



# Request for Proposal (RFP)

## Comprehensive Brand Study and Brand Strategy Development

**Who:** Carey Services, Inc., Marion, Indiana and Grant and Surrounding Counties  
**Issue Date:** May 26, 2026  
**Due Date:** July 1, 2026  
**Contact:** Kelly Scher, Vice President of Advancement  
Carey Services  
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**Submission Instructions:** Please submit proposals electronically in PDF format to Kelly Scher at [kelly.scher@careyservices.com](mailto:kelly.scher@careyservices.com) with the Subject Line: “Carey Services Brand Study Proposal”

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### 1. Organizational Overview

Founded in 1954, Carey Services is a nonprofit human services organization serving individuals with disabilities, children, families, and communities throughout north central Indiana. Carey Services provides a broad range of supports and services including early childhood education and prevention services, employment services, residential and community living supports, transportation, life skills training, and business enterprises.

The organization’s mission is: “Turning abilities into opportunities.”

Its vision is: “A world where all people are empowered and equally valued in the community.”

As Carey Services continues to grow and evolve, the organization seeks to ensure that its brand identity clearly communicates who we are, what we do, why we do it, and the impact we create.

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### 2. Purpose of the RFP

Carey Services is seeking proposals from qualified branding, marketing, and/or public relations firms to conduct a comprehensive brand study and provide strategic recommendations regarding the organization’s overall brand identity.

This project is associated with Carey Services, Inc.’s Strategic Plan Action Plan #3 and specifically supports the Strategic Initiative: “Conduct a comprehensive brand study and implement changes as appropriate (name, logo, language, etc.).”

This initiative aligns with the organizational priority: “Brand — The distinctive organization identity we aspire to.”

And supports the organizational goal: “We will be the provider of choice for people in the disability and early childhood education/prevention industries.” The identified problem/opportunity statement driving this work is: “Who we are, what we do, and why we do it must be clear to all stakeholders.”

Carey Services seeks a strategic partner capable of helping the organization evaluate and strengthen its brand identity, positioning, messaging, public perception, and long-term market differentiation, with the understanding the “Big, Hairy, Audacious Goal” for Carey Services drives the organization: “Carey Services will be a nationally recognized, nationally award-winning industry leader in employing and serving people in the disability and early childhood education industries.”

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### **3. Project Objectives**

The firm selected will help Carey Services:

- Assess current brand awareness, perception, and effectiveness
- Evaluate whether the current organizational name, logo, messaging, and language accurately reflect the organization’s mission, vision, strategies, and future direction
- Identify opportunities to strengthen stakeholder understanding and engagement
- Clarify organizational positioning within disability services and early childhood education/prevention industries
- Develop recommendations to improve brand clarity, consistency, recognition, and differentiation
- Ensure brand strategy aligns with organizational values, strategic priorities, and community impact
- Provide actionable recommendations and implementation guidance, including if any change to brand is recommended, and if so, what changes are needed

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### **4. Scope of Services**

The selected firm should propose a process that includes, at minimum, the following components:

#### **A. Brand Discovery & Assessment**

- Review of current branding materials and communications
- Evaluation of organizational identity, messaging, and positioning
- Competitive and comparative market analysis
- Website and digital/social media presence review
- Assessment of public-facing language and storytelling

#### **B. Stakeholder Research**-Conduct research with key stakeholder groups, like:

- Individuals served
- Families and caregivers
- Employees
- Board members
- Donors and funders

- Community partners and community members
- Employers/business partners
- Referral sources

Research methods may include:

- Surveys
- Focus groups
- Interviews
- Brand perception studies
- Community listening sessions

**C. Brand Evaluation-Evaluate:**

- Organizational name relevance and clarity
- Logo and visual identity effectiveness
- Messaging consistency
- Brand architecture
- Service-line naming conventions
- Market differentiation
- Reputation and awareness
- Internal brand alignment

**D. Strategic Recommendations-Provide recommendations regarding:**

- Brand positioning
- Messaging platform
- Brand voice and language
- Visual identity updates or redesign
- Naming recommendations (if applicable)
- Communication strategies
- Community engagement opportunities
- Marketing and PR alignment
- Brand rollout and implementation strategy

