

San Francisco City Guides

Request for Proposal:

Website and

Management Information System Development

April 10, 2012

Introduction

San Francisco City Guides (SFCG) is a non-profit organization providing free walking tours of San Francisco. The organization is 34 years old and leads about 3,000 tours per year for 40,000 walkers from around the world with a roster of approximately 300 volunteer guides.

We have an existing public facing website www.sfcityguides.org and a reasonably complex back-end management information system (MIS) to handle scheduling, training and guide communications. These systems were developed in-house with a volunteer staff (a remarkable achievement that points to the dedication of the City Guides community) and function reasonably well.

However, given recent and projected growth of the organization the board has adopted a strategic plan with one of the objectives being to professionalize our Web and MIS system development and maintenance. A secondary goal is to use this opportunity to modernize our public site design and to add back end functionality for future needs.

To this end, the management board of City Guides is looking for a development firm to redevelop our:

- Public facing website
- Internal facing “guides’ only” website
- Internal facing staff and committee member MIS interfaces
- Underlying database structures
- Existing data to the new site (porting databases)

Notwithstanding the opportunity to improve and modernize our website design, this is not a “rebranding” exercise. We expect vendors to work with our existing logo and content material.

General Project Scope

* indicates new functionality

New public website incorporating:

- New introduction page with improved navigation (see Appendix A)
- *Interactive map based tour selection (see Appendix A)
- Individual tour pages with information including name of scheduled guide (see Appendix H)
- Ability to search tour schedule by time, tour or guide as well as interactive map
- *Ability to make on-line reservation for tours (see Appendix C)
Note not all tours require reservations. It needs to be selectable by tour/date
- Link to our existing store at Café Press (we do not anticipate other e-commerce)
- Ability to accept donations via PayPal (or other payment processor)
- Sponsor advertising and links (not external feeds)
- *Content Management System (CMS) for all tour images and text
- *XML feed for all tours

Guides' Only section with password access and limited access to MIS/databases:

- Ability to view tour schedules
- Ability to sign up to lead specific tours
- *Ability to download reservation lists for tours with reservations
- Ability to sign up for special events, continuing education events, etc.
- *Ability to input data from "tour sign in sheets" (a record of each walk)
- Ability to read the monthly newsletter "*Guidelines*"
- Links to SFGC Facebook & twitter pages
- Basic Internal Bulletin Board similar to existing
- Ability to upload documents to tour specific storage (ftp) page
- **"Guide of the Day" feature to remind everyone who's who in organization

More information on this page may be found in Appendix D

Staff /committee members' area with selected password access to full MIS/ CMS and databases:

- *Individual passwords for volunteers to access select areas of database
- Ability to run common reports (See Appendix G)
- Ability to enter data into database using pre-defined input pages
- *Expanded number of database fields (See Appendix E)
- *Dashboard view of organization as initial staff access point (also includes Guide of the Day)
- *Individual committee "dashboards" accessible to committee members (See Appendix D)
- *Free form "select & sort fields" access to database records.
- *Reservation system for tours so that individual walks (a specific tour on a specific date) can have reservations enabled/disabled (See Appendix C)
- Ability to upload material to CMS (*Guidelines*, update tour descriptions, add sponsors, etc.)
- Ability to send bulk e-mail organization-wide and to specific subgroups
- *Expanded automatic reminder system to alert guides via e-mail regarding upcoming tours, missing tour sheets, continuing education requirements, etc . (The system sends initial reminders automatically and if conditions are not corrected in a selectable amount of time, an internal message/report becomes available to staff/committee members) (see Appendix G)

Overall additions:

*There has been a request to encrypt volunteer personally identifiable information (PII). This is not a requirement; however, we are interested in exploring and evaluating costs for this feature. We do not expect to handle financial (payment card) information.

Vendor Qualifications

Firms responding to this RFP must have:

- Demonstrable experience delivering at least five previous projects of similar scope and scale with at least one in the non-profit sector.
- Have at least three years of related experience supporting previous projects
- In-house capability for site-planning, database design, interface design, basic graphic design, production and testing
- Office location within the nine San Francisco Bay Area counties
- A full time staff of at least five people

Expected Audience

Public Side

SFCG's public site serves as the primary information source regarding tours for the public. It must provide easy access to the tour schedule and tour details (start location, short description, etc.) in an easy to navigate manner. The public site must also accommodate users on mobile devices and utilize GPS functionality to locate visitor on tour selection map.

