



MINNESOTA COUNCIL  
ON FOUNDATIONS

# REQUEST FOR PROPOSALS (RFP): TRANSFER OF WEALTH MESSAGING & MATERIALS DEVELOPMENT

## Purpose of Request

A recent Transfer of Wealth study was conducted by the University of Minnesota Extension, indicating that significant assets will be transferring from one generation to the next in Minnesota over the coming decade and beyond.

You can view the study here:

[https://drive.google.com/file/d/14e\\_VM\\_dxC7JePaoeaic5YW4t9tbMTekc/view?usp=sharing](https://drive.google.com/file/d/14e_VM_dxC7JePaoeaic5YW4t9tbMTekc/view?usp=sharing)

The Minnesota Council on Foundations is interested in building on the data and findings in the study to develop messaging and materials to encourage individuals and communities to capitalize on the transfer of wealth, for the benefit of nonprofits and communities across Minnesota.

The selected consultant would be charged with developing messaging and materials that could be utilized by a variety of groups that engage in fundraising, donor relations, and financial services to have a unified message as it related to the transfer of wealth and the opportunity it creates for our communities. Users of these materials would likely include community foundations, United Ways, nonprofit development professionals, financial and tax advisors, estate planners, etc.

Consultant activities and deliverables will include:

1. Create opportunities for MCF members and other interested parties to inform the message and material development process (for example, this could include focus groups, interviews, survey, advisory group, etc.).
2. Develop compelling messaging that motivates potential donors to give back to their communities. While all messaging should fit within an overarching narrative arch, specific messages will likely be needed for different audiences. MCF wants to ensure that the needs of its community and public foundation members are met, while also creating messages that other audiences could use (e.g. nonprofit development professionals, financial and tax advisors, estate planners).
3. Develop a toolkit of branded materials that individual organizations and users could customize and utilize to promote the unified transfer of wealth message.
4. Develop recommendations for MCF on how we use our voice in support of this effort.
5. Do up to two presentations on what is ultimately developed, helping potential users understand the messaging and materials and how to use them.

Prospective consultants are welcome to contact MCF vice president Katina Mortensen for further information and discussion of the opportunity. She can be reached at [kmortensen@mcf.org](mailto:kmortensen@mcf.org) or 612-335-3597.

Please deliver proposals to MCF Vice President Katina Mortensen at [kmortensen@mcf.org](mailto:kmortensen@mcf.org)

*October 2024*

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## RFP TIMELINE

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<b>October 30, 2024</b>	RFP announced
<b>December 6, 2024</b>	Proposals due
<b>December/January 2025</b>	Review of proposals, interviews and reference checks
<b>January 15, 2025</b>	We aim to select the consultant on or around January 15
<b>February 1, 2025</b>	We hope the consultant will be available to start by February 1
<b>June 30, 2025</b>	Expected conclusion of consulting engagement/deliverables due

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## BACKGROUND INFORMATION

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The Minnesota Council on Foundations (MCF) is an association of grantmakers working to advance prosperity and equity through connecting, strengthening and mobilizing the field of philanthropy in Minnesota. The organization's 150 members represent grantmaking throughout the state, annually providing millions of dollars and non-financial resources to nonprofits. Members include family and independent foundations, community foundations, grantmaking public charities, and corporate foundations and giving programs.

MCF is guided by a strategic framework, adopted by the Board of Directors in 2022; Principles for Philanthropy, developed in 2021; and a commitment to diversity, equity, inclusion and anti-racism, updated and codified in 2020.

Nebraska and Kansas have done Transfer of Wealth campaigns and could serve as examples for this effort:

Nebraska Community Foundation - <https://www.nebcommfound.org/transfer-of-wealth/>

Kansas - <https://kansascfs.org/learn/transfer-wealth>

Anticipated outcomes of this Transfer of Wealth messaging and materials development effort:

- Organizations engaged in donor relations, fundraising, and financial services in Minnesota have a common set of language and tools to encourage charitable giving and financial planning for community benefit as it relates to the transfer of wealth.
- Minnesota communities are better positioned to take advantage of this historic transfer of wealth.
- Targeted audiences understand how keeping locally generated wealth within a community offers a unique opportunity to ensure the long-term viability of those communities.
- Messaging and materials recognize and address the linguistic and cultural differences between rural and urban audiences to make sure each audience is communicated with in an effective manner.
- Ultimately, a greater percentage of the transfer of wealth is committed for community benefit over the next decade than would have been without this unified effort.

*October 2024*

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## QUALIFICATIONS + SERVICES REQUESTED

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MCF seeks a consultant who brings the following to this engagement:

- Strong communications and messaging expertise and the ability to make complex ideas accessible and digestible
- The ability to engage various interested parties in a message development process
- Graphic design skills for materials development
- The willingness to develop a relatively nuanced understanding of charitable giving and financial planning, and the positive impact they can have on the broader community
- A recognition that multiple audiences likely mean message variation within an umbrella communications effort
- Facilitation skills and ability to facilitate in virtual settings
- Ability to engage with people and groups who represent a variety of roles and organizations, including staff, members/grantmakers, and other interested parties
- Knowledge of and connection to Minnesota

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## PROPOSAL SUBMISSION AND EVALUATION PROCESS

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MCF staff (with potential support from select MCF members) will review proposals and engage in further discussion with those that seem to be best aligned with the organization's needs. We seek to understand the following information from prospective consultants, which can be presented by answering these questions directly and in this order, or another way, if preferred. Answers may be any length that best represents interest and experience. Proposals can be delivered in a word or pdf document, or a short video, attached to an email. Those who have barriers to providing their response in one of these formats may contact Katina Mortensen at [kmortensen@mcf.org](mailto:kmortensen@mcf.org) to discuss alternatives.

1. Why are you interested in working on this project?
2. Tell us how you would approach this project and what your anticipated timeline would be.
3. Share 1-3 examples of past work that you would draw upon for inspiration in this effort.
4. Explain your relationship with and/or understanding of charitable giving and philanthropy today, and in particular how it has the potential to support and improve our communities.
5. Share the ways you bring diverse thoughts, perspectives and/or lived experience to this engagement, particularly in the areas of race/ethnicity; gender; sexual orientation; ability; rural geography.
6. Tell us how you will structure your fees for this project and, given the expectations of this engagement, what you estimate the cost to be. Note—the maximum budget for this engagement is \$50,000.
7. Feel free to add anything else that you wish to have considered.

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## SELECTION CRITERIA

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Proposals will be evaluated by members of the MCF staff and may be shared with a small set of MCF members. All proposals will be evaluated using the same criteria, as follows:

- **Ability to Be Successful** — MCF will consider the answers to common questions, and any other material prospective consultants wish to submit for consideration, to determine the ability to be successful in this engagement.
- **Diversity** – MCF seeks diversity of lived experience, thought and perspective in all roles, including consultants and vendors, particularly in the areas of race/ethnicity; gender; sexual orientation; ability; rural geography.
- **References**— For those consultants most aligned with the needs of this project, we will contact three references provided by the prospective consultant. We may consider reputation, knowledge of prior work, and informal feedback from peers, when applicable.
- **Interviews**—MCF may conduct interviews as part of the selection process.

The decision to engage a particular consultant to work with MCF will be based on many factors detailed in the request for proposal. No single factor will determine the final decision.

The Minnesota Council on Foundations connects, strengthens and mobilizes Minnesota’s vibrant philanthropic community to advance prosperity and equity. Learn more at [mcf.org](https://mcf.org) **#WeAreMCF**

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*October 2024*