

Request for Proposal, Comprehensive Campaign Consulting Services



Date Issued: January 25, 2022

Responses Requested Until: March 1, 2022

Respond to: Dr. Heidi Swank
Executive Director
Rethos: Places Reimagined
heidi@rethos.org

Contact: Paul DeGeest, MA
Director of Development
Rethos: Places Reimagined
paul@rethos.org
651-293-9047

The New Preservation Comprehensive Campaign

Rethos: Places Reimagined will launch a comprehensive fundraising campaign in 2022. The New Preservation campaign will secure funding for expanding our mission impact geography, obtaining and reusing a historic building as our new organizational headquarters, opening and staffing a new program office in Duluth, Minnesota, and increasing our base of charitable supporters among individuals, corporations, foundations, and others.

Expanding Mission Impact Geography

Currently Rethos operates four main program areas, each with its own geographic footprint.

Our **Historic Preservation Loan Program** engages with building reuse projects mainly in Minnesota, Wisconsin, Iowa, and Texas. Rethos has engaged professional marketing services to identify other states in which our loan program can operate (based upon state historic tax credit availability) and to market the program accordingly. As the reach of the loan program grows, additional staff support will be required, internal processing capacity will need to increase, and ongoing promotion and marketing will be needed.

Estimated cost: \$360,000 over three years

Minnesota Main Streets, operated by Rethos, currently partners with twelve Designated Communities, eight Network Communities, and multiple Affiliated Communities across the state. Our objective in 2022 is to increase the number of Designated Communities to fifteen or more and the number of Network Communities to twenty or more. Funding will be required to adequately staff this expansion from 1.5 FTE currently to 2.5 FTE or more. Additional internal resources for marketing, communication, website improvements, and travel will also be needed.

Estimated cost: \$410,000 over three years

Our **Education Program** offers in-person classes in multiple physical locations in Minnesota and remote classes nationwide. These classes include hands-on instruction for owners and tenants of older homes teaching them how to maintain and preserve windows, plumbing and electrical systems, plaster and stucco, paint and finishing, basic masonry, and acquire other skills necessary to keep their living spaces in good condition. Rethos also offers continuing education (CE) credits approved by the United States Department of Commerce for real estate professionals on topics including Old Home Certification, Racism in Real Estate, and specific geographic histories of home ownership. Rethos will expand these educational offerings in 2022 to include new topics, additional instructor partners, more locations, and new CE opportunities for realtors, appraisers, attorneys, and other real estate professionals.

Internal staffing for Education Programs will need to increase from the current 1.5 FTE to 2.5 FTE (or more) and increased resources will be needed to market class offerings, contract with additional instructors, provide sufficient tools and safety equipment for class attendees, and improve internal systems for scheduling and delivering in-person and virtual classes.

Estimated cost: \$322,000 over two years

The **Rethos Policy Institute** is our newest program, established in 2021. Rethos has been active in its advocacy for best practices in public policy around historic preservation for decades. The Policy Institute was established to more formally organize our work in legislative education, policy research, community outreach, and providing resources for local decision makers. In 2022 this new program will expand its reach to become a resource for municipal and county governments seeking to leverage historic preservation to revitalize downtowns, create jobs, support neighborhoods, and maintain the character of their communities. Further, the Policy Institute will increase the efficacy of its work with members of the State Legislature and the Governor's Office to protect and extend the Minnesota State Historic Tax Credit and to promote and expand other initiatives that strengthen historic preservation. The current staffing of .5 FTE will need to increase to 1.5 FTE (or more) in 2022 to achieve these objectives. Internal capacity in policy research, external communications, public outreach, and government relations will need to increase significantly as well.

Estimated cost: \$220,000 over two years.

The New Preservation Campaign will secure funding required to purchase and renovate a historic building to serve as the Rethos headquarters. Rethos: Places Reimagined is a Minnesota nonprofit organization and always will be. Our program reach already extends well beyond the state's borders, but Minnesota is our home. Our current office space within the historic Landmark Center in downtown Saint Paul has served us well for many years. But given the expanded reach we will pursue in 2022, Rethos will need more space for additional staff and programming. To that end, Rethos established a space committee comprised of board members, staff, and outside real estate and construction professionals to identify and assess the suitability of several structures in the Twin Cities area. Based upon that research, Rethos has developed a detailed profile with associated purchase and rehabilitation costs for its ideal new home.

Further, Rethos has identified a need to add a programmatic presence in Duluth, Minnesota in order to best serve new program participants in the Arrowhead Region. Office space, equipment, and staffing will be required, as well as upgraded information system infrastructure to support this new location.

Estimated cost: \$3.5 million

Total Goal for The New Preservation Comprehensive Campaign: \$4,812,000

About Rethos: Places Reimagined

We are Rethos: Places Reimagined, a 501(c)(3) nonprofit organization based in Minnesota and working nationwide for the purposeful reuse of old buildings and sites. We are holistic in our thought and flexible in our approach. We activate space, invest in communities, and reimagine what can be. We embody and advance The New Preservation and invite you to join us.

Founded in 1981 as the Preservation Alliance of Minnesota, Rethos has been working for four decades to protect and preserve historic structures of all kinds. Our original focus was to identify and lead the effort to preserve historic buildings slated for demolition. These efforts were highly successful, but we came to understand that merely preventing old buildings from being torn down was only a small piece of what we embrace as historic preservation. There must be purpose.

The New Preservation is just that: historic preservation with a purpose. Our work does focus on historically significant structures and places. But the definition of "historically significant" must always be revisited and refined to best suit the needs of people and communities today. We ask why is it historic? How is it significant? What stories does it tell? Most importantly, we ask how this old building can best be reused to serve a need today?