Internal Side

Volunteer Guides

Our guides span the entire range of technical ability from professional programmers to complete novices. It is imperative that the guides' only section be as simple as possible especially for key functions such as checking tour schedules, signing up for tours, inputting tour signup sheets and reading the newsletter. It would be a plus if this was available on mobile devices.

Volunteer Committee Members

These volunteers are using the MIS to implement and track various activities of the organization. They can be assumed to be fully familiar with using websites and somewhat familiar with basic office software. It is not expected that these committee members would use mobile devices to work on the MIS databases.

Professional Staff

CG employs two full time staff members. This number is not expected to increase and there is no expectation that either will be IT professionals. We can expect that staff will be fully computer literate and functional with MS Word, Excel and other typical office software as well as rudimentary database skills. It is not expected that staff would use mobile devices to work on the MIS databases.

Timeline and Budget

Desired Timeline

RFP issued	April 15, 2012
Questions due from vendors	April 22, 2012
(Answers will be distributed to all participants via email)	
RFP responses due	May 2, 2012
Interviews of final firms (if needed)	May 7-14, 2012
Final selection	May 21, 2012
Project kick-off	June 1, 2012
1 st design deliverables	July 15, 2012
SFCG approval	Aug 1, 2012
2 nd design deliverables	Aug 15, 2012
SFCG approval	Sept 1, 2012
Final design deliverables	Sept 15, 2012
SFCG approval	Oct 1, 2012
50% Build review	Nov 15, 2012
Membership preview (limited functionality)	1 st week of December, 2012
New site live	Feb 1, 2013

Desired Budget

Project budget is estimated at \$25,000 with an additional \$5,000 contingency/first year maintenance. Budget does not include hosting costs (both initial and on-going). By submitting a proposal, you agree your bid shall remain valid and binding for ninety (90) days reckoned from the due date of responses.

Vendor is responsible for and will bear all costs, expenses, and liabilities incurred in the preparation of bids and/or responses to this RFP whether or not a contract is awarded.

Client Side Team and Resources

The vendor will be working primarily with the Executive Director, Michael Cushing, to develop more detailed descriptions of the site. This is especially true of the MIS system.

While we do not expect substantial re-use of existing code/database structures we probably can make this code available. The volunteer most responsible for the website is moving out of state and would be available only for brief technical questions. The volunteer most responsible for the databases will be available for questions and will continue to maintain the existing site until cut over.

SFCG will supply the following:

- All needed photographs with copyright clearance as required (we have access to many historical photos)
- All tour descriptions and copy (much already exists on our current site)
- SFCG logo
- Sample graphics from other material to use as style reference. Additional graphics are the responsibility of the vendor.
- The map background as created for our brochure in electronic form. Vendor may choose to use this map either as is, or with modifications, or create a new map.
- General guidance on look and feel of homepage (see Appendix A)
- Existing database records in electronic form for porting to new database structures.

Implementation Details

The SFCG website is currently hosted by LunarPages. While we will consider alternatives, we do not anticipate the need to change hosts.

Given increased functionality, desired storage needs & desire for a more robust SQL engine we may need to upgrade our hosting plan to meet new site requirements. Vendor will advise on requirements.

The site must meet all ADA guidelines.

Proposal Requirements

Pre Proposal Questions

Proposers should indicate an interest in submitting a proposal via email to Audrey Cooper. This will add your firm to the list of proposers who will receive the questions and answers.

Questions may be addressed by e-mail to:

Audrey Cooper, Chair audreyanncooper@yahoo.com prior to April 22.

Answers will be provided via e-mail to all respondents by April 27.

Deadline

Proposals are due by 4 PM on Tuesday May 2, 2012 at SFCG offices:

SF City Guides
Attn: Michael Cushing, Executive Director
100 Larkin Street
San Francisco, CA 94102

Please provide (1) electronic copy on a CD and (2) print copies of the proposal.

Please limit proposals to 30 pages and follow the outline below.

About the Firm

- Provide a company profile that includes length of time in business, financial stability, and core competencies.
- Briefly describe your firm's organizational capacity to produce our website including number of staff, equipment, software, physical space, and office location.
- Describe your experience in producing sites for non-profit and/or community-focused projects.
- Describe your experience in MIS / Database implementation.

Team Qualifications

- Describe the proposed team. Include a brief background summary for each key staff member assigned to this project. Note each person's role on the proposed project and their relevant experience.
- Describe your team's project qualifications as they relate to the proposed project. Include a list of three website URLs produced by your firm that best reflect great work and relevancy to this project (briefly note the role your firm played in each project in addition to the staff who worked on each project that are also proposed for this project). Only sites that are live will qualify during evaluation.
- Provide current reference information for three clients including client name, title, organization, email, telephone, project name and project completion date.

