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The Role of the DBA in the Development Shop

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Blackbaud.

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Agenda

- ◆ The Role of the DBA
- ◆ The Tasks of the DBA
- ◆ The “Great” DBA

Roles with a Development Database

- ◆ Constituent and gift entry staff
- ◆ Constituent and gift entry supervisor
- ◆ Development end-users
- ◆ Power user
- ◆ Report writer
- ◆ Database administrator (DBA)

The Database Administrator

- ◆ *The database administrator is the single person in the organization with final responsibility and authority for the database's setup, use, and maintenance.*
- ◆ The DBA might also have other roles, with the database or in development
- ◆ Being DBA is a role, typically not a full-time job
- ◆ Why this session? Bill's frequent observation...
- ◆ Brief history of the development DBA

The Role of the DBA: Position

- ◆ Every organization should have one, regardless of size
- ◆ Should be in Development, not IT
 - Title of DBA vs. IT's perspective
- ◆ It should be a proactive, leadership role, not a “support staff” role
- ◆ Equivalent to annual fund or special event manager
- ◆ Single person with backup(s)
- ◆ Not a “database dictator”
- ◆ Hard job: combination of hard and soft skills

The Role of the DBA: Responsibility

- ◆ Take responsibility
- ◆ Be professionals (not just “be professional,” but “be a professional”)
- ◆ Manage the work
- ◆ Be involved in development planning activities
- ◆ Proactively suggest approaches and solutions
- ◆ Keep a keen eye on unmet needs and insufficient workarounds with current system and be working toward potential solutions in the future
- ◆ Cultivate and steward IT and finance

- ◆ Advancement and Development Services
 - See Robert Weiner’s session tomorrow morning

The Tasks of the DBA: Database Management

- ◆ Setup
 - Security: groups, users, passwords
 - Fields, data properties, general configuration
- ◆ Use
 - Data entry protocols and documentation
 - User training and oversight
- ◆ Maintenance
 - Data audits: duplicates, policy adherence, missing data, inconsistent data
 - Large (or important) imports, global changes, etc.
 - Synchronization with external databases
 - Technical maintenance, such as backups
 - Updates and upgrades

- ◆ → Technical, user and data oversight

The Tasks of the DBA: Security

- ◆ Ensure groups are set up properly so that users can do all they should and nothing they shouldn't
- ◆ Security is based on need and training, not on position
 - Typically the higher the position, the fewer the rights
- ◆ Watch especially
 - Constituent record deletion rights
 - All gift rights: add, edit, delete
 - System tools
- ◆ Create meaningful, accurate, detailed groups
- ◆ Consider user name protocols
- ◆ Watch master/supervisor-level access to the database
- ◆ Ensure good password protocols

The Tasks of the DBA: Training

- ◆ Responsible for whole staff's database education
 - New users
 - Ongoing training for existing users
 - Software upgrades
- ◆ Cross training on DBA responsibilities
- ◆ Motivating staff to be comfortable with database
 - Regular hints and tricks sent out (email, newsletter, SharePoint announcement, etc.)
 - Helping individual staff with personalization/customization of software

The Tasks of the DBA: Documentation

- ◆ Probably the most important task which is all too often left for “when I have time”
 - Create as you go, do not save for one big project

- ◆ See Bill’s sessions tomorrow morning, in summary:
 - Write for your organization, not generic database usage
 - Write for knowledgeable database users, not brand new users
 - Document specific procedures, not general uses
 - Document output, not just data entry
 - Focus on content, not formatting
 - Create individual Word documents for each process, not one “manual”
 - Again, do it as you go

The Tasks of the DBA: Laws and Rules

- ◆ Growth of the role into development and advancement services
- ◆ Your nation's laws or governing agency guidelines about handing contributions to non-profit organizations
 - IRS, CRA, HMRC, etc.
- ◆ GAAP, FASB, UPMIFA, CASE, AFP
- ◆ Issues often dictated by a legal agency such as those listed above:
 - What is a contribution/gift/donation?
 - How much of a payment is a contribution (tax-deductible)?
 - What is the gift date of a contribution?
 - What is a pledge?
 - Who can make payments on a pledge?

The “Great” DBA: Job Description and Review

- ◆ Manage up
- ◆ Be accountable
- ◆ How “big” of a job is this?
- ◆ Should use both fundraising and database related language
- ◆ Should report as high as possible
- ◆ Should create or be given clear and measurable database goals (not directly related to the \$ amount raised by the department)
- ◆ Should demonstrate capability to make clear arguments for database

The “Great” DBA: Best Practices and Education

- ◆ Blackbaud (blackbaud.com)
 - Conference, user groups, web forums
- ◆ Blackbaud User Society (blackbus.org)
- ◆ AFP (afpnet.org)
- ◆ CASE, esp. advancement services resources (case.org)
 - Conferences
 - Publications
 - Taylor, *Advancement Services*
- ◆ IRS or agency for your country (irs.gov/charities, cra-arc.gc.ca)
 - Email list
 - Publications
- ◆ Fundsvcs (fundsvcs.org)

The “Great” DBA: Best Practices and Education

- ◆ AASP (advserv.org)
- ◆ NTEN (nten.org)
- ◆ Techsoup (techsoup.org)
- ◆ Related software conferences (online, auction, etc.)
- ◆ Computer knowledge
 - Word, especially merging and creating documentation
 - Excel
 - Access or other database program
 - Outlook
 - Windows
 - Working with IT (hardware, network operating system, networking)

Summary

- ◆ *You decide, do you just want to be “support staff,” always responding to what others ask for, or do you want to be a leader, in charge of your own area?*

Questions and Contact Information

- ◆ Questions and additional thoughts?

- ◆ Contact information for Bill Connors, CFRE
 - Phone: 415.861.5454
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- ◆ *Fundraising with The Raiser's Edge: A Non-Technical Guide* (Wiley, February 2010). More information on content and ordering available at www.billconnors.com.

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