Warren Achievement Center

Database Needs

find meeting times for group

go to github meeting tonight to look at group version control

-get Microsoft Access (via Microsoft suite 360) [available for Mac]

-play with Access

Warren Achievement Center needs a database to track all donors, donations, pledges, etc… The database needs to be searchable in order to mine, track and compile data.

**IT NEEDS TO:**

* Have numerous fields for data
  + fields? - first name, last name, etc
  + donor: first name, last name, title, preferred name, memo field about restrictions or side notes, last solicitation,
  + corporate donors: contact person, memo field about restrictions or side notes, last solicitation,
  + grants: grant #, memo field about restrictions or side notes, last solicitation,
* Be able to track donations by person, amount, event, date, payment type, location, etc…
* Must be able to track financial pledges, payments and payment types
* Must be able to print specific reports by mining the data within the database
  + ex. monthly funding reports, donors from previous year, etc
* Be able to have amount totals for whatever report is generated
  + # of donors also, # of donors gave between [] and [] amounts
  + [month] [year] to [month] [year] || day/weekly
* Be able to have all contact information on donors
* Able to have multiple entries for each person, and be able to see them individually
  + multiple entries per person for specific donations
* Data must be able to be assigned a “campaign year” or “capital campaign” designation
  + capital campaign - term goal, changes after goal is reached
* Search capabilities
  + given constraints, give report/page view
* Create mailing labels for certain searches
  + donors per term, create header/mailer
* Be able to tag donors with certain designations (do not mail, deceased, etc…)
  + some kind of donor status, do not mail, inactive donor (no donations recently)

There are other things not on this list, which will come out during our discussion.

Thank you,

Sean Cavanaugh

Marketing Coordinator, Warren Achievement Center

Q1: What level of experience would you say you have with computers?

-speaks to how much work needs to be put into user view

moderate, provide simple but workable user view design

windows computer (Windows 7), single desktop for now

-user login requested with password

Q2: What main types of information do you want to be managed?

Q3: What kinds of information is related to those main types?

Q4: What would the most common types of reports look like/contain?

Q5: Do you anticipate having multiple users access the data?

Q6: Are there any portions of information that would be stored which require special security?

Q7: How do you want to enable additions to the database? Multiple entries at once or single entries?

Q8: Do you have any key features that you would like to have available?

Q9: I saw you have an online paypal donation link on your site, how do you account for those donations now? How frequently is that used compared to the usual way of donation? How many types of donations are there?

Q10: How much previous years data do you want to include:

none, starting fresh, first capital campaign

Q11: Number of users:

Q12: Report formation:

number table, no charts or graphs

mailings: mailer for donation (they have person to write up main portion), thank you letter, reminder of payment (monthly, quarterly, total)

pick set of donors —> type of letter —> notice of…[type of letter] —>fill in blanks/make edits—>export report/letter

Q13: Pledge vs donation:

pledge-paying towards total donation, need way to update paid vs. total pledged

donation-given up front

-additional option: payroll deduction (bi-weekly, weekly, monthly) —kind of a pledge

possible other program: Donation Tracker

Tracking: donors, donations,

——WAC 5 to 6 reception at corporate office