Rethos has developed and expanded four major program areas to promote The New Preservation:

1. Our Education Program delivers hands-on (and now remote) learning opportunities for people to acquire the skills and confidence they need to maintain and preserve their older homes and spaces. This extends the useful life of these older buildings, the first step in preservation.
2. Our Minnesota Main Streets Program is a Main Streets America™ Coordinating Program and works with local leaders in communities all across the state. Together we identify new and better ways to support small businesses, create jobs, revitalize neighborhoods, and preserve a sense of community with a focus on preserving historic downtowns.
3. Our Historic Rehabilitation Loan Program allows historic property owners and developers to access the full financial power of Minnesota's State Historic Tax Credit program. We also work in other states with similar tools in order to make transformational building reuse projects financially feasible.
4. Our newest program is the Rethos Policy Institute. Our work to promote and educate about best practices in historic preservation public policy is not new, but in 2021 we created this program to better organize and focus our ongoing efforts.

Rethos: Places Reimagined is a dynamic, agile organization focused on historic preservation. These ideas are not opposites, but rather form a complex relationship between the old buildings and places we love and the pressing contemporary needs and aspirations of communities today. It's preservation with a purpose. It's The New Preservation.

Background and Scope

Rethos: Places Reimagined has identified more than \$4.8 million in funding needs. For context, the annual operating budget for Rethos is \$1.7 million. In these extraordinary times, opportunities for public funding from federal, state and local resources are being actively pursued. As is the history with most comprehensive and capital campaigns, this campaign will ultimately succeed through a partnership of both public and private investment. The purpose of this request is, in part, to determine the level of private contribution – from foundation, corporate, and individual support – Rethos can expect to secure through a vigorous comprehensive campaign effort. Further, Rethos seeks to partner with outside fundraising counsel to plan and execute the campaign itself, resulting in securing the identified funding needed, but also growing our base of charitable investment from all sources and building upon the momentum of a successful campaign to bolster our post-campaign fundraising program.

A successful proposal will:

- ✓ Determine if key stakeholders (including those new to Rethos), community leaders, and potential donors believe this comprehensive project is important.
- ✓ Identify how much / whether the community can raise funds to support the project at this time.
- ✓ Analyze Rethos' existing donor base for prospective contributors to this campaign.
- ✓ Identify key messages and themes that resonate with potential supporters.
- ✓ Propose community-centered approaches to creating an inclusive campaign that welcomes, facilitates, and recognizes not only major gifts but financial contributions of all amounts.
- ✓ Determine whether Rethos' staff and board are prepared and capable of achieving the campaign's goals (planning, administration, solicitation, recognition, etc.).
- ✓ Provide an estimated timeline for achieving all fundraising goals and securing support.
- ✓ Create a detailed plan for successfully completing The New Preservation Comprehensive Campaign within four years of launch.
- ✓ Provide a structure for how campaign consultant(s), Rethos staff and volunteers, and others will coordinate activities to most effectively achieve the identified goals and objectives.
- ✓ Actively manage the comprehensive campaign process to ensure favorable outcomes.

Deliverables (Pre-campaign):

- A written document summarizing findings, including clear recommendations and insights related to:
 - Likely prospective donors
 - Likely range of funds to be raised
 - Proposed timeline for completion (both pledges and payouts, if possible)
 - Insights regarding current donor participation
 - Insights and proposed community-centered fundraising engagement strategies
 - Analysis of Rethos' staff and board capacity
- A presentation (undetermined whether this will be in person or virtual) to Rethos' Board of Directors (or Executive Committee) on findings and recommendations.

Deliverables (Campaign):

- Detailed plan for successfully completing The New Preservation Comprehensive Campaign that achieves the financial and other goals and objectives described above.
- Estimate of all associated costs, including, but not limited to compensation for campaign counsel.
- Detailed timeline identifying key tasks and their corresponding due dates related to successful completion of the campaign.

Proposals Must Include:

- Primary contact Name and Information (phone, email, address, website, etc.)
- Understanding of project (including vision, scope, deliverables).
- Project Approach (including explanation of process and methodology, proposed timelines for all deliverables outlined above, and description of any additional proposed activities).
- Project Responsibility (including clear description of duties you perform and those you expect to be performed by Rethos' staff and volunteer leadership).
- Proposed fee and fee structure for all work described above.
- Summary of respondent's capabilities, experience with similar organizations, experience with comprehensive or capital campaigns, and a representative list of clients (who may be asked to provide reference as part of the selection process).

Respondents are encouraged to identify if they represent an enterprise owned and/or operated by women, people of color, or other groups that have been historically excluded from the benefit of full participation or consideration in this type of business opportunity or venture.

Additional information you choose to provide (limited to two additional pages).

Total proposal must not exceed ten (10) pages. Equal Opportunity Employer

Equal Opportunity Employer

It is the policy of Rethos: Places Reimagined to provide an equal employment opportunity to all individuals. We are committed to a diverse workforce and to diverse vendor relationships. We value all employees' talents and support an environment that is inclusive and respectful. We are strongly committed to this policy and believe in the concept and spirit of the law. It is the policy of Rethos to comply with all applicable laws that provide equal opportunity to all employees or applicants for employment without regard to race, color, creed, religious belief, sex, sexual orientation, national origin, marital status, status with respect to public assistance, disability, age, military status, genetic information, familial status or any other characteristic protected by applicable federal or state law.

To Be Considered:

Please submit your complete written proposal electronically as one document (Word or PDF preferred) to heidi@rethos.org no later than March 1, 2022. Proposals received after that date may not be considered.