

ROP Organizing Tips- Database

Organizing is the art of bringing more and more people into the movement for social justice. A group's database is a critical tool for keeping track of contacts so you can mobilize the largest possible number of people for social change.

WHY WE NEED A DATABASE

A database is a critical way to track current, past, and future supporters' contact information, political districts, interests, and donations. It's not just about printing labels – It's about building power. Each person represents a potential voter, activist or leader for social justice. The more people we have on our databases, the more political power we wield. Don't cede the glory for "a well-organized list" to our adversaries. With this prestige comes power. A database allows you to:

- *Keep track of volunteers.* Some people may never come to meetings but are perfectly happy to bake cookies for events or write letters to the editor. A well-designed database can allow you to create a list of all the events volunteers or musicians.
- *Track activities.* Who showed up at the last training? A database can help you keep track of who does what.
- *Measure your progress.* How many new members did your last campaign bring in? Who donated to your group this year that hadn't donated before? Databases allow you to sort and compare information easily.
- *Find the right people.* Your database should allow you to search on things like legislative district or county which is very handy for targeted actions.
- *Keep supporters happy.* Some people may want to stay in touch with your group, but do not want to receive mailings because of privacy or environmental concerns. You can keep them on your email and phone list without making them mad.
- *Know who is on your list.* Are you reaching young people? Is your base diverse? If you track demographics, you'll be better able to tell if you're reaching the people you most want to reach. Also, foundations often want to know whether your group is meeting diversity goals.
- *Save energy, time and money.* If you know who is interested in a particular issue or is part of a committee, you'll save volunteer time and postage stamps.

Database Structure

- It is up to date and contains full contact information for each person or organization on your list.
- It allows you to tell who is a leader, member, supporter or volunteer.
- Has a way to track the interests/activities of members and supporters.
- It can help you track donations of time and money by project.
- It is backed up regularly, with backups kept off-site by at least one organizational leader.

Procedure and Policy

- Have guidelines defining who is a member, supporter, etc.
- Have policies on who has access to the database, how the list may or may not be used and who decides.
- Use sign-in forms that capture the key information you want to track.
- Notify the database volunteers when they learn of changes, or disconnected numbers and make sure all new contacts get entered promptly.



Tips for keeping your database healthy

- Assign a specific volunteer to keep the list up to date.
- Avoid duplicates. Before entering a record, look for it first.
- Information goes into the field for which it was intended. (For example, don't try to use the last name field for organization names. Better to create a field for Organization name.)
- Enter data consistently. Is it St, St., or Street? Write a short "style guide" for your organization and keep a print-out near the computer for volunteer reference.
- Enter information so it can be easily understood. For example, use Environmental Foundation vs. Env Fdn.

SETTING UP A DATABASE

Each Record Needs a Unique Identifier

- A unique identifier is a number your computer assigns to each record.
- Usually easy to create, and auto-generated.
- Be sure to preserve this ID when you migrate to a new database.

Field Naming

- Your successor should be able to figure out what the field is just by the name.
- Date vs. Last Donation Date vs. Join Date (the more specific the field name, the better).
- If you get new info create a new field.

Correct Address Storage

- Keep the address in 4 parts- street, city, state, zip.
- Separate 5-digit ZIP from ZIP+4.
- Keep home and business addresses separate.

Just Have One List

- Too many lists guarantees duplication.
- If there is more than one than data operations must be repeated.
- The correct method is to have one list with fields that distinguish entry types.
 - Newsletter (Y/N)
 - Member (Y/N)
 - Board (Y/N)

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