REQUEST FOR PROPOSALS (RFP)

AI-Enabled Workforce & Ecosystem Navigator

Issuing Organizations: Charlotte Works & Charlotte Executive Leadership Council (CELC)
RFP Issue Date: November 9, 2026 **Proposals Due:** January 8, 2027 (5:00 PM EST)
Procurement Contact: Kevin Loux (klloux@charlotteworks.com)

1. Purpose and Opportunity

Charlotte Works and the Charlotte Executive Leadership Council (CELC) seek a qualified partner to design, build, launch, and actively manage an AI-enabled navigator that helps people and businesses identify the resources, programs, and next steps most relevant to their needs. The initial implementation will focus on job seekers in Charlotte-Mecklenburg, with a deliberate path to expand to small-business ecosystem navigation and, over time, to ecosystem-level insights.

The selected partner will translate this vision into a practical, secure, and sustainable solution. Proposers should recommend an approach that delivers early value while preserving flexibility for future audiences, partners, data use, and governance decisions. To accelerate delivery and maximize value, Charlotte Works has established a foundational reference architecture and data methodology —incorporating regional labor market intelligence (800+ occupations), living-wage and opportunity scoring models, directional skill-transferability and foundational skill frameworks, and a 24-organization ecosystem service matrix—which will be provided to guide technical alignment.

2. Background

Residents, small businesses, and community organizations navigate a fragmented ecosystem of information, resources, and pathways. Relevant services may exist, but users may not know they are available, which provider is the right fit, or what sequence of actions will help them move forward. Charlotte Works and CELC intend to reduce this friction through an AI-enabled experience that can understand user needs, guide users to appropriate supports, and strengthen visibility into unmet needs across the ecosystem to enable employment.

3. Product Vision and Phased Scope

The intended solution is a phased set of related capabilities, not a requirement to build every capability at launch. The initial product must be valuable on its own and architected to support future evolution. Specifically, the solution architecture should support a modular, multi-portal framework capable of serving four core views over its lifecycle: **(1) Job Seekers**, **(2) Community Partners**, **(3) Employers & Small Business**, and **(4) Executive / CELC Leadership Insights**.

4. Initial MVP Objectives

- Help users articulate employment goals, current circumstances, and barriers in a low-friction, conversational experience.
- Provide tailored, actionable referrals to relevant workforce programs and trusted community organizations, sequencing life-stabilization and wraparound supports alongside career coaching and training.
- Connect users to wraparound supports, including training, childcare, transportation, housing, utility assistance, and related services that may be necessary to pursue sustainable employment.
- Where feasible, surface relevant job opportunities and realistic next-step career pathways from existing sources—incorporating wage benchmarking, foundational skill readiness, and education/experience filters—without positioning the MVP as a stand-alone job board or direct placement service.
- Enable staff and partner organizations to maintain accurate resource information, route client needs across the 24+ partner network, and understand referral activity, subject to agreed data governance and privacy practices.

5. Required Scope of Work

Discovery and Co-Design

- Validate value proposition for identified job-seeker personas (Young Adults and Experienced Adults), needs, and journeys through a structured discovery process, building upon Charlotte Works' existing reference architecture and ecosystem findings.
- Secure buy-in from workforce providers, community-based organizations, and other stakeholders that may serve as referral destinations in the tool design and value.
- Define the scope for phase one while exploring integration of features for small-business, employer wage/talent benchmarking, and other ecosystem partners.

Experience and Solution Design

- Design a mobile-responsive conversational user experience—paired with low-friction, high-contrast visual navigation—that prioritizes speed, clarity, and trust.
- Architect a hybrid system that pairs deterministic relational database logic (for fast, zero-token career pathway math, skill-overlap calculations, and directory filtering) with token-gated conversational AI and human-escalation pathways.
- Outline specific features and capabilities that can be added in future phases to support new audiences or functionalities (including Small Business AI resource navigation and executive supply/demand analytics), accompanied by estimated costs for each addition.

