

# Organizers Database (ODB) Customization Survey (revised 1/15/07)

This survey is designed to be filled out *before* you customize ODB and enter lots of data. It can help you think about how you want to categorize the contacts in your database. Once you have completed the Customization Survey, you have a starting place to modify ODB for your purposes. Section B of the User Manual provides all the information you need to change settings and codes to reflect the customized categories you defined. You may choose to do this yourself, or as we recommend, have someone with ODB experience help you do this.

Once you customize ODB, you can save your settings as a "template" for backup and to share among other organizations with needs similar to yours. Your efforts can help others avoid "reinventing the wheel."

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

If you realize that you will need a substantial number of custom-designed reports, extra user-defined fields, advanced householding capabilities, advanced voter list management, tracking of outgoing grants, human services client management, etc. then ODB may not be the ideal database solution for you. Please see our Truth In Advertising statement for more information about the capabilities and limitations of ODB.

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**1. Contact Information:** Name, address and email of your organization that people would use to send back contributions.

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You may want to come back to this question after you complete step #3.

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

*Examples: For a nonprofit group, typical categories are donor or prospect, press, organizational contact, vendor, foundation contact. Typical codes for a union are union member, nonunion supporter, press, retired member, organizational contact, vendor. For a local electoral campaign, typical categories might be prospective voter, prospective donor, prospective media, and prospective endorsement.*

Keep in mind that these categories should not be overlapping. This means that a person coded as one "type" does not also fall under another type code.

*Bad Example: overlapping categories like donor, volunteer, board member, prospect.*

In the case above, a volunteer might also be a donor. Or a board member is also probably a donor.

**3. Activity Codes.** What are the main roles that people are assigned to, elected to, in your organization? This code can also be used to identify people who are involved in some kind of activity with your group.

*Examples: board member, staff, intern, former staff, former officer, town contact, campus contact, shop steward, committee member, or coalition member. If you are organizing a campaign, "Work Election Day" or "Signholding" might also be activity codes.*

Note that this code can be overlapping. Here, campaign volunteers can also be former staff or a coalition member. Folks can be assigned to multiple committees or activities. You can create up to 32 activity codes.

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**4. SRC or Event Codes.** What is the first interaction you had with a particular person? What is the source of her/his contact information? Did s/he come to an event, respond to a fundraising appeal letter, come from a list supplied by another organization?

The SRC code is designed to allow you to track a slightly different kind of "activity" than in step 3 – the "source" or first contact made with an individual, as well as ongoing interactions with them. For this reason, it is also useful for organizing events.

*Example: If you run a campaign that assembles lists from 25 different environmental organizations, you can use the SRC code to track the original list each name came from. Or if you hold 20 CPR trainings a year, you can sign up who has registered and who has paid.*

If you have an old database that you are going to import into ODB, perhaps the first SRC code assigned to all those old contacts could be "Old DB contacts".

You can create unlimited SRC codes.

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**5. Issue Codes.** What issues are your members, donors, or constituents most concerned with? 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 create issue categories much more specific to the needs of their organization.

*Examples: An environmental group might track issues like Toxic Waste, Dirty Power Plants, or Global Warming. Community or labor organizers might track interest in particular campaigns like the Stop Wal-mart Campaign or the Living Wage Campaign.*

You can create up to 32 issue codes.

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**6. Constituency Codes.** What are the main kinds of constituencies represented within your membership or the community you serve (if those are the contacts you are maintaining in your database)?

The purpose is to identify the active members in specific communities that your organization can target for support.

*Examples: A health advocacy organization may want to track different kinds of physicians, nurses, and hospital technicians. A domestic violence group might want to code individuals in the legal, medical, and mental health communities, as well as those who work with survivors or batterers. A community organization may want to track ethnicity, nationality, or religion of members.*

You can create up to 32 constituency codes.

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**7. VID or Rate Codes: Volunteer Involvement or Voter Identification.** What are some activities in which people have different levels of involvement or competence?

*Example: An 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).*

*A community literacy program may track the reading level of its constituents, or the level of supportiveness of various journalists who cover education issues.*

Alternatively, an election campaign would want to track the level of support of potential voters and a union affiliation drive would also rate supporters. You can create up to 24 VID codes.

