



You can soon reach a stage where the back of your address book just isn't big enough. Get a simple database and make life easier.

Databases, the whys and hows

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As soon as you have a couple of volunteers helping out, or half a dozen people have bought tickets, you will start to need to keep track of who is doing what, where and when. You'll also want to be able to get in contact with people, so you'll want their contact details in one place.

While good old fashioned pen and paper has many virtues it has the one major disadvantage, it is hard to search and you can not ask it to present information to you in groups. This becomes more important when people are involved in more than one way. For example it won't present all the people who have:

- bought tickets for a dinner and have asked to share a table
- signed up for a 100 Club and their membership expires next month
- agreed to help you next time you run an event

DIY OR COMMERCIAL?

There are lots of really whizzy databases [available commercially](#), though they don't come cheap and you need to carefully consider what you want a database to do now and in the future if you are going to invest in one. Peter Flory, a well established expert in fundraising databases, gives his advice on [choosing a commercial database](#) on the ICT Hub Knowledgebase website.

But initially it is likely that a simple spreadsheet programme will enable you to store and process the information that you need. You can simply start by listing all the information that you want to record. Your list might include:

- ID (unique number for each record)
- Name of the organisation (leave blank for individuals)
- Address 1
- Address 2
- Address 3
- Address 4
- Postcode
- First name
- Second name
- Telephone
- Title
- Job title
- Email
- Website (if they have one)
- Potential donation
- Can be contacted again (Y/N)
- Gift aid declaration (Y/N)

Then depending on the activity you are running you will need to add rows to record their involvement, how much they have given and possibly how you know them. Remember that if you store data you must comply with the [data protection act](#).

Use each item as a heading for a column in spreadsheet. Find out from the 'help' function how you can 'sort data' and 'find data' in your spreadsheet programme. Being able to 'hide columns' and rows can be helpful when the spreadsheet gets bigger, as this way you can just focus on the information you need at any one time. You can find all this information for Microsoft Excel on [their website](#).

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THE GOLDEN RULE

However tempting it is to have separate spreadsheets for different events and roles, the GOLDEN RULE is to have only one. Sooner or later someone will be involved with your fundraising in more than one way and the best way to cause offence is to forget they gave money before, fail to ask them to an event when they might expect an invitation or not thank them for their volunteer support. One spreadsheet or database means that you can't create duplicate records for people, and this is important because duplicate spreadsheets often fail to contain everything you know about that person as they focus on what is relevant only to that spreadsheet.

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SPECIALIST DATABASES

If you prefer to use a database, then TechSoup list a number of databases that are [free of charge](#), just check that they are going to be able to record everything you want to before you invest a lot of time entering names and addresses etc.

Peter's warning in the article above, that you should not start building your own Access (or other) database, is probably sound advice if you are raising a very large sum. But it is based to some extent on the idea that fundraisers can spend more time trying to fix their faulty database than they do fundraising and so they fail to meet their targets. But if you have or [can find](#) a very able co-volunteer, who enjoys IT projects and will happily build and maintain a database for you, then this may be a good cost-effective answer.

Volunteer fundraisers have fundraising targets that range from a few pounds to over a million. If your target is big, you don't have an IT literate co-volunteer, and you have to contact a large group of people a number of times over an extended period, then consider a commercial database. You know it is worth buying when you judge that it will actually save you enough time to manage fundraising that will generate three or four times the cost of the database.

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