

Request for Proposals (RFP)

Marketing & Outreach Consultant for SeamlessAccess

1. Background

SeamlessAccess is a community-driven initiative that enables privacy-preserving, federated access to scholarly and research content. It is supported by a broad coalition of publishers, libraries, service providers, identity federations, standards organizations, and other stakeholders across the research ecosystem, including collaboration among GÉANT, Internet2, NISO, and STM.

The SeamlessAccess governing group has approved the engagement of a consultant to support the next phase of the initiative's growth. Adoption and trust across diverse stakeholder groups are essential to the long-term success and sustainability of SeamlessAccess.

Because SeamlessAccess relies heavily on limited staff capacity and significant volunteer effort, this engagement must result in recommendations and strategies that are **explicitly designed to be executed and sustained by a volunteer-supported organization**, without assuming dedicated full-time marketing staff.

2. Objectives

The core purpose of this engagement is to strengthen and professionalize SeamlessAccess's marketing and outreach efforts. Specifically, the selected consultant will:

- Identify and clearly define the key audiences for SeamlessAccess (e.g., end-users, integrators, publishers, libraries, service providers, standards bodies, and other stakeholders).
- Develop clear, consistent, and audience-specific value propositions and messaging.
- Design a scalable outreach strategy focused on increasing awareness, adoption, and positive perception of SeamlessAccess.
- Recommend concrete, high-impact outreach activities that are realistic given limited financial resources and a strong reliance on volunteer effort.
- Define outreach goals and success metrics to enable ongoing evaluation and reporting.

Optional Objective

- Analyze existing pricing or funding models used by comparable community-driven or infrastructure services and recommend a sustainable pricing or membership model for SeamlessAccess.

3. Scope of Work

The proposed work is expected to be structured in phases, as outlined below. Respondents may suggest refinements or alternative approaches where appropriate.

Phase 1: Assessment and Discovery

- **Current State Analysis**
Assess existing marketing and outreach activities, identifying strengths, gaps, underperforming areas, and opportunities for improvement.
- **Audience Profiling and Needs Assessment**
 - Identify and profile key stakeholder and user groups.
 - Analyze audience needs, motivations, concerns, and barriers to adoption.
 - Examine why and how integrators and other organizations benefit from SeamlessAccess.

Phase 2: Strategy and Content Development

- **Messaging Development**
Develop tailored value propositions and key messages for each primary audience, ensuring clarity, consistency, and relevance across all SeamlessAccess communications.
- **Outreach Strategy and Program Design**
Create a comprehensive outreach strategy and program plan based on Phase 1 findings. The plan must prioritize **high-impact activities that are feasible for a volunteer-supported, non-profit initiative**, avoiding recommendations that would require sustained full-time staffing or large marketing teams.
- **Channels and Content Planning**
 - Identify the most effective communication channels (e.g., website, conferences, webinars, social media, partner communications).
 - Recommend best practices for use of each channel in low-resourcing environments.
 - Identify the types of content required to support the messaging and strategy (e.g., explainer materials, case studies, presentations, templates or reusable materials).

Phase 3: Strategic Engagement and Measurement

- **Partnerships and Alliances**
Recommend strategic partnerships or alliances that could amplify SeamlessAccess messaging and support adoption.

- **Policy and Standards Engagement**
Define an approach for engaging with policy makers, standards bodies, and consortia to enhance credibility and influence.
- **Measurement and Reporting**
 - Define key performance indicators (KPIs) and success metrics.
 - Recommend a structure and process for reporting progress to the Outreach Committee, SeamlessAccess leadership, and the broader community.

Optional Phase 4: Financial Model Framework

- **Market and Model Analysis**
Research and analyze pricing, funding, or membership models used by similar non-profit, community-governed, or infrastructure services.
 - **Pricing Options Development**
Develop three to five potential pricing or membership models (e.g., tiered membership, service-based fees, sponsorship), including:
 - High-level revenue projections
 - Risk and benefit analysis for each option
 - **Recommendation**
Recommend a sustainable pricing or funding framework aligned with SeamlessAccess' mission and value proposition.
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4. Deliverables

The consultant is expected to deliver the following:

- **Outreach Program Charter:** Documented goals, objectives, and success metrics.
- **Outreach Effectiveness Assessment:** Summary of current outreach performance and improvement opportunities.
- **Stakeholder and Audience Profiles:** Description of key audiences, their concerns, and the types of organizations that benefit from SeamlessAccess.
- **Value Proposition and Messaging Pack:** Core messages and positioning for all major audiences.
- **Outreach Strategy and Program Plan:** Recommended strategy, channel approach, content needs, and partnership opportunities.

Optional Deliverable

- **Sustainable Pricing Model Framework:** Market analysis, pricing options, financial projections, and recommended implementation approach.

5. Proposal Requirements

Interested respondents should include the following information in their proposals:

Approach and Understanding

- Brief description of your knowledge of SeamlessAccess and your assessment of the project's primary objectives.
- Proposed approach and methodology, including any suggested refinements to the scope.

Timeline

- Proposed project start date.
- Estimated duration for each phase and for the overall project.

Costs

- A not-to-exceed cost for Phases 1–3.
- Separate pricing for the optional Phase 4 (pricing/financial model), if proposed.
- Pricing should be provided on a fixed, phase-based basis.

Experience and Qualifications

- Relevant experience and expertise.
- Examples of similar projects, particularly those involving community-led, non-profit, infrastructure, or standards-based initiatives.
- References and, where possible, metrics demonstrating outcomes from comparable engagements.

Project Team

- Names and roles of key personnel who would work on the project.
- Relevant experience of each team member.

Risks and Mitigation

- Identification of key risks to successful project delivery and proposed mitigation strategies.

Conflict of Interest

- Disclosure of any actual or potential conflicts of interest involving the proposing organization or project staff.
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6. Evaluation Criteria

Proposals will be evaluated based on:

- Demonstrated understanding of the project objectives
 - Quality and feasibility of the proposed approach
 - Relevant experience and past performance
 - Qualifications of the proposed project team
 - Cost-effectiveness and value for money
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7. Expression of Interest and Submission Process

Organizations or individuals that would like to be considered for this project should complete the short [Expression of Interest form](#) by March 20, 2026. **Completion of the form is required prior to submitting a full proposal.** Full proposals must be submitted via **email** to chipke@niso.org no later than April 3, 2026.

Timeline

- Expression of Interest deadline: **March 20, 2026**
- Full proposal submission deadline: **April 3, 2026**

Questions about this RFP may be directed to:

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chipke@niso.org

SeamlessAccess anticipates sharing this RFP through community channels and professional networks and welcomes expressions of interest from qualified independent consultants, consultancies, and agencies with relevant domain expertise.