The Database Matrix

How finding your match will deepen engagement with your supporters.

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How do you have a meaningful relationship with 1000, or 10,000 people? Ten years ago, I was asking myself this question knowing that there had to be a better way than sifting through the folder of Excel spreadsheets that listed my organization's supporters. I dreaded this task. Besides being labour intensive, mining data from spreadsheets is at best a challenge and does not support identifying ways to better communicate with the people who wanted to support our work. Back then, I wish I knew what I do now: there is a better way.

Finding the right suite of database tools (often referred to as a contact management systems, or CMS) won't only save you time and grief, but also can be a powerful way to deepen your organization's impact by allowing you to engage, authentically and consistently, with more people in specific and targeted ways.

At the heart of every good engagement program is a philosophy of relationship building. If we want to grow our list of supporters and deepen the ways our supporters get behind our work, then we need to make sure that they know, and are inspired by, what we are about. But, relationships go two ways. So, we have to learn what our supporters are about too: why they are inspired by our work and what mutual goals we share.

We do relationship building every day in our personal lives -- with other parents at our kids' bus stop, with co-workers in the lunchroom, with family at reunions. Information about these relationships is stored in our brain. This is called social cognition--a process by which our brain creates a framework to understand and categorize our different relationships. This framework, largely unconscious, allows us to make judgments and determines how we interact with the people in our lives. Relationship-building is a fundamental aspect of what it means to be human. But, for those of us who work in fields where we regularly foster and build multiple relationships, our brains can quickly become overwhelmed by keeping track of them all.

Enter databases. When our brains are weary, a good database can help take a load off. Not only can it manage the relationships any one person in the organization is developing, it can manage the relationships that all of your staff - and in many cases volunteers - are developing. Organizations that are managing, learning from and developing these relationships inherently run more efficient, targeted and ultimately successful engagement programs. Why? Because they are building meaningful relationships with a constantly growing base of supporters -- with 10s of 1000s of supporters.

Why Use a Database Anyway?
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I just got a new e-book in my inbox about how to measure success. The email professed that “the best run service companies know how to measure success. The first step is understanding the data that is driving your business.” This is wholly true for non-profits as well--and your database will help you get there.

Setting up your database for success starts with your [theory of change](). An engagement-based theory of change may read something like this: if 10,000 people in our community support (in name, as donors and as volunteers) our efforts for monitoring local water quality, then we will be able to effectively measure the health of all our local waters and advance efforts to eliminate threats because we need community members to help us understand and take action for the health of our waters.

In this theory of change, we have embedded assumptions, for example, that engaging 10,000 people will lead to specific outcomes. Often, we base the whole of our work on assumptions about what we think will be effective in addressing any given issue. We certainly could be more confident in our work if we had some evidence that our assumptions are accurate. Fortunately, databases can help us to validate assumptions such as the one above, for example by tracking our supporters and their level of engagement with our organization’s work. Using the above example of a goal of 10,000 people engaged, a database would allow us to track this number at its aggregate level, i.e. the total number of people engaged. But it also allows us to break down that number in a variety of different ways-- for example, how many of that 10,000 have donated to our organization, how many have signed a petition, how many are volunteers supporting on-the-ground activities et cetera. We can then start to test whether our theory of change holds true. Are we really achieving the change we want to see and are our engagement activities supporting that change?

Let’s walk through this again, with a practical example. The Canadian Freshwater Alliance is currently running a campaign in BC to strengthen the implementation of the new Water Sustainability Act. Our theory of change for the initiative is: if we engage 10,000 British Columbians to support stronger freshwater protections in the province, then we will get an Act that is better equipped to protect freshwater systems, adequately resourced and effectively implemented. We believe this will happen because government is responsive to its constituency, and is more likely to prioritize spending and allocate resources to the issues that are most important to the residents of the province--and we think that 10,000 British Columbians is a “critical mass” of constituents that can elevate freshwater protection as a top issue of government. Similar to our fictitious example above, the engagement assumption in this theory of change is the 10,000 person tipping point.

But how do we know if 10,000 is enough? We test it.

Back to that email I got in my inbox: the best run non-profits know how to measure success and the first step is understanding the data that is driving our engagement.

So, what does all this have to do with a good database again? Your database can, at any given moment, tell you:

- how many people you have engaged;
- how deeply you have engaged them; and
- What strategies have worked best to engage them.

This information alongside an analysis of impact of that engagement (e.g. did we get the change we were looking for?) enables you to test the assumptions of your engagement programs, learn from them (it's not often just numbers but strategies) and in many cases revise them. For example, maybe we engaged 10,000 people, but are still not getting the change we want to see. Or, maybe we got the change we wanted to see with less people engaged? Both of these outcomes merit reflection and analysis about what happened and why, and from there we can revise our strategies accordingly.

