

RFQ: 2025-004 Strategic Planning Facilitation and Development

Questions & Answers

1. What groups are currently included as key stakeholders? Is there an existing list or contact information to consider? Is there an approximate number of stakeholders (asking to determine the viability of statistically valid survey results)? Do these audiences need to be sourced by the research provider?
 - Answer: EmployIndy will provide initial guidance on stakeholder groups including Board of Directors, EmployIndy staff, current and prospective funders, community and program partners, and workforce system stakeholders. A contact list will be developed collaboratively during the Kickoff + Discovery phase. The selected provider should be prepared to support outreach, but EmployIndy will assist in initial introductions and coordination.
2. Has any research currently been conducted around stakeholder engagement, value proposition development, and the driving force behind engagement? Are there any voices that were previously overlooked and would be ideal to include now?
 - Answer: Past strategic planning cycles have included engagement with key internal and external stakeholders. However, the upcoming planning process aims to deepen this input, with intentional inclusion of funders and community voices, especially those from underrepresented populations and emerging sectors.
3. Are all engagement methods (focus groups, interviews, surveys) equally prioritized? Or is there a preferred method or expected weight among them? Is there a preferred channel (virtual versus in-person)?
 - Answer: There is flexibility in engagement methods. EmployIndy values a mixed-methods approach that ensures a diversity of input. While some in-person engagement is encouraged (e.g., the September 25 kickoff), virtual options are acceptable and may be necessary to increase access and convenience for participants.
4. What is the ultimate objective of stakeholder engagement? In other words, do we want to inform the strategic plan, support a funding proposal, evaluate existing programs, or something else? Are there any key questions you hope stakeholder engagement will answer?
 - Answer: The primary objective is to inform the 2026–2029 strategic plan, including the development of strategic priorities and a fund development strategy. Stakeholder engagement should surface community needs, partnership opportunities, and insights into EmployIndy’s value proposition and areas for growth.
5. Will EmployIndy want to be involved in recruiting stakeholders?
 - Answer: Yes. EmployIndy will be involved in identifying and recruiting stakeholders and will support scheduling and coordination, especially for high-priority groups like Board members, funders, and organizational partners.
6. Can you clarify the expectations for the case for support? What would be the work product, and do you envision the case for support will relate to the strategic plan or the organization?
 - Answer: The case for support should align with the new strategic plan and position EmployIndy for philanthropic and public sector investment. It should

articulate the organization's vision, strategic priorities, and funding needs, and will be used for external communication with funders and partners.

7. How many distinct stakeholder groups do you anticipate engaging (e.g., staff, board, partners, community members, funders)?
 - Answer: At least five stakeholder groups: Board of Directors, EmployIndy staff, current and prospective funders, community and program partners, and workforce system stakeholders. Final segmentation will be confirmed during the Kickoff + Discovery phase.
8. Approximately how many one-on-one interviews are you expecting to include in the process?
 - Answer: The proposal should anticipate conducting approximately 10–15 one-on-one interviews, with a focus on high-value stakeholders such as funders, city and state leaders, and sector partners.
9. Are there specific expectations or requirements regarding subcontractors, including goals or preferences for engaging MBE (Minority Business Enterprise) partners?
 - Answer: While there are no mandated requirements, EmployIndy encourages and values proposals that reflect supplier diversity and/or partnerships with MBE-certified organizations or subcontractors.
10. Do you anticipate a need for communications support—either internal (e.g., staff updates, talking points) or external (e.g., public messaging, press releases, design)—as part of the project scope?
 - Answer: Yes. The selected partner should advise on internal and external messaging during the plan development and launch phases, including development of the case for support and implementation/communication guidance materials.
11. Would EmployIndy consider an out-of-state firm to complete the scope of work as specified in the RFP?
 - Answer: Yes. Firms outside Indiana are welcome to apply, provided they demonstrate an understanding of the local context and are able to meet the required engagement and meeting schedules.
12. Does EmployIndy expect in-person services, or could the firm propose providing services, including the September 25th kickoff meeting, virtually?
 - Answer: While the September 25th kickoff with the Board is expected to be in person, a hybrid model for other phases and engagements is acceptable. Flexibility will be considered based on the quality of the engagement plan.
13. Does EmployIndy have a scoring rubric for evaluating proposals?
 - Answer: An Evaluation + Scoring Rubric will be used, and proposals will be evaluated on the following weighted criteria:

Evaluation Criteria	Weight
Relevant Experience + Qualifications	25%
Proposed Approach + Methodology	25%
Project Team + Roles	15%
Work Plan, Timeline + Feasibility	10%
Budget + Value	10%
Communication + Deliverables Strategy	10%
References from Similar Projects	5%

14. What are the steps in the process once proposals are submitted?
- Answer: Following submission, proposals will be reviewed by a selection committee. Finalists may be invited for interviews or follow-up questions, with award notification expected shortly thereafter and a start date by August 25, 2025.
15. Who will be reviewing proposals?
- Answer: A selection committee composed of EmployIndy leadership will review all proposals.
16. Have any key stakeholder groups been identified already for participation in the strategic planning process, apart from the Board of Directors and staff?
- Answer: See responses to questions 1 and 7 above.
17. What kinds of prior experiences in fund development are most valuable to EmployIndy?
- Answer: Experience developing integrated fund development strategies as part of broader strategic planning efforts is highly valued—particularly those that include individual and corporate fundraising, public-private partnerships, and case for support development.
18. Does EmployIndy envision that individual and corporate fundraising will be a key piece of the fund development plan?
- Answer: Yes. Diversification of funding sources—including individual, corporate, philanthropic, and government—will be central to the fund development strategy to support the strategic plan.
19. Will EmployIndy provide more detailed requirements for plan deliverables during the Project Launch + Planning stage?
- Answer: Yes. EmployIndy will collaborate with the selected partner to finalize deliverable expectations, formats, and communications needs at the outset of the engagement based on the proposed approach and methodology.
20. My question is whether all the tasks must be done on site/face to face, or whether some, such as the community listening sessions may be conducted virtually, thus creating a mix of on site and virtual opportunities?
- Answer: A blended model is acceptable and encouraged where it increases accessibility and participation. In-person engagement will be important for key meetings, but virtual methods may be used for broader outreach and community listening.
21. The RFP lists (2) different due dates for submissions - on page 1 at the top it has "August 1, 2025" and then at the bottom of page 2 it specifies "August 8, 2025" as the due date. Can you please confirm the date desired?
- Answer: The correct due date is August 8, 2025