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8. **Donation Codes.** When someone gives money to your group, what are the main types of donations and how are the funds are collected?

*Examples: dues by mail, 1-on-1 meetings, weekly collections, foundation grant, event, prospect mailing, tuition payment, renewal mailing, unsolicited, etc.*

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9. **Dues.** If you collect annual membership payments directly from your members, what is the standard membership rate, what is the term of membership (often one year), and are contributions to your group tax-deductible? Do you wish to be able to enter \$0 donations (in-kind gifts)?

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10. **Gift Subcategory, Check Number, Appeal Code.** Would you like the ability to also record a 2<sup>nd</sup> level gift code with each payment (i.e. cash/check/web, or C3-C4-PAC, or earmarked account name, whatever you wish). Also do you want the check number field made visible, and do you use codes on your reply slips to track the success of individual appeals?

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11. **Fax, Apartment Number, Country, Title, Suffix, Gender, Occupation, DOB Fields.** Would you like to have any of these fields made visible?

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12. **Additional Address Line.** If you have a large number of addresses with departmental addressing information, you might need this to be turned on. The additional address line cannot be turned on if the Country field is in use, so that addresses can be still be printed on small-sized (5-line) labels.

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13. **Title, Suffix.** Do you want the ability to have ODB automatically place the 'Mr./ Ms. / Mrs. / Dr. etc.'" in front of someone's name where appropriate? If you enable the Title feature, ODB will only address people formally if you enter a title for them. ODB will allow you to also override the default salutation, so that you can use 'Mr.'" on the envelope and a nickname within a form or thank you letter. The Suffix feature is optional: it should only be used if you have suffixes like Esq or III or M.D. in your address list.

14. **Thank You Notes.** Does your organization use a single standard thank you form letter for all smaller donors, or do you have two or more different kinds of thank you form letters for different types of gifts (i.e. membership gift vs. endowment fund, etc.)

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15. **Large Lookup List.** If you are segmenting your list into a handful of 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. Then you will need to enter the long list of choices for this pull-down menu. Do you need this?

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16. **Hiding/Renaming Fields.** Do you want to hide some of the fields or make subtle changes to the labels of the buttons?

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17. **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 five-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.

Do you need to use the "regions" feature?

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**18. Mandatory Entry.** Several of the fields can be set to require that something be entered into them. You can require a comment to be entered for each person or that a type code or SRC code be assigned to each record you import.

We strongly recommend that you turn on the "require Type" feature. Type codes will then be given to everyone you enter, so you can efficiently segment your entire mailing list. You will be able to distinguish people who should get all your mailings from those who only get a newsletter or those who should not get any mailings at all (e.g. the local office superstore). Will you require certain data to be entered?

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**19. User-defined Field.** ODB currently allows you to one or two text fields of up to 60 characters and give them a name. If you want to provide a social security number, child's name, year of graduation, etc. you can use this feature. You can set up the field to a fixed number of characters if you want, e.g. 9 for the social security number. The field can also be used for ODB's feature to include 'in honor or in memory of' text in thank you notes.

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**20. Backups.** Does your system administrator back up your server automatically or does staff perform this task? If you do this yourself, how frequently would you like to back up your data - daily, weekly, monthly?

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**20. Notes/Pledges.** ODB 1.0 provides support for tracking notes, tracking pledges, and generating reminders. These features are new and will have additional bells and whistles by the time that version 1.1 of ODB is released. Some organizations have chosen to enable them now. Do you wish to do this?

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**21. 2<sup>nd</sup> Email Address.** Do you need a second email address and what do you anticipate using it for (i.e. backup email address, email address of spouse/partner, or email address for bulk mailings)

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**22. Custom Reporting.** For an additional charge, and with 3<sup>rd</sup> party software, you can set up 3<sup>rd</sup> party reports to run with your database. The time required to have us to do this can be significant, and the lead time required is larger than for other setup options. Our minimum charge to add 3<sup>rd</sup> party reports is \$200. Do you envision that you will need specialized printouts (other than the default listings, envelopes, form letters, labels included with ODB) and if so what are the two main kinds of printouts you will need?

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*Note: we are willing to provide, for a fee, training in how to create custom reports, for ODB customers familiar with MS Access or Open Office Base.*