A Nonprofit's Guide to Data Migration

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FOREWORD

Dear Reader,

Data is an important asset for any nonprofit organization. It is the data that tells us about our donors, about our clients and constituents, and about our operations. It is critical to our organization. Without it we cannot prepare finance reports for our boards, send invitations to our upcoming fundraiser, or articulate our outcomes. It is the reason that you are probably making the investment in a new database for your organization.

If you have downloaded this report you probably already have a sense that migrating data can be a difficult and scary task. There is no room for error, the migration must go well. The trouble is it that it probably won't, at least not without a plan.

Reading this report is an important first step. It will help you ask the right questions and look in the right places for assistance. It will help you plan for the big event of migrating your data. Hopefully it will also help you think through the process of, and to plan for, maintaining your data into the future.

What you will learn by going through a data migration process will be helpful well beyond the date you finally take a deep breath and start using your new database. Understanding your data, defining processes for keeping it clean, mapping and defining your data: these are all tools that will allow you to be successful with your new system.

We are pleased to partner with Idealware to sponsor this important body of work. As a nonprofit capacity building organization, we believe in empowering nonprofits with the best information available on this and other technology subjects. We want to help you meet your IT needs and enable your organization to deliver more effectively and efficiently on your mission.

Thank you for the work you do to make our world a better place.

Sincerely,

Patrick Callihan
Executive Director, Tech Impact

TABLE OF CONTENTS

You've chosen a new donor management system that will best meet the evolving needs of your organization. Now it's time to move all the data you've gathered in your existing system into the new one in a way that renders it accessible and useful and that takes advantage of all the features. How do you go about this task?

The process of data migration is deceptively complex. From the 40,000-foot level, the concept looks simple—you move data from one system to another—but data is tricky. It needs to be told where to go and it needs context, otherwise it's useless.

To carry out a successful data migration, you have to plan ahead. And you're likely to need help. Typically called "conversion," the process is separate from "implementation," or the decision-making behind how you want to use and configure your system. However, conversion is inextricably dependent on the decisions made in the implementation process. If you haven't worked out the complexities of your implementation, your data migration will not go well.

Throughout this report we'll walk you through the process, from conversion considerations during the purchasing phase to the planning and preparation you'll need to go through before you start migrating your data, and then to the conversion itself. We'll look at the steps you'll need to take before "going live," and consider the post-conversion work you'll need to do to ensure the system runs smoothly. We'll also look at two real-world case studies of organizations that transitioned to new donor management systems, but struggled with the conversion process.

SEVEN DATA MIGRATION MILESTONES

From start to finish, these are the basic steps to a smooth and efficient conversion process.

1. **Talk to a consultant**. Even a short consultation can help you understand your organization's unique needs and put you on the right track.
2. **Think through the logistics**. Assigning an experienced staffer to own the project and the data is essential for keeping the project on time and on budget.
3. **Clean your data**. You don't have to do it all up front (there are many post-conversion tools to help with cleaning), but the more you do before the conversion the more useful your new system will be after.
4. **Create policies and procedures**. Unless you document rules for what goes into the system and how it's entered, you're in danger of creating a system full of cumbersome and confusing data.
5. **Develop a map that shows how data moves from your old system to your new one**. This is the surest way to make sure your data is usable in your new system.
6. **Test your conversion**. A conversion is rarely perfect on the first try. Or the second. Leaving plenty of time to test and adjust will mean less pressure on your conversion specialists and staff members to get the job done and more chances to make sure it's done right.
7. **Convert your data**. If planned properly, this step is a matter of handing off your data and going live with your new system.

Before You Buy

In addition to learning about all the features of your new donor management system, including the price, the modules or add-ons you might want, and the programming work you might want to undertake, you'll need to consider a few factors that will affect your conversion.