Scope

- Provide a brief project understanding that includes a discussion of the authoring tools, database tools and coding languages proposed for this project. We lean toward industry standard solutions, where applicable.
- Describe your process for porting and verifying our existing SFGC databases to the new structure.
- Briefly discuss your testing and support plan.
- Describe how your team will maintain reasonable security of PII both as part of the final site and during development.
- Describe your project management strategy including methods of distilling requirements and data from stakeholders in a non-profit/volunteer organization.

Schedule and Budget

- Provide an understanding of overall project schedule based on the requested schedule. Include a list of design deliverables your firm will provide at each of the three approval points. Describe any additional approvals or changes considered necessary.
- Please explain your service level agreement (SLA) structure.
- Provide a fee proposal noting payment milestones as well as hourly rates and projected hours for key personnel.

Additional Information

- Provide other information to assist the SFGC board in selecting your firm for this project.

Evaluation Criteria

Proposals will be evaluated with the following criteria:

- Suitability: proposed solutions meet the needs and criteria set forth in the RFP
- Depth and Breadth of Team: the candidate firm has the appropriate team to develop the site within budget, on time, and provide maintenance and upgrades to the website going forward
- Experience: vendor has demonstrated successful completion and support of similar projects (special consideration given to firms with experience creating back-end MIS systems of a similar nature, especially for non-profit organizations)
- Aesthetic Web Design Capabilities: prior work demonstrates artistic, innovative, and user-friendly interfaces that engage communities and viewers
- Timeline and Budget: schedule and fee proposal are consistent with the RFP
- Commitment: demonstrated commitment to high service level agreements (SLA)

Terms and Conditions

The following are some of SFCG's terms and conditions. Vendor's proposal must explicitly state that this "RFP has been read and its requested terms will be accepted should an award be made." Your proposal must specifically indicate any terms and conditions you are not willing to accept, if any. A person authorized to obligate your firm contractually to the scope, terms, specifications, and pricing must sign your response.

By submitting a proposal and bid, the Vendor agrees to be bound that:

- All deliverables will be "work for hire" with all rights held solely by SFCG
- Vendor will deliver all source code and documentation in a mutually agreeable electronic form to SFCG prior to final payment
- Payments will be based on accepted, agreed upon milestones listed in the contract
- While SFCG has allocated existing funds for this project, the vendor will assist in any required documentation for potential grants SFCG may seek during this process
- No news release or advertising pertaining to this project shall be made without express prior written approval from SFCG
- SFCG reserves the right to modify or waive any provisions of this RFP

By submitting a proposal and bid, the Vendor represents and warrants that:

- Vendor will treat all information, especially PII, with strict confidence. No data may be used or sold for any purpose without written consent of SFCG

Your response to this RFP shall constitute an offer to provide a full scope of project initiation and administration, documentation, and other related services for SFCG. If your response is accepted, SFCG may, at its option, incorporate any or all parts in the final contract, by reference. This RFP represents only a definition of requirements. It is not an offer to contract. Only the execution of a written contract shall obligate SFCG in accordance with the terms and conditions contained in such contract.

Thank you and we look forward to your response.

The SFCG Board: Audrey Cooper (Chair), Christopher Fey (Vice Chair), Harriet Sollod (Treasurer), Paige Williams (Secretary), Phil Bailey, Peter Deutsch, Katherine Lew Hsieh, Patti Pace, Joshua Weinberg, and Michael Cushing, SFCG Director, Libby Zazzera, SFGC Staff.

APPENDIX A

Three possible ideas for splash page

APPENDIX B

Main Navigation Bar

APPENDIX C

Reservation System

APPENDIX D

List of desired “Dashboard Information” and start pages for various users

- Guides Only
- Specific Committees
- Staff

APPENDIX E

Proposed new database records for:

- Guides (the individuals who make up the organizations)
- Walks (a specific instance of a tour on a specific date & time)
- Donors (the wonderful people who make this all possible)

APPENDIX F

List of existing databases for reference
Existing reports for reference

APPENDIX G

List of desired reports
List of Automatic Guide Reminders

APPENDIX H

Wireframe of Individual Tour pages

Appendix A

City Guides Ideas for Splash Page

1. Map

- Look: Map of SF (mimics existing collateral but stylized and interactive) shows visitor where tours begin
- Feel: Functional and organized, familiar to guides and visitors
- Elements include red pins on tours within 24 hours (rollover for Tour Name + Time) that hyperlink to tour info. Black pins on all tours.



