



Center for Economic Progress

Communications Consultant

Prepared September 29, 2010

REQUEST FOR PROPOSAL

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EXECUTIVE SUMMARY

The Center for Economic Progress (the Center) seeks a Communications Consultant (the Consultant) to help the Center and its national coalition of local and state partners to increase the visibility of its federal advocacy work (government relations and policy) by establishing a stronger presence with the media. For the past twenty years, the Center has provided free tax preparation and financial services to low-income workers in Chicago and throughout Illinois. Eight years ago, the Center launched the National Community Tax Coalition (NCTC), a nationwide network of free tax and financial services providers. Staffed by Center employees and guided by an external Steering Committee, the Coalition is an organizing body through which member organizations advocate in Washington D.C. for their clients and other low-income workers.

One of NCTC's greatest strengths is its ability to bring together direct service providers from all over the country to build consensus recommendations to help guide and influence public policy. The fact that NCTC is a national network of community-based organizations connects policymakers to the local realities of low-income taxpayers and their families, which further strengthens NCTC's credibility in the federal arena. Additionally, NCTC possesses the ability to mobilize advocates in every state and the majority of Congressional districts across the United States. In recent years, the Center and NCTC have collectively achieved several victories, including the creation and subsequent expansion of a federal grant program for free tax preparation programs and the regulation of paid tax preparers.

Our policy victories are the direct result of access to Congressional offices and committee staffers who see NCTC as an expert on tax preparation and the practical aspects of an increasingly complex tax code. However, the Center needs further assistance in establishing the NCTC as a national coalition of expertise on the Coalition's broader policy agenda, so as to strengthen our access and influence to policymakers on issues such as tax reform and savings policy. The Center and NCTC must demonstrate to policymakers that Coalition members offer a unique and valuable perspective—that our collective expertise as service providers extends to policies affecting low-income workers. A Communications Consultant will raise the Coalition's profile in the media by developing a strategic communications plan for advocacy that connects NCTC staff and member organizations to influential columnists, writers, and news reporters.

The ideal consultant will have past experience working with public relations and media around federal advocacy, government relations, and policy.

Please contact Gregory Brown, Director of Policy & Research, with any questions you may have regarding the request for proposal. **The submission deadline is November 1, 2010.**

REASON FOR REQUEST FOR PROPOSAL

The National Community Tax Coalition (NCTC) is a network of community based organizations that provide free tax preparation and financial services for lower to moderate income working families throughout the United States. The collective experience and knowledge of our 600+ affiliates throughout the country allow us to advocate for a fair and progressive tax system, as well as honest financial services that will help working families move towards financial stability. NCTC seeks a Communications Consultant that will help to support our advocacy efforts. The centerpiece of this support will come in the form of a strategic communications plan for advocacy.

The strategic communications plan for advocacy and policy will be used as a tool in the Center's daily efforts, as well as for the long term planning of the NCTC. The plan will contribute to the growth and success of our advocacy efforts by effectively building public support through the media. The Center recognizes that building good media support is an excellent complement to a strong advocacy movement; and to do so NCTC must build solid working relationships with key media contacts. Other important elements of this communication plan include communication team building, properly framing advocacy messages, targeting audiences, training spokespeople, developing written material, identifying news opportunities, and creating an evaluation process to measure the organization's progress toward improving its national visibility and positioning in the federal affairs arena.

We seek to have a thoughtful strategic communication plan around advocacy that reflects our mission and is based on an awareness of how people form opinions. We understand that good media attention will make our work more effective. A successful communications strategy can help change attitudes about poverty and working families. It can also help to bring about systematic change, increase membership, and help secure resources. With a two year strategic communication plan for advocacy, NCTC can extend its reach and effectiveness. A Communication Consultant would need to deliver a strategic communications plan by December 17, 2010.

