STORE + TRACK YOUR DATA: Choosing a Database – What to Consider

Purpose: Having a solid data management system—or *database*—can take your work to the next level. Instead of working off two dimensional spreadsheets with rows and columns, a database can help you look at the depth of your data by showing connections between data points. In a database, you can connect a child to a parent and/or a full household. If the family moves, you only need to change the address in one place for all family members. A database can make monthly and annual reporting a breeze by making the data connections you need. You can also disaggregate (slice your data) to get deeper into your stories. For example, you can compare single vs. two-parent households or watch a child's ASQ scores over time. Below are database features you may want to consider in your search.

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The Basics *(Things to Consider for All Platforms)*

Cost	Users	Access	Security	Support	Training
•What are the monthly and annual costs? •Are there various levels of cost? •How does the company accept payments?	•What user packages are available? •What are the types of users (e.g. admin.)? •What is the cost for additional users?	•Is it a cloud-based service, or will you need to install software? •Are the database forms phone & tablet friendly?	•What kind of security does the database use? •Is it HIPPA/FERPA compliant? •Does it have various levels of security?	•Does the company provide technical support? •Is tech support an additional cost? •What is included in tech support?	•Is training included in the fees? •What are the ongoing training resources? •How much does training cost?

Customizability *(How Can You Make the Database Work for Your Unique Needs?)*

Forms	Skip Logic	Reports and Outcomes	Data Visualization	Permissions	Overall
•How customizable are the forms? •What types of fields (text, date, checkboxes, etc.) are included? •Can you create your own forms, or is an engineer required?	•Does the database allow skip logic or conditional rules in forms (For example, if an answer is yes to one question, then additional questions are made visible)?	•Are there pre-built reports? •Are reports customizable? •How are reports built? •Can you create your own custom reports, or is an engineer or consultant required?	•Does the database have any built-in data visualization tools? •Are data visualizations customizable? •What types of charts and graphs are included?	•How customizable are permission sets for users? •How detailed are permissions? •Who is allowed to manage permissions?	•How customizable is the entire platform? •Is it possible to edit colors, fonts, form layout, etc.? •Are regular or admin users allowed to make changes?

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Functionality to Consider *(Based on Program/Organizational Needs)*

Importing Data
- Who can import our existing data into the database? Can we do it? Consultant? The database co.?
- Who prepares the data for import?

Alerts + Reminders
- Is this feature an extra cost?
- Are alerts &/or reminders available to users within the program and/or externally via emails or texts?

Communication Tools
- Are staff able to communicate with each other inside the platform?

Connecting Cases
- Does the system allow you to connect clients to other clients, for example as family members?

Referral Capabilities
- What are the capabilities for managing client referrals?
- How do internal vs. outgoing vs. incoming referrals work?

Data Visualization
- Is this feature an extra cost?
- How customizable are the tools?
- Are there limitations?

Volunteer/Intern Management
- Can the system also track volunteer or intern hours, applications, etc.?
- Is it affordable to add guest users?

Calendaring Integration
- Can the platform integrate with our email system?
- How can we use calendaring to improve our workflow?

Survey Functionalities
- Are we able to conduct surveys?
- Can surveys be connected to identified respondents, anonymous, or both?

Case Management
- What are the specific case management functions of the database?
- What are this platform's unique strengths?

Class/Workshop Tracking
- Does the database have the ability to track classes?
- Can it track attendance?
- Can it track progress?

Export Functionalities
- What are the data export functionalities?
- In what formats are the data exported (such as Excel or CSV)?

Resource Lists
- Are you able to track community partners and/or resources that are commonly used by staff?

Duplicate Checking
- Does the platform have the ability to check for duplicates when adding a new client or information?

Electronic Signatures
- Does the platform have an electronic signature function?
- If so, is it secure?
- Does it lock a form once signed?

Document Storage
- Does the database allow document storage?
- If so, what types of files?
- If so, what is the storage limit?

Data Entry Process
- What is the data entry process?
- Can data entry be done in the field?
- Can data entry be done on a phone or tablet?

Online Forms
- Can we send forms to clients via email or text for them to fill out electronically?
- Does this data go directly into the database?