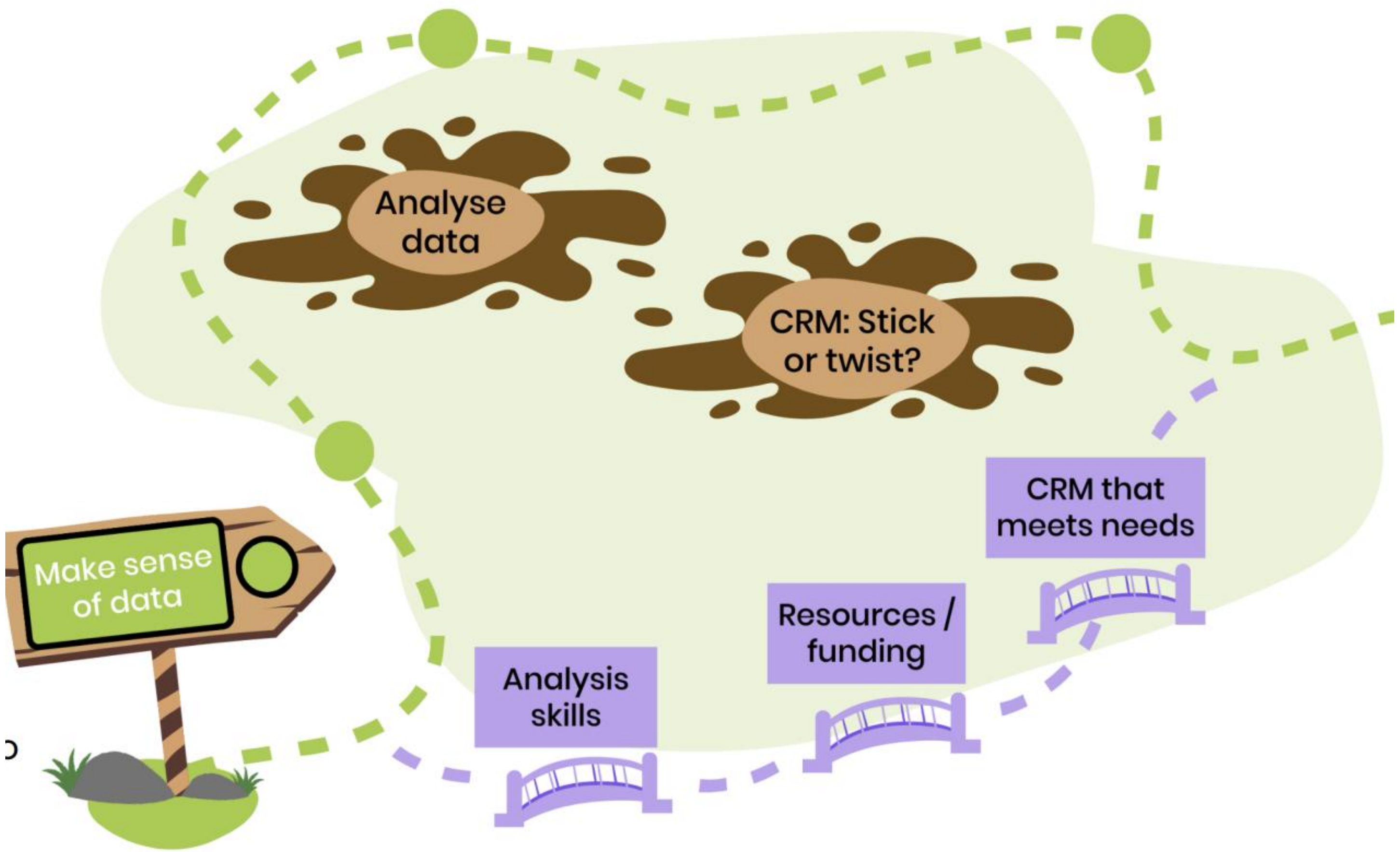
Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.

What we'll be covering today

- ✓ Introducing our 7-step process
- ✓ Tips for bringing your team on the journey
- ✓ Defining functional requirements
- ✓ Database options for smaller charities
- ✓ System set up and customisation
- ✓ Our free resource toolkit with templates, videos and lists of databases



Small charity data journeys
November 2023
Go forward
Superhighways Think Social Tech
Make sense of data
Analyse data
CRM: Stick or twist?
Analysis skills
Resources / funding
CRM that meets needs
Act on insights
Data culture
Dedicated data role
Use data to improve
Data savvy CEO / Board
Strategic view
Influence change
Collect better data
Learning about data
Capacity
Choose tools
What to collect
Logistics, Policies
Develop data expertise
Collaboration / Partnership
Publish and share
Influence policy
Collective approach
LET'S GO
ADVENTURE


Make sense of data
Analyse data
CRM: Stick or twist?
CRM that meets needs
Resources / funding
Analysis skills

What do we mean by a CRM or database?

A CRM is a Customer Relationship Management database

The people you work with

How they engage with you

The impact of that

Why do you need one?

- ✓Single source of truth – everyone always updates and uses data in one place
- ✓Easy to cross reference and report on data
- ✓Data is kept secure & backed up
- ✓Automate repetitive tasks & reduce duplication
- ✓Access permissions – make sure people only see what they need to see
- ✓Audit trail – see who's done what & when

What's your biggest challenge to implementing a new database/CRM?