SCOPE OF WORK

The Communications Consultant will be responsible for developing a Strategic Communications Plan to reinforce and strengthen the visibility of our advocacy efforts and that includes the following components: the creation of an NCTC communications team, increased public awareness, enhance visibility, increased fundraising opportunities for the organization, increased access to influential columnists and law makers, and expanded recruitment of additional NCTC members. Our goal is to raise NCTC's advocacy profile in the media and to push the Coalition's advocacy agenda, but we also want policymakers and influential people to see NCTC members in the media as knowledgeable experts and reliable resources on issues affecting low-income workers.

We have identified four priority areas where the Communications Consultant can help NCTC to strengthen its media position as an effective national advocate for low-income workers.

Advocacy: Enhancing the visibility of our advocacy efforts in government relations and policy work.

Publicity: Reaching influential columnists, writers, and news reporters.

Membership: Recruiting more affiliates who are interested in contributing to our advocacy efforts, thus strengthening our leverage in the policy arena.

Resource/Fundraising: Increasing resources and fundraising opportunities for advocacy work through the publication of strategically-placed news stories.

DELIVERABLES

The Communications Consultant will be supported by the Advocacy Department that consists of the Director of Policy and Research, the Manager of Government Relations, the Policy Analyst, the Members Relations Manager, and the Website Manager. NCTC staff will play an important role developing the strategic communications plan, cultivating media relationships, providing website access, producing e-mail lists, and disseminating media material and information.

Strategic Communications Plan: Developing a Strategic Communications Plan for Advocacy that captures the NCTC policy priorities, goals, vision and values. The strategy must include a plan: to reach our target audience, include research on public opinion about our issues; provide guidance on our messages and material to be produced; account for available resources; and be in the form of a written work plan.

1. Long Term Planning includes:

- **Build an NCTC Communications Team**
- **Identify Target Audiences**
- **Conduct Research**
- **Develop Messages**
- **Produce Material**
- **Access Resources**

2. Day-to-Day Efforts include:

- **Ensuring Positive Media Coverage**
 - Secure a national media story quarterly
- **Securing Columnist and Editorial Support**
 - Develop local op-ed articles for NCTC Advocacy Leaders quarterly
- **Training Spokespeople**
 - Provide **spokesperson training for Advocacy Leaders** around NCTC's policy priorities
 - Provide spokesperson training for College Access Program around Financial Aid U Week
- **Building Media Partnerships**
- **Conducting Evaluations**

TIMELINE

1.	RFP is distributed to vendors	October 1, 2010
2.	Proposal due date	November 1, 2010
3.	Final selection	November 10, 2010
4.	Contract finalized	November 12, 2010

5.	Anticipated commencement date of work	November 15, 2010
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BUDGET

The contract period is planned to last from November 15, 2010 through November 15, 2011. The total budget for the Communications Consultant over this period is \$56,000. The total contract amount, contract length, and monthly rate are negotiable. Reimbursement of expenses will be by prior agreement.

CONTACT

If you have any questions regarding the RFP, please contact:

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 Director, Policy & Research
 National Programs National Community Tax Coalition
 Center For Economic Progress
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CENTER FOR ECONOMIC PROGRESS BACKGROUND

Our Vision

The Center for Economic Progress envisions an America of shared prosperity, where *all* working families can access the financial opportunities they need to succeed.

Our Mission

The Center for Economic Progress helps hard-working, low-income families move from financial uncertainty to financial security.

Local in service but national in voice, we achieve our mission in three ways:

- We provide trusted tax and financial counseling, giving Illinois families the tools to make sound choices.
- We lead a national coalition of organizations that promote economic progress for low-wage workers and their families.
- We advance policies and practices to create a financial system that works for all.

Local Work

Since its inception in 1990, the Chicago-based Center for Economic Progress (the Center) has evolved to meet the changing financial services needs of low-income workers and their families. The Center started

as a free tax preparation program and low-income taxpayer law clinic, but has steadily added services over the years. We see the annual ritual of tax preparation as a “teachable moment,” an opportunity for clients to reassess their financial situations. In addition to free tax preparation services, our tax sites offer clients the chance to open bank accounts, purchase U.S. Savings Bonds, complete the Free Application for Federal Student Aid (FAFSA), and participate in screenings for public benefits. Our goal is for clients to make the most of their tax refunds.