The best place to start is finding out the level of support you'll get from your vendor. Large vendors will often take on nearly every aspect of the technical conversion and implementation processes and will provide planning and strategic support along the way. However, smaller vendors usually offer little or no support beyond training. Finding out how your vendor will work with you in the conversion process is crucial because the less support you get, the more additional help you'll need from a consultant.

Budget is a significant determining factor during the purchase of a new system, but it can also be a set of blinders. We all want to hear a vendor or consultant tell us that the process will be fast, cheap, and painless, but the experts we spoke with said those three words are major red flags.

This is not to say that a conversion process can't be low-cost and efficient, but it does mean that you'll need to do additional homework to be confident that what they're telling you is true. Often, vendors or consultants who say the process will be fast and easy lack experience, either with the system you're converting from or the system you're moving to—and sometimes both. They also might not understand nonprofits or the particularities of your organization.

Make sure you ask the vendor a lot of questions before you buy: What kind of training do you offer? How will you work with us to map the data from our old system to our new one? What kinds of data cleaning should we be responsible for and what will your technical staff take care of? Also, make sure you're working with a team that asks you a lot of questions. Your vendor or consultant's desire to understand the ins-and-outs of your system and the way your organization works is a good indicator for how well your conversion will go.

The Benefits of Working With A Consultant

If there is any doubt about the level of support you will get from your vendor, you should talk to a consultant. Even if your vendor offers significant consulting support, you may want an impartial voice guiding you through the process to ensure that your organization is getting exactly what it needs.

In fact, hiring a consultant may be the single most important decision you make as you implement and convert your new system. A skilled and knowledgeable consultant can ask the right questions and provide guidance that helps you get the system you want up and running. And while hiring a consultant can be costly, depending on the complexity of your organization and the system you're imagining, the help of a skilled expert who knows the technology and how nonprofits work can save money over the long term. (To learn more about hiring and working with a consultant, read Idealware's free article, *How to Find, Hire, and Collaborate With Technology Consultants,* at http://www.idealware.org/articles/how-find-hire-and-collaborate-technology-consultants.

There are three skill sets you should look for in a consultant:

1. **Knowledge of your old system**. Your consultant should have a good understanding of the system you're leaving, including the general logic and setup and the specific ways your organization configured the system for its use.
2. **Expertise in the new system**. An intimate familiarity with your new system is essential for every part of the implementation and conversion processes. Without it, your consultant is likely to produce conversions that are messier and harder to fix and you're likely to end up with a system that is far from what you imagined when you chose it.
3. **Technical skill to manipulate data**. Moving data is not a simple drag-and-drop process. A lot of technical skill is required to import items such as pledges and payments. Often, a separate, technical consultant is needed just for this part of the process.

Beyond these skills, the experts we spoke with all agreed that your consultant should have deep experience working with nonprofits and have a strong understanding of the needs and terminology common in the nonprofit sector. It's important to ask your consultant tough questions about his or her sector knowledge, the kinds of conversions he or she has done in the past, and how they like to work to find out whether the relationship will be a productive one for your organization.

CASE STUDY: A VISION FOR THE FUTURE

A youth education and training nonprofit in the Chicago area needed a better way to track donors, volunteers, students, program graduates, and prospects. It got its chance in 2013 with a capacity-building grant intended to help it purchase a new donor management system that could handle such a diverse group of people.

The organization looked at three systems and eventually decided on Salesforce because of its low cost, significant flexibility, and event app "Auctions." However, Salesforce offers no hands-on support, so the organization had to find a consultant. It quickly settled on the company it had worked with for years to manage its IT because the nonprofit believed the IT staff had experience implementing Salesforce and was told the process would be fast and easy. It also didn't hurt that the quote for the whole project was well within the organization's $20,000 budget.

Unfortunately, nothing about the process was fast or easy. First, the organization assigned a low-level staffer to manage the project. The individual had very little experience with development programs or donor management systems. This was complicated by a change in development director just after the system implementation had begun. As a result, the data was messy after the conversion. There were a number of duplicate records and items that needed to be fixed manually.