2. Collage of San Francisco City Guides Images

- Look: Grey or color-filtered collection of SF images that become vibrant with mouse rollover that also provides hot button functionality
- Feel: Casual, warm, grassroots, happy, unique to San Francisco and City Guides



3. Cityscape Scene

- Look: Scene from Alamo Square Park with a collection of SF things on a park bench providing more information upon rollover
- Feel: As if you are about to go on or have just gone on a CG tour. Warm, inviting, happy traveler in SF enjoying a view almost too good to be true
- Elements on bench include a folded CG schedule, SF map, pocket watch, cable car ticket stub, camera bag, red CG jacket, yellow envelope



Note that these are only ideas to provide some guidance as to the complexity of interface we are looking for. We are interested in exploring design alternatives with selected vendor and would expect additional options to select from.

Appendix B

Main Navigation

This is the navigation for the public & guides. Staff access to the login for the complete MIS system would be via www.sfcityguides/admin or similar.

HOME	TOURS	ABOUT	SUPPORT	GUIDES ONLY	FAQs
	Today's Tours	Overview	Donate	(password)	
	Search by Map	News	Sponsorship	See Below	
	Search by Schedule	Press	Membership	Guidelines	
	Private Group Tours	Social Media	Gift Shop		
	School Tours	Sponsors	Feedback		
		Become a Guide			
		Links			
		Contact CG			

Guides Only Break-Out

Calendar

Tour Resources (Tour Sign In Sheet, Statistics, Tours that Need Guides, Current Schedule of Tours, Past Schedule of Tours, Tour Sign Up, Links to Improve Your Tour)

For Guides in Training (Class Schedule, FTP for Class Materials, Video of Classes)

Committee Resources (About Each Committee, Committee Contact list, Join a Committee, Committee Dashboards, FTP, Submit Calendar Items)

Connect with Other Guides (FB page, Twitter Feed, Pinterest, Yahoo Group Email Link, Bulletin Board, Contest, Special Events, Submit an Article to Guidelines, Kudos)

San Francisco History (Photographs, Articles, Links)

About the CG Management Board

Policy (Bylaws, Policy Documents, Strategic Plan)

Contact CG

Feedback

Appendix C

Reservation System

In general SFCG does not require reservations. We operate in a “bring ‘em on” manner however we are starting to experience significant crowds and wish to have a functioning reservation system in place for possible use on selected tours. This is new functionality for the organization.

Each individual tour on each specific date will have the following settable by staff:

- Reservations required <yes/no> The default is NO reservations.
- A specific maximum number of walkers <number 1-999>
- Maximum number of walkers in a single group <1-9>
- A “pay” flag <yes/no> indicating if there is a charge for the tour (for possible future use)

Public Side Functionality

If reservations are enabled when a visitor to the web site selects that tour’s information page a “pop up” will appear informing them of the need to make a reservations (text by SFCG). Also suppress the start location.

If the tour is already full, inform them and ask them to check back later to see if additional spaces are available. If there is space and they wish to make a reservation we should collect:

- Name
- Number of walkers in their party
- e-mail address to send them a reminder.
- Phone #

If the “pay” flag is enabled then we ask them to complete transaction via Paypal

When they complete the reservation display start location.

Allow visitor to cancel reservation by name if and only if they can supply the matching e-mail address

We are interested in exploring the cost/complexity of a “waiting list” functionality but it is not a requirement of this RFP

Staff and Guide Side Functionality

Maintain list of names.

Automatically E-mail list to guide giving the tour a specified number of days before the tour

When a tour is fully booked:

- Send e-mail to tour coordinator to see if they want to add a guide. If a guide is added the max number of walkers will be manually updated.

- Display on staff dashboard the name and date of full tour(s)

Appendix D

Dashboards

This represents a complete list of dashboards required by this RFP. The exact functionality will need to be developed by vendor with input from SFCG but this is a good representation of our goals.

