



ULI—the Urban Land Institute
District Council Task Forces for Health and Social Equity

REQUEST FOR PROPOSALS

ROLE:	Adviser/Consultant, Equity & Inclusion
CONTRACT ADMINISTRATOR:	Senior Director Content, Building Healthy Places
LOCATION:	Flexible, with some travel required
PROJECT DURATION:	18-month part-time contract term
PROJECT BUDGET:	Not to exceed \$50,000, including travel expenditures
PROPOSAL DUE DATE:	July 30, 2019 (early submissions encouraged)
SUBMIT PROPOSALS TO:	health@uli.org

PROJECT SUMMARY

The Urban Land Institute’s (ULI) Building Healthy Places (BHP) Initiative is seeking a Consultant to advise and support a series of upcoming [District Council Task Forces for Health and Social Equity](#). The task forces are designed to identify local policies and practices that make health-promoting development difficult or increase the vulnerability of low-income people. The Consultant will primarily serve as an on-call expert adviser on emerging equitable development practices to help ensure that proposed Task Forces meaningfully address social, economic, gender, and racial equity considerations in their scopes of work. The Consultant may be an individual or a company.

The Consultant will work closely with the ULI project staff, members, and other project partners. The Consultant’s deliverables will advance efforts to address equity and inclusion, while driving direct engagement with local stakeholders and citizens in each of the four task force locations. The Consultant contract will have a term of 18 months and compensation not to exceed \$50,000 over the project term. Consultants may charge for travel.

The Consultant will be compensated based on task-oriented invoices, which should reflect number of hours worked, tasks completed, and deliverables submitted, in addition to applicable travel expenses. The Consultant will need to manage costs in accordance with the project budget. The Consultant will also provide email updates biweekly on major activities planned and completed. The Consultant will meet with the Senior Director at least once a month to discuss progress and identify challenges, if any.

Working arrangements are flexible and will be based on project and client needs and Consultant availability. The BHP team is based at the ULI headquarters in Washington, D.C. The Consultant may work remotely.

BACKGROUND

Many local, regional, and national policies and regulations hinder the development of healthy and equitable communities. At the same time, cities are implementing innovative policy solutions and practices aimed at promoting physical and mental health and creating more-inclusive, economically vibrant communities.

This project, led by the ULI Building Healthy Places Initiative with support from the Robert Wood Johnson Foundation, will identify policy and regulatory barriers to healthier and more equitable places and provide recommendations for local policy shifts and reforms.

Over the course of a year and a half, the ULI Building Healthy Places Initiative will work in collaboration with four ULI District Councils (local ULI chapters that deliver the organization’s mission in geographically defined areas) to convene Task Forces to identify local policies and practices that make health-promoting development difficult or increase the vulnerability of low-income people. The Task Forces will build the case that reform is needed and prepare specific recommendations for shifts in policy and practice.

Task Forces, composed of eight to ten ULI members and local leaders, will meet regularly from August 2019 to December 2020. Participants will identify key issues, work with partners to gain local consensus, and develop action-oriented final reports. Through the program, ULI members will leverage their leadership positions to explore and document problematic policies and practices, and to push for reform and change.

As the result of a competitive process, these District Councils have been selected:

- **ULI Arizona** will explore new models for affordable housing along transit corridors in Tempe.
- **ULI Chicago** will look at adapting basement- and attic-level spaces into Accessory Dwelling Units.
- **ULI Sacramento** will seek to inform a Health and Equity Toolkit for South Sacramento.
- **ULI Tampa Bay** will evaluate land use policy updates to support future transit-oriented neighborhoods.

The Consultant will provide actionable input and feedback about how proposed Task Force actions can embed equity and inclusion considerations throughout the project.

CONSULTANT SCOPE OF WORK

ULI’s Building Healthy Places Initiative approaches social equity through the lens of the PolicyLink definition: *Equity means just and fair inclusion. An equitable society is one in which all can participate and prosper. The goal of equity must be to create conditions that allow all to reach their full potential.*

The selected Consultant will apply 1) expertise in consulting to identify opportunities to integrate principles of social equity and inclusion into Task Force work plans; and 2) facilitate trainings and discussions among people from a variety of economic and racial backgrounds, including, but not limited to the elderly, women, members of the LGBTQ community, and people with disabilities. The Consultant will provide guidance to ULI staff and local Task Force leaders about how to incorporate considerations of equity and inclusion more thoroughly into all phases of the four Task Force projects. Primary consultant tasks include, but are not limited to, the following:

TASK 1: Audit Proposed Task Force Scopes and Schedules (up to four Task Force projects)

TASK 2: Facilitate In-Person and Virtual Trainings (up to seven sessions)

TASK 3: Serve as an On-Call Expert Adviser (*approximately 65 hours*)

TASK 4: Review Recommendations (up to four sets of project recommendations/outcomes)

TASK 1: Audit Proposed Task Force Scopes and Schedules (*approximately 10 hours*)

The Consultant will review project scopes, schedules, and work plans for each Task Force (up to four) and provide guidance to ULI staff on how to more deeply integrate considerations of social equity, including who needs to be included in various components and phases of the project.

Deliverable(s):

- Audit Memo: Upon review of each Task Force scope, schedule, and work plan, the Consultant shall prepare a single summary memo to chronicle findings and suggestions.
- Follow-up Conversation: The Consultant shall discuss the findings and suggestions directly with ULI staff (in person or by phone).