Our recommended 7 step process

50% of work			10% of work	40% of work		
1. Scope	2. Plan	3. Specify	4. Select	5. Prepare	6. Test & train	7. Implement
Taking stock - what have we currently got?	How are we going to approach it?	What do we need the database to do?	Which database should we choose?	Get everything ready	Put it to the test	Use it everyday
Time & budget Attitude towards change Technical skills Data stakeholders Software & equipment audit Outcome & evaluation framework	Appoint Project lead Timeline Staff & Volunteer buy-in	Mapping data to outcomes Reporting needs User requirements	Explore database options Map how the new database will fit in with your current systems	Database customisation Data clean up and migration User materials New working processes	Testing & fine tuning User training	Full roll-out Ongoing user support Database maintenance Continuous improvement

[Read the blog and access the templates]

1. Scope

Taking stock – what have we currently got?

- ✓ Outcome & evaluation framework
- ✓ Technical skills
- ✓ Data stakeholders
- ✓ Software and equipment audits
- ✓ Time & budget
- ✓ Attitude towards change

Data stakeholder mapping

Who’s going to be using or benefitting from the system?

Staff
- Caseworkers
- HR
- Finance
- Management

Volunteers
- Admin
- Helpline
- Community fundraiser

Trustees
- Board

Beneficiaries
- Young people in residential care
- Young people living at home

Donors
- Casual givers
- Legacy givers
- Individual donors
- Corporate donors

Funders
- Local authority
- Corporate funder
- Community foundation

Partners
- Libraries
- Local Colleges
- Local charities
- Religious groups

Budgeting – costs to consider

- ✓ Database software
- ✓ Additional software
- ✓ Additional hardware
- ✓ Additional infrastructure
- ✓ Customisation
- ✓ Data consolidation
- ✓ Data migration
- ✓ Training materials & process guidelines
- ✓ Training sessions
- ✓ Ongoing improvement
- ✓ Usage and process support
- ✓ Technical support
- ✓ Data management

