



Database Needs Assessment

Congratulations on taking the first steps in determining the best approach to your organization's new data management system. The following is a guide that we use in assisting our client in best assessing and examining their data needs.

Things to have ready for our meeting:

- Assessment completed to the best of your abilities
- Time designated to speak with the IT staff or consultant(s)
- Location of all your data sources that we will need to review
- Copies of all of your reports that you will need
- Some samples of other reports you may have on hand to review for your data system
- Any and all forms or other organizational or operational tools you utilize in your organization



Key Questions to Consider

- Since a problem with a non-software related issue can prevent the successful implementation of a new or improved database, you should look for any non-software related issues which must be resolved whether before or in tandem with changes to new database software.

- Requirements that might force you to build a custom software solution, rather than purchase a software package.

- Other software and systems you are or have been using. Why didn't they succeed?

- Database requirements that will be key differentiators among different software packages. For example: Does it have to run on a Mac? Do you require dial-up or web access? Do several users require simultaneous access?

- Surprises: has the organization anticipated all the costs, changes, impacts and risks implied by a database change? Is the organization prepared for them?

- What are your barriers to success?

- What is your timeframe for completion?



General Requirements of Your Data System

Needs	Current Issues and Problems	Current Requirements (check those which apply)	Future Requirements (leave blank if same as current)
Type(s) of data in the database:			
accounting			
activists			
affiliate organizations			
clients			
corporations			
donors			
foundations			
friends			
grants			
information			
major prospects			
members			
projects			
Schools			
students			
volunteers			
other (specify)			
Database outputs			
Analyses			
Display data on-line			
Display list of results on-line			
Display or print graphs			
Display or print reports			
Forms Interactivity			
Print Envelopes			
Print Labels			
Print Letters			
Send Email			
White Paper Data Extrapolation			
Output data to spreadsheet			
Other (please specify)			