



REQUEST FOR PROPOSALS #2011-89002

Marketing and Media Plan Request for Proposal

US Tax Shield, one of the nation's leading professional tax representation and mediation contractors, seeks proposals for marketing and media services for the creation and execution of an ongoing national direct response campaign.

December 30, 2010

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RESPONSES DUE: Tuesday, January 11, 2011, 3:00 p.m.

US Tax Shield
REQUEST FOR PROPOSALS #2011-89002
Marketing and Media Plan

US Tax Shield is seeking qualified contractors to submit proposals for marketing and media services for the creation and execution of an ongoing national direct response campaign. to engage the public and provide sensible, ethical resolutions and protection against wage garnishments, levies and asset seizures.

I. COMPANY BACKGROUND

US Tax Shield is a privately-held tax resolution corporation that represents the interests of individuals and business with tax issues.

Company Mission Statement

US Tax Shield is an efficient and effective company striving towards excellence in providing tax resolution for its clients. US Tax Shield clients are always treated with professionalism, respect, and compassion towards their situation.

Our experienced and capable staff of tax attorneys, ex-IRS agents and tax advisors provide our clients with the best possible professional representation, the best achievable results and unrivaled communication throughout the resolution process.

Our commitment to excellence and integrity has allowed us to assemble a team of professionals, whose expertise and dedication to exceptional service is unmatched in the industry.

Services

Should you have unfiled tax returns, you owe the IRS back taxes that you just can't pay, or you are the target of a wage levy or asset seizure, you are not alone. There are thousands of taxpayers that owe back taxes. The majority of taxpayers do not understand their rights before the IRS, that is why a taxpayer needs help to resolve their tax problems. To resolve IRS problems requires not only the understanding of the tax law, but how the IRS operates internally, this allows the US Tax Shield Tax Services provider to solve your IRS problems in the most efficient and effective manner possible.

According to the company's personal pledge:

*WHETHER IT'S PERSONAL OR BUSINESS, IF YOU OWE MORE THAN FIFTEEN
THOUSAND IN BACK TAXES, US Tax Shield WILL IMMEDIATELY AND
PERMANENTLY PROTECT YOUR FAMILY, BANK ACCOUNTS AND STOP
FURTHER COLLECTIONS AGAINST YOU.*

Areas where US Tax Shield can help:

- SSI Garnishments
- Delinquent Payroll Taxes
- Liens And Levies
- Penalties And Interest
- State Tax Problems
- Unfiled Tax Returns
- Wage Garnishment

US Tax Shield can help consumers and business within all 52 states and territories in the United States and is one of the few, if any, tax resolution companies that maintain an A+ rating with the Better Business Bureau.

II. PROJECT COMPONENTS

US Tax Shield is seeking proposals from marketing and media contractors with the capacity to create and execute an integrated national direct response campaign. US Tax Shield is particularly interested in working with contractors with experience with direct response campaigns.

The proposals requested involve both strategy and implementation of a national direct response campaign. US Tax Shield expects the selected contractor to work with US Tax Shield staff to devise a comprehensive plan that may include the following strategies: direct response, marketing and branding, and mail initiatives.

US Tax Shield requests proposals for a contractor to provide direct response services, including,

- Campaign Strategy and Planning
 - Marketing and Branding Work collectively with US Tax Shield staff and the Agency to produce integrated direct response materials that put forth the compelling brand developed for US Tax Shield. Maximize the use of the most appropriate and effective method to reach prospect, including the internet. Coordinate with web, print and media materials to maximize response by encouraging prospects to choose US Tax Shield for their tax resolution and settlement needs.
 - Develop a comprehensive direct response campaign for US Tax Shield
 - Produce a schedule or timeline for implementation of the direct response campaign.
 - Provide budgets for all costs associated with execution of the direct response campaign plan.
 - Establish direct response campaign goals and a plan to ensure that they will be met, including a plan for determining a return on investment.

- Report to US Tax Shield on a regular basis on how campaign goals and metrics are being met.
- Recommend prospect lists.
- Timeline with expected due dates for both materials to be provided and approvals to be obtained from US Tax Shield staff.
- Projected budget, including all subcontract and fulfillment costs.

III. SUBMISSION REQUIREMENTS

Proposals should provide a straightforward, complete and concise description of the contractor's capabilities to satisfy the requirements of the RFP. The proposals have no maximum and should include supporting documentation, imagery and work samples. Please prepare two (2) copies of your proposal.

- All proposals must be made in accordance with the conditions of this RFP. Failure to address any of the requirements is ground for rejection of a proposal.
- All information should be as complete, specific, and concise as possible. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
- US Tax Shield may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to January 7, 2011.
- Proposals shall constitute contractor offers. Once submitted, proposals cannot be altered without the written consent of US Tax Shield, but proposals may be withdrawn.
- US Tax Shield expects to select one contractor in February 2011. The term of the contract will be two years (24 months). In certain cases multiple contracts may be awarded.
- US Tax Shield reserves the right to reject any and all proposals.
- Any questions can be addressed to Michael Lloyd, Marketing Director at michael@ustaxshield.com.

