STUDYDADDY

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Get Help

GROW Local South Texas database project with TAMUCC
Requirements discovered and/or highlighted by way of Interviews

The database is a contact People-Centric system(CRM) with strong relationships to Events. GROW needs to be able to track people for the purpose of contact in the future, tracking volunteer and event hours for grants and surveys, communications such as thank you notes, and mass mail outs.

Preferred User Interface color scheme (Branded Colors from Website GROW Local and Farmers' Market logos)
• Green
• Brown
• Red (like the tomato in the FM logo)
• Purple (like the beet in GROW logo)
• Black

Data Fields:
• Member records:
    • First Name
    • Last Name
    • Address1
    • Address2
    • City
    • State
    • County
    • Email address
    • Phone
    • Zip Code
    • Birthday
    • Volunteer Hours (Can be Zero for the record.)
        • NOTE: Volunteer hours will always be associated with a Member or a Non-Member and an Event.
        • Date
        • Time
        • Event
    • Membership Join and Expiration Dates.
    • Membership Type with the following options:
        • Individual
        • Family
        • Student
        • Veteran
        • Vendor
        • Business
        • Non-profit
• Lifetime Y/N
• Business Type including the following types (more can be added later):
        • NOTE: Business Type should be available for all member/non-member entries not just a business member. Some people with a business type would be a "vendor" member not a "business" member (like small cottage foods or a single farmer or a hobby gardener) and

some people may also be an "individual" member (like a chef). Or they could be a farmer that is not a vendor at our market and could be a member or a non-member.
- Restaurant
- Food Truck
- Farmer
- Cottage Foods
- Rancher
- Grocery Store
- Chef
- Hobby Gardener
- Local Business
- Donor
- Sponsor
- Local Food Industry Professional
  - Ethnicity Option
  - International Y/N
    - NOTE: International Designation usually means FN, LN might be all the contact information collected. However knowing that a Person record is international is good data.
- Non-Member records
  - First Name
  - Last Name
  - Address1
  - Address2
  - City
  - State
  - County
  - Email address
  - Phone
  - Zip Code
  - Birthday
  - Volunteer Hours (Can be Zero for the record)
    - NOTE: Volunteer hours but will always be associated with a Member or a Non-Member and an Event.
    - Date
    - Time
    - Event
  - International Y/N
    - NOTE: International Designation usually means FN, LN might be all the contact information collected. However knowing that a record is international or not is important information to collect.
  - Business Type including the following types (more can be added later) (See note about Business Types above):
    - Restaurant
    - Food Truck
    - Farmer
    - Cottage Foods
    - Rancher
    - Grocery Store

- Chef
- Hobby Gardener
- Ethnicity option
- IMPORTANT: Do not Require fields other than First Name, Last Name. Users need to save a record with nothing but FN,LN. If a drop down list is used for a field, then N/A or Not Applicable should be saved in lieu of a blank record

Events
- We need to assign Events to multiple Member or Non-Member records.
- Every Event has a category (can add more values later)
  - Monthly Educational
  - Farmers Market
  - Open Hours
  - All Hands Day
  - BAWKtoberfest
  - Farm to Table
  - Garden Party
  - Producers Conference
- Indicate Sponsors, Donors, Speakers per Events for reporting

Search Page
The system should incorporate a simple Search page that would allow users to search for a record by
- Last Name
- First Name
- Events

Volunteers
The system should allow for tracking GROW volunteers. These might be Non-Member or Member records. Need to know:
- Who is volunteering (Name, Member?, Non-Member?)
- Where are they volunteering (i.e. admin, Learning Garden, Farmers Market, Farm To Table, Outreach, Educational Workshops, Bawktoberfest, Producers Conference, Neighborhood Garden Party (can add more values later)
- Number of hours they volunteer, including dates of hours volunteering
- Categorical Age of volunteer (i.e. Adult, Youth, Children, Seniors, Students, Veterans, (can add values later)

Reports:
- By Record Types
  - Members
- By Member Type (can add values later)
  - Individual
  - Family
  - Student
  - Veteran
  - Vendor
  - Business
  - Non-profit

- By Business Members
  - By Business Type (see values above and can add values later)
  - International Y/N
- By Non-Member
  - International Y/N
- Get Mail Chimp existing reports and see whether it makes sense to duplicate that report here
- By Zip Code
- By Event:
  - List of People who attended,
  - List of People who volunteered,
  - List of People that Sponsored or Donated for an event
- Monthly Volunteer Hourly Report (member and/or non-member)
- EOY Report to Farmers - Send a list of email addresses for all Restaurants or Food Trucks so farmers can establish relationships with people that need/want local food
- List of People and Donations (for sending Thank You Notes)
- Members Expiring _____ Month
- Business Type by zip code (this would help the farmer map Aislynn wanted)

Security:
- An Admin account with password - to be used only for Top Down complete administrative tasks; not assigned to any user record
- Personal Login with Password accounts for all users (i.e. a user will be a record in the system, but not necessarily a member) Logins can be assigned to any person record in the system but is not required.
- Security Groups
  - Admin Group (highest level-database backend access included - all rights);
  - Power User (next highest level with Read, Write, Edit and Add rights and Access to Reports)
  - Edit User with Read, Write and Edit
  - Add User with Read, Write and Add
  - Search User with Read only
  - Reporting User - access to run reports

Some Wish List items:
- Print Labels
- Online Membership Application that automatically updates database
- Ability to create Google Sheets from data in the DB and that can then update the database as edited (the way Sharepoint works as well)
- Import and Export of Excel files
- Track Vendor or Producer products/items
- Track Donations and Sponsors
- Tracking Membership expirations (one notice before expiration, one notice after expiration) for notices or reminders
- Public Search of their own expiration dates
- Automated Welcome Letter for new Members
- New member check list
  - Has the Decal been sent
  - Has a Welcome Letter been sent

- Tracking number of children that attend events (at this time Children defined as under 12 although there may be events and times (i.e. Youth Odyssey is 6-16?)
- Family Memberships (tracking family names and number of family members)