

EVENT DETAILS

Audience Size and Location

Attendance will be capped by the venue's capacity. Venue selection is not required, as we plan to use the CPCC Harris Campus again, targeting around 250-300 attendees.

Summit Length and Agenda

The event's length will be determined by the Collaborative Leaders Group, with targeted core hours of 10:00 AM - 2:30 PM. Last year's event was a one-day summit from 8:00 AM - 2:00 PM with three breakout tracks. An additional day may be added, depending on input from the Collaborative Leaders Group.

- A facilitator's guide, including the agenda, is available [HERE](#).
- Additional information about the 2024 event is available [HERE](#).

What Day(s) is the September 2025 Summit?

The date of the Summit will be September 19th. Preparations and potentially an additional piece may occur the day before the Summit.

ROLE OF VENDOR AND SCOPE OF RFP

What is the Role and Scope of the Project Management and Strategy Vendor with respect to Fundraising

The proposal should include a strategic plan for securing funding and sponsorship. The vendor is not required to directly fundraise but must equip the Collaborative Leaders Group and other stakeholders with the tools and resources necessary to secure funds internally and externally. Sponsor payments will be managed directly by Charlotte Works.

Role of the Vendor in Event Logistics

Venue management will be under the scope of the Event Logistics RFP, not the Project Management and Strategy RFP.

Role of the Vendor in Marketing

Media relations and PR are tentatively planned to be included in the Marketing and Event Management RFPs. The selected vendor will collaborate with these teams to ensure alignment with the overall strategic goals and vision. The final scope of the additional RFPs will be determined by the selected project management vendor's capacity. Scopes may be refined if the vendor demonstrates sufficient expertise in these areas.

Budget for the Project Management and Strategy RFP

The budget is not broken down by components but should account for all required deliverables outlined in the RFP.m/

SUPPORT RESOURCES

In-Kind Resources from 2024 and Anticipated Resources for 2025

Last year's Project Management, Event Management, and Marketing Services were provided through a combination of a single vendor and in-kind contributions. For 2025, we aim to ensure sufficient expertise and capacity in all areas to deliver excellence.

In 2024, Charlotte Works provided in-kind support in several areas, including:

- Thought leadership for session planning.
- Assistance with event marketing and promotion.
- Hosting breakout sessions and securing guest speakers and content.

For 2025, Charlotte Works plans to define the vendor's role more clearly to minimize the burden on internal capacity.

Charlotte Works will provide:

- A key point person to assist the selected vendor with organizational insights, project management activities, and risk mitigation.
- Personnel to support the Event Management and Marketing vendors as needed.
- Additional Support as Necessary

The selected vendor will work alongside the Collaborative Leaders Group to recruit and manage speakers. Some aspects of speaker management may fall under the Event Management Vendor's scope once speakers are confirmed.

Will Charlotte Works draft the initial Event Management and Marketing RFPs?

Yes, Charlotte Works will provide draft RFPs and work collaboratively with the selected vendor to refine them. The editing process will involve substantive contributions from the vendor, with final approval resting with Charlotte Works.

Post-Event Evaluation Takeaways

A debrief was conducted with key stakeholders in 2024, and the contents of that discussion will be shared with the selected vendor. Stakeholders agreed the event was a success and immediately committed to making it an annual occurrence. Moving forward, the biggest shift will involve finalizing project elements earlier, enabled by increased capacity.

The survey used to evaluate the 2024 summit is available [HERE](#). For 2025, success will be measured by the summit's ability to drive **measurable, long-term impact on the community's workforce strategy**, which was not formally assessed in 2024.

INNOVATION AND IMPACT

What are the technology and software requirements for management and the event?

Specific technology platforms or virtual components are not required. However, vendors proposing “**innovative approaches** to ensuring that the summit drives actionable outcomes” will be given higher consideration.

Process for Determining Event Strategy

The selected vendor will be responsible for running efficient, well-structured meetings with the Collaborative Leaders Group. Stakeholders’ availability is limited, so no fixed meeting cadence can be provided. Maximizing the productivity of these sessions is critical, as is the ability to prepare simple, targeted questions for stakeholder feedback between meetings. Charlotte Works will provide support between meetings to help prepare content for stakeholder engagement.

Examples of Measurable, Long-Term Impact

Charlotte Works defines measurable, long-term impact as including but not limited to:

- Employers committing to changing hiring practices or hiring program graduates.
- The formation of new partnerships or initiatives that improve workforce alignment.
- Increased ecosystem alignment with Charlotte Works reducing fragmentation and duplication of efforts.
- New funding commitments to expand services and resources.
- Attendees leaving with actionable plans for implementing learnings from keynote speakers.