Therefore, a good database helps you to foster relationships with an increasing number of people *and* engage those people in ways that make sense for them. A good database will also allow you track the impact of that engagement, as it relates to your overall theory of change.

Now that we've explored the need and value of a good database, how do you go about choosing one?

Choosing the Right Database for your Engagement Programs

Hands down, the most frequent question that I get asked is "what is the best database"?

It's a question that I continue to struggle to respond to. The answer depends on a number of key criteria such as the engagement priorities of your organization; if and how the database connects to other systems (e.g. financial systems); and how much capacity your organization has to manage, customize and fully integrate the system.

There are a number of database tools out there. It does not take long to become completely overwhelmed by the suite of options. However, after nearly a decade of paying close attention to the database conversation, I have begun to notice a few trends in systems groups are choosing. To help break it down, I have grouped the type of organizations that I have worked with, and alongside, into four general categories, or personas, and matched databases to which these organization types seem to migrate to.

Group Persona	Engagement Priorities / Capacities	Case Study	Database Trends
The Organizer	**Engagement High** - Continuously seeking ways to identify and engage more supporters, the success of which is tied to their organizational theory of change. **High Capacity** - Significant capacity to manage and customize database solutions.	ECOLOGY OTTAWA ECOLOGIE OTTAWA	NationBuilder, Salesforce (customized), Salsa Labs
The Member/Donor Developer	**Engagement Moderate** - Engagement important to organization but is not inherently critical to their organizational theory of change. **High Capacity** - Significant capacity to	Bruce Trail CONSERVANCY	Raiser's Edge, Salesforce (customized), GiftWorks, Sumac

	manage and customize database solutions.		
The Grassroots Group	**Engagement High** - Continuously seeking ways to identify and engage increasing numbers of supporters, the success of which is tied to their organizational theory of change. **Low to No Staff Capacity** - little capacity for management beyond volunteers and/or part-time staff.		NationBuilder, Salesforce (free version)
The Stewardship Group	**Engagement Moderate** - Engagement important to organization but is not inherently critical to their organizational theory of change. **Low to No Staff Capacity** - little capacity for management beyond volunteers and/or part-time staff.		Mailchimp, Excel

Through this analysis, it has emerged that the vast majority of database systems are best tailored for mid to high capacity organizations, leaving little option for the low to no capacity groups. Organizations with robust membership and donor systems - and where mobilization is not a priority to a theory of change - seem to migrate to Raiser's Edge or similar systems, which require a greater degree of capacity to manage. A customized Salesforce system is also a common choice, particularly with organizations with greater capacity and where engagement is central to programs and activities.

Database options are limited for lower capacity organizations -- i.e. those with 1-3 staff members or those run by volunteers. For many of those lower capacity teams, NationBuilder has become the database of choice. It is cost-effective and combines website hosting and management alongside contact management. NationBuilder has also integrates some unique toolsets (their goals and pathways tools for example), which allow users to integrate and track their engagement pyramid. This makes it one of the more robust tools for organizations where mobilization and engagement tracking are of utmost importance.

What to do before making a decision on your new database?

Rarely is a database met with 100% satisfaction from its users or from any one organization. Those with the highest contentment tend to be high capacity organizations who have the resources and ability to customize systems to best fit their needs.

5-Steps for choosing a new contacts database

Determine needs
Assess and shortlist options
Test finalists
Choose and transition
Stick with it

Even with such capacity, it is important to carefully consider your organization's needs and assess which systems will most support those needs. The matrix depicted above only describes trends based on engagement and capacity, but there may be other factors at play that could affect your choice. Ultimately, the right database for your organization can only be determined by your organization's culture, needs and engagement priorities.

The Nature Trust of New Brunswick (NTNB) recently decided that in order to scale up their engagement and communications efforts, they were going to need to shift from the outdated system they were using--a hodgepodge of programs to track donors, volunteers, and contacts. They wanted a system that would fit all their needs, communicate with their financial program, and be accessible to all staff across the organization. They were also working toward scaling up engagement in a key program areas, and wanted to track that engagement more effectively.

This process for the NTNB began by conducting a thorough audit of their communications, contacts management and engagement needs. The review had input across the organization including from staff and key volunteers. It created a criteria list, or needs assessment, for what they needed in a Contacts Management System. This helped them define what their core needs were and how they could prioritize databases based on their ability to meet those needs.

In total, they assessed 12 systems (see a summary of their review here) and eventually narrowed down the candidates to three finalists: Salesforce, NationBuilder and Raiser's Edge. In the end, they opted for Salesforce due to its flexibility and ability to be customized to fit their needs. They also had the good fortune of a very supportive Salesforce team in New Brunswick that offered some fantastic training and onboarding support at minimal cost.