**E. Final Deliverables-Deliverables should include:**

- Comprehensive brand study findings report
- Stakeholder research summary
- SWOT analysis and market positioning insights
- Strategic recommendations
- Executive summary presentation
- Implementation Roadmap with timelines and priorities
- Estimated implementation budget ranges (if applicable)

Optional deliverables may include (to be bid and priced separately):

- Messaging framework
- Tagline development

- Visual identity concepts
  - Communications toolkit
  - Brand standards guidance
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## **5. Desired Qualifications**

Carey Services seeks firms with demonstrated experience in:

- Nonprofit branding/repositioning
- Healthcare, disability services, human services, and/or education sector focused
- Stakeholder engagement and market research
- Strategic communications
- Public relations and reputation management
- Brand identity development and implementation

Preference may be given to firms with:

- Experience collaborating with mission-driven organizations
  - Experience facilitating community-centered branding initiatives
  - Knowledge of accessibility and inclusive communications
  - Familiarity with organizations serving individuals with disabilities and families
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## **6. Proposal Requirements-Proposals should include:**

### **A. Firm Overview**

- Company history and background
- Areas of specialization
- Size and structure of firm
- Office location(s)

### **B. Relevant Experience**

- Similar projects completed
- Nonprofit and/or human services experience
- Case studies and measurable outcomes
- References from comparable organizations

### **C. Proposed Approach**

- Project methodology
- Stakeholder engagement approach
- Research methods
- Project phases and timeline
- Deliverables

### **D. Project Team**

- Key personnel and roles
- Relevant qualifications and experience

**E. Timeline**-Provide estimated timeline for:

- Discovery
- Research
- Analysis
- Recommendations
- Final presentations

**F. Pricing**-Provide:

- Detailed fee structure
- Estimated project costs
- Optional services and pricing
- Reimbursable expenses

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**7. Tentative Timeline**

| <b>Milestone</b>                | <b>Date</b>    |
|---------------------------------|----------------|
| Questions Due                   | June 10, 2026  |
| Answers Posted on Website       | June 19, 2026  |
| Proposal Deadline               | July 1, 2026   |
| Finalist Interviews (if needed) | July 6, 2026   |
| Selection Notification          | July 20, 2026  |
| Project Start                   | August 1, 2026 |

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**8. Evaluation Criteria**-Proposals will be evaluated based on:

- Relevant experience and expertise
- Understanding of organizational needs
- Quality of proposed methodology
- Stakeholder engagement approach
- Creativity and strategic insight
- Cost/value
- References and demonstrated results

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**9. Additional Information**-Carey Services reserves the right to:

- Reject any or all proposals
  - Request additional information
  - Not post all questions received
  - Not answer all questions
  - Negotiate scope and pricing
  - Modify the timeline as needed
  - Select the proposal deemed in the best interest of the organization
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Carey Services, Inc. seeks a brand identity that reflects the following values:

**(1) We believe people are worthy of our best.**

- **Principle** – Every person we support deserves our highest **quality**, care, and commitment. We strive for **excellence** in every effort and interaction, always improving and evaluating how to consistently improve and align ourselves with high standards, honoring everyone’s unique worth and potential.

**(2) We believe in the power of independence and the power of belonging.**

- **Principle** – Everyone thrives when they are empowered to make choices that shape their own lives.  
We **respect** people in such a way that we work to break down barriers and create opportunities where individuals of all abilities can live, work, and thrive together.

**(3) We believe health and safety are foundational.**

- **Principle** – The well-being of those we support is central to every decision we make. We hold a deep responsibility to protect, advocate for, and prioritize safety at every level because every voice has a place, so we provide education and **advocacy**, and assist individuals and families in making informed decisions.

**(4) We believe in earning trust through integrity.**

- **Principle** – Transparent practices, responsible stewardship, and strong governance guide our work.  
We **communicate** clearly and fulfill every commitment, including donor intent, with **professionalism, service, and respect**.

**(5) We believe in doing it together and doing it well.**

- **Principle** – Through **teamwork** and relentless pursuit, we build a better world—one opportunity at a time. We **celebrate** each other and honor the wins we see in each other as we foster a culture of **compassion, collaboration, and shared success**.

Thank you for your interest in assisting Carey Services to keep “Turning abilities into opportunities” for decades to come.

Sincerely,

James R. Allbaugh  
President/CEO

Kelly Scher  
Vice President of Advancement