GUIDES-ONLY

This is the general starting point for all guides. Requires password access.
Password is known to all guides (and half the city)

- Tour signup
 - 1. Link takes guide to page where they can sign up for tour
 - 2. Link takes guide to page with that tour's pdf dump (scripts, etc)
- Calendar
 - 1. Prominent and includes events in different colors
- Communications page
 - 1. Link to Facebook page
 - 2. Link to yahoo group e-mail signup
 - 3. Display of SFCityGuide twitter feed (with other guides??)
 - 4. Link to a general bulletin board (??)
- Committees' dashboards
- Schedules of monthly tours
- Tours looking for guides
- Tour stats (tbd)
- Guidelines
 - 1. Leads to archive and current issue
- New trainee link
 - 1. Pdf site for materials
 - 2. Video of training sessions
- Resources and Documents
 - 1. Pdf site of books, training tips, etc
 - 2. Link to tour signup sheet
- Improve your tour
 - 1. Site that lists pdf tips and checklists
- "Guide of the Day"
Display Photo, Class, list of tours, list of committees
The selected guide rotates daily from active roster

COMMITTEE DASHBOARDS:

These are accessed by committee members based on permissions granted to their specific login.

GUIDELINES

- PDF site for archived copies
- Upload site that can send electronic copies
 1. Links to means of automatically sending when appropriate
- Password-protected Calendar link for recording future meetings and deadlines
- Contact the committee

TOUR QUALITY — All parts protected with general committee password

- List of guides who need first evaluations in next three months
 1. Interior page that links from here needs to be in grid format and list: guides, next tours/dates, and have a way for evaluators to reserve that person's tour. From that reservation page, would be nice to have a pop-up that has telephone contact info for the guide and tour coordinator's e-mail.
- Guides who need updated evaluations (eventually turned on but not initial launch)
 1. Interior page that links from here needs to be in grid format and list: guides, next tours/dates, and have a way for evaluators to reserve that person's tour. From that reservation page, would be nice to have a pop-up that has telephone contact info for the guide and tour coordinator's e-mail.
- List of guides with pending evaluations
 1. Link from here should take someone to the guide, when he was supposed to be evaluated, and name of evaluator who signed up.
 2. Separate admin password-protected site should allow admin (TQ Chair/office) to enter results of evaluations and link evaluations. Essentially a link to the Guide data page with only TQ items available for edit.
- Status of flagged guides (with names obscured)
 1. Link should be admin password protected and go to the complaint/status/re-eval form
- Pie chart of last three guide classes and how of those current guides many need evaluations
- Calendar link for future meetings
- PDF site for evaluation forms, checklists, tips, and other documents
- Contact the committee

Education & Training (ETC)

- Calendar link
 1. Able to enter meeting times, special events, continuing education, training
- Pie chart showing last three guide classes and how many have given tours, how many have not
- Mentoring pie chart, how many guides from last class has a mentor
 1. Links to database with guides and assigned mentor and guide status
- Continuing education link
 1. Links to RSVP for events
- Contact the committee

BOARD

- PDF site for minutes
- Calendar link for upcoming meetings
 1. Password protected
- PDF site for materials related to each meeting, with automatic e-mail function (to send to board)
- Link to contact the board

SPECIAL EVENTS

- Calendar
 1. Password protected links allows ability to enter dates of special events
- Reservation link
 1. Links to ability to RSVP for events
- Link to contact the committee

DEVELOPMENT/FINANCE — All password protected

- List of sponsors that need to be contacted
- Graph showing of sponsorship contributions for last month, YTD
- Link to contribute
 1. Encrypted site (same as from homepage) allowing people to donate

MARKETING COMMITTEE

- Calendar
- PDF site
- Link to contact the committee

TOUR COORDINATOR COMMITTEE

- Calendar
- PDF site
- Link to contact the committee

STAFF DASHBOARD

This are accessed by staff members based on permissions granted to their specific login

- “Guide of the Day
Photo, Class, list of tours, list of committies
The selected guide rotates daily from active roster
- Live display of current stats
This is a representative list. The idea is to display a single page of the most relevant information

Tour Statistics

- How many walks in the month
- How many posted walks
- How many not posted walks
- Total walkers in the month
- Average Walkers per walk
- Total donations collected
- Average Donation collected per walk
- Average donation per walker
- Walks with full reservation list

Financial Statistics

- Comparison of gifts/donations the current yr. vs. last
- How many donors
- How many diners are guides?
- Total Amount of Donations

Organization Statistics

- What tours need more guides
- Number of guides with outstanding tour sheets

Calendar

- Upcoming meetings
- Training Events
- Special Tours
- Private Tours

Appendix E

MIS Database Records.

These record lists provide a sense of the data we wish to capture about the ongoing operation of SFCG. Much but not all of this data is already captured in our existing system and will need to be ported. In addition any existing data fields must be incorporated into the new databases.

This appendix is organized as:

A **GUIDE** record (the data we wish to know about an individual guide)

A **WALK** record (the data we wish to know about an individual walk)
Note a walk is a specific instance of a tour.