The NTNB's review is one of the more thorough that I've seen. It represents an example of an organization taking this decision very seriously and covering its bases to ensure they make the best decision for their organization. Databases are an investment and when they are functioning well, they can make for a much smoother day-to-day operation.

Setting up for Success: Integration, Staff Buy-in, Training.

Once you've done a review and determined the system that is best for you, take some time and plan your transition. Have you ever heard of a renovation job running on time and on budget? Well, it could be said that database transitions (or renovations) are similar. They take longer, and could cost more (depending on your needs) then you had anticipated.

The Bruce Trail Conservancy recently planned a major transition to better align their member, donor and engagement activities. In particular, they were in need of a system that could handle sophisticated donor relations but wanted also to sync this system with leading edge digital engagement tools. They had organizational capacity to commit to overseeing the transition. When they decided to transition to Raiser's Edge they embarked on a year-long journey to organize, migrate, test and integrate their data.

Their transition started in 2014/15 when a subgroup of staff compared three systems - Salesforce, Raiser's Edge and Donor Perfect. After testing and reviewing their shortlist, they opted for Raiser's Edge, compelled by its status as an industry leader in donor relations. Further, the system's new partnership with Luminate Online offered the combined 'all-in-one-box' solution they were seeking.

Raiser's Edge has long been a favored system in the development and fundraising world. Though recently has fallen behind on offering tools for digital engagement many organizations were starting to seek. To fill this gap, Blackbaud is combining two systems that, in theory, work seamlessly together: Raiser's Edge filling the donor, member needs; and Luminate Online offering the engagement solutions with mass mailing, online forms etc with seamless interaction with their contacts management tool.

Over a year after making the decision to transition, the Bruce Trail Conservancy is now live with Raiser's Edge. This means that all supporter lists are now live. However, their hopes that the database could provide an 'all-in-one-box' solution were, unfortunately, not fully met with the new system. The Conservancy has specific and sophisticated needs for their list segmentation, and some of the functionality they were hoping for (with respect to memberships and product sales) proved too complicated for Raiser's Edge. In the end, they customized a back-end solution to deliver the information they needed, and synced their database using an online tool "ImportOmatic."

Their suite of solutions now looks something like the following: Raiser's Edge is their central database containing all records for contacts. An online back-end solution exists on brucetrail.org for membership purchases, member logins, and e-commerce sales of Bruce Trail gear and products, synced to Raiser's Edge via ImportOmatic. Luminate Online will be used for online donation forms and digital communication tools (such as mass email tools). Synching of Luminate Online and Raiser's Edge also required a third party Omatic solution since the built-in Luminate Online / Raiser's Edge Integration tool was not robust enough

The transition to a new system, for the Bruce Trail Conservancy, was not without its challenges. Migrating and converting data from their old system into Raiser's Edge was producing errors and took some time and capacity to work out. Despite its marketing as a combined solution, getting Luminate Online and Raiser's Edge to talk to each other also proved challenging. Ensuring ample time and patience to overcome these challenges with data transition and integration was essential for the Bruce Trail Conservancy.

The Bruce Trail Conservancy case study gives us a few lessons that can help us guide our transitions to new database solutions:

1. Migrating to a new system takes time. Ensure you leave a sufficient amount of time to set up and test your new database before you launch it.
2. When you have sophisticated engagement modules, a certain degree of customization is going to be needed. When offered a ‘package’ solution by a vendor, ensure that they fully comprehend the needs of your organization, which may differ from other organizations in unique ways.
3. When working with separate products (even those offered by the same vendor), ensure that they truly integrate in the ways that your organization requires. Checking in with other organizations, ideally most aligned with your own, can be a good test on marketing messages of database companies.
4. Learning new systems take time. Allow for sufficient staff training in your transition time.

But we are volunteer run with little capacity - what do we do?

There is no doubt that contact management systems are geared towards staffed organizations--or at the very least, organizations with capacity to manage systems. But there are affordable solutions (and even free solutions) that can offer the volunteer organization a better system for managing and engaging growing lists of supporters. Salesforce offers a free system for charitable organizations that will give you basic features for contacts management and engagement. MailChimp, designed to enable mass e-communications, has tools to help you organize your lists (segmenting) and measure how engaged your supporters are. Google Docs and other cloud-based tools can help you share contact spreadsheets with others in your organization, which can enable better workflow when it comes to engaging supporter bases.