Each year, the Center assists over 30,000 clients throughout Chicago and Illinois. We train and mobilize over 1,500 volunteer tax preparers who serve at our 30 tax sites throughout the state. Volunteer tax preparers include community members, employees of local businesses, and former clients. While several hundred volunteers are Certified Public Accountants (CPAs), the vast majority of new volunteers have no prior tax preparation experience.

The Center’s free tax preparation service is a Volunteer Income Tax Assistance (VITA) program. The IRS administers the VITA program and supports over one thousand community-based organizations throughout the nation by providing training and in-kind resources as well as administering an \$8 million competitive grant program. VITA programs range from small operations that prepare fewer than one hundred returns a year to sophisticated year-round operations like the Center, which provide a variety of services in addition to free tax preparation.

National Work

In addition to its local work, the Center also leads the National Community Tax Coalition (NCTC), a network of community-based tax and financial services organizations. The idea of a national tax network was born in 2001, when twenty-two individuals met in Chicago to share their experiences as community-based tax preparers. The following year, 186 participants from thirty-two states convened the first-ever national conference of VITA programs. The conference gave shape to the National Community Tax Coalition, a national movement focused on working families and insistent that the tax system and asset-building products facilitate upward mobility for low-income workers and their families.

As one of the most well-established VITA programs, the Center took the lead coordinating the Coalition. Today, NCTC is housed within the Center, where more than ten full-time staff members are dedicated to national work. An NCTC Steering Committee comprised of leaders from community-based programs and national organizations as well as experts in the fields of taxation, public policy, and financial services advises NCTC staff. Steering Committee members meet in person biannually and over the phone on a monthly basis. A number of members chair NCTC working groups and serve as mentors for newer programs.

Today, NCTC has over 700 members in all 50 states, with over 100 paid members who have access to the full range of services and trainings offered. We provide technical assistance to VITA programs with the goal of increasing capacity and improving services and serve as a voice in Washington D.C. for low-wage workers and against unfair financial practices.

Capacity Building and Training

We provide technical assistance to VITA programs with the goal of increasing capacity and improving services.

- National Conference: Every other year, NCTC hosts a national conference that brings together over 500 representatives from community-based organizations; state and local governments; foundations; and government agencies, including the IRS, for several days of training and networking opportunities.
- Regional Summits: In years with no national conference, NCTC hosts regional summits, which are smaller conferences targeted at regions where the Coalition has fewer members.
- Working Groups: Steering Committee members and NCTC staff facilitate working groups related to advocacy, asset building, quality of tax preparation, and data collection.
- Training: NCTC staff offer member organizations a variety of trainings on tax site operations, savings initiatives, and advocacy through conference calls and web seminars.
- Technical Assistance: NCTC staff offer new and existing free tax preparation programs guidance on a variety of service-related issues, including managing a tax site, training volunteers, and meeting IRS rules and regulations.

Policy and Advocacy

We seek to broaden the reach of community tax preparers as a leading voice in Washington D.C. for low-wage workers and against unfair financial practices.

- Grassroots Organizing: Grassroots campaigns are managed by NCTC's Field Organizer who also leads the advocacy working group and mobilizes members of the "State Advocacy Leaders Network." Guided by the Field Organizer, the network organizes actions at the state level, including sign-on letters and calls to elected officials. Campaigns call on NCTC member organizations to take action, but rarely involve clients, volunteers, or the general public.
- Administrative Advocacy: Administrative actions taken by the IRS and Treasury often affect free tax preparation programs and low-income workers. For example, this past year, the IRS issued regulations on the disclosure of client information that would have prevented NCTC members from reporting on basic tax season results. The IRS has also taken action in the past to single out low-income taxpayers claiming the Earned Income Tax Credit (EITC) for special enforcement measures. Traditionally, NCTC has organized sign-on letters with national partners (e.g., the United Way and AARP) and also met with Treasury and IRS officials to address concerns.
- Federal Lobbying: Grassroots campaigns are often complemented by direct lobbying. Previous Advocacy Directors have developed a limited number of relationships with Congressional offices and committee staffers. These relationships allow NCTC to share member concerns directly with

elected officials and to organize effective and targeted advocacy campaigns.

