

An Introduction to Databases for Grassroots Organizing



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Today we'll talk about

- What is data?
- Why might I want a database?
- Demo a database
- How to pick a database
- How to make sure your database is a success

Understanding Your Data

- Data = information (any and all of it!)
 - Basic contact & demographic info
 - Donor history
 - Program participation
 - Event attendance
 - Volunteer history
 - Mass communications
 - Individual interactions

Where Does Your Data Live?

- Most organizations keep data in multiple places.
 - Spreadsheets
 - Databases
 - Online tools
 - Paper
 - Personal systems (esp. e-mail!)
- Multiple tools & systems can be okay if they're intentional, efficient, and talk to each other. But that's usually not the case!

How Data Disarray Hurts Organizations

- Non-digitized = unsearchable, destined for loss or destruction
- Personal = unshared, inconsistent, loss is likely
- Silos = isolated data, fragmented knowledge
- Synchronization nightmare
- No standardization
- Training hurdles
- Cost of upkeep

Wrangling Your Data

- Consistent data collection
- Consistent data entry
- Data sharing and integration
- Centralized data storage

What is a Database?

- A **database** is a repository or container for information, often indexed or searchable.
- A **database platform** is the tool used to create your database's structure, enter data, search data, and extract data.
 - Common platforms: Microsoft Access, Filemaker Pro

What is CRM?

- **Constituent Relationship Management** (system, software, platform, tool)
- “CRM is the **set of processes** and supporting technologies used to acquire, retain, and enhance the relationships with all different constituent groups who interact with an organization.”
- CRM is the “**organizational strategy** that defines the processes and methods you use to interact with your constituents”

What Can CRMs Do?

- Store much (or even all!) of your data
 - Basic contact & demographic info
 - Individual interactions & activities
 - Mass communications (e-mail, texting, postal mailings)
 - Program & activity participation
 - Membership management
 - Leadership & engagement development
 - Event management
 - Volunteer history & coordination
 - Donation management
 - Resource booking/management

What Can CRMs Do?

- Keep data **centralized, organized, and searchable**
- Track **relationships**
 - relationships between your organization & your contacts
 - Relationships between your contacts
- **Share and export data** for use elsewhere (since one tool usually doesn't do it all)

What Can CRMs Do?

- CRMs can help give you the **full 360° view** of your constituents & contacts
 - Understand the full relationship that contacts have to your organization
 - Individual activities that appear small when examined alone can add up to substantial engagement
 - Identify and track opportunities for deeper engagement and leadership development

Do I want/need a database?

- It's almost impossible to scale past a certain point without one – but not everyone is in a position to take advantage of one.
- We'll talk about how to decide when it's the right choice for you.

Choosing and Implementing a CRM



How much is this going to cost?

- It depends! (we'll talk real numbers shortly!)
- Three major costs: Software cost, implementation cost, ongoing cost
- Implementation depends on YOU:
 - Custom training & documentation
 - How many features & functions?
 - Out-of-the-box or highly customized?
 - How much data?
 - How dirty is your data?
 - Really, how much dirty data?

How much is this going to cost?

- Ongoing costs vary.
- Some places will give you an “all in one” quote.
- Some will break out various services – hosting, support, training all priced separately.
- Most (not all) CRMs will charge more for more users, more contacts, or additional features.
- Some are priced as a subscription: If you stop paying, you lose access. Others are priced so you don't get updates/support, but you keep what you have.

How much is this going to cost?

- “0.25%- 0.5% of your annual budget on a solid constituent management system. If you have a \$500K annual budget, this would mean devoting \$1250 to \$2500 per year”
- “A smaller or new organization with standard needs... can get started with [CRM] for between \$5,000 and \$15,000. Depending on the complexity of processes & the amount of data, larger organizations can spend from \$30,000 up to hundreds of thousands of dollars on suites.”
- Cheap, fast, good: pick any two!

Some CRM software

- Salesforce (w/ Nonprofit Starter Pack)
 - Many other nonprofit CRMs built on Salesforce (inc. Sphere, Luminare)
- Salsa, Nationbuilder (more eAdvocacy focused)
- DonorPerfect, e-Tapestry (donation mgmt)
- CiviCRM
 - Open source – and our favorite!
 - PowerBase: specific build for community organizations
- Check out the Idealware report for more.

Demo Time

- Individual Records
- Donation/Event pages
- Workflows

Using a CRM to its full potential: Segmentation

Divide your contacts into various groups, or segments.

