

# NONPROFIT DATABASE CHECKLIST

If you're looking for a new database use this checklist to make sure you don't forget these key factors in making your decision. Databases are complicated and serve multiple purposes for a variety of different user types so it's important to stay focused on the big picture and not get too mired in the details of a new system.

## DEMOGRAPHICS

### WHO WILL BE INVOLVED?

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- STAFF USER NEEDS AND ACCOUNT TYPES/PERMISSION SETS
- CLIENT INFO

## SYSTEM SPECS

### WHAT ARE THE BASIC NEEDS?

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- NUMBER OF RECORDS/DATA USAGE
- BROWSER AND TECH REQUIREMENTS
- DATA EXPORT AND IMPORT CAPABILITIES

## USABILITY

### HOW WILL THIS IMPROVE OUR WORK?

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- EFFICIENCY OF DATA ENTRY
- CUSTOMIZABLE DASHBOARD
- USER FRIENDLY REPORTS BUILDER AND STANDARD REPORTS BUILT IN

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## SPECIFIC FEATURES

### WHY IS THIS PRODUCT SPECIAL?

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- HOW DOES THIS INTEGRATE WITH OTHER TECHNOLOGY
- CAN CUSTOM FORMS BE CREATED LATER
- WHAT AUTOMATIONS ARE AVAILABLE

## SUPPORT AND SECURITY

### WHERE WILL WE GET HELP?

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- IS TECH SUPPORT INCLUDED OR AN ADDITIONAL COST
- WHAT SECURITY ASSURANCES ARE THERE
- ADDITIONAL TECHNICAL AND ADMINISTRATIVE SUPPORT + COSTS

## SET UP PROCESS

### WHEN WILL WE BE UP AND RUNNING?

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- IMPLEMENTATION TIMELINE OR WAITLIST
- ADDITIONAL COSTS AND UPGRADES
- DATA IMPORT AND CUSTOM FORMS