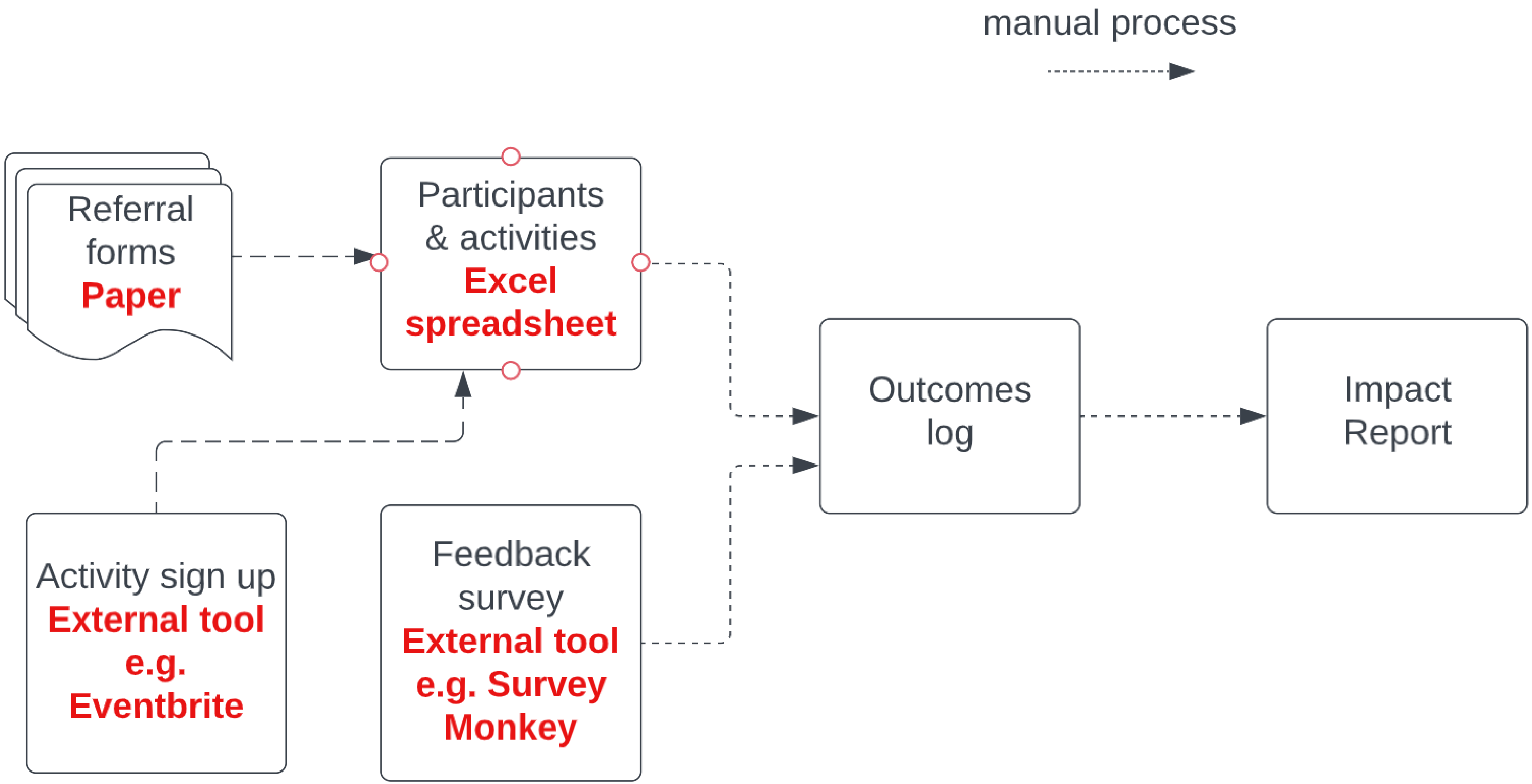
Systems audit template

Download the template with example and use for your org

System name e.g. registration form, member list or client	Application used e.g. Word/ Excel/ Access/ CRM etc	Description of what it's used for including type of data collected / stored e.g. names, attendances, work carried out	Who uses it – are there restrictions as to who can access, modify etc?	Can you produce reports from the 'system'? (as appropriate)	What are the risks/benefits to using this system (for example security, ease of use, etc.)	Are there any challenges / issues you have using this tool or 'system'?	What would make use of this tool / 'system' more effective?
Helpdesk	WebHelpDesk	For our Tech support service. Holds contact details of all our members and other organisations accessing this service. Enables us to log tech support provided - for reference and also monitoring access against support package (used to check service level at annual renewal). Emails to helpdesk@superhighways automatically creates a ticket	Restriction of 5 licences. Tech team + generic tech support.	You can filter different views and produce various reports as pdf or download as CSV	Client data secure	Staff not always updating in real time. Users creating new tickets not adding to existing ones.	Better reporting to track Membership service used. Need to explore further what's possible. Potential automation of invoicing? Would an app on mobile phone be useful for quick updates on the go? Need more licences.
Digital support request form	O365 Form	Collects new digital support requests (non members) Functions as an initial enquiry form with contact details and further information of issue. (Provides more structure information and a reference point in one place than ad hoc emails to different staff)	Sorrel, Kate, Philippa	Form responses create a real time updated Excel spreadsheet. We can then filter etc	Free. Quick and easy to use	Only one person gets alerted when a new response comes in (but nore worked out how to use Powerautomate to alert other emails too)	If this information could be brought together with Helpdesk info and other spreadsheets / Eventbrite data where we've potentially provided other services to that organisation & for easier reporting to funders etc
Training Excel sheet	Excel	Downloaded from Eventbrite for monitoring & evaluation. Links into Power BI for analysis and sharing.	Everyone	In theory everyone but it's tricky to use in Excel as the file is so huge so we've linked it to Power BI so we can share interactive dashboards internally & externally	Free. Quick to set up new templates for new projects/workstreams. Team all have good Excel skills. Data security not watertight. No audit trail.	Not a real time link with Eventbrite so we have to download manually. The high load of training we're doing during Covid is making this a challenge to stay on top of.	A real time link with Eventbrite using Zapier or Microsoft Flow. A centralised database to link the two workstreams together.

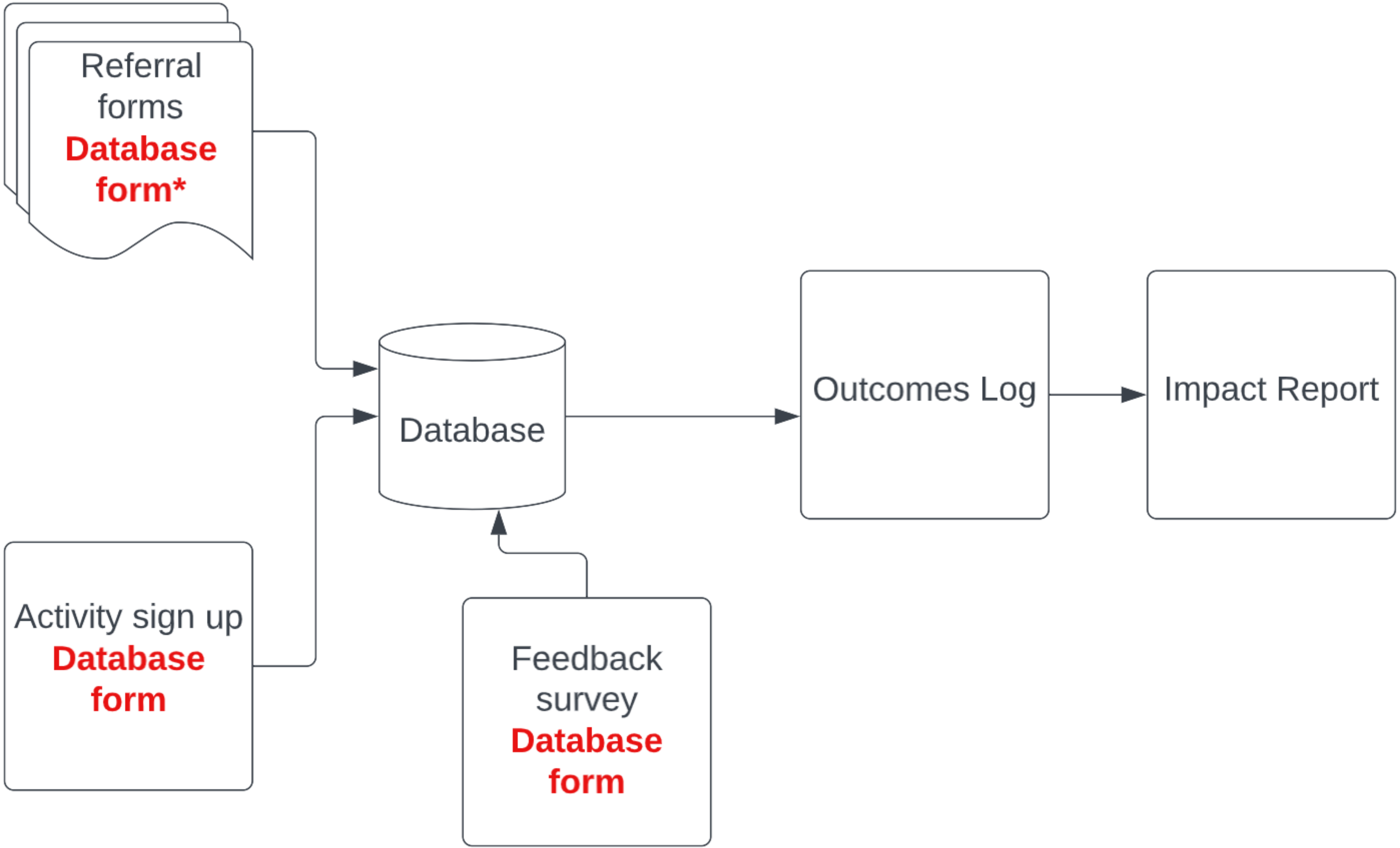
What do you currently use to manage your organisation’s data?

