

**Request for Quotes (RFQ) 2025-004:**  
**Strategic Planning Facilitation + Development**

Release Date: July 15, 2025

Proposal Due Date: August 8, 2025



## **Introduction**

As a workforce intermediary, [EmployIndy](#) proactively addresses the needs of business, job seekers, and communities by connecting and supporting partners to implement accessible, high-quality workforce development initiatives. EmployIndy invites proposals from qualified firms or consultants with demonstrated expertise in strategic planning facilitation, stakeholder engagement, fund development, and organizational strategy development. The selected partner will guide EmployIndy, its Board of Directors, and key stakeholders through a comprehensive strategic planning process that will result in a clear, actionable, and forward-looking three-year strategic plan, with an integrated fund development strategy. The new plan will launch in July 2026, updating the current [2023-2025 Strategic Plan](#).

## **Background**

EmployIndy convenes, aligns, and invests in efforts to ensure a pipeline of skilled talent meets the evolving workforce needs of Indianapolis. The new strategic plan will build upon the organization's previous efforts, reflect lessons learned, respond to emerging opportunities and challenges, and ensure alignment with the community's workforce priorities and organizational priority for [diversified funding](#).

## **Scope of Work**

### **Project Launch + Planning (August 2025)**

- Develop a detailed project plan based on the timeline outlined, including fund development as a key pillar of the strategic plan
- Define project governance and a strategic planning steering committee
- Establish communication protocols

### **Kickoff + Discovery (September – October 2025)**

- Facilitate project kickoff meetings with leadership and steering committee, including engagement of the Board of Directors in a kickoff meeting on September 25<sup>th</sup>, 9am – noon
- Gather and review existing strategic documents, organizational assessments, and relevant data
- Conduct a review of EmployIndy's current funding streams, grant history, philanthropic partnerships and funding gaps
- Identify stakeholder groups for engagement

### **Stakeholder Engagement + Community Listening (November 2025 – January 2026)**

- Design and execute a stakeholder engagement strategy including focus groups, interviews, and surveys, including current and potential funders
- Synthesize input and identify key themes, challenges, and opportunities

### **Strategy Development (February – April 2026)**

- Facilitate strategy sessions with staff leadership and the board
- Develop strategic priorities, goals, and measurable objectives, positioning fund development as one of the core strategic priorities
- Draft the strategic framework based on input and feedback

### **Board Approval + Launch Preparation (May – June 2026)**

- Finalize the strategic plan with board input and approval
- Provide strategic plan summary and materials to support internal and external communication, including key fund development materials like the case for support and implementation guide

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**Strategic Plan Launch (July 2026)**

- Support EmployIndy in launching the plan to internal and external audiences, including funders and potential donors for communicating investment opportunities
- Advise on messaging and stakeholder communication

**Deliverables**

- Stakeholder engagement tools and summary reports
- Draft and final strategic plan documents, including full plan, executive summary, and case for support
- Facilitation materials and session notes
- Implementation and communication guidance to support launch

**Project Timeline Overview**

Phase	Timeline
Project Launch + Planning	August 2025
Kickoff + Discovery	September – October 2025
Stakeholder Engagement + Community Listening	November 2025 – January 2026
Strategy Development	February – April 2026
Board Approval + Launch Preparation	May – Jun 2026
Strategic Plan Launch	July 2026

**Budget**

The budget for this project is \$60,000 – 80,000.

**Proposal Requirements**

- Firm overview and relevant experience, including experience in fund development
- Approach to strategic planning and stakeholder engagement
- Proposed project team and roles
- Project timeline and fee structure
- Three references from similar projects

**Submission Instructions + Questions**

Applicants must submit one (1) electronic copy of the proposal. Please note that EmployIndy will not return any proposals it receives and will not reimburse applicants for any costs they incur in developing their proposals.

Any questions regarding this RFQ should be submitted via [www.employindy.org/contractopp](http://www.employindy.org/contractopp) no later than 5:00p.m. on Monday, July 28, 2025. Answers to submitted questions will be made available on the EmployIndy website by close of business Wednesday, July 30, 2025.

All proposals must be submitted no later than 11:59 p.m. EST, Friday, August 8, 2025, at [www.employindy.org/contractopp](http://www.employindy.org/contractopp). The project start date will be no later than August 25, 2025.