

# Organizers Database (ODB) Customization Survey

*Draft 5, January 20, 2003 – <http://www.organizenow.net/odb.html>*

*This survey is designed to be filled out before you customize ODB. It provides a way for you to start thinking about how you want to categorize the people in your database. Using this information, it is possible to more quickly customize your ODB categories and tracking codes – whether you choose to do this yourself, or as we recommend, have someone with ODB experience help you do this. Once you use the information in this survey to customize your copy of ODB, you can even go into the settings area of the software and save the setup as a "template" which is ready for use by other organizations with needs similar to yours. Thus, ODB is a tool that can avoid the common syndrome of "reinventing the wheel."*

*Please keep in mind that ODB's codes can be modified at any time in the future, so you don't have to figure everything out today. The idea is to set up ODB with the codes you and your coworkers are definitely going to use. When you recognize others that are also needed you can add them later (without a consultant). Plus, you can lock down your categories as well so that a casual user of the system will not be able to change them!*

**1. Name and address of your organization** (that people would use to send back contributions), and organizational email address

**2. Individual Type Codes:** What are some key categories which classify people in to your organization?

Example: for a nonprofit group, typical categories are:  
Donor or prospect, press, organizational contact, vendor, funding contact

for a union, typical categories are:  
Union Member, Nonunion Supporter, press, Retired Member, organizational contact, vendor

for a local electoral campaign, typical categories might be: voter prospect, donor prospect, media prospect, endorsement prospect

for a small training school, typical categories are faculty, student, vendor, supporter

**3. Activity Codes.** What are the main roles that people are assigned to, elected to, in your organization? This is used to identify who is on your board, or people who have some kind of involvement or activity they are part of (examples: officer or board member, staff member, intern, former staff, former officer, town contact, campus contact, shop steward, etc.). If you have are organizing a campaign, "Work Election Day" or "Signholding" might be activity codes – things someone can sign up for when they send in a reply form.

**4. Event or SRC Codes.** Does your organization need way more activity codes than ODB provides (the limit is 32)? Well if this is the case, you will want to use SRC codes. If you do 20 trainings a year in CPR and you need to sign up who has registered and who has paid, you can use SRC codes for that. Or if you run a campaign that assembles lists from 25 different environmental organizations, you can use the SRC code feature to know what organization(s) each name came from. It is not necessary to list all of these; you only need to identify it you will need them to be available.

**5. VID Codes: Volunteer Involvement or Voter Identification.** What are some activities with your organization that people have different levels of involvement in (i.e. they start out as a volunteer, and eventually might become more or less involved on the committee or as a leader)? (i.e. a choir or a events committee might have "core members" who come to practically all the meetings, backup members who come less often, or when needed, and "day of event" people who show up to help with a major event or performance. These people can be classified by level of involvement, from 1 (high involvement) to 3 (low involvement) or 4 (former involvement).

Alternatively, you might want to track the level of support of potential voters for your election campaign or your union affiliation drive. Or even the level of Internet Literacy of your members if you are trying to rescue them from the other side of the Digital Divide.

**6. Constituency Codes.** What are the main kinds of constituencies represented within your membership? Below is a fairly general list of constituencies. You will probably want to replace this with a new list that is appropriate to the groups you already tend to work with or want to work with (i.e. immigrants could be more specifically categorized as Brazilian, Korean, Haitian, Italian or Jewish, Catholic, Methodist, Baptist). The the idea is not to classify everyone, but to identify the relative small number of members who are very active in specific communities that your organization is in a position to target for support.

Consumer Groups; Disability-Based; Elders/Senior Citizens; Faith or Congregation-Based; High School/ Youth; Immigrant/ National Origin; Job or Workplace Based; Local Business Community; Low-Income; Neighborhood Queer/Gay/Lesbian/Bi/Trans; Race-Based; University or College; Veterans; Women/ Gender Based

**7. Issue Codes.** What are issues that people associated with your group are concerned with and in a position to work on? Below are some GENERAL categories. We recommend that you choose more specific issues, using the language that people in your community would use. (i.e. Waste Incinerator, Stop Walmart Campaign, Living Wage Campaign, etc.). The purpose of these categories is to enable you to mark the key people, or "possible activists" within your organization on issues of most concern to you.

ODB starts you out with some very general categories, but organizations usually remove almost all of them so that they can use issue categories much more specific to the needs of their organization. If a group work on environmental issues, for instance, you will find interest in your group on specific environmental issues like Toxic Waste, Dirty Power Plants, Global Warming, etc.

**8. Ledger Codes.** When someone gives money to your group, what are the main methods by which the funds are collected? I.e. this could be through the mail, 1-on-1 meetings, weekly collections, foundation grant, event, prospect mailing, tuition payment, renewal mailing, web donation, etc.

9. **ID Codes: Coalition Organizing.** If you are very active in getting other organizations to lend support to a campaign or join a coalition, what are the names of these campaigns or coalitions?

10. **Dues.** If you collect annual membership payments directly from your members, what is the standard membership rate, and what is the term of membership (this is often 1 year), and are contributions to your group tax-deductible?

11. **User Defined Field.** ODB allows you to add a text field of up to 60 characters and give it a name. If you want to provide a social security number or a Date of Birth field, you can use this feature. You can set up the field to a fixed number of characters if you want, i.e. 9 for the social security number. Once the feature is deemed to be working well, we will modify ODB to allow a second user defined field.

12. **Large Lookup List.** If you are segmenting your list into a half-dozen categories, the Type feature listed above works well. But what if you have 1000 categories (like the names of universities people are from)? If you have a really long choice list, you can turn on the Biglist feature of ODB.

13. **Fax Number for people.** Some organizations don't need it. Those that do need it can have it. Do you need it?

14. **Regions.** If you want to divide your organizing territory into sections and delegate responsibility to "captains" who are responsible for one or two regions, you can use the built-in Region code feature of ODB. If you use the region feature without zip code lookup turned on, you can, for instance, divide your database into the neighborhood people live in (which are generally smaller than one 5-digit zip code). If you turn on the region zip code lookup feature, you can have regions in your state or in the entire U.S. (or Mexico or Canada actually) that are determined by the zip code. So you could divide the U.S. into West, Midwest, Northeast, South and ODB would automatically fill in a region code like WES, MDW, NEA, SOU when you enter a zip code. Dividing up your membership into geographic areas is the first step in setting up a "field organization" for your group. Of course, if your group doesn't need to do this right now, you can leave the region feature turned off and the field will not even show up.

15. **Hiding fields.** Some of the fields can be hidden so that you don't have to see them if you don't plan to use them. So if you have a need to do this, indicate it here. Note that if you don't need the groups table, you can hide it in version 0.9. (The groups area of ODB will become more useful in version 1.0.)

16. **Mandatory Entry.** Several of the fields can be set to require that something be put into them. For example, you can require that every person entered have a comment that would explain why they are in the database in the first place. We strongly recommend that you use the Type feature and require that this be entered. Then this information will be gathered on everyone you enter, and within a few months it will be easy to distinguish people who should get all your mailings vs. people who get a newsletter but no fundraising appeals vs. people who are not really supposed to get any mailings at all as they are not among the people you are trying to organize (i.e. the local office superstore).