Build, Deployment, and Ongoing Management

- Develop and launch the MVP for deployment through a widget, web application, or chatbot-style experience within an existing website.
- Integrate or ingest agreed resource directories, regional labor market datasets, and local training pathways (e.g., CMS CTE, CPCC/ETPL, UNC Charlotte).
- Provide end-to-end hosting, maintenance, and continuous management of the deployed solution.
- Deliver assisted management of the application, enabling Charlotte Works to rapidly iterate and update the tool's content, underlying data tables, and logic while receiving ongoing technical support.

6. Minimum Expectations

	Minimum Expectation
Conversational guidance	Guided intake that uses plain language to understand goals, readiness, preferences, and barriers without an unnecessarily long or rigid questionnaire.
Tailored navigation	Recommendations and referrals that explain why a resource or career step may be relevant and what a user should do next.
Resource management	A maintainable process for managing provider, program, eligibility, and support information; identify the organization responsible for content stewardship. Automation of updates is a key feature.
Privacy and safety	Data minimization, clear consent and disclosure practices, secure handling of user information, AI safety guardrails, role-based access controls for leadership/partner views, and escalation pathways for sensitive or unsupported requests.
Analytics and learning	Usage, referral, and outcome analytics appropriate to the MVP, with a recommendation for privacy-preserving aggregation for future ecosystem and CELC leadership insight.
Interoperability	A modular relational and API-ready approach that can accommodate future integrations, multiple front-end portal experiences, and evolving hosting or governance decisions.
Accessibility and language	Mobile-first responsiveness, compliance with WCAG 2.1 Level AA accessibility standards, and an architecture capable of supporting multilingual navigation (including English and Spanish).

7. Key Decisions and Assumptions

Proposers should explicitly address the following items in their proposed approach. They are expected decision points, not assumptions that have already been finalized.

- The appropriate degree of shared architecture, relational data schemas, and AI tooling across the job-seeker, community partner, small-business, and executive insight capabilities.
- Initial data sources, integration of Charlotte Works' proprietary scoring/mobility datasets and 24-partner matrix, data quality assessment, content refresh processes, and partner roles.
- How to balance deterministic database queries vs. LLM token consumption to ensure cost sustainability at public scale.
- The role of live job listings and employer-facing integrations in the MVP versus later phases.
- Measures of user value, referral quality, service uptake, and ecosystem impact.

8. Deliverables

- Project work plan, governance cadence, stakeholder-engagement plan, and risk register.
- Discovery findings, user personas, journey maps, and validated MVP requirements.
- Experience designs and prototypes for the MVP, including usability testing results.
- Developed and tested MVP, launch plan, and ongoing Service Level Agreement (SLA) for assisted management and technical support.
- Data governance, privacy, security, and AI safety recommendations appropriate to the selected solution.

9. Proposal Instructions, Schedule & Contractual Terms

Proposals should be concise, submitted in PDF format, and include the following information:

- Executive summary and understanding of the opportunity.
- Organization profile, relevant project experience, key project team members/roles, and disclosure of any proposed subcontractors.
- Proposed approach, scope, work plan, and indicative timeline for discovery, build, launch, and post-launch support.
- **Proof of Capability:** Vendors must demonstrate proven execution capability by providing either a working, functional demonstration built upfront for this specific scope, or a portfolio of active, live solutions that are highly representative of the requested deliverables (include live URLs, test credentials, or recorded walkthroughs as applicable).
- Menu of future feature additions and integrations, explicitly mapped with estimated costs for post-MVP scaling.
- Approach to responsible AI, privacy, security, data governance, and quality assurance.

- Detailed pricing by phase, assumptions, optional elements, and anticipated ongoing management/support costs (separating one-time implementation fees from recurring annual hosting, licensing, and LLM/API consumption estimates).
- Key dependencies, risks, and decisions required from Charlotte Works, CELC, or participating partners.
- **Disclosure of Third-Party IP & Terms of Service Restrictions:** If proposers intend to incorporate any pre-existing proprietary tools, third-party software, underlying models, datasets, or content subject to other intellectual property restrictions or Terms of Service (ToS) in the development or operation of the solution, all such restrictions, licensing terms, and usage limitations must be explicitly outlined in the initial proposal response so they can be evaluated accordingly.

