

## Database Planning Process & Activities Overview

The following table outlines the assessment phase of the database planning process. In order to understand what you need the database to do, all of these steps should be completed before beginning the next phase of evaluating and reviewing software.

| Steps | Tasks  | Activities / Outcomes  | Staff Involved  |
|-------|--|--|---|
| 1.    | Agreement to allocate staff time and resources to developing or selecting a database | <ul style="list-style-type: none"> <li>▪ Commit to resource allocation for this project</li> </ul>   | <ol style="list-style-type: none"> <li>1. <b>Board Members</b></li> <li>2. <b>Executive Director (or staff member who has the authority to allocate significant resources to this project)</b></li> </ol>   |
| 2.    | Staff the database planning effort   | <ul style="list-style-type: none"> <li>▪ Identify your Database Planning Coordinator</li> <li>▪ Identify Database Planning Staff Team</li> </ul>                         | <p><b>Executive Director or other “lead staff “person</b></p> <p><b>Database Planning Coordinator</b></p> <p><b>Representative staff from various areas of your agency, including but not limited to your Accounting, Development and Program Staff</b></p> |
| 3.    | Notify your staff  | <ul style="list-style-type: none"> <li>▪ Send out a message to staff members informing them about the data assessment process and requesting their assistance</li> </ul> | <ol style="list-style-type: none"> <li>1. <b>Database Planning Team (produce and send out notice)</b></li> <li>2. <b>All staff (receive notification)</b></li> </ol>  |
| 4.    | Prepare for the Database Planning Kick-Off Meeting                                   | <ul style="list-style-type: none"> <li>▪ Review the Kick-Off Meeting materials</li> <li>▪ Duplicate all forms for meeting</li> <li>▪ Remind staff of meeting</li> </ul>  | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> </ol>   |

| Steps | Tasks   | Activities / Outcomes   | Staff Involved  |
|-------|---|---|---|
| 5.    | Kick-Off Meeting                              | Facilitate 1-hour kick-off meeting to: <ul style="list-style-type: none"> <li>▪ Establish Roles and responsibilities</li> <li>▪ Distribute Database Planning Worksheets</li> <li>▪ Establish schedule / timelines for completion</li> </ul>   | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> <li>2. <b>Database Planning Team</b></li> </ol> |
| 6.    | Collect all forms, reports and questionnaires | <ul style="list-style-type: none"> <li>• Collect completed worksheets and documentation from staff</li> <li>• Collect copies of all Reports that need to be generated from the database</li> <li>• Collect copies of all Forms that will be used with the database</li> </ul>   | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> </ol>   |
| 7.    | Summarize/merge staff information             | Compile/summarize staff information and resources, including: <ul style="list-style-type: none"> <li>• Info tracking systems</li> <li>• Hardware / software</li> <li>• Staff development/ training needs</li> <li>• 1 agency-wide summary of data / information flow worksheet</li> <li>• 1 agency-wide summary of the database planning questionnaire</li> </ul> | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> </ol>   |
| 8.    | Meet to finalize your database priorities     | Facilitate meeting to finalize and agree on internal procedures, including: <ul style="list-style-type: none"> <li>Current data collection and tracking systems</li> <li>Priority tracking areas</li> </ul>   | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> <li>2. <b>Database Planning Team</b></li> </ol> |
| 9.    | Write your database project plan              | Incorporate information from assessment and inventory into your database project plan<br>Identify next steps  | <ol style="list-style-type: none"> <li>1. <b>Database Planning Coordinator</b></li> </ol>   |