- National Partnerships: As a network of direct service providers and advocacy organizations, NCTC often shares common interests with other national organizations. For instance, national partnerships with the United Way of America and AARP, organizations also involved with free tax preparation, give the Coalition additional clout when negotiating with the IRS and federal agencies. Other partnerships that have demonstrated results are with the New America Foundation and the Center for Financial Services Innovation (a Shore Bank affiliate).
- Policy: NCTC's Policy Analyst supports the Coalition's advocacy campaigns by tracking legislation, summarizing bills, as well as publishing fact sheets and position papers.

Traditionally, our advocacy work has focused on protecting and expanding the EITC, ensuring federal funding for free tax preparation programs, and addressing IRS administrative issues. Our 2010 advocacy agenda is organized around four primary issues: tax reform, savings policy, consumer protections, and funding for free tax preparation services.

- Tax Reform
 - Expand refundable tax credits
 - Restore fairness to the tax code
- Savings Policy
 - Create a matched savings incentive for low-income workers
 - Increase access to direct deposit and low-priced bank alternatives such as prepaid debit cards
- Consumer Protections
 - Regulate paid tax preparers to ensure quality tax preparations for all consumers
 - Protect consumers from predatory lenders
- Funding
 - Increase federal grant support for free tax preparation assistance
 - Identify new funding opportunities in proposed legislation and within existing federal programs for organizations that offer free financial services and/or capacity-building support

GUIDELINES FOR PROPOSAL SUBMISSION

Submission Deadline and Process

All proposals must be received by 5:00 PM (EST) on November 1, 2010. Please submit proposals electronically in PDF format or by post to:

Gregary Brown,
Director, Policy & Research
National Programs National Community Tax Coalition
Center For Economic Progress
29 E. Madison Street, Suite 900
Chicago, Illinois 60602
(312) 252-0280
gbrown@economicprogress.org

Requirements

Proposals should include the following sections:

1. Title Page
2. Cover Letter
3. Approach
4. Budget
5. Appendix: References
6. Appendix: Conflicts of Interest
7. Appendix: Project Team Staffing
8. Appendix: Company Overview

Title Page

The title page should include The Center for Economic Progress, Communications Consultant Proposal, your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person.

Cover Letter

State your interest in the Request for Proposal and provide a brief overview of your proposal. The cover letter should be signed by the person or persons authorized to sign on behalf of the company.

Approach

In this section, please address the following issues:

1. Explain how your firm would develop a strategic communication plan for our advocacy efforts
2. Explain which media relationships (be specific as possible) would yield the highest return on investment for the Center and NCTC and your firm's capacity to facilitate the formation of these relationships.
3. Explain how your firm would help manage relationships with media contacts.
4. Describe how your firm's past experiences and qualifications would enable you to develop specific media relationships.
5. Describe the steps you would take to meet the project deliverables. Propose any alternative deliverables that you think fit within the project's scope.

Budget

Explain your firm's capacity to meet the project deliverables while remaining within the project's budget constraints.

Appendix: References

Provide three references from current or recent clients (preferably nonprofits) for which you provided similar services.

Appendix: Conflicts of Interest

Disclose any potential conflicts of interest.

Appendix: Project Team Staffing

List all staff members who would be involved with the project and describe their relevant experience. Include a CV and biography for relevant staff members and management.

Appendix: Company Overview

Outline the firm's vision, mission, and values. Briefly describe the firm's history and experience working with nonprofit organizations.

CRITERIA FOR EVALUATION

Proposals will be evaluated based on the following criteria:

- Values that align with the Center's vision and mission.
- Demonstrated understanding of how NCTC's unique role as a network of direct service providers can position the Coalition in the mass media.
- Access to relevant journalist and experience with national advocacy efforts.
- Experience working with nonprofits.
- Knowledge of issues related to the Center and NCTC's work.
- Ability to meet the proposed deliverables while adhering to the budget.