Submission Instructions, Point of Contact & Reference Architecture Access

All vendor questions, requests for reference architecture briefings/data schema documentation, and final proposal packages must be submitted electronically via email to **Kevin Loux** at **kloux@charlotteworks.com** (with a copy to **info@charlotteworks.com**) using the subject line: *"RFP Submission – AI-Enabled Workforce & Ecosystem Navigator – [Vendor Name]"*.

To ensure a fair and transparent process, all substantive vendor questions received by the deadline will be anonymized and answered in a consolidated Q&A addendum posted publicly on the Charlotte Works RFP webpage and distributed to registered prospective proposers. Late submissions may not be reviewed.

Procurement Schedule & Key Deadlines

	Target Date / Deadline
RFP Release Date	November 9, 2026
Vendor Questions Deadline	Week of Thanksgiving (by Wednesday, November 25, 2026 at 5:00 PM EST)
Responses to Questions Posted	On or before Friday, December 4, 2026 (published on Charlotte Works website)
Final Proposals Due	**January 8, 2027 at 5:00 PM EST**
Potential Proposal Presentations & Shortlisting	Late January 2027
Vendor Selection & Contracting	Late February 2027

Budget & Funding Considerations

Charlotte Works and CELC have not established a fixed budget ceiling for this engagement, and overall cost-effectiveness combined with demonstrated return on investment will be an important evaluation consideration. Proposers are encouraged to present right-sized, transparent pricing for the core MVP alongside modular pricing options for phased capabilities. Please note that while higher-investment proposals demonstrating exceptional capability and value will be fully considered and may be selected, higher-cost structures may extend the final award and contracting timeline as the issuing organizations coordinate multi-stakeholder funding pathways.

Reservation of Rights, Proposal Validity & Modified Proposals

This RFP does not commit Charlotte Works or CELC to award a contract or to pay any costs incurred in the preparation or submission of a proposal or Proof of Capability demonstration. Submitted proposals and pricing shall remain valid for ninety (90) days following the submission deadline. Charlotte Works and CELC reserve the right to accept or reject any or all proposals, waive minor irregularities, negotiate with any qualified proposer, or request modified proposals, supplemental clarifications, or revised scope and pricing structures from any or all proposers based on the initial submissions received.

> **Intellectual Property Rights, Ownership & Required Disclosures**
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> Charlotte Works and CELC shall retain full, exclusive, and unrestricted intellectual property rights, title, and ownership in and to all deliverables, custom source code, data schemas, algorithms, configurations, user interface designs, documentation, and derivative works built, developed, or customized for us under the resulting agreement, alongside all pre-existing frameworks, methodologies, and datasets provided by Charlotte Works and CELC. Proposers must ensure that the delivered solution is free of undisclosed proprietary lock-in that would prevent Charlotte Works from accessing, modifying, or transitioning its data, logic, or application assets. If any component of the proposed development or ongoing service relies on content, software, or platforms subject to third-party or pre-existing vendor IP restrictions or Terms of Service, all such restrictions, terms, and licensing conditions must be fully disclosed and outlined in the initial proposal submission for evaluation.

10. Evaluation Criteria

	What Reviewers Will Consider
Alignment to product vision	Clear understanding of the initial job-seeker focus and a credible pathway to small-business navigation and ecosystem learning.
User-centered approach	Strength of discovery, co-design, and usability approach for job-seeker needs.

	What Reviewers Will Consider
Technical and responsible AI capability	Feasibility, security, privacy, safety, maintainability, cost-effective hybrid AI/database architecture, and ability to evolve without unnecessary complexity.
Proven Execution Capability	Demonstrated ability to deliver the required scope, evidenced by a working upfront demonstration or a portfolio of highly representative, comparable active solutions.
Implementation approach and value	Practicality of work plan, clarity of assumptions, cost transparency, adherence to IP ownership requirements (and transparency of any third-party IP/Terms of Service disclosures), and expected value for investment, including ongoing management support.