



Request for Proposals (RFP)

Project Management and Strategy for the 2025 Workforce Summit

Issued by: Charlotte Works

Issued Date: November 4

Proposal Due Date: December 2 at 4:59pm

I. Overview

Background:

Charlotte Works is dedicated to developing a skilled and in-demand workforce by engaging businesses, aligning community partners, empowering and connecting job seekers to meaningful employment, and fostering inclusive economic growth. Through our mission, we aim to create a workforce ecosystem that ensures "Charlotte Works for everyone." As a central catalyst in the region's workforce development, Charlotte Works operates under three core strategic pillars: **Connect & Convene**, **Design & Impact**, and **Inform & Influence**. These pillars drive our initiatives to enhance alignment across workforce collaboratives, supporting both talent development and business readiness for quality job placements.

Charlotte Works' Role in the Workforce Ecosystem

Within the regional workforce ecosystem, Charlotte Works plays a vital role at the core, coordinating efforts and facilitating alignment among all partners engaged in talent development and hiring. Through the **Workforce Providers Council (WPC)**, we work to advocate for job seekers, equipping them with the resources and training needed for employment readiness. Simultaneously, the **Charlotte Executive Leadership Council** partners with us to support businesses talent needs, establish pipelines of skilled talent, and ensure that companies are ready for swift and effective hiring. This collaboration helps to streamline the process between job seekers and employers in facilitating job matches.

History of the Workforce Summit

In 2024, key stakeholders from across the Charlotte region—including the Charlotte Executive Leadership Council, Charlotte Works, the City of Charlotte, Mecklenburg County, and the Charlotte Regional Business Alliance—came together to launch the inaugural **Workforce Summit**. This event marked a pivotal step in uniting employers, workforce



providers, community partners, and other stakeholders dedicated to strengthening the regional workforce ecosystem. The summit offered a platform for collaborative sessions and strategic discussions, where participants were exposed to important and new information to broaden perspectives and drive change. The outcomes of these discussions created an opportunity for more collaborative efforts in workforce development.

Building on Past Success

The success of the first Workforce Summit and interest in making this an annual event has underscored the importance of a unified approach to workforce challenges. As we look toward the 2025 Workforce Summit, Charlotte Works will further solidify its role at the center of the ecosystem. Leveraging the momentum from the inaugural event, we aim to continue fostering alignment among collaboratives, bridging the gap between talent and business needs. Our goal is to ensure that workforce development efforts translate directly into job placements, and we hope that this event can build on the success and move from an informative awareness raising event, to a catalyst for meaningful change and expanded collaboration.

Purpose:

Charlotte Works is seeking proposals from qualified organizations to provide comprehensive project management and strategic planning services for the 2025 Workforce Summit. The selected vendor will manage the summit's entire project lifecycle, ensuring alignment with strategic goals established by the Charlotte Workforce Collaborative Leaders Group, coordination with multiple vendors, and sponsorship and funding outreach to ensure the summit's success. **Proposals must demonstrate the ability to manage change effectively and integrate summit outcomes into broader community-level strategies, ensuring actionable and measurable organizational change.**

II. Scope of Work

The selected vendor will:

1. Strategic Planning & Vision Establishment:

- Facilitate planning sessions with the Charlotte Workforce Collaborative Leaders Group, comprising representatives from CELC, Mecklenburg County, the City of Charlotte, and Charlotte Works, to develop the strategic vision and goals for the 2025 Workforce Summit.



- Align event themes with this overall vision and work alongside the selected marketing vendor through a separate RFP process who will develop the theme and branding, including the logo.
- **Engage key stakeholders** including CELC, Mecklenburg County, the City of Charlotte, and Charlotte Works. A proven ability to engage these stakeholders is critical to the project's success.
- **Integrate change management principles** to ensure that the summit's outcomes lead to actionable activities, driving real organizational change on workforce issues. The summit must serve as a catalyst for community-level progress.
- **Develop a comprehensive funding and sponsorship plan** aimed at meeting anticipated expenses, including this scope, the marketing scope, and the event management scope, and other associated event costs. While last year's summit funding exceeded \$60,000 (excluding in-kind contributions), this year's funding needs may vary. With some previous funders potentially contributing at reduced levels, success will depend on an effective and creative approach to fund development and cost management. Identify new potential sponsors and propose meaningful engagement strategies, while also outlining plans for re-engaging past sponsors.

2. Project Management:

- Develop and implement a comprehensive project plan, outlining all phases of the summit's development, execution, and follow-up.
- Coordinate with vendors selected through separate RFPs for marketing and event logistics, ensuring that **deliverables align with the broader ecosystem-level workforce strategy**.
- Ensure all deliverables meet timelines and advance the summit's strategic goals, particularly in driving real progress on community workforce strategies.

3. Vendor Coordination and Stakeholder Engagement:

- **Event Logistics:** Work in partnership with Charlotte Works to issue a separate RFP to secure a vendor for event logistics coordination. Ensure appropriate staffing and resources for a successful summit execution.



- **Marketing RFP:** Work in partnership with Charlotte Works to issue a separate RFP to secure a marketing and design vendor responsible for theme, branding, and promotional efforts.
- Establish and work with the **Event Logistics Committee** and **Marketing Committee**, comprising community partners and stakeholders, to assist and advise selected vendors. A list of the inaugural annual summit planning committee members will be provided to provide a starting point for member selection. Vendor is responsible to ensure appropriate stakeholder engagement and fidelity to the strategic vision.
- Oversee all vendor coordination, ensuring alignment across teams, particularly regarding **change management integration and measurable outcomes** for workforce development.