Deep into the process, the incoming development director also discovered that the IT company actually had very little knowledge of the capabilities of Salesforce, especially for nonprofits. This lack of expertise not only meant that basic features such as the duplicate checker were left out, but the IT company had a tendency to assume that what was in the old system would be in the new system. The result was a system that not only contained the same data, but also many of the same limitations and frustrations.

The organization eventually did its own research and discovered the Salesforce Foundation's Power of Us program, a free online community designed for nonprofits in the Salesforce Foundation's product donation program. There, organizations and experts helped it fix ongoing issues and learn how to get more from Salesforce. In the process, the organization also met a consultant that it eventually hired to build out the features it needed and guide it through the next stage of its implementation.

Now, with a more robust system, including apps such as Auctions and Click & Pledge, the organization is living its vision. "Salesforce has been life changing, even with all the hiccups," said one staffer. "We're extremely excited about the future."

Preparing For Conversion

Once you've selected your system and have determined the level of help you'll need from a consultant, there's still a lot of work to do to prepare for the physical conversion of your data.

Project Management and Training

You'll need a staff member who will work with the new system on a regular basis to be your organization's project manager because this person will not only make sure tasks get done, track the budget, coordinate other project participants, and communicate about the project with the rest of the organization, but will also be responsible for verifying the accuracy of the data in the new system. He or she will need to be trained before the conversion on how to enter information, reporting, mailing, and data storage, among other topics. Other staff members may also need to be trained, especially if they are participating in other parts of the prep work.

Policies and Procedures

If they don't already exist, you should spend some time before your conversion establishing written policies and procedures for data entry and system use. Focus on three areas: data entry processes, data output processes, and notes on how your database has been set up. This effort will better ensure that your data is accurate, accessible, consistent, and protected. If you're starting this documentation from scratch, just work on the basics and let further development happen naturally as issues arise. (Just don't write it and forget it.)

CASE STUDY: LOST IN TRANSITION

When a Chicago-area youth civic engagement organization sought a better way to organize donor contacts, it turned from an outdated system to a new and more powerful donor management system.

It worked directly with the vendor to implement and convert the system and was told that the process would only take between two weeks and one month and that it would be fairly simple.

However, once the organization began to convert the data, it realized that nothing about the process would be simple. The first trial run came back with numerous errors—missing gifts, missing constituents, mismatched couples—and no pattern for why those errors were occurring. A second trial brought up more errors, not fewer. A third trial conversion was no better. In all, the organization went through seven trials before going live. Each time, a member of the staff had to spend most of the day searching for errors. "It got to the point where I was wondering, 'Are we ever going to get this right?'" said one staffer.

The organization did eventually get it right, but not without significant vendor support, which it was able to get free of charge due to the large number of problems that emerged.

Looking back, it's clear that the organization needed a consultant to guide it through the process. The vendor began conversion without collaborating to map the data between the systems. It only required the organization to provide a sample of the data. It also made no mention of data cleaning beyond the need to assign individuals to household records that were without them. The vendor also didn't seem to have a plan for managing such a long and difficult timeframe. Organization staff said they were asked to track data in a spreadsheet during conversion, but the spreadsheet template the vendor provided didn't include many essential fields that were required in the new system.

All of this added up to a frustrating process that has soured the obvious benefits of the new system, including better list-building capabilities and a more centralized system.

Sample Data

To help your vendor better understand your needs, you should provide sample data for the vendor to review. An expert in your new system will then be able to point out potential problems and help you think through how to fix them before you begin conversion.

Data Mapping

This may be the single most important step before migration. Data mapping is drawing connecting lines between the data in your old system and where it will go in the new system. From many data entry fields, this is a direct migration. For example, the data captured in the "Last Name" field of your old system will go into the "Last Name" field in your new system. But as one expert we spoke to pointed out, mapping is often as much art as science.

