



Request for Proposals

Community Assessment Evaluation

Introduction

SERA Community Ventures Ltd. is a board-led, not-for-profit corporation, which is independently funded and has been established for 10 years. SERA's mandate is to assist and support rural entrepreneurs and community groups whose endeavours and projects fulfill a social purpose and improves the economic vitality of rural Ontario communities. SERA offers services primarily in Durham Region but with a catchment area covering central Ontario. For further information, the organization website is

www.seracommunityventures.ca

Deadline for submissions is Friday, November 18, 2022 at 5:00PM

Proposals must be submitted electronically only to SERA at: info@seracommunityventures.ca

Project Overview

Sera Community Ventures Ltd. (SERA) invites proposals from professionally qualified consultants or contractors to provide services to SERA for a community assessment in the form of an evaluation report to determine the need and readiness for a planned digitization of SERA services to rural social entrepreneurs. The evaluation is intended to identify factors from both inside and outside the organization that may impact the long-term viability of the organization's service offerings and the need to adopt digital assets and channels to offer SERA's services in a changing landscape.

Scope of Work

This initiative will focus on a needs assessment of communities and stakeholders in rural Durham Region. SERA has works with many entrepreneurs and non-profit organizations to develop social enterprises to support community sustainability. In the past, most of these support services were conducted as face-to-face meetings and workshops. The Covid-19 pandemic has limited the delivery and formats for SERA, as the face-to-face interactions were no longer possible, and SERA was not able to pivot to address these barriers and adjust our program delivery models. Through funding from the Ontario Trillium Foundation, SERA intends to address the needs in the post-pandemic environment of the rural organizations and entrepreneurs we serve and determine how to develop a strong and renewed presence, potentially by making available our support services in new digital and interactive formats, using new tools and delivery channels to support the communities and clients we support.

An effective assessment will help SERA to uncover community needs and resources as well as understand how the organization should move forward in a post-pandemic environment. This evaluation is a portion of a larger project focused on determining the assets, resources, opportunities, and stakeholder participation

required to adapt the services of SERA Community Ventures to fulfill its mission and best support developing rural social entrepreneurs. It is expected that SERA stakeholders will be engaged in consultations as part of this work and that the evaluation report will address how SERA might support the current needs of rural social entrepreneurs to potentially implement new digital education platforms and resources, and enhanced services.

With this funded project, SERA Community Ventures has an opportunity to enhance the business development supports that SERA has always offered by adding digital portals and online services to rural stakeholders. The online presence of SERA will be strengthened in the process.

The outcomes of this project will be to utilize collected information to develop recommendations that will inform SERA's direction to pivot to an enhanced online presence and a new suite of digital educational and support services. The research collected, will lay the groundwork needed to develop of a framework that will allow SERA to reimagine its services, digitally and virtually, to support rural entrepreneurs and the growth of the social economy.

Requirements

Continuing the work conducted by SERA to develop support services for social development work of entrepreneurs and community groups, SERA is seeking assistance to determine current needs for digital delivery of SERA products and services and assessment of the most relevant services with actionable recommendations in an evaluation report.

Review

- Review existing research materials that have informed SERA's strategic direction and services
- Leverage data from a community partners' data base to better understand the impact of the pandemic on rural business

Community Consultation Session

- The successful candidate will conduct (design and deliver) one stakeholder sessions with the aim of developing an environmental scan on the changing needs of the communities SERA supports and of the changing needs of entrepreneurs, within the context of the services SERA provides to stakeholders
- Participants are to include local entrepreneurs, community organizations, business advisory groups such as boards of trade and chambers of commerce, farmers' market organizers, related non-profit organizations, and municipal economic development representative. SERA will assist in recruiting individuals for consultation
- Provide updates every 14 days, advising the Board of Directors of progress and any problem areas
- Provide a final report within 45 days from the start date, including an Environmental Scan that the current needs of rural entrepreneurs, and particularly digital resources, and providing recommendations to inform future work from an immediate start date

Required Services/Experience

- The selected consultant will demonstrate experience working with relevant stakeholders
- Work directly with SERA's Project Coordinator and Board of Directors to engage with stakeholders
- The successful consultant will possess:
 - Familiarity with local market readiness criteria
 - Familiarity with community development and social enterprise
 - Experience in developing and delivering community consultations & workshops
 - Experience in all aspects of community needs assessment /environmental scan
 - Clear and concise communication skills and evaluation report writing

- The proposal must demonstrate that you have an understanding of the project objectives and requested deliverables.
- The proposal must present clear milestones, deliverables and timelines. In those instances where proponents are proposing to deliver services in partnership with other consultants, please identify in your proposal the lead proponent (who is in charge of oversight and who will sign the contract).
- Proposal deliverables include but are not limited to project approach (outlining specific work items/deliverables), a detailed project schedule/workplan and budget.

Project Deliverables

- Project kick-off meeting with SERA Board and project manager
- Communications/outreach plan
- Delivery of one stakeholder consultation workshop (or a plan for individual consultations)
- Creation of a presentation in PowerPoint for stakeholder consultations, approved by the Board
- Community Assessment / Evaluation report
- Short (1-page) bi-weekly progress reports to the Project Manager

Project Timeline

Release of RFP	October 26, 2022
Deadline for Submission of Proposal	November 18 at 5:00PM
Review & Selection Process	November 21-28
Projected Start Date	November 30
Final Report	45 days from start date

PROJECT BUDGET & PROPOSAL EXPECTATIONS

GENERAL TERMS AND CONDITIONS

SERA reserves the right, at its sole option, and for its convenience, to accept and/or reject any proposal, in whole or in part, for any or no reason. By making this request for proposals (RFP) SERA does not imply or give any assurance whatsoever that any proposal will be accepted. No contractual or other legal obligations arise on the part of SERA to any proponent by this RFP until such time as a final, written agreement, if any, is subsequently entered into with a proponent.