A **DONATION** record (the data we wish to know about donations)

Nothing about the presentation of this information should be taken to indicate how we wish the internal databases to be created or structured. Vendor will use best relational database practices to design our specific data structures in a robust manner.

In addition we will want ~ 10 “future” fields of varying types in each record to facilitate additional information we may desire in the future

Note fields labeled <auto fill> are populated automatically from data stored elsewhere in the databases. For example the Guides “date of last tour” comes from the schedule database.

Guide Record

INFORMATION

Name	Last	First	Middle	Honorific <Mr. Ms,Mrs, Dr.>	
Address 1	Line 1,	Line 2	City	State	Zip
Address 2	Line 1,	Line 2	City	State	
Primary Phone		type <home, work, mobile>			
Secondary Phone		type <home, work, mobile>			
Start Date					
Training Class Year					
Total Tours Given					
Outstanding Nanny Items		<auto fill>			
Evaluation status		<auto fill>			
Current Status		<active, inactive, emeritus, good soul,>			
General Notes#1 <free text>		<auto fill>			
General Notes#2 <free text>		<auto fill>			
General Notes#3 <free text>					
link to photo					

TOURS	Name	Mentor	Approved to give tour	TC Sign Off	TQC Sign-Off	Total Tours Given	Date of last Tour
Tour #1	<from list>	<from list of tour members>	<yes, no, conditional>	<name/date>	<name/date>	<auto fill>	<auto fill>
Tour #2							
...							
Tour #25							

TOUR QUALITY	Date	Evaluator	tour evaluated	Reason for evaluation	Next eval due	complaint	Response	Status of re-eval
Evaluation #1				<first, flagged, update>	<autofill>	<free text>	<free text>	<free text>
Evaluation #2								
...								
Evaluation #99								

CONTINUING EDUCATION

Event #1			
...			
Event #99	event name <free txt>	date	notes <free text>
	event name <free txt>	date	notes <free text>

COMMITTEE SERVICE

Committee #1	event name <free txt>	date	notes <free text>
...			
Committee #99	committee name <free txt>	Position	start date
	committee name <free txt>	Position	start date
			end date
			Service notes <free text>

COMMENTS

Kudos 1	committee name <free txt>	Position	start date	end date	Service notes <free text>
...					
Kudos 99					

Walk Record

Date		<auto fill from schedule >
Tour	<drop down list of tours>	<auto fill from schedule >
Type	<scheduled, web-only, private, other>	<auto fill from schedule >
Guides	Primary	<auto fill from schedule >
	1st assit	<auto fill from schedule >
	2nd assit	<auto fill from schedule >
	3rd assit	<auto fill from schedule >
	4th assit	<auto fill from schedule >
	. . .	<auto fill from schedule >
	10th assit ?	<auto fill from schedule >
Reservation Required	yes/no	
payment required	yes/no	
Max number of walkers	<1-999>	
Max walkers per reservation	<1-99>	
Reservation Names	Reservations Names (up to 99>)	<auto fill from reservation
Tour Sheet Recieved	<yes/no>	
Zero Walkers reported	<yes/no>	
# of Walkers Reported		
Contributions Received		
Guide no-show	<yes/no>	<free text reason>
Any SFCG Issues	<yes/no>	<free text discription>
Kudos	<yes/no>	<free text discription>
Complaints	<yes/no>	<free text discription>

Donor Record

NAME

Name	Last	First	Middle	Honorific
Type of Sponsor relationship	<individual, business, non-profit, trust, estate, other, > <free text?>			
SFCG status	<guide, board, staff, none>			
Address	Line 1,	Line 2	City	State Zip
Primary Phone				
Secondary Phone				
Status	<active, inactive, one-time>			
Employer				
Matching	<yes/no>			
Dollars for Doers	<yes/no>			
Online Offer	<free text>			

Date of last Donation	<auto fill>
Date of last Contact	<auto fill>
Amount of last Donation	<auto fill>
Total Donations	<auto fill>

