Request for Proposals (RFP) - Evaluation Consultant

ROLE: Advisor/Consultant, Monitoring and Evaluation

CONTRACT ADMINISTRATOR: Manager, Building Healthy Places

LOCATION: Flexible, with some travel required

PROJECT DURATION: 8-month part-time Contract Term

PROJECT BUDGET: $75,000 maximum, including travel and other direct expenses

PROPOSAL DUE DATE: December 6, 2019

SUBMIT PROPOSALS TO: health@uli.org

SUMMARY

The Urban Land Institute (ULI) is seeking a Consultant to serve as advisor on Monitoring and Evaluation for the Building Healthy Places Initiative’s (BHP) program of work. The Consultant will be responsible for advising in-house staff on evaluation design, data analysis, and performing various evaluation tasks. This includes select data collection and synthesis activities to inform process improvement and program impact as well as helping to build staff capacity for monitoring and evaluation. We are interested in better understanding what existing and potential data tells us about program impacts and opportunities, and in identifying other methods that can be used to measure medium-term and long-term outcomes. A key part of this role will involve helping the Initiative to identify and prioritize appropriate evaluation activities that can be integrated and standardized across all of BHP’s program of work.

BACKGROUND

The mission of ULI is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI brings together leaders from across the fields of real estate and land use to exchange best practices and serve community needs. The ULI Building Healthy Places Initiative leverages the power of ULI’s global networks to shape projects and places in ways that improve the health of people and communities.

The Initiative works to engage, inform, and inspire ULI’s members to promote health in their professional practice and in their leadership of communities. As the conduit for impact, ULI members improve the world in three intersecting ways:

- Through the decisions they make about projects and investments and the buildings they operate
- Through leadership of their organizations
- Through serving as knowledgeable experts, leaders, and advisors in their communities
The Building Healthy Places Initiative executes an ambitious program of work, which involves creating learning and networking opportunities for ULI members, informing real estate development practices for health and social equity, and shaping cities and regions. Since its inception, the Building Healthy Places Initiative has evolved into a multi-faceted program of work funded by a number of major foundations.

Key programs include:

- The Health Leaders Network, a program that empowers real estate and land use professionals with the skills, knowledge, and networks to improve health outcomes in their professional practice and communities with a nine month-long program of activities and learning opportunities.
- The 10 Minute Walk Campaign, a program being undertaken in partnership with other organizations to ensure that all people have safe access to a quality park or green space within a 10-minute walk of home by 2050.
- Opportunities to bring together ULI members to learn and share knowledge, via convenings like the Building Healthy Places Forum series, ULI meetings, workshops, and more.
- A robust research and education program which produces three to four major reports each fiscal year.
- Many programs to engage ULI networks for local impact, including District Councils (local chapters), and specifically the District Council Task Forces for Health and Social Equity project.

SCOPE OF WORK

The BHP team seeks assistance with tasks related to ongoing monitoring and evaluation needs. The Consultant’s main tasks, which may overlap in timing, include:

TASK 1: Review Existing Evaluation Approach

Currently, the BHP team implements a range of data collection activities to conduct process and impact evaluations. To date, these efforts have primarily involved measuring short-term impacts through outputs tracking, interviews, and surveys. The Consultant will assess current BHP metric collection efforts.

To complete this task, the Consultant will review BHP’s existing evaluation approach and strategies and identify opportunities to streamline activities to make analysis and synthesis easier. Existing instruments include a BHP logic model, an annual member survey, post-event surveys, post-program interview questionnaires, structured observation tools, and various metrics trackers for member engagement and impact. Upon review, we welcome specific feedback on items such as question ordering, question phrasing, response choices, and scoring systems to strengthen the overall design and rigor of these tools.

Deliverable(s):

- Review and assessment of existing standard BHP data collection tools, with suggested modifications, and recommendations and development of new tools. Existing tools include but are not limited to:
  - Event and participation tracker
  - Social media outreach trackers
  - Post-event surveys
  - Structured observation tools
  - Semi-structured interviews for post-event stakeholders, using question guides
  - Annual ULI Member Survey on Health and Real Estate
• Identification of priority information needs and data gaps, such as information about member volunteer hours, activities across ULI’s distributed networks, etc.

TASK 2: Analyze Evaluation Metrics and Summarize Findings for Selected Programs

Building upon the impact evaluation strategy in Task 1, the Consultant will analyze data from the surveys and other tools collected by BHP to date. The consultant will also assist with conducting select data collection activities, such as interviews and follow up interviews, in order to prepare evaluations/data reviews for selected programs.