OneCowichan and Wellington Water Watchers are two grassroots initiatives that have chosen NationBuilder to support their engagement activities. Both organizations have part time staff but are run by teams of committed volunteers. For Wellington Water Watchers, the adoption of the suite of tools offered by NationBuilder has taken some time. At first, they simply used it as a tool for tracking supporters, sending emails and collecting donations. In 2016, their campaign hit new heights as they won a significant victory in Ontario with a provincial commitment to review water taking policies in the province. The victory meant they had a two year window to build a supporter base that would be sufficient to both influence this review and become the first province to end water bottling practices altogether - the latter being their ultimate goal. They had to kick their engagement efforts to new levels. NationBuilder proved to be an effective mechanism to undertake this work. They trained themselves and their key volunteers on how to use NationBuilder’s different tools, they began tracking engagement pathways, they explored using NationBuilder’s text messaging features to sustain engagement of their growing younger supporter base. After several years of only using the platform’s basic features, they were more readily able to capitalize on a period of growth customizing messages to supporters and better driving engagement of their growing list.

The Wellington Water Watchers example is one that offers an important lesson for other largely volunteer run organizations. It may seem like learning and adopting a database tool is a lot of effort. It may even seem like you are not using your tool to its utmost capacity. But, in building familiarity with a tool and getting your core team used to its functionality when the time comes to scale up, you are ready and not trying to adopt a new tool at this time.

However, NationBuilder does take capacity to run, and for volunteer-based organizations, dedicating precious time to managing NationBuilder might not be the best allocation of resources. Fortunately, an increasing number of mass mailing systems have emerged as affordable - and sometimes even free - avenues for managing contacts. MailChimp offers some perks, such as allowing users to segment contacts according to specific criteria. It is also free up to 2000 emailable contacts. As an engagement tool, it quickly becomes limited as engagement efforts deepen. For example, as a database, it doesn't allow you to track easy multiple points of engagement for any given contact, it's limited in its ability to track donors nor is it designed to manage volunteer engagement and management.

A large number of groups still use Excel spreadsheets to manage, sort and organize contacts list. This has gotten easier with cloud computing as tools like Google Sheets that allow these sheets to be shared and managed by a number of people. Though maybe a workable solution for only a few hundred contacts, spreadsheets leave far too much room for error and often take more time and effort to manage than mass mailers like MailChimp. I strongly recommend that even the smallest groups who have supporters they want to communicate with should migrate to contacts solutions that will allow them to better track and manage supporters.

Your database and communication workflows

No matter what suite of systems you use, and quite possibly for the volunteer organization especially, investing time in charting out your workflows for engagement will go a long way to getting you ready to invest in database solutions. Truly effective use of database systems is all about triggering workflows - who communicates what to who, when and to what effect? And this is true whether you are volunteer or highly staffed. No matter what system you have, or where you want to go, spend some time thinking about these workflows can help your engagement tremendously.

To determine these workflows start to map how a supporter is channeled through your organization. First you get a name and contact for a supporter - where and how does that get tracked? Then that supporter gets contacted by your group - is this an email, a phone call or a text message? Who is responsible for this follow-up and within what given timeline? What happens next? Are they grouped into a mass mailing list which channels future communications? Do they get a 'welcome series' which helps orient them to your work? Are they asked to attend a future event, become a volunteer or to donate to your efforts? If so when and how does this engagement take place?

Hopefully, you can now start to see how charting these workflows can help you understand 'how' you engage your supporters. The more you understand your own organization's workflows can help you define how you use your CMS tools most effectively. It can, in some cases, also help define which CMS is best for your group by examining how (or if) the tool will support 'easing' the workflow.The best CMS tools will make your engagement workflows EASIER and will ease the capacity burden that it takes to engage your supporters most effectively.

Conclusion

Choosing a new database (or a first one) can seem like a daunting task. There are a lot of systems on the market and they are all made to sound like they will solve all your engagement problems. The truth of the matter is, no system is perfect, the best systems are the ones that match your engagement priorities and needs with what any given system offers. The best way to define this is to narrow your search and test different systems against a needs assessment that defines your group's priorities. Get your selection down to two or three options and test them. Do not just talk to the sales representatives of the tools - remember, their job is to sign you up - talk with other organizations, similar to your own, who use the tools. Have multiple staff and/or volunteers test your short-listed solutions and have them rank the tools using the same set of criteria. Finally make a decision and don't look back. Plan your transition and budget for it to take more time then you think. Offer ample time to prepare and clean data, train staff, and test the tool before you launch fully. Depending on how complex your needs are this process could take a few months or up to a year. Finally, continuous learning is important. Sometimes your group may not harness all that a tool has to offer at the onset. Once you get comfortable using a contacts management systems, always strive to learn more, do more and improve processes.

What has your experience been with your database? What do you wish you had known before that you do now? Please share with us, we'd love to include your lessons in our future trainings and coaching on the topic to databases.

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