SERA may or may not award the business that is the subject of this RFP to any proponent or proponents at its sole discretion. SERA reserves the right to negotiate with proponents, seek clarification from proponents regarding their proposal responses and invite modifications to the proposal responses submitted. SERA also retains the right to withdraw or modify this RFP at any time without notice and without obligation to proponents. SERA may waive compliance with the requirements of this RFP and consider a proposal response that does not meet all of the requirements of this RFP.

Your proposal is submitted at your own risk. If, prior to the deadline for submission of proposals you fail to notify SERA of an error and your proposal is selected, you shall not be entitled to any compensation or time by reason of the error or its later correction.

No part of this RFP will become part of any final agreement between SERA and the provider unless specifically incorporated into a final, written agreement. Any or all contents of your proposal may become part of the final agreement. Further, your proposal response, including fees, shall constitute a binding offer capable of acceptance in whole or in part by SERA, and if selected will remain valid until such time as a final agreement is negotiated and executed.

SERA shall not be in any way responsible for or liable for any costs associated with your proposal and you

shall not make claim to SERA for any such cost or expenses. By submitting a proposal response, you agree to waive any right to claim damages against SERA for any reason, cause, or thing arising out of the RFP process.

Any contract awarded as a result of this RFP will be non-exclusive. SERA may, at its sole discretion, purchase the same or similar services from other sources during the term of the contract.

It is understood and agreed that the successful proponent will be an independent contractor. Any proposed subcontracting agreements must be approved by SERA and will not release you from any obligation with respect to the performance of your obligations.

Errors and omissions

SERA shall not be held liable for any errors or omissions in any part of this RFP. While considerable effort to ensure an accurate representation in this RFP, the information contained in the RFP is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

Potential for conflicts of interest

Each proponent, in their proposal submission, shall declare all conflicts of interest or any situation that may be reasonably perceived as a conflict of interest that exist now or may exist in the future. Failure to comply with this requirement will render the proposal non-compliant and will cause the proposal to be rejected. SERA reserves the right to disqualify from further consideration proposals that in SERA's opinion demonstrate a conflict of interest.

The total available budget for the consultant is **\$4,200.** inclusive of taxes and expenses and a community consultation budget of **\$300.** for incentives. The total contract is **\$4,500.**

Proposal Guidelines

Submission will be accepted in MS Word or PDF format, submitted electronically. Please limit your submission to 10 pages in length.

Your proposal is to be accompanied by a cover letter / e-mail certifying the accuracy of all information contained in your submission and acknowledging your offer of services according to (a) the project scope as set out in the scope of work and the terms and conditions of the RFP.

Please provide the following:

Section 1: Executive Summary

Outline of your understanding of the project, identifying concerns or potential problems with the project overview of approach to the project.

Section 2: Consultant Profile & Experience

Brief profile of the company/consultant (company name if applicable, name of project leads, website) and outline of candidates' experience, specifically highlighting relevant experience, how you meet the requirements of the project and the value you would bring to completing this project in the timelines provided.

Section 3: Methodology/Approach

Given the information provided in this RFP, outline your approach to the requested scope of work and any anticipated issues/concerns about the nature and/or scope of work and/or timelines. Please include a draft work plan informed by the project timeline.

Section 4: Engagement of Stakeholders

Clearly outline your process of engaging stakeholders and your approach to facilitation.

Section 5: References

Please provide 3 references based on similar work projects.

Evaluation Criteria

Weight %

Demonstrated a clear understanding of the project including a description of work tasks, data collection methods, fulfilling responsibilities and deliverables	15
Experience working with diverse stakeholders, including entrepreneurs, non-profits and government bodies	10
Research Frameworks/Methodologies for an environmental scan, including stakeholder engagement and consultation	15
A clear plan for data collection, analysis, and usefulness of the information	10
Qualification of project lead(s) with collaboration experience	10
Knowledge of the social economy and social enterprise	10
Proposal meets format requirements	5
Relevant work experience with references	15
Thoroughness of proposal and ability to meet specifications	10
Total Score	100

Submission

It is your responsibility to seek clarification of any matter that you consider unclear before submitting your proposal by the deadline specified herein for submission of written questions. SERA is not responsible for any misunderstanding or misinterpretation of this RFP document or requirements.

Deadline for proposal submission is: 5:00 pm – Friday, November 18, 2022

Proposals must be submitted electronically (only) to:

SERA Community Ventures Ltd.

info@seracommunityventures.ca

SERA is an equal opportunity employer and strongly committed to equity, diversity, and inclusion. We welcome applications from members of racialized groups, Indigenous persons, persons with disabilities, person of diverse sexual orientations and gender identities and others with the skills and knowledge to productively engage with diverse communities.

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Land Acknowledgment

SERA acknowledges that we are on the land of many Nations and as settlers, we are grateful for the opportunity to meet, live and work here. This land has been inhabited by Indigenous People from the beginning and we thank the generations of Indigenous people, who have been the stewards of this land for thousands of years. We recognize and appreciate their deep historic connection to this place.

We acknowledge the traditional territory of the Mississauga of Scugog Island First Nations, the Chippewas of Georgina Island, and all other territories we work particularly those in the Upper Canada and Williams Treaties.

We also recognize the contributions of the Metis, Inuit and other Indigenous people in shaping and strengthening our community, province, and country.