



Request for Proposals

Marketing Strategy and Implementation Plan

Introduction

SERA Community Ventures Ltd. (SERA) is a volunteer-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 endeavors and projects fulfill a social purpose and improve 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

Project Overview

SERA works with many socially focused entrepreneurs and community organizations to develop enterprises that support community sustainability and rural community development. In the past, most of the SERA support services were delivered through in-person meetings and workshops. The Covid-19 pandemic has limited these service delivery formats for SERA, reducing in-person collaboration and interactions. SERA is addressing its options for service delivery methods and meeting client needs in the post-pandemic environment present for rural organizations and entrepreneurs. In order to re-align the organization and develop a strong and renewed presence, SERA is endeavouring to make our support services available in new digital and interactive formats, using new tools and delivery channels to support the communities and clients we support and educate.

SERA Community Ventures Ltd. has undertaken a project to rebuild and recover from impacts of COVID-19 by implementing a suite of new virtual services and educational programs to better support the organization's mandate using digital platforms. Desired project outcomes include the re-imaging of the delivery of SERA's programs and services to meet the needs of the community, to meet them where they are online, and to improve our ability to develop new and/or alternative sources of revenue from broader sources. Research and consultation with various audiences on current marketplace needs has been concluded and this evaluation has confirmed the viability of marketing SERA products and services online.

Phase 2 of the project requires the development and implementation of a marketing strategy and plan to target audiences, identify ideal revenue streams/models for digital products and services, and to structure a marketing strategy to launch and build upon the organization's new virtual service delivery platform.

A targeted marketing strategy and action plan will launch the online services and guide SERA

Community Ventures Ltd. toward its mission to support developing rural social entrepreneurs and community development groups in a post-pandemic environment.

Scope of Work

SERA Community Ventures Ltd. invites proposals from professionally qualified consultants or contractors to develop a marketing strategy and action plan to identify appropriate channels, resources, strategy, and budget to effectively market a suite of new online products and services for SERA Community Ventures Ltd. and to expand the organization's online presence, market reach and impact.

With this project, SERA Community Ventures Ltd. has an opportunity to enhance the business development support on offer with the addition and marketing of a digital platform and online services to its rural stakeholders. A strengthened online presence for SERA and its services is the goal.

The outcomes of this marketing strategy project are to include the development of recommendations that:

- Create a strategy to market a new online platform of services and entrepreneurial education products
- Identify appropriate resources and tools to promote SERA'S existing and new products and services to its key target audiences
- Allow SERA to reimagine a digital reach, through the adoption of digital assets and channels, to expand SERA's support services for its clientele of rural entrepreneurs and community groups that will evolve and grow their business acumen in a virtual environment

Requirements

With input from the board and project manager at SERA Community Ventures Ltd. the successful supplier will create a 2-year marketing strategy and plan to launch a suite of online services and products and provide an action plan of strategic and targeted marketing tactics to promote the new platform and online services.

SERA is seeking assistance to determine the best marketing strategy for this new digital delivery of SERA products and services, coupled with a marketing analysis and in-depth research that will form a plan proposing achievable and sustainable marketing tactics with actionable recommendations.

Segmentation details derived from Phase 1 of this project will be supplied and used to guide the marketing strategy and tactics. An assessment of product/market match (audience segmentation) is to be included. It is anticipated that digital/social media will be a significant element of a plan and that a strategy will include financial and capacity recommendations towards a sustainable marketing approach for SERA specifically. Integration with the SERA strategic plan is expected. An action plan is to include, at a minimum, a 1-year media calendar of marketing activities and suggested content.

The marketing strategy is to include an analysis of revenue streams for online models, including fee-for-service, subscription, certification courses, sponsorship-supported, and project-based delivery models. New technology platforms could enable remote coaching, access to professional development education courses and/or presentations, self-guided learning, and a shared knowledge hub. The plan should outline best practices and recommendations to market these

types of services.

Required Services/Experience

- Demonstrated experience in creating effective marketing strategies
- An understanding of current and relevant marketing for online platforms, programs, and service fee models.
- Supplier will possess:
 - Familiarity with community development and social enterprise
 - Experience in developing marketing strategies, redefining brands, product/service launches
 - Experience in all aspects of marketing development
 - Clear and concise communication skills and report writing
- The proposal must demonstrate 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/work plan, and budget.

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Project Deliverables

- Project kick-off meeting with SERA Board and Project Manager
- Project work plan
- Delivery of a marketing strategy and actionable plan as outlined
- Brief (1-page) bi-weekly progress reports to the Project Manager
- Presentation of strategy and consultation with the SERA Board
- Submission of final report within 45 days from the start date, to include complete marketing strategy, with recommendation, and an action plan for implementation

Project Timeline

Release of RFP - February 17, 2023

Expressions of Interest - February 28, 2023 at 12:00PM

Deadline for Submission of Proposal - March 10, 2023 at 5:00PM

Review & Selection Process - March 13 - March 16

Award of Project - March 17, 2023

Project Start Date - March 20, 2023

Final Report - May 8, 2023

PROJECT BUDGET - The available budget for the project is **\$6,000.00** inclusive of taxes and expenses.

Deadline for submission is Friday, March 10, 2023 at 5:00PM

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

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.

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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 is made 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 exists 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.

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: Marketing Strategy

Clearly outline your process of creation and implementation of a marketing strategy and action plan for this SERA Community Ventures Ltd. project.

Section 5: References

Please provide 3 professional 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
Frameworks/Methodologies for development of a marketing strategy and implementation plan	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/entrepreneurship	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.

Expressions of Interest due February 28, 2023 at 12:00PM

Deadline for proposal submission is: 5:00 pm – Friday, March 10, 2023

Proposals must be submitted electronically (only) to:

SERA Community Ventures Ltd.

natasha@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, persons of diverse sexual orientations and gender identities and others with the skills and knowledge to productively engage with diverse communities.

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.