Evaluation priorities will be determined by the BHP team but will encompass supporting multiple projects and programs, up to a total of five discreet programs or sets of activities. In some cases, programs are ongoing, so the Consultant will advise on data collection and evaluation priorities.

Deliverable(s)
• Analysis of existing data and trends from the BHP member survey and other data sources to help illuminate BHP and ULI’s impacts.
• Summary of key findings, in terms of metrics, impacts, quotes, and opportunities for improvement, for up to five ongoing programs, to be identified in collaboration with BHP staff but likely to include:
  o Technical assistance activities for the 10 Minute Walk Campaign, including Advisory Services panels (9) and National Study Visits (6-7)
  o District Council Task Forces for Health and Social Equity (ongoing)
  o District Council engagement grants for the 10 Minute Walk Campaign (ongoing)
  o Health Leaders Network
  o Reports and major research products

TASK 3: Provide Recommendations on Overall Approach to Evaluation and Metrics

Building on the learnings from Tasks 1 and 2, the Consultant will recommend a workable overall approach to monitoring and evaluation that can be used to summarize metrics and impacts from a range of programs, current and future. The overarching impact evaluation plan for the initiative should capture short-term, medium-term, and long-term impacts.

One key aspect of this task will involve assisting BHP staff in establishing measures or performance targets/benchmarks to help us refine priorities and effectively monitor our own progress. Given these key metrics, the Consultant will assist in developing a set of standardized evaluation questions or approaches that can be used across multiple program areas, where results can be rolled up and synthesized to help demonstrate BHP’s overall impact to ULI members and urban communities.

The Consultant will leverage skills in data visualization to develop reporting templates that allows the BHP team to effectively communicate its outputs, short-term, medium-term, and long-term (if possible) outcomes to internal and external audiences (i.e., ULI Leadership, foundations, and/or corporate sponsors.)

Deliverable(s)
• Development of a clear overarching impact evaluation approach, with both qualitative and quantitative metrics and instruments that can be used to measure medium-term and long-term outcomes for impact, including:
  o New and/or revised data collection instruments
  o A list of measurable and relevant performance targets and/or benchmarks that can be used
for specific programs
  o A “question bank” that identifies a set of core evaluation questions that can be adapted and asked consistently across programs of work.
  o Development of standardized and succinct reporting templates BHP staff can adapt and use for projects and Initiative as a whole, which contains process-related and impact-related measures.

DESIRED QUALIFICATIONS
The Consultant should have expertise in the following areas:

- Expertise in mixed-methods program evaluation, including quantitative and qualitative research competencies in instrument development, establishing key performance indicators (KPIs) and benchmarking, survey design and analysis, and data synthesis and reporting.
- Excellent verbal and written communication, including ability to discuss and apply complex analytic and evaluation methods to a professional audience, as well as translate findings into succinct and clear deliverables.
- Strong experience with developing visual templates, tools, and/or graphics for data reporting and sharing key findings from assessments to internal and external non-research audiences is required.
- Ability to help professional clients build in-house capacity for evaluation through trainings and/or discussions on: identifying KPIs, benchmarking, data collection, establishing effective internal reporting systems, and survey design and analysis techniques.
- Prior experience working with membership organization and/or knowledge about real estate, land-use, the built environment, and/or urban development is a plus, but not required.

PROPOSAL SUBMISSION INSTRUCTIONS
All proposal correspondence and submissions should be directed to health@uli.org.

Proposals are due by December 6, 2019.

We welcome notifications from prospective consultants so you can be included in any updates to the RFP process.

Please submit a proposal that includes the following:

1. **Cover Letter/Letter of Interest:** Letter introducing the Consultant and describing their interest and qualifications in the project. (1 page max)

2. **Resume/CV:** Brief description of the general qualifications and specific expertise of the Consultant(s) and the lead team member(s). Please highlight relevant prior experience. (4 pages max)

3. **Approach:** Please tell us about your overall evaluation approach, and approach to the specific tasks described. (4 pages max)

4. **Timeline:** Please summarize your intended timeline.

5. **Work Samples:** Please provide two work examples (links are okay) that demonstrate the development of a long-term evaluation and performance measurement strategy for a mid- to large-sized nonprofit initiative. Deliverables could be any of the following:
   - Logic Model
   - Measurement Plan
   - Surveys and/or other data collection instruments
6. **Overall Project Budget**: Provide a detailed project budget of $75,000, including travel and direct expenses. Invoices should be submitted based on Task progress or percent completion.

Example project budget table:

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<thead>
<tr>
<th>Monitoring and Evaluation Consultant</th>
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<tbody>
<tr>
<td>Task 1</td>
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