DONNATION HISTORY

Donation #1	Date	Amount	<yes/no>
Donation #2			
...			
Donation # 99			

CONTACT HISTORY

Contact #1	Date	By	Notes <free text>
Contact #2			
...			
Contact #99			

Appendix F Existing Databases

Table	Rows	Type	Size	Comments	
applicants	164	MyISAM	674.5 KiB	Creation:	Feb 22, 2011 at 08:53 PM
				Last update:	Feb 02, 2012 at 02:52 PM
board_announcements	3	MyISAM	15.0 KiB	Creation:	Apr 23, 2009 at 08:25 PM
				Last update:	Apr 06, 2011 at 03:17 PM
class	19	MyISAM	3.1 KiB	Creation:	Mar 11, 2011 at 10:33 PM
				Last update:	Jan 19, 2012 at 10:07 AM
classmaterials	79	MyISAM	10.5 KiB	Creation:	Jul 01, 2010 at 04:35 PM
				Last update:	Jan 18, 2012 at 02:44 PM
Contests	21	MyISAM	30.1 KiB	Creation:	Apr 03, 2008 at 05:04 PM
				Last update:	Sep 20, 2009 at 10:30 AM
countyzip	9	MyISAM	4.9 KiB	Creation:	Feb 04, 2011 at 05:43 PM
				Last update:	Feb 04, 2011 at 08:44 PM
delivery	946	MyISAM	111.2 KiB	Creation:	Jan 31, 2012 at 10:26 AM
				Last update:	Jan 31, 2012 at 10:26 AM
Donations	10,550	MyISAM	638.3 KiB	Creation:	Mar 27, 2011 at 02:58 PM
				Last update:	Jan 30, 2012 at 02:54 PM
dups	in use			VIEW	
Emails	10,008	MyISAM	5.8 MiB	Creation:	Nov 18, 2007 at 05:11 PM
				Last update:	Feb 05, 2012 at 05:12 PM
Evaluations	413	MyISAM	56.1 KiB	Creation:	Dec 26, 2007 at 03:38 PM
				Last update:	Feb 04, 2012 at 08:39 AM
Events	459	MyISAM	302.6 KiB	Creation:	Jun 19, 2009 at 11:41 AM
				Last update:	Jan 05, 2012 at 12:08 PM
Groups	12	MyISAM	2.3 KiB	Creation:	Jan 24, 2008 at 09:25 PM
				Last update:	Apr 13, 2008 at 06:07 PM
GroupTours	568	MyISAM	82.8 KiB	Creation:	Feb 15, 2008 at 03:57 PM
				Last update:	Jan 27, 2012 at 01:33 PM
Guidelines	1,150	MyISAM	1.3 MiB	Creation:	Aug 01, 2008 at 08:10 PM
				Last update:	Feb 06, 2012 at 01:20 PM
guidelines_mailings	16	MyISAM	121.0 KiB	Creation:	Jan 28, 2012 at 09:10 PM
				Last update:	Jan 31, 2012 at 10:26 AM
Guides	571	MyISAM	97.4 KiB	Creation:	Aug 27, 2010 at 01:07 PM
				Last update:	Feb 06, 2012 at 01:55 PM
Guides_per_walk	485	MyISAM	20.3 KiB	Creation:	Dec 28, 2009 at 08:54 AM
				Last update:	Feb 03, 2010 at 07:19 PM
joe_cal_events	6	MyISAM	8.8 KiB	Creation:	May 01, 2008 at 02:32 PM
				Last update:	Feb 06, 2012 at 01:56 PM
Kudos	51	MyISAM	16.5 KiB	Creation:	Jul 16, 2008 at 03:31 PM
				Last update:	Mar 26, 2011 at 05:15 PM
lastdon	in use			VIEW	
Links	34	MyISAM	6.3 KiB	Creation:	Sep 08, 2007 at 08:19 AM
				Last update:	Jan 24, 2012 at 03:36 PM
Mass_emails	285	MyISAM	1.6 MiB	Creation:	Feb 21, 2011 at 08:31 PM
				Last update:	Feb 02, 2012 at 12:30 PM