4. **Risk Management & Compliance:**

- Identify potential risks and develop robust mitigation strategies to address operational, legal, and contractual challenges.
- Ensure full compliance with legal and contractual obligations.

III. Deliverables

1. **Comprehensive Project Plan.**

1. **Proposal Requirement:** Provide a detailed project plan that outlines key phases, timelines, and milestones for the event. Specify the proposed frequency of meetings, preferred communication methods, and any support required from Charlotte Works to ensure successful collaboration.

2. **Sponsorship & Funding Plan.**

1. **Proposal Requirement:** Include a targeted sponsorship strategy with a template ask, benefits, and a strategy for reaching prospective sponsors. Outline any anticipated necessary funding targets.

3. **Event Management & Marketing RFP Revisions**

1. **Proposal Requirement:** Present an initial approach and recommendations for refining the Event Management and Marketing RFPs. Leverage organizational expertise to suggest how to best structure and scope these proposals.

4. Regular Progress Reports

1. **Proposal Requirement:** Outline a reporting plan, specifying the frequency (e.g., bi-weekly or monthly) and format for progress updates. Reports should cover milestones, identified risks, mitigations, and key accomplishments to ensure alignment with project goals.

5. Post-Summit Evaluation

1. **Proposal Requirement:** Describe an evaluation plan that measures the summit's impact, both immediately and long-term, on the workforce ecosystem. Include proposed metrics and methods for connecting event outcomes to broader community-level workforce development initiatives.

IV. Proposal Requirements

Proposals should include the following:

1. Company Overview:

- Brief description of your organization, with a focus on experience in project management, strategic event planning, and change management.
- Relevant past projects of similar scope, engagement with key stakeholders, and a particular focus on projects involving community-level strategy integration.

2. Project Approach:

- Detailed approach to managing the scope of work, with an emphasis on stakeholder engagement, change management, and how the summit will serve as a catalyst for broader workforce change.
- Description of the project team structure, including key personnel qualifications.

3. Timeline:

- Provide a proposed timeline that includes key milestones for the development, execution, and follow-up phases. With the Summit tentatively planned for September 2025.

4. • Cost Proposal:

- Detailed cost breakdown, including all associated fees and costs.

V. Scoring Criteria

1. Impact on Workforce Ecosystem and Real Change (30%):

- Vendors must demonstrate how their approach will connect the summit outcomes to **measurable, long-term impact** on the community's workforce strategy. Preference will be given to those who can show how the summit will serve as a catalyst for **real organizational change** across non-profit partners and CELC companies and contribute to broader community-level workforce initiatives rather than functioning as an isolated event.

2. Stakeholder Engagement (20%):

- Vendors must have demonstrated experience engaging key stakeholders, including CELC, Mecklenburg County, the City of Charlotte, and Charlotte Works. Their engagement plan should be closely tied to driving **tangible results** in collaboration with these entities.

3. Project Management Expertise (20%):

- Assess the vendor's ability to manage complex, multi-vendor projects with **outcomes that advance strategic goals**. Vendors who can align project management efforts with **long-term workforce solutions** will be prioritized.

4. Cost-Effectiveness (20%):

- Vendors will be evaluated on their cost proposals, focusing on efficient resource use while maintaining alignment with **meaningful, outcome-driven strategies**.

5. Innovation and Process Optimization (10%):

- Vendors proposing **innovative approaches** to ensuring that the summit drives actionable outcomes, including the use of **change management techniques** to transition summit discussions into real workforce change, will be given higher consideration.

VI. Proposal Submission Instructions



- **Submission Deadline:** All proposals must be submitted by **4:59 PM ET on December 2, 2024**. Late submissions will not be considered.
- **Submission Method:** Submit proposals electronically in PDF format to **info@charlotteworks.com**. Ensure the subject line reads: “2025 Workforce Summit Proposal Submission - [Your Company Name]”
- **Questions and Clarifications:** All questions or requests for clarification must be submitted by **10:00 AM ET on November 18, 2024**, via email to **info@charlotteworks.com**. Responses to all questions will be compiled and distributed to all interested vendors by November 22, 2024, to ensure equal access to information.

VII. Timeline

- **RFP Issued:** November 4, 2024
- **Deadline for Questions:** November 18, 2024, at 10:00 AM ET
- **Response to Questions Issued:** On or before November 22, 2024
- **Proposal Due Date:** December 2, 2024, by 4:59 PM ET
- **Award Announcement:** On or before January 3, 2025
- **Project Kickoff:** January 13, 2025

VIII. Terms and Conditions

- **Right to Reject:** Charlotte Works reserves the right to reject any or all proposals at its sole discretion, to waive informalities or irregularities, or to request resubmissions if necessary to ensure alignment with organizational needs.
- **Ownership of Submitted Materials:** All materials submitted in response to this RFP become the property of Charlotte Works upon receipt and may be used for future planning and strategic purposes.



- **Confidentiality:** Information provided in this RFP and during the proposal process is proprietary to Charlotte Works. Respondents are not permitted to share, distribute, or reproduce any materials without written permission from Charlotte Works.
- **Costs:** All costs incurred by respondents in the preparation and presentation of their proposals shall be the sole responsibility of the respondent. Charlotte Works shall not be liable for any expenses related to proposal development.
- **Contract Award and Negotiation:** The award of this RFP does not guarantee a contract. Charlotte Works reserves the right to negotiate terms and conditions with the selected respondent before finalizing the contract. Should Charlotte Works be unable to reach a satisfactory agreement with the preferred respondent, it reserves the right to negotiate with the next preferred respondent.