

**ULI San Francisco
Request for Proposals
Strategic Plan Facilitator**

March 2026

About ULI San Francisco

The Urban Land Institute (ULI) is a global nonprofit research and education organization focused on responsible land use and creating thriving communities. ULI San Francisco (ULI SF) serves as a regional hub for land use leaders across the Bay Area, convening professionals from real estate development, finance, design, public policy, and community organizations.

ULI SF delivers a wide range of programming including conferences, panels, leadership programs, technical assistance panels, and thought leadership initiatives. The organization works closely with both public and private sector leaders to address key regional challenges including housing affordability, downtown revitalization, climate resilience, and equitable development.

Project Purpose

ULI San Francisco seeks a consultant to design and facilitate a strategic planning process that will shape the organization's priorities and produce a clear, actionable plan for the years ahead. The process will engage key leadership including ULI SF's Executive Board, committee leaders, key stakeholders, and staff. The goal is to identify strategic priorities, strengthen organizational impact, and develop an implementation plan that guides ULI SF's work over the next two to three years. The consultant will play a central role in facilitating discussions, synthesizing insights, and helping ULI SF member leaders align around shared priorities.

Scope of Work + Deliverables

The selected consultant will design and facilitate a strategic planning process that engages ULI San Francisco's members, staff, and leadership, and results in clear, actionable strategic direction.

Key components of the engagement include:

- Project kickoff and preparation: Collaborate with ULI SF staff and Management Committee to confirm goals, scope, timeline, and overall approach. Review existing materials (prior strategic plans, annual reports, program summaries, and organizational priorities) to inform the process.
- Stakeholder engagement and research: Design and administer a membership survey and conduct targeted stakeholder meetings with leadership, staff, and select members, as needed. Provide a synthesis of key themes and insights to guide strategic direction.

- Strategic planning workshops:
 - Design and facilitate one full-day strategic planning retreat with ULI SF leadership (approximately 40–50 participants).
 - Facilitate a 1–3-hour follow-up workshop with key leadership and staff to review and refine the draft strategic plan (if needed).
 - This includes development of agendas, discussion frameworks, and facilitation materials.
- Strategic framework and plan development: Synthesize findings from all inputs to develop a clear strategic framework outlining key goals, priorities, and areas of focus.

Final deliverables:

- A visually compelling, public-facing 2–4-page Strategic Plan summary, suitable for website publication, clearly articulating ULI SF’s vision, priorities, and focus areas.
- A more detailed, implementation-oriented strategic plan document for internal use, outlining strategic goals, priority initiatives, and considerations for execution.
- Both documents should be professionally designed, clearly structured, and developed through an iterative review process, including draft review and input from ULI SF staff and select member leaders, with final approval by ULI SF.

Timeline

ULI San Francisco anticipates the strategic planning process will take place between April and September. The anticipated timeline is as follows:

- Consultant Selection: April 2026
- Project Kickoff and Planning: Late April – Early May 2026
- Membership Survey and Stakeholder Input: May 2026
- Strategic Planning Retreat (in-person): Early June 2026
- Follow-Up Leadership Workshop: Late June or July 2026
- Draft Strategic Plan: July 2026
- Final Strategic Plan: August or Early September 2026

ULI SF welcomes consultant input on the most effective process and timeline to achieve these milestones.

Consultant Qualifications

ULI SF seeks consultants with demonstrated experience in strategic planning facilitation. Ideal qualifications include:

- Experience facilitating strategic planning processes for nonprofits, membership organizations, or professional associations
- Strong facilitation skills
- Ability to synthesize complex input into clear strategic frameworks
- Experience working with organizations focused on urban development, land use, real estate, or related fields
- Strong written communication and presentation skills



Budget

ULI San Francisco anticipates that proposals for the scope of work described above will fall within a range of \$20,000–\$25,000. Proposals should include a detailed budget outlining consulting fees and any anticipated costs associated with preparation, facilitation, analysis, and production of final deliverables.

Consultants are encouraged to provide a clear breakdown of fees and may propose alternative scopes or approaches if they believe a different structure would better achieve ULI SF’s goals.

Proposal Submission

Interested consultants should submit a proposal that includes:

- Description of the proposed approach and methodology
- Relevant experience and examples of similar work
- Proposed project team (if applicable)
- Budget and fee structure within the anticipated range
- Two to three professional references

Proposals should be submitted in PDF format to ulisanfrancisco@uli.org by **March 30, 2026**.

Questions may be directed to ULI SF Executive Director, Natalie Sandoval:
natalie.sandoval@uli.org.

ULI San Francisco reserves the right to modify or cancel this RFP and to select the consultant that best meets the organization’s needs.