
Where is the data? Vendors? Third Parties? What is the data?

Where/Vendors

- TRACE
 - **Link to database's general information website - Will not be using**
- Donor Perfect
 - Data from data perfect too
 - Keep things separate
 - **Link - CEO will discuss access when y'all meet**
- Excel sheet
- Hubspot?
 - **Is there data in Hubspot we need to pull from? - There is currently no data in Hubspot. We just recently got an account but have not used it.**
 - **Link - NA**

Third parties to work with

- MailChimp
- eventBrite

Are there any contracts in place for third party vendors that they use?

No there are not

Types of data

Is data in different locations of the same type? ie: Name, phone number, email, address,

Are there other types? Other fields of information? - The main data is going to be first name, last name, company, job title, email, office phone, cell phone, address, state,

zip...This is going to be across the board in all locations. There may be multiple contacts for different companies/ organizations but they will need to be put in separately.

Would some contacts have unique information that you'd want to store in this application?

-Depending on the location the contact is currently in (ie. Excel, MailChimp, eventBright, etc.) there may be other information needed – this is something that will also be discussed with CEO at meeting.

List of all fields of information we need to store (list or picture or doc of a list is perfect!)

****Each group/organization may have multiple contacts**

We will not be storing client information

We want to store contacts of resources/organizations/companies that make up the network Unlocking Doors has created for their clients.

Maybe Clients that have graduated from program

Workflow

Any diagrams about all the data that Unlocking Doors currently uses? - I have my computer today and will login and show y'all as much as possible that I think will be beneficial for these questions.

Any diagrams of dataflow?

- Adding/updating contacts
 - Searching for contacts
 - Using third parties like eventBrite/mailChimp
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Organizing Contacts

Currently we're thinking of organizing contacts based on these types...

Location

Type of contact (phone, email, address, etc)

- **Any others?**

Type of resource (schooling, rehab, companies, etc)

- **What are all the types of resources stored?** (list, picture, document) - **This is something that I am wanting to discuss in person. Right now, only the contacts are going to be entered. Want to talk about how easy it would be to go in and change that if we want to had resource tags.**

Groups

- Partners
- Providers
- Supporters
- **Board Members**
- **Donors**
- **Employeeer**
- **Resource-Tx (Non Partner**
- **Resource - Out of state**
- **General Contact**
- **Volunteers**

^^

Diagram of how all contacts are organized at Unlocking Doors?

Only these three categories or any others? - Employers. They are all going to be under the Employer Staffing Program

Any other options that would be helpful?

- **I will print out and bring some documents that may be helpful. Also, will log in on my computer and show y'all some things while I am there in person so I can explain!**
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Who will have access?

- Christina
- Caitlynn
- Data Management Person
- **Who else -> Specifically groups or roles within the company**
 - Makes it easier to organize who can do what
 - **Possibly Brokers. Waiting for Christina to confirm.**

Any other organizations that need to have access?

Access Privileges

- Admin
 - Can edit/view contacts
 - Create/delete accounts for database
 - **Christina**
 - **Caitlynn**
 - **Data management person**
- Editing
 - **Who needs to have editing privileges?**
 - **Christina**
 - **Caitlynn**
 - **Will update after Christina confirms if any other**
- Viewing
 - **Who needs only viewing privileges?**
 - **Waiting on confirmation from Christina. Will update when after.**