One consultant we spoke with spends multiple days on the mapping process, holing up in a conference room with organization staff and going through the old and new system with sample data from the organization and noting how the data should convert. The process is tedious, but can potentially save months and a lot of headaches during conversion.

Often implementation issues arise during this process as you start to see how the system will work in real life. Taking the time to think through some of the implementation decisions you've made and being open to revising them can mean not having to undo mistakes later or living with a system with obvious flaws.

Data Cleaning

Your database is like most things in life. If you put garbage into it, garbage is what will come out. Staff members who jump on the system and find data that is inaccurate or untrustworthy are much less likely to use and maintain the system properly, so making sure your data is clean is tremendously important.

Rather than lug flawed or outdated information with you to your new system, conversion is a great opportunity to decide what you need, what you don't, and what simple fixes you can make to smooth out the conversion process. For example, you might decide to exclude all data entered before a certain date or from donors who have not made a contribution within a certain number of years. You may also need to figure out what records attach to which people, especially if you are converting from a system that organizes by family rather than individual.

However, depending on your conversion consultant or your new system, you don't necessarily have to provide spotless data for your conversion. Many conversion specialists have tools that can change capitalizations or run sophisticated find-replace functions. Your new system also likely can detect duplicate records and help you merge them.

Converting Your Data

Once you're ready, you'll provide the data you want to migrate to a programmer who will run a trial conversion. After this conversion is complete, your vendor should walk you through the new system and the process you'll have to go through to test it. This is by no means a "go-live" moment and you still should be using your old system the same way you always have.

Testing is a critical part of the actual conversion. Staff members, likely the person managing the project, need to systematically sample data from every field and check it for accuracy against the old system. If problems are identified, you can work with your consultant or vendor to identify patterns. Every expert we spoke with said that conversion is never clean on the first try and that three trial conversions are typical before the new system goes live.

Even after three trial conversions, your data still might not be spotless. Planning ahead for what you will need to clean up post-conversion and clarifying what you can live with once you go live will be important for knowing when to "flip the switch" to your new system.

But once the trials are completed and you are satisfied with the trial conversion, it's time to lock down your old system—that means absolutely no more data entry—and submit your final data to your conversion specialist. The final conversion can take a few days, so this is often a good time to do any additional staff training and finalize your policies and procedures. If you do need to record data after your old system has been locked down, record it in a spreadsheet or word processing document and reenter the data in your new system once it is ready. If your system is too complex for this, your consultant may have other suggestions. None of the experts we spoke to recommended running both a new system and old system in parallel—entering data in both systems each time. They said that, while it might give you some peace of mind, it also doubles your work and can often be a crutch for not fully realizing your new system.

After the Conversion

As mentioned above, there are a few steps to take after conversion but before you're fully up and running on your new system.

You will likely need to do additional data cleaning. Your new system should have the tools you need to both fix these final issues and conduct regular hygiene reports to find errors as staff members get familiar with the new system. You'll also want to double check security settings and permissions to make sure the right staff are working with the right parts of the system.

Finally, you'll also want to make sure that your system has a manager, or someone who regularly keeps an eye on it and maintains it as needed. This could be the person who managed the implementation and conversion, an IT professional, or someone hired specifically for this purpose. Every organization meets this need in its own unique way.

Conclusion

Time frames and cost for a full implementation and conversion can vary wildly. It is difficult for a consultant to provide an estimate without a thorough review of your systems and your organization's needs, but a small organization that is only tracking a couple hundred of donors, has that data in good shape, and is moving to a straightforward system might pay $2,000 to $3,000 on top of the cost of the system and implementation. More complexity in any of those factors could raise the price to more than $20,000. Being upfront with your vendor or consultant about what you're converting and being honest with yourself about wants vs. needs can help you get a more accurate estimate that is closest to your budget. Regardless of the system you're seeking or the cost, thorough planning, expert support from a consultant and your vendor, and strong project management will help keep the process running smoothly and efficiently.