Contractors submitting a proposal in response to this RFP may be required to give an oral presentation of their proposal to US Tax Shield. This oral presentation may provide an opportunity for the contractors to clarify or elaborate on the proposal but will in no way change the original submission. Engagement staff should be present at the oral presentation. US Tax Shield's request for an oral presentation shall not constitute acceptance of a proposal.

IV. RFP TIMELINE

The current schedule for this effort is as follows:

Thursday, December 30, 2010.	RFP Issued
Monday, January 9, 2011	Deadline to register as a proposer (via email) and to submit questions, if any.
Tuesday, January 11, 2011	Deadline for Responses (proposals) 3:00 p.m.
Friday, January 14, 2011	Evaluation of Responses
Wednesday, January 19, 2011	Oral Presentations conducted (if requested)
Friday, January 21, 2011	Contractor Selected

V. SCOPE OF WORK

US Tax Shield is seeking a single agency to manage its statewide advertising and marketing efforts for a two (2) year period, with an anticipated contract start date of March 1, 2011, continuing through February 28, 2013.

The awarded vendor will be responsible for providing marketing services, creative services, private sector partnership programs, public relations and media planning and placement. The vendor may also be required to handle ad and collateral production, research, and direct marketing on a per-project basis. All creative materials prepared for this account become the property of US Tax Shield. All materials shall be provided to the US Tax Shield upon completion in the final format, including layered files and links.

The awarded vendor will work directly with the US Tax Shield Staff to plan, implement, and execute all projects. The awarded vendor will provide timely written documentation of all conversations, telephone calls, and meetings to confirm the information discussed as requested.

V.1 VENDOR PERSONNEL MANAGEMENT

V.1.1 Specifically, by name and position, describe the account team that would be assigned to the US Tax Shield account. Please include biographical information (including any special recognition given by the advertising industry) for all personnel described below who will service the US Tax Shield account:

V.1.2 Creative service team;

V.1.3 Marketing/promotions team; and

V.1.4 Media planning and buying team.

V.1.2 Will your present staff be sufficient to handle the US Tax Shield account, or will it be necessary to hire additional staff? If hiring is necessary, how soon will your agency be fully prepared to handle the US Tax Shield accounts?

V.1.3 Please explain how your agency's management will be involved with the US Tax Shield account.

V.2 MARKETING SERVICES

V.2.1 Describe the methods used to ensure follow-through on important details, expense control, ability to react to timely requests, and to be pro-active in anticipating US Tax Shield's needs.

V.2.2 Please list your full-service capabilities available and the number of employees supporting each service. Please specifically address the following areas:

- Account Management;
- Marketing/Promotions;
- Media Placement;
- Creative Team;
- Private Sector Partnership Programs; and
- Value-added services.

V.2.3 Please provide 2-3 mini case-histories from the past two (2) years and examples of work, when applicable, that demonstrate your agency's capabilities in the following areas:

- Campaign development;
- Print Ads;
- Collateral Production;
- Video Production;
- Television & Radio Production;
- Direct Mail; and
- Web/Internet/Social Media.

V.2.4 Please list recent creative awards your agency has received. Describe how your agency interacts with clients to develop creative strategy.

V.2.5 Please describe your creative staff's involvement with clients, their initiative in presenting new ideas and alternatives, and ability to meet deadlines and work on multiple large projects simultaneously.

V.2.6 Please explain your media department's approach to developing:

- A media plan;
- Buying; and
- Post-buy analysis.

V.2.7 Describe how your agency develops annual marketing plans for clients.

V.2.8 Specify areas in which your agency specializes.

V.2.9 Why do you feel your agency would be the most qualified to handle the US Tax Shield account?

V.2.10 Provide a quarterly direct response plan covering how your agency would allocate \$225,000 in media spending, \$150,000 in online / social media spending and \$150,000 in direct mail spending. Also list the creative elements needed to support your plan and detail the methodology to achieve our goal of a minimum of 3x in ROI.

V.2.10.1 Approach

A description of how the contractor intends to address the anticipated scope of services set forth, including A detailed project approach that addresses a plan for ensuring that the scope of services above is executed fully and to the satisfaction of US Tax Shield.

V.3 COMPANY BACKGROUND AND REFERENCES

- Company ownership (sole proprietor, partnership, etc).
- Location(s) of the company offices and location of the office that will provide the services described in this RFP.
- Number of employees both locally and nationally.
- Location(s) from which employees will be assigned.
- Name, address and telephone number of the vendor's point of contact for a contract resulting from this RFP.
- Company background/history and why vendor is qualified to provide the services described in this RFP.
- Resumes for key staff to be responsible for performance of any contract resulting from this RFP.

