



The Cleveland Restoration Society

**Request for Proposal Database
Developer**

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Project Summary

The Cleveland Restoration Society seeks to improve the efficiency and performance of the Microsoft Access database system dedicated to the Heritage Home ProgramSM.

Company Information

The Cleveland Restoration Society (CRS) is a 501(c)(3) private nonprofit organization founded in 1972. CRS operated with volunteers until 1987, when it hired its first professional full-time staff member. In the intervening four decades, CRS has grown into a vibrant organization with an operating budget over \$1 million, an engaged board of trustees, a headquarters, and a staff of twelve professionals offering historic preservation programs and expertise throughout Greater Cleveland. CRS's mission is to use historic preservation to revitalize the diverse communities, strengthen the regional economy, and enhance the quality of life in northeastern Ohio. CRS's programs reach a regional constituency of more than two million residents and are at the intersection of preservation and economic revitalization. CRS is the respected voice for historic preservation in Northeast Ohio, heard strongly through events, educational programs, a biannually printed magazine, website, emailed communications, social media, and print media coverage.

The Heritage Home ProgramSM

Heritage Home ProgramSM provides technical assistance and low interest loans to homeowners for maintenance, energy efficiency, and rehabilitation work. Since its inception twenty years ago, this program has directly benefited 5,913 homeowners with free technical advice on projects valued at over \$126 million and more than 1,045 homeowners with home rehabilitation loans valued over \$38 million. The positive impact of this program has been quantified by Cleveland State University. The Heritage Home ProgramSM is currently active in thirty-eight (38) communities.

Database Content and Structure

The Heritage Home ProgramSM Database is a Microsoft Access Database (.mdb) which hosts over 10,000 client records consisting of addresses, contact information, property details, architectural information, client information, and so forth. CRS does not have the ability to create new fields within the database.

The Database is capable of generating reports pulling from fields by ward, city, county or a combination of the foregoing. Pre-set Reports and Queries can be run by selecting data that show how many inquiries, technical assistance, or phases of the loan process occur in defined geographical areas and defined by date. There is no capability to create Reports or Queries other than the pre-set ones.

The Database contains at least two parts, a Front End and a Back End. CRS staff have been trained to use the Front End but not the Back End. It is assumed that many features of Microsoft Access are embedded in the Back End which CRS staff are not trained to use.

Goals

HHP is expanding into new geographic regions and has a need for its partner facilities to have remote access to a centralized terminal server which will host a copy of the HHP database. The developer should build the terminal services infrastructure to accommodate multiple clients with two levels of permission: the first supervisor permission should have full access over all content; and the second level should only have the ability to input data.

The following additional changes are necessary to modify the current Heritage Home ProgramSM database to become more efficient and increase the range of reports that can be generated.

- Add an option to run reports that can easily be converted to other formats such as Excel.
- Streamline the reporting system to accurately reflect the data respective to each table
- Allow HHP staff to manipulate the program for future modifications such as to add fields and to create new queries and reports.
- Expand current search options
- Create new queries and manipulate/consolidate existing queries
- Provide sufficient training and manuals to allow CRS staff to utilize all the features of Microsoft Access and the HHP Database.

Budget

The Database Developer should quote a fixed fee for the project.

Proposed Timeline

The Database Developer should set forth a proposed Timeline for the project.

Proposals

An interested applicant should please submit a proposal:

In writing to: the Cleveland Restoration Society at 3715 Prospect Avenue, Cleveland, Ohio 44115. Attention: Tom Jorgensen ; or

Electronically to: tjorgensen@clevelandrestoration.org

Proposals must be submitted by **May 25, 2014**.

Contact Information

For more information about Cleveland Restoration Society or the Heritage Home ProgramSM please contact Tom Jorgensen at tjorgensen@clevelandrestoration.org

or visit us on the web at:

www.clevelandrestoration.org

www.heritagehomeprogram.org