Example of systems BEFORE a database



What better looks like!

Example systems WITH a database



*Database forms can be created in the database and then embedded in your website, accessed via a link you can email or post somewhere, or in some cases via an app on a phone or tablet.

2. Plan

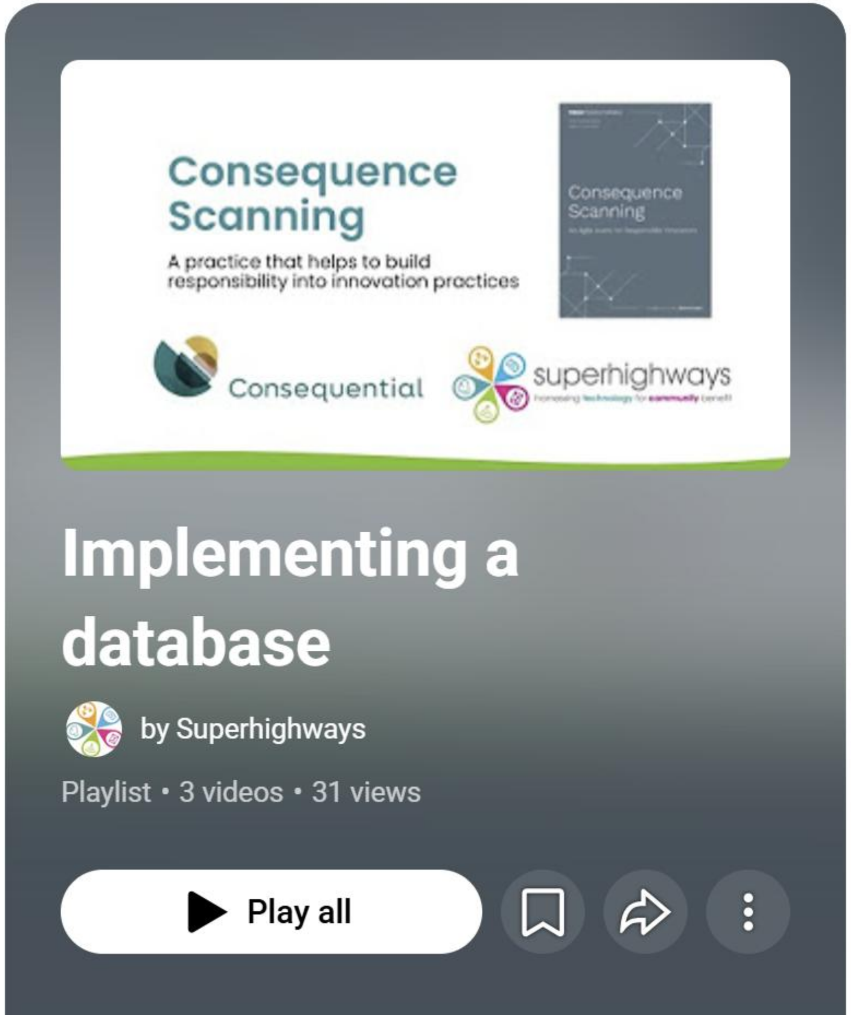
How are we going to approach it?