ADDITIONAL RESOURCES

A Day in the Life of a Data Migration Expert

http://theconnectedcause.com//?s=migration

Marcelo Keppy from Heller Consulting reminds us that data migration is not as simple as plug and play. He talks about the expectations he sets in his first meeting to help his clients stay focused throughout the process.

The Unavoidable Decisions You Will Face with Donor Data Migration

http://www.nten.org/articles/2014/the-unavoidable-decisions-you-will-face-with-donor-data-migration

Samantha Carr from NTEN outlines seven tough decisions every organization has to make before it decides to migrate data.

Moving in to Your New Nonprofit CRM

http://www.z2systems.com/neoncrm/blog/moving-your-new-nonprofit-crm

Bethany Lang from Z2 Systems explains that, just like moving day, you need to be organized and clean out the junk before you can enjoy your new CRM. A guest blogger at npENGAGE uses a similar metaphor to make slightly different points.

Take Control of your Organization's Data

http://www.rlweiner.com/nten/control_your_data.pdf

Robert Weiner lists his top seven tips for maintaining quality control throughout the conversion process. Also check out his blog post about the dysfunctional relationships some of us have with our databases.

Ask the Experts: The Most Thorough Data Migration Answers You'll Ever Get Without Hiring a Consultant

http://www.classy.org/blog/ask-the-experts-the-most-thorough-data-migration-answers-youll-ever-get-without-hiring-a-consultant/

Tompkins Spann from KELL partners gives honest answers to the toughest questions his clients bring him.

How to Choose and Work with Technology Consultants

http://www.techsoup.org/support/articles-and-how-tos/how-to-choose-and-work-with-technology-consultants

Nearly every organization will need a consultant to help with its data migration. Our recent article in Tech Soup breaks down how to find your consultant and how to work with him or her once they're on board.

ABOUT THIS REPORT

How Was This Report Funded?

This report was funded by three major sources. The lead sponsor for this report was Tech Impact, a nonprofit organization whose mission is to empower communities and nonprofits use technology to better serve our world. Learn more about them and the work they do on the next page.

The report was also funded through the visible ads from consultants and consulting firms that help nonprofits choose, implement, or manage technology systems. Idealware is committed to unbiased, impartial research—all sponsors and advertisers committed to payment before the report was distributed for review and none had any control over its content.

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Dan Rivas, Idealware's Managing Writer, is a versatile writer and editor who specializes in translating complex information into compelling stories. Prior to Idealware, he was a copywriter and editor at a marketing agency that serves large technology and financial services companies. He also has experience as a freelance writer and journalist.

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Reprinting and Quoting

ABOUT THE REPORT PARTNERS

About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits make smart software decisions. Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary to keep up with new technologies and find the right tools. From the most basic questions (such as how to use software to help manage emailing hundreds of people at once) to the more complex (such as understanding the role of social networking and mobile phone text messaging in fundraising strategy), organizations need a trusted source for answers.

Idealware provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources. And our reach is expanding; our reports have been downloaded hundreds of thousands of times.

Idealware is made up of a small, growing staff aided by a community of experts, including content partners and contributors, and overseen by a remarkable board and set of advisors.

Learn more about Idealware, read hundreds of free articles and other resources, download free reports on topics of interest to nonprofits, or sign up for our mailing list to be kept in the loop about new free resources at www.idealware.com.

About Tech Impact

Tech Impact is a nonprofit organization whose mission is to empower communities and nonprofits to use technology to better serve our world. Our technology services enable nonprofits to plan for, implement, and effectively employ technology tools to achieve their organizational goals. Our signature program is ITWorks, a workforce development program for at-risk-youth that trains technology and soft skills, helping our graduates enter the workforce with a self-sustaining wage and a promising career in technology. We maintain offices in Philadelphia PA, Brooklyn NY, Wilmington DE, Las Vegas, NV, and Redwood City, CA. Tech Impact has been delivering services since 2003 to thousands of national and international nonprofit organizations.

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