TASK 2: Facilitate In-Person and Virtual Trainings (*approximately 65 hours*)

The Consultant will facilitate in-person and virtual trainings on equity and inclusion to help project members/partners better understand issues of implicit bias and discrimination. These trainings will take place at up to two ULI national meetings and up to four local convenings. The Consultant will prepare written training materials and supportive worksheet templates that may be used by project stakeholders outside of trainings.

Deliverable(s):

- ULI National Meetings (*approximately 4.5 hours of session time*): The Consultant shall lead trainings and facilitate discussions (*approximately 1.5 hours each*) at three upcoming meetings—in Washington, D.C. (September 2019 and mid-January 2020) and Toronto, Canada (May 2020). The September training shall focus on presenting a summary of findings from Task 1 and leading a facilitated group discussion to help define equity. Subsequent training and facilitation topics will be determined. *Note: A Project Recap Convening may be held at the ULI Fall Meeting in San Francisco (October 2020) and is a potential addition to the contract scoped within.*
- Local Convenings (up to four one-day sessions): The Consultant shall participate in one day of local activities in each of the four local Task Force communities. Activities may include facilitating discussions with Task Force members and partners. Specific agenda, training, and/or facilitation content is to be determined and tailored to the needs of the local community.
- Equity Template: To shape how project participants think through issues of equity beyond in-person trainings, the Consultant shall prepare a resource (a template, framework, guide, or similar document).

TASK 3: Serve as the Project’s On-Call Expert Adviser (*approximately 65 hours*)

The Consultant will serve as an on-call expert adviser to ULI staff to ensure social and economic equity considerations are effectively integrated into proposed program offerings and communications.

Deliverable:

- Approximately 65 hours of on-call advising (*approximately 3.5 hours per month*)

TASK 4: Review Recommendations (up to four sets of project recommendations) (*approximately 10 hours*)

The Consultant will review draft recommendations, outcomes, and deliverables to identify opportunities to enhance considerations of social equity and inclusion.

Deliverable(s):

- Summary Memo(s): Upon review of draft recommendations associated with each of the four Task Force projects, the Consultant shall prepare a single summary memo to chronicle findings/suggestions.
- Follow-up Conversation: The Consultant shall discuss the findings and suggestions directly with ULI staff (in person or by phone).

PROJECT SUMMARY SCHEDULE

Summer 2019	<ul style="list-style-type: none"> • Task Forces Begin Convening • Research Agenda Formulated (BHP in partnership with District Councils)
Fall 2019	<ul style="list-style-type: none"> • Equity Training, ULI Fall Meeting—Washington, D.C., September 19 • Local Workshops/Roundtables—Round 1
Winter 2020	<ul style="list-style-type: none"> • Draft Findings Reports • Issues Briefs by BHP • Expert Advising and Sharing Sessions, mid-January
Spring 2020	<ul style="list-style-type: none"> • Sharing/Learning Session, ULI Spring Meeting—Toronto, Ontario, May 12–14 • Local Workshops/Roundtables—Round 2
Summer 2020	<ul style="list-style-type: none"> • Final Findings Reports • Action and Outreach Planning • Local Launch Events and Working for Change Locally
Fall 2020	<ul style="list-style-type: none"> • National Synthesis Report Published • Transition to District Councils for Implementation • <i>Recap Convening, ULI Fall Meeting, San Francisco, October 12–15 (consultant role/participation TBD)</i>

REQUIREMENTS

- Demonstrated knowledge of, commitment to, and interest in the promotion of equity, with an emphasis on community urban planning, housing, land use, transportation, and real estate development.
- Strong project management and research capabilities.
- Outstanding interpersonal and verbal communications skills, including presentation skills (experience developing, leading, and facilitating group training preferred).
- Capacity, willingness, and ability to travel.

SUBMISSION INSTRUCTIONS

All proposal correspondence should be directed to health@uli.org. Proposals are due to that email address by **July 30, 2019**. Please submit any inquiries by July 25, 2019. We welcome notifications that you are planning to apply so we can send you RFP updates.

Please submit a proposal that includes the following, in this order:

- 1. Cover Letter/Letter of Interest:** One-page letter introducing the Consultant and describing interest in the project.
- 2. Description of Work Plan:** No more than three pages describing the Consultant’s proposed approach, work plan, and schedule, including identification of key milestones and deliverables.
- 3. Project Expertise/Experience:** No more than two pages with a brief description of the general qualifications and specific expertise of the Consultant and/or Consultant team. Specific evidence of relevant experience serving as an on-call project adviser, developing/facilitating trainings, and working with nonprofits, local grassroots organizations, and/or related activities should be identified. If applicable, identify relevant experience working on real estate/land use issues.

4. **Overall Project Budget:** Provide a detailed project budget, not to exceed \$50,000, including travel expenses. Invoices should be submitted based on Task progress or completion.

Example Project Budget Table

Integrating Equity/Inclusion into District Council Task Forces	
TASK 1: Audit Task Force Scopes/Work Plans	\$XXXX
TASK 2: Facilitate Trainings	\$XXXX
TASK 3: Serve as On-Call Expert Adviser	\$XXXX
TASK 4: Review Recommendations	\$XXXX
Associated Travel (up to seven convenings)	\$XXXX
TOTAL	\$XXXX

5. **Project References:** Provide up to four professional references representing the Consultant’s experience with similar projects, including:
- a. Reference name, including current contact information.
 - b. Current status of project/assignment (e.g., in progress? complete?).
 - c. Project/assignment size and scale.
 - d. Industry served (e.g., real estate? education/training?).
 - e. Description of key deliverable(s), including links to final document(s), if available.

EOE/m/f/d/v/so