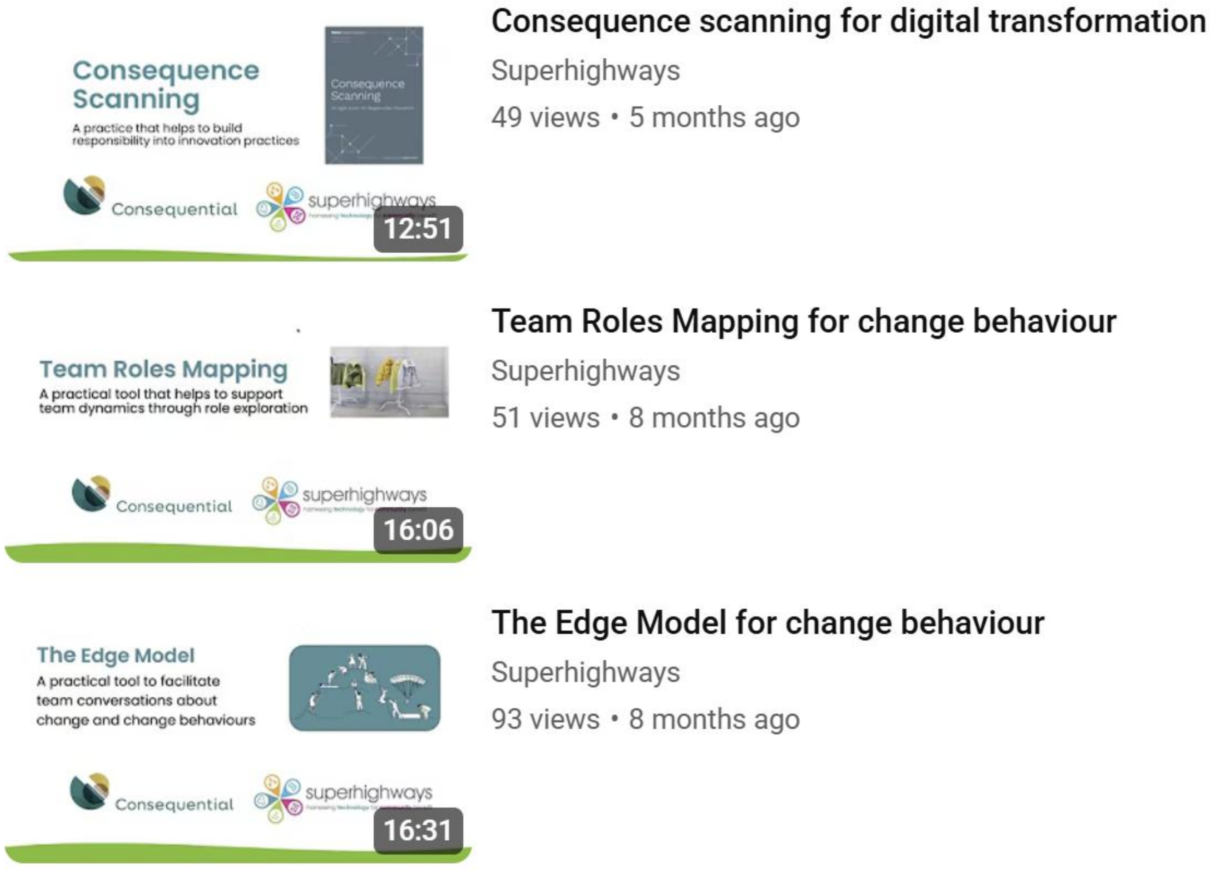
- ✓ Appoint a project lead
- ✓ Timeline & project plan
- ✓ Staff & volunteer buy-in

Help the team ease into change

- ✓ Recognise the potential anxiety and scope of the undertaking
- ✓ Underline the importance of everyone in the process
- ✓ Sell the benefits
- ✓ Uncover and tackle apprehensions early on
- ✓ Crowd source solutions to problems
- ✓ Co-produce & involve everyone at every step
- ✓ Identify and back change agents

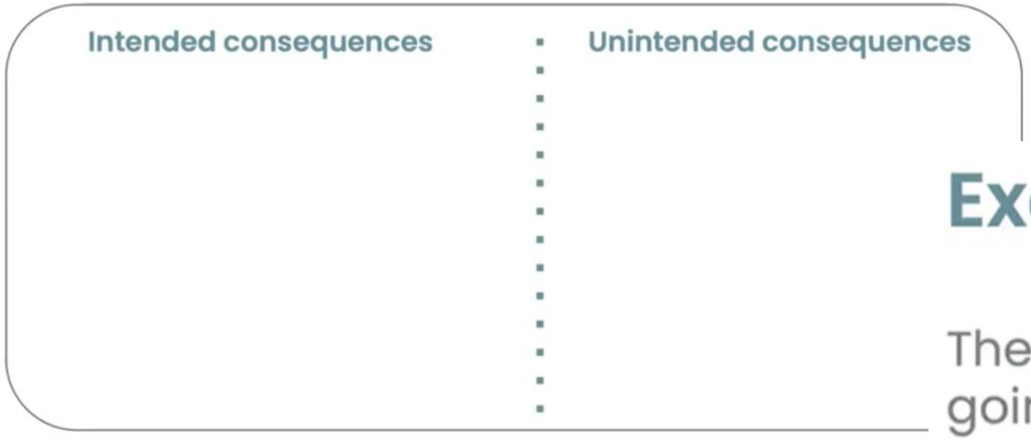
Practical participatory exercises to navigate change and embrace digital transformation





