Request for Proposals
Assessment & Modernization of Publications by ULI Center for Sustainability and Economic Performance

ROLE: Consultant, Individual or Firm

CONTRACT ADMINISTRATOR: Senior Director for Building Healthy Places

PROJECT DURATION: 4 Months

RFP ISSUE DATE: January 26, 2021

PROPOSAL DEADLINE: February 22, 2021

SUBMIT PROPOSALS TO: health@uli.org

PROJECT BUDGET: $30,000

OVERVIEW:
ULI is seeking the services of a firm or individual with communications expertise to review current CSEP publication outputs, benchmark against research products produced by other organizations, assess audience desires and expectations, and identify opportunities for innovation and updates (such as new formats, new content types, cadences, etc.), over a 4 month time period.

PROPOSAL SUBMISSION

Please submit proposals to health@uli.org by the deadline. Proposals will be evaluated on consultant qualifications and track record, approach, and other criteria. We anticipate selecting a Consultant and starting this project approximately one month after the proposal deadline.

Proposals should include:

- Consultant background and qualifications, including key team members and relevant past projects
- Summary of key tasks and activities with timeline
- Budget, broken out by labor (with rates) and direct expenses

We prefer proposals to be no longer than 12 pages, including all materials.

Please notify us in advance at health@uli.org if you intend to submit a proposal so we can keep you posted on any chances to the project plan. Please direct any questions to health@uli.org.

BACKGROUND
The Center for Sustainability and Economic Performance’s three program areas – Building Healthy Places, Greenprint, and Urban Resilience – collectively produce dozens of reports and publications each year. These resources can take many forms, including stand-alone reports of varying lengths, case studies/project profiles, articles in Urban Land magazine and other venues, videos, maps, digital reports, etc. CSEP promotes and builds from this work through events and digital delivery formats, such as social media promotion, webinars, local District Council programs, and virtual conferences.
When it comes to research reports, despite the variety described above, the most common format is designed PDFs posted to the web and to the ULI Knowledge Finder sites, often with print versions which are distributed at meetings and convenings. The quality of these publications is very high, and CSEP specializes in producing visually compelling publications which make technical information accessible to ULI’s practitioner members.

As research consumption habits have evolved and changed, both in line with the growing use of social and online media, and in response to the coronavirus pandemic which has pushed most activity to be virtual/online, CSEP is taking the opportunity to review our publication strategies, benchmark our work against other similar organizations and member expectations, and identify opportunities to refine approaches and innovate on formats.

To do this, ULI is seeking the services of a firm or individual with communications expertise to review current CSEP publication outputs, benchmark against research products produced by other organizations, assess audience desires and expectations, and identify opportunities for innovation and updates (such as new formats, new content types, cadences, etc.), over a 4-month time period.

In coordination with the ULI communications and marketing team, CSEP is continually refining and innovating on approaches to creating reports for maximum readership and impact. This work is ongoing.

Excluded from this analysis are the following topics: analysis of report content or topics; assessment of impact of reports; and assessment of marketing strategies for reports and research, except to the extent that these factors impact the core focus on this RFP. Although it can be hard to differentiate reports from their post-production communications efforts, this assessment is focused on the format and approach of the research itself, rather than on roll-out/promotion strategies and distribution channels.

**TASKS**

Key tasks will include the following. It is anticipated that each task will take approximately one month, and may be conducted in series or in parallel.

1) **Review current approaches to CSEP research and publications**

The Consultant will, with the support of CSEP staff, review a representative cross-section of recent CSEP publications. The Consultant will review length, design approach, and other characteristics of recent reports, and consider them in the context of ULI’s broader publications and research portfolio. CSEP will provide a list of publication and materials to review, as well as metrics of readership and downloads. CSEP will also share typical roll out strategies and substantive collateral materials (such as UrbanLand articles and webinar slides) produced at the time of report publication.

The Consultant will identify general CSEP report typologies based on report length, subject matter, design, format, cadence/timing, and other characteristics, as well as substantive spin off/communications materials such as articles.

2) **Benchmark against best practices of other organizations**
The Consultant will identify 5 or 6 organizations with similar missions or that produce content aimed at members or professionals, or that are media organizations which have an engaging approach to designing research or publications. The Consultant will focus on organizations or companies which have “cutting edge” approaches to report production. Potential organizations to benchmark could include: McKinsey & Company, Brookings, Center for Active Design, Smart Growth America, Rocky Mountain Institute, and others TBD (including other member-based organizations).

The Consultant will review these organization’s publications strategies and identify innovations and best practices. They will then benchmark ULI CSEP publications against those best practices.

3) Identify expectations and desires of ULI member and other audiences

The Consultant will convene focus groups, review past survey findings, and use other methods to assess ULI member desires and expectations when it comes to ULI publications and research. The Consultant will also identify other key audiences for CSEP reports, such as other advocacy organizations and public policy makers.

Key questions include how members and others currently consume and interface with CSEP resources, or how they would like to. The Consultant will summarize findings in a memo, PPT, or other format.

4) Provide recommendations on how to refine or "modernize" CSEP’s publication approaches

The Consultant will distill learnings and provide actionable recommendations from previous tasks for refinements and enhancements to the CSEP publications approach. Recommendations will encompass report “typologies,” when it comes to formats, length, design approaches, etc. The Consultant will identify opportunities for modernization and innovation, including potential digital-first approaches, videos, white papers, podcasts, etc.

The Consultant will also suggest a release cadence across program areas to maximize exposure for reports. The Consultant will provide specific examples and, where possible, mockups of ideas and recommendations. The emphasis will be on actionable suggestions and strategies that can be implemented over the short and long terms by the CSEP team.

DETERMABLES

The deliverable for each task can be findings reports in memo or PPT form.

A summary of deliverables includes:

- Memo summarizing CSEP report typologies, timing, and substantive spin off/communications materials.
- Memo benchmarking publication approaches of 5-6 other innovative organizations against CSEP’s work.
- Memo summarizing expectations and desires of ULI members and other audiences.
- Recommendations report identifying opportunities to refine or "modernize" CSEP’s publication approaches.
ABOUT ULI and CSEP

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. Today, the Institute has more than 42,000 members worldwide, representing the entire spectrum of the land use and development disciplines and the public and private sectors.

The Center for Sustainability and Economic Performance is dedicated to driving more sustainable, environmentally responsible, and profitable outcomes in real estate development and investment, and to helping ULI members create healthy, resilient, and resource-efficient communities around the world. The Center advances knowledge and catalyzes adoption of transformative market practices and policies that lead to improved sustainability, health, resource efficiency, and resilience. The three flagship programs of CSEP include: Building Healthy Places, Greenprint Center for Building Performance, and the Urban Resilience Program.

BUDGET and TIMELINE

The budget for this project is $30,000, and the timeline is approximately 4 months. It is anticipated that each task will last approximately one month. A findings memo for each task should be developed. CSEP will convene a Steering Committee made up of leaders from CSEP, Marketing, and Communications, to meet on a biweekly basis throughout the duration of the project.