Appendix F Existing Databases

Table	Rows	Type	Size	Comments	
Media	491	MyISAM	67.8 KiB	Creation:	Apr 04, 2008 at 12:55 PM
				Last update:	Jan 08, 2010 at 01:25 PM
oc_calendar	1	MyISAM	2.0 KiB	Creation:	Jun 03, 2011 at 11:17 AM
				Last update:	Jun 05, 2011 at 03:04 PM
paradox_cglist	2,548	MyISAM	427.0 KiB	Creation:	Jan 23, 2008 at 02:02 PM
				Last update:	Jan 23, 2008 at 02:20 PM
paradox_donations	8,909	MyISAM	240.2 KiB	Creation:	Jan 22, 2008 at 07:54 PM
				Last update:	Jan 22, 2008 at 07:58 PM
paradox_tour	15,675	MyISAM	814.4 KiB	Creation:	Dec 28, 2007 at 10:44 PM
				Last update:	Feb 07, 2008 at 09:06 PM
paradox_tours	93	MyISAM	5.5 KiB	Creation:	Jan 02, 2008 at 10:01 PM
				Last update:	Jan 02, 2008 at 10:03 PM
paradox_where	46,949	MyISAM	2.1 MiB	Creation:	Dec 28, 2007 at 10:48 PM
				Last update:	Feb 07, 2008 at 09:26 PM
preview	19	MyISAM	10.8 KiB	List of preview walks	
				Creation:	Feb 03, 2012 at 05:39 AM
				Last update:	Feb 06, 2012 at 02:09 PM
preview_addls	0	MyISAM	1.0 KiB	Creation:	Feb 03, 2012 at 05:46 AM
				Last update:	Feb 03, 2012 at 05:46 AM
preview_dates	64	MyISAM	4.4 KiB	Creation:	Feb 03, 2012 at 04:21 PM
				Last update:	Feb 06, 2012 at 02:10 PM
preview_guests	1,122	MyISAM	93.8 KiB	Creation:	Apr 13, 2011 at 04:37 PM
				Last update:	Feb 06, 2012 at 06:46 AM
Schedule_distribution	252	MyISAM	28.1 KiB	Creation:	Jul 11, 2008 at 12:42 PM
				Last update:	Oct 20, 2011 at 01:04 PM
signup	3	MyISAM	3.4 KiB	sign ups for events - see also signupslots	
				Creation:	Nov 03, 2011 at 08:55 AM
				Last update:	Nov 03, 2011 at 10:16 AM
signupslots	80	MyISAM	8.8 KiB	slots for sign ups for events	
				Creation:	Nov 08, 2010 at 01:21 PM
				Last update:	Nov 30, 2011 at 12:21 PM
Societies	110	MyISAM	15.5 KiB	Creation:	Jan 24, 2008 at 09:08 PM
				Last update:	Jun 28, 2011 at 09:43 AM
Sponsors	2,602	MyISAM	348.2 KiB	Creation:	Mar 27, 2011 at 01:28 PM
				Last update:	Jan 30, 2012 at 04:00 PM
subscribers	44	MyISAM	6.1 KiB	Creation:	Jan 08, 2009 at 07:57 PM
				Last update:	Feb 01, 2012 at 11:05 AM
Tours	119	MyISAM	113.7 KiB	Creation:	Mar 29, 2010 at 02:57 PM
				Last update:	Feb 06, 2012 at 01:31 PM
Walks	15,654	MyISAM	3.0 MiB	Creation:	Aug 20, 2011 at 03:33 PM
				Last update:	Feb 06, 2012 at 01:49 PM
webforms	61	MyISAM	42.8 KiB	Store information entered on various webforms	
				Creation:	Apr 25, 2011 at 04:50 PM
				Last update:	Feb 06, 2012 at 08:32 AM
43 tables	120,645	—	18.2 MiB		

Appendix G

Reports & Reminders

City Guides Internal Reports

These are the “one button” common reports. In your proposal allow for 10 additional similar reports.

Report showing last year’s statistic with YTD for regular tours & private tours

Tour Statistics

- How many walks in the month
- How many posted walks
- How many not posted walks
- Total walkers in the month
- Average Walkers per walk
- Total donations collected
- Average Donation collected per walk
- Average donation per walker

Financial Statistics

- Comparison of gifts/donations current year. vs. last
- How many donors
- How many diners are guides?
- Total Amount of Donations

City Guides Internal Reminders

These are the automated e-mail reminders we wish to send. In your proposal allow for 5 additional similar reminders.

Tour Guides

- Email upcoming tours they are leading
- Email reminder of upcoming events including event details
- Email reminders to guides that have not turned in tour sheets

These should be consolidated into a single e-mail

Private Group Tours

- Email reminder to customer directing them to contact office for payment and details

Development

- Email reminder to staff containing status report of donors or sponsors
- Automatic thank you letter generated with sponsor name and donation amount

Appendix H

Tour Pages

Each Tour has a visitor accessible page describing the tour and it's particulars. This information (especially photographs and text) must be easily updatable by staff from the CMS

NAVIGATION BAR

Tour Description Page

Name of Tour

Picture

Tour Description

Map of Meeting Place Location

Picture

HOT BUTTON
Book a Private Tour

HOT BUTTON
Find This Tour on a Map

HOT BUTTON
This Tour's Full Schedule

Tour Stats
Start Time:
Start Location:
Next Tour:
Led By:
Guides:

Special Note:

*If you like this tour,
take this tour:*

Picture

Share

FB

Tweet

Email

Etc.