Consequence scanning

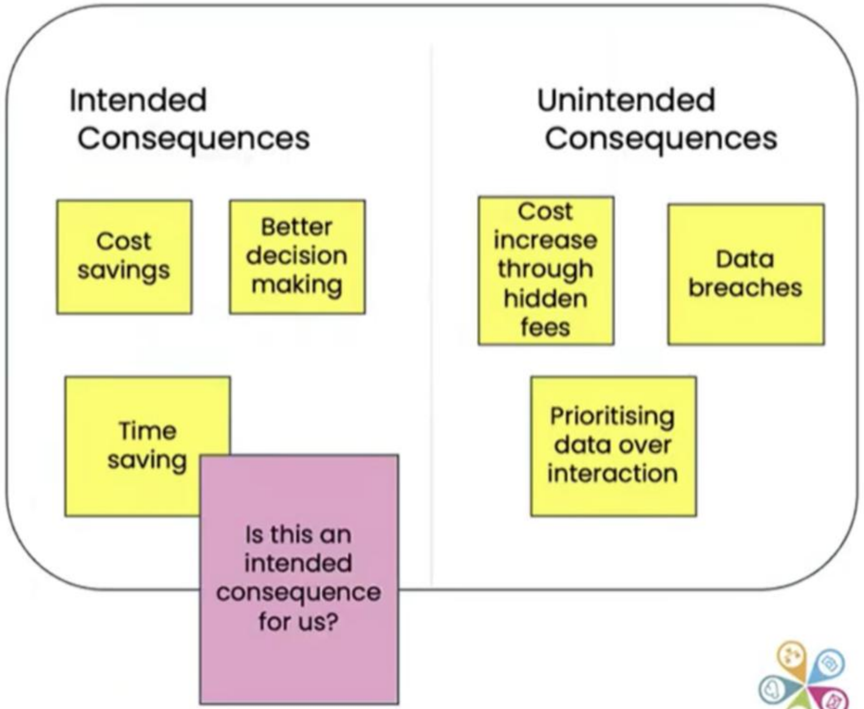
A simple canvas



Example

The focus: We are going to introduce a new CRM system.

What are potential intended and unintended consequences.



Managing change

3. Specify

What do we need the database to do?

- ✓ Mapping data to outcomes
- ✓ Reporting needs
- ✓ User requirements

User stories

As a <type of user> **Who** are we building this for? Who is the user?

I need <some feature> **What** do we need? What is the intention?

So that <some reason> **Why** do we need it? What is the value for the user?

As a Support Worker who organises the food bank deliveries

I need to be able to produce a list of beneficiaries and their requirements for each ward in the borough

So that I can know what & how much is needed to prepare parcels and map addresses for the delivery drivers

Here's some more examples

As the Administrator I need to know when there are spaces on upcoming heritage walks **so that** I can respond to enquiries and allocate spaces

As an Outreach worker I need to be able to record information whilst I'm out and about **so that** I can maximise my time with participants

As a Manager I need to run reports **so that** I can see if we are meeting targets and share our impact with funders

User persona example

Goals:

- Equip young people with the knowledge, skills & contacts they need to get a job

Tasks/Activities:

- Link young people up with mentors to help them on their journey to employment
- Deliver skills training to young people to help them get jobs
- Make sure young people are aware of the opportunities out there

Usage practices:

- Office based but runs skills training sessions community centres across the borough.
- Uses her own personal laptop for external training sessions

Frustrations/pain points/feelings:

- No online database or training material location means lots of prep before & after the sessions
- Reliant on wifi in training centres to get online
- Aware that the current mainly paper based system is wasting time but anxious about upskilling to go 100% online
- Using own laptop so shouldn't really download or store client's data but it's hard to avoid

Identifying functional requirements

Goals:

- Equip young people with the knowledge, skills & contacts they need to get a job

Usage practices:

- Office based but runs skills training sessions community centres across the borough.
- Uses her own personal laptop for external training sessions to access training materials & training lists

Tasks/Activities:

- Link young people up with mentors to help them on their journey to employment
- Follow their progress & measure our impact
- Deliver skills training to young people to help them get jobs
- Make sure young people are aware of the opportunities out there

Frustrations/pain points/feelings:

- No online database or training material location means lots of prep before & after the sessions
- Reliant on wifi in training centres to get online
- Aware that the current mainly paper based system is wasting time but anxious about upskilling to go 100% on line
- Using own laptop so shouldn't really download or store client's data but it's hard to avoid