- Common segments: Most important issue, geographical location, major donors, etc.
- “I want to send an e-mail to everyone ages 14-24 in Brooklyn interested in LGBT issues and/or filmmaking”
- Segments can be tied to user permissions – hide high-profile contacts from summer interns

Specific Workflows: Community Organizing

Goal: Maximize turnout to events/meetings

- Assign an organizer to be responsible for a group of contacts
- Any time you call someone, you log an activity for them, and register them for an event.
- Later, run a report on folks who have committed to attend. Call again, and record that you followed up. Repeat as necessary.
- After the event, run reports to check turnout rates and conversion rates (participation in future activities) per organizer

Specific Workflows: Phone Banking

Goal: Conduct a survey of your members

- Search for your members
- Run a phone bank report
- Collect your results
- Analyze your results

Specific Workflows: Grasroots Fundraising

Goal: Build your sustaining (recurring) donors

- Use searches to identify groups of donors who are likely to respond
- Track personal contacts – make sure no one's slipped through the cracks
- Automate mailings to thank and appreciate donors
- Track your progress using reports and dashboards

Steps for CRM Implementation

- Stop thinking about the tech!
 - Think about your needs before you try to identify or choose the tools that will meet them.
- Who helps with your existing tech?
 - Your internal tech-savvy staff
 - Board members, volunteers
 - Aspiration Technology
 - Movement-based consultants

CRMs are mostly the same!

- About 80% of the functionality is identical from CRM to CRM
- The last 20% is crucial and dependent on your organization's specific needs; we'll give you information to help you make the right choice.

CiviCRM/Powerbase

- As a community organizing group, your “last 20%” is organizing-specific functionality.
- Phone banking, surveys, walklists, engagement index, e-advocacy, grassroots fundraising
- PTP and Palante believe there's nothing comparable to CiviCRM/Powerbase for community organizing-specific functionality.
- Decide what's a best fit for your organization.

Steps for CRM Implementation

- Identify organizational & programmatic needs
 - Types of constituents & contacts
 - Info about constituents
 - Organizational activities & processes
 - Reporting (including grant reporting)
 - Future growth & needs over time

Steps for CRM Implementation

- Assess your current data situation
 - What data will need to be imported, from where?
 - Data cleaning & standardization
 - What data will need to be entered manually?
 - Who will enter it? When?
 - What other systems need to be integrated?
 - Other DBs that you need or want to stick with
 - Mailing & e-advocacy tools
 - Websites/Content Management Systems

Steps for CRM Implementation

- Assess your resources
 - Budget (both initial and ongoing)
 - Timeline
 - Internal time and energy
 - During implementation – building the tool
 - After implementation – using the tool
 - Internal tech skills & comfort levels
 - Ongoing IT staffing or support

Steps for CRM Implementation

- Evaluate and choose a suitable CRM
 - Read up online
 - Talk to similar/allied organizations about their tools & consultants
 - Get help
 - Consultants (assessment & planning, choosing a tool, and/or implementation)
 - Nonprofit tech organizations & experts
 - Funders & technical assistance providers
 - Write an RFP (with or without naming the software you want)

Criteria for Choosing a CRM

- Features & functionality
- Online vs offline
- Internal organizational capacity
- User-friendliness
- Widespread community adoption
- Availability & suitable avenues of support & services
- Privacy & security
- Cost!

Criteria for Choosing a CRM

- Integration with other tools (APIs)
- Easy data export & migration
- “...open data ... can sometimes be more important to consider than whether or not a tool is open source – since integration with other tools, as well as using external tools of various sorts is critical. Closed data systems, difficult to integrate systems, or systems that require payment to get access to your data should be avoided at all cost.”

What If You Can't Afford It?

- Standardize
- Consolidate
- Take advantage of free tools
- Think ahead!

Why CRM projects fail

- Lack of organizational buy-in
- Not devoting staff resources to the project, e.g. to test the CRM as it develops, identify important features, clarify needed workflows, etc.
- Not budgeting for ongoing support/maintenance

Integrating CRM Into Your Work

- Using CRM should be a practice that is integrated into your organizational culture.
- Prioritize ongoing training & documentation.
- Create clear guidelines & systems for collecting, standardizing, and entering data.

Integrating CRM Into Your Work

- Work with vendors that understand your work & organization & think beyond tech.
- As your organization grows & changes, so should your CRM. Reassess & revise!
- Don't take too much on all at once. Use systems, tools, consultants that let you start small and grow over time.

Resources

- View slides & resource guide on web and download PDF:
 - <http://palantetech.coop/resources/crm-2014>
 - We'll email you this link! Also on handout.
- Contact us
 - <http://palantetech.coop>
 - jon@palantetech.coop