

## Request for proposals for implementation plan for Save Ohio's Treasures program

Date distributed: April 1, 2014

Optional bid meeting (phone/in person): 11AM-Noon, April 22, 2014

Date proposals due: May 30, 2014

Consultant notification no later than: June 13, 2014

Submit RFP to: Joyce Barrett, jbarrett@heritageohio.org

Submit RFP questions/meeting RSVP to: Frank Quinn, fquinn@heritageohio.org

### **Background**

Heritage Ohio recently began the process of establishing a brick & mortar fund, the Save Ohio's Treasures program, as a new source of preservation funding to ensure the rehabilitation and continued use of threatened and endangered historic properties. As the next step in the process, Heritage Ohio is issuing this RFP to retain a consultant to assist us to lay the procedural groundwork for success.

Incorporated as Downtown Ohio, Inc, in 1989, Heritage Ohio fosters economic development through preservation of historic buildings, revitalization of rural downtowns and urban neighborhood commercial districts, and promotion of our civic tourism industry. Heritage Ohio accomplishes its mission to help people to save the places that matter, build community, and live better, through its flagship Ohio Main Street Program, Annual Revitalization & Preservation Conference, and trainings and networkings. Heritage Ohio served as the prime advocacy voice to encourage passage of the Ohio Historic Preservation Tax Credit, and continues to work with legislators now to insure its continued use. You can learn more about Heritage Ohio online at [www.heritageohio.org](http://www.heritageohio.org).

### **Scope of Work**

The consultant chosen to work with Heritage Ohio will be the one best demonstrating the ability to meet the current needs outlined below.

1. Develop an implementation plan that identifies and provides the PROs and CONs regarding specific options in the structuring of the fund, including, but not limited to:

- Whether to take controlling interest in target properties, strictly disburse funds to third parties, or whether to accomplish fund objectives through a combination of approaches

- Whether, if taking a controlling interest, to purchase properties outright, accept donated properties, place options on target properties, or accomplish fund objectives through a combination of approaches
- Whether, if taking a controlling interest, to mothball only, complete exterior repairs, or produce turnkey properties prior to sale
- Whether, if working with third parties, to disburse funds in the form of loans, grants, a combination, or other process

2. Develop an implementation plan that analyzes specific building/neighborhood types that would benefit from program funds, including:

- Privately owned residences
- Underutilized/vacant house museums
- Underutilized/vacant commercial/industrial buildings
- Underutilized/vacant churches
- Underutilized/vacant public buildings

Additionally, providing PROs and CONs to limiting program fund expenditure to National Register-listed or National Register-eligible properties only.

3. Develop the internal structure of the program, including:

- Providing a timeline for setting up and initiating the different components of the program
- Determining eligibility criteria and reasoning for including/excluding specific endangered property types
- Developing internal guidelines for measuring the likely success of a project
- Providing model policies and procedures specific to Save Ohio's Treasures
- Providing a model fund application
- Providing a model fee structure with PROs and CONs to initiating a fee structure and reasoning for choice
- Outline the application process from receipt of application to post-project reporting to insure due diligence on the part of Heritage Ohio
- Provide a model 2-year marketing plan to market the program to prospective applicants and to prospective donors
- Outline of the tasks associated with running the program and the qualifications of people to cover those tasks
- Determining which tasks could be handled by volunteers and which tasks must be handled by paid professionals

### **Materials to be Submitted**

Please submit electronically, as a PDF or word document, the following materials by 5:00 PM, Friday, May 30, to Heritage Ohio:

- Statement of interest and summary of qualifications
- Review of other completed project work similar to the Save Ohio's Treasures program
- A summary addressing how the completion of the Scope of Work will happen, resulting in the creation of the requested implementation plan
- Pricing to complete the implementation plan as presented
- Confirmation of the ability to complete the requested implementation plan, if chosen, no later than Friday, November 21, 2014, fulfilling Heritage Ohio's request to provide progress updates on the first Tuesday of each month

Please note that Heritage Ohio will be applying for Brink Leadership funds through the National Trust for Historic Preservation, and may request the attendance of the consultant, accompanying Heritage Ohio board and staff, on a mentoring visit to a nonprofit organization in a neighboring state. Therefore, consultant pricing above should also include a three-day travel budget within the Midwest including hotel, food, and mileage costs for the mentoring visit.

The board and staff of Heritage Ohio thank you for your interest in partnering with us to develop this critically needed program that we hope will have a positive impact on historic properties throughout the state.