As a Trainer who links young people with mentors

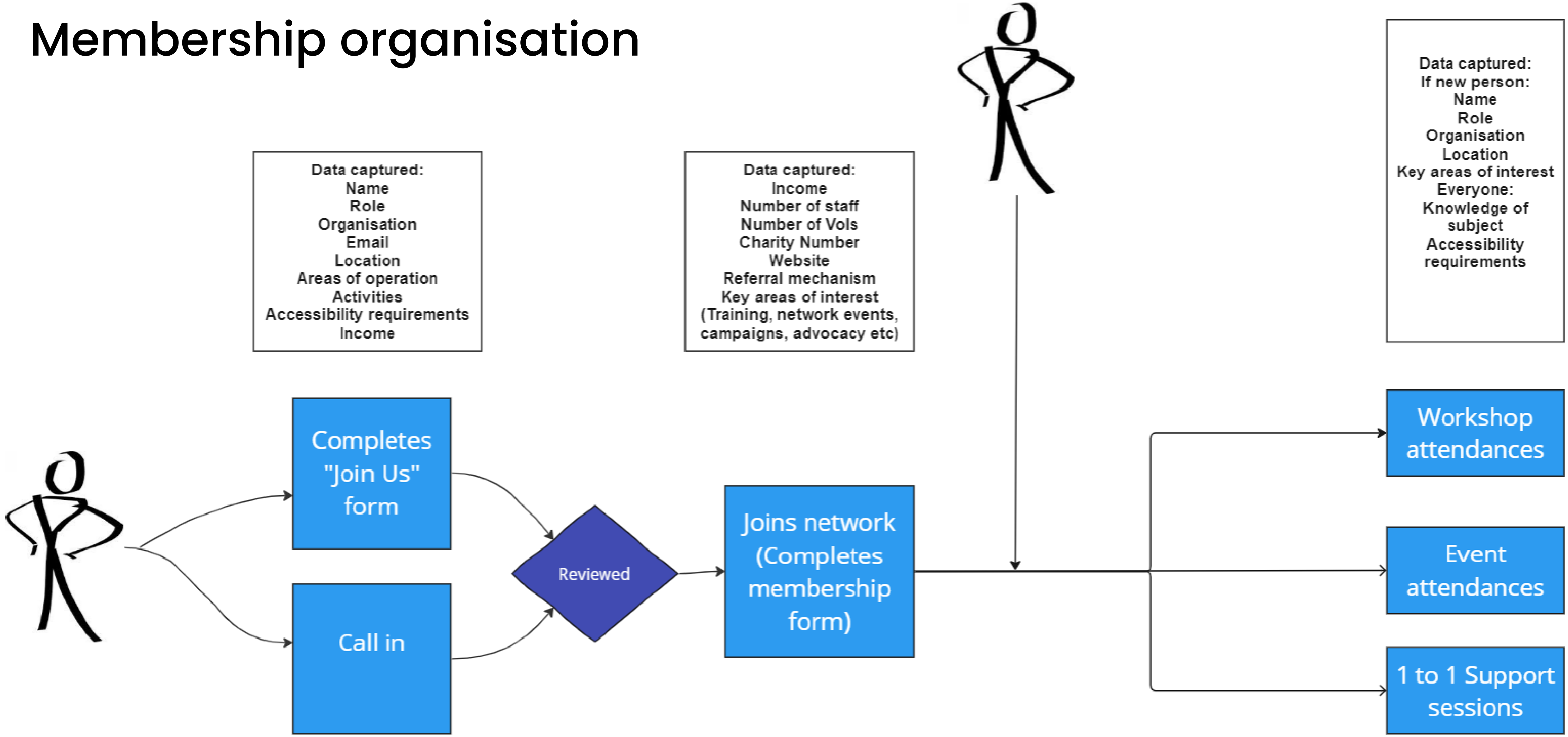
I want to be able **to identify all available mentors, their area of expertise and their location**

So that I can **match appropriate mentors with young people**

The what (Functional requirement)	The why (Justification for requirement)	Stakeholder	Essential	Desirable	Leave & link	Alternative solution	Wishlist
Online access to training materials	To ensure the trainer has the latest version of the training material with them when training externally	Staff-Trainers		Yes		Put on our website in a protected page or on a shared online drive	
Secure online access to check off training session attendance	Online check in for attendees would allow for secure, real time updating of attendance records & keep participant info (name, tel number etc) confidential	Staff - Trainers	Yes				
Offline, mobile access to training materials & attendance lists	To access the training materials when off site in a location without wifi	Staff - Trainers		Yes		Equip staff with Mifi to enable them to get online anywhere	
Feedback surveys to feed into participant records	To ensure mentor & participant feedback surveys are collated in the participant's record	Staff - Trainers	Yes				
Participant progress monitoring	Visual report to measure individuals progress using the participation records &feedback surveys to mentors & participants at start/mid-way & end of the programme	Staff - Trainers and Programme Manager	Yes				
Link mentors to participants	To be able to identify which mentor is assigned to which participant & who is currently unassigned	Staff-Trainers	Yes				
Mapping tool to see the location of mentors and participants	To be able to identify which unassigned mentor is closest placed geographically to participants needing a mentor.	Staff -Trainers		Yes		Export the postcodes to an external mapping tool	
Newsletter mailing	To be able to email out tailored newsletters to participants, mentors & donors				Leave in Mailchimp and link to database?		
Online registration for participants to create provisional database record (approval required for upload)	Enable online self-registration and link directly into our database but ensure we don't end up with duplicate, incomplete or incorrect records	Beneficiaries & Staff	Yes				

Example client journey

Membership organisation



Data dictionary example

Field ID	Field name	Field Type	Description	Example of data	Look up values	Input format	Purpose	Proposed by	Mandatory?
	ID	Auto number	A identification number for each person in the database	145	Not applicable	Automatic number	To ensure each person has a unique id to avoid duplicates	Maya	Yes
1	First name	Text	To record first name	Mary	Not applicable	Short text	Separate from last name so we can create personalised emails	Maya	Yes
2	Last name	Text	To record last name	Jones	Not applicable	Short text		Colin	No
3	Membership start date	Date	To record the start date of each membership	23/02/2021	Not applicable	DD/MM/YY	To trigger renewal reminders & in Funder reporting for yearly membership numbers	Alice	Yes
4	Member?	Lookup	To record if they are a member or not	Yes	See Look up values worksheet	Look up value	For Newsletter distribution & Funder reporting for yearly membership numbers	Alice	Yes
5	Postcode	Geographical Location	To record where a person is based	NW3 1TT	Not applicable	Short text	To see if the membership application is in scope and for reporting (vital if we want to map our user base)	Amira	No
6	Gender	Lookup	To record the gender of the person	Frontline	See Look up values worksheet	Look up value	To identify if we are reaching our target audience	Sorrel	No

4. Select

Which database should we choose?

- ✓ Explore database options
- ✓ Map how the new database will fit in with your current systems

Which database/CRMs are you considering?

Database options fall into 3 categories…

1. The big players: Comprehensive all-rounders

Pros: Comprehensive, organisation-wide database, catering for a large portion of your business needs. Free or low cost entry level.

Cons: Complex systems. Although often "free" they will require extensive paid-for support from a specialist provider if you don't have the skills in-house. They tend to require a larger organisational shift with extensive training before they fulfil their potential.

Examples:

- ✓ Salesforce
- ✓ Microsoft Dynamics
- ✓ Civi CRM

2. Off the shelf all-rounder: Customise & configure

Pros: Great understanding of the charity sector - you'll feel well understood when describing your needs. There's no middle person - you'll be dealing directly with the database provider themselves.

Cons: Some user interfaces might be dated, so there could be limitations like not being great on mobile devices. There's likely to be greater upfront costs for these systems, but this isn't necessarily negative as you'll benefit from hands on knowledgeable support and functionality upgrades.

Examples:

- ✓ Simply Connect
- ✓ Lamplight
- ✓ Views
- ✓ Charity Log
- ✓ Beacon
- ✓ Plinth (formally Time to spare)
- ✓ Aide CRM
- ✓ Advice Pro
- ✓ Upshot
- ✓ Cimpl

3. Build your own (no code/low code)

Pros: Full flexibility to build a bespoke database that suits your unique ways of working and data collection / analysis needs. Drag and drop tools mean you don't need to be a computer programmer to create a database. Prices are relatively low because you're doing all the work! But, it's possible to get simple databases can be up and running in hours.

Cons: Sizeable learning curve and you'll need skills, time and commitment in-house to build these yourself. Or pay for support. You also may be building something from scratch when something already exists that will fulfil 80% of your needs

Examples: Airtable Knack Zoho Creator

5. Prepare

Get everything ready

- ✓ Database customisation
- ✓ Data clean up & migration
- ✓ User materials
- ✓ New working processes

Data clean up & migration process

Beforehand

- ✓ Clearly plan timelines so there's no confusion which system people should update
- ✓ Establish data retention rules – what's your policy on how long data should be kept for?
- ✓ Export all data from your current systems to review and assess what's needed to clean it up
- ✓ Map data from the old system fields to the new CRM fields
- ✓ If possible, run a test migration on a small subset of data to check your mapping is working

On the big day….

- ✓ Export data from your current system(s)
- ✓ Bring together in a single place
- ✓ Remove data outside of your data retention period
- ✓ Check for errors, gaps and duplicates in your data
- ✓ Migrate & test
- ✓ Staff & Volunteer user testing – they'll know best of all if the data is looking right

6. Test & Train

Putting it to the test

- ✓ Testing & Fine tuning
- ✓ User training

Turning user stories into test scripts

As the **Administrator** **I need** to know when there are spaces on upcoming heritage walks **so that** I can respond to enquiries and allocate spaces

Test script: Administrator - Heritage Walk availability check

Test objective:

Ensure the Administrator can view heritage walk availability and respond to enquiries/referrals effectively

Test scenario

The Administrator checks availability of upcoming heritage walks and uses this information to handle user enquiries and referrals.

Step	Action	Expected result	Worked?	Comments
1	Log in with Administrator credentials and navigate to the heritage walks section.	Upcoming walks and availability are displayed.	Yes	
2	Review the list of walks and check which ones have available spaces or are full.	Walks with open slots and full status are clearly shown.		
3	Allocate a space for a walk with available space to a test person (use an email you can check)	Referral is recorded and availability updates correctly.		
4	Notify the person of their admission onto the walk	Automatic email sent to the test person & received		

7. Implement

Use it everyday

- ✓ Full roll out
- ✓ Ongoing user support
- ✓ Database maintenance
- ✓ Continuous improvement

Where else to get help?!

- ✓ Our choosing and implementing a CRM resource - includes templates for each step of the process and explanations of how to use them
- ✓ Superhighways - for data and digital training (London charities only)
- ✓ CITA – includes a mentoring programme to help charities wanting to rethink their systems
- ✓ Clothworkers Foundation: funding includes databases – see their digital infrastructure guidance
- ✓ Check Funder plus opportunities e.g. Lloyds Bank Foundation has a CRM preparedness offer
- ✓ IT for Charities Database guide
- ✓ Data Orchard – a data support agency

Any questions?

Thanks for listening & stay in touch

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eNews sign up

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