V.4 REFERENCES

- V.4.0 Vendors should provide a minimum of three (3) references from similar projects performed within the last three years. Business References not received, or not complete, may adversely affect the vendor's score in the evaluation process. The Purchasing Division may contact any or all business references for validation of information submitted.
- V.4.1 Client name;
- V.4.2 Project description;
- V.4.3 Project dates (starting and ending);
- V.4.4 Staff assigned to reference engagement that will be designated for work per this RFP;
- V.4.5 Client project manager name, telephone number, fax number and e-mail address.

V.5 COST

All Cost Proposals shall be submitted as a separate, sealed package and clearly marked: "Cost Proposal in Response to RFP #2011-89002".

Vendors must provide detailed fixed prices for all costs associated with the responsibilities and related services (billing rates). Clearly specify the nature of all expenses anticipated. Cost Matrix is contained on page 9 of this RFP.

Although hourly rates will be accepted, US Tax Shield would prefer a monthly retainer for the 24 month term of the contract.

Payment for the contracted service will be within 30 days upon receipt of invoice and the using agency's approval.

COST MATRIX

Vendor Name -

Add lines or pages as needed.

Billable Services	Hourly Rate
Account Supervision	_____
Account Coordination	_____
Account Planning	_____
Art Direction/Layout	_____
Broadcast Production	_____
Concept/Design	_____
Consulting	_____
Copywriting	_____
Creative Direction	_____
Production Coordination	_____
Public Relations	_____
Research (Extended)	_____
Special Events	_____
Web Site Planning	_____
Web Site Design	_____
Web Site Maintenance	_____

Non-Billable Services - Describe and List with Hourly Rates

Monthly Retainer i Monthly Sum to be Billed in Each of the 24 Contract Months

VI. CONTACT INFORMATION

On a single cover sheet in your proposal, please provide:

- The contractor's name;
- The contractor's responsible contact person;
- Telephone, fax, and wireless numbers for contractor principals and individuals working on US Tax Shield's project;
- E-mail address for contractor principals and individuals working on the US Tax Shield's project;
- The street address of the contractor;
- The year the contractor or individual practice was established;
- The type of work or specialty and size of the contractor; and
- The signature of the lead individual, and the date of the signature.

VI. CONFLICTS OF INTEREST

- Submit a statement describing any potential conflict of interest or appearance of impropriety, relating to other clients of the contractor, or officers, directors, and employees of US Tax Shield, that might be created by your providing services to US Tax Shield.
- Indicate what procedures will be followed to detect, notify US Tax Shield of and resolve any conflicts of interest.
- Indicate any pending litigation and/or regulatory action by any oversight body or entity that could have a material adverse impact on the contractor's ability to serve US Tax Shield.

VII. F. Women and Minority-Owned Business Enterprises (W/MBE) and Disabled Veterans Business Enterprises (DVBE) Consideration.

Proposer will provide a statement of understanding to utilize Women and Minority-Owned Business Enterprises (W/MBE) and Disabled Veterans Business Enterprises (DVBE) where appropriate. Contractor shall list the W/MBEs and/or DVBEs they plan to use for subcontracting or supplying opportunities or list certifications if the Contractor itself is a W/MBE or DVBE.

VIII. CRITERIA FOR SELECTION

US Tax Shield will enter into negotiations and make the final selection of a contractor based on statements that are the most advantageous to US Tax Shield. Accordingly, US Tax Shield may not necessarily select the contractor with the highest ranking on non-cost factors, nor make the award based on the lowest compensation proposal, if doing so would not be in the best interest of US Tax Shield. The overall criteria listed below for

evaluating proposals are listed in the order of their relative importance. Cost is an important, but not controlling, evaluation criterion.

- Approaches in methodology and strategy with respect to the anticipated scope of services that demonstrate maximum understanding of and ability to provide such services to US Tax Shield, including creative, technical and management approaches to the work.
- Creativity in combining the mission of US Tax Shield and the objectives of the direct response campaign.
- Demonstrated ability/capacity to implement the direct response campaign.
- Quality of work product, as demonstrated through submitted work samples.
- Innovative or outstanding work that demonstrates the contractor's unique qualifications.
- Experience of contractor and employees to be assigned to the project on analogous projects.
- Proposed project team's availability and facility for working with US Tax Shield staff.
- Knowledge of US Tax Shield and its work.
- The ability of the contractor to complete projects with fast-track schedules and to maintain project budget.
- Proposed fee structure related to both the contractor's fee and projected cost estimates.

US Tax Shield reserves the right to reject any or all proposals, to reissue another RFP and/or to waive informalities and irregularities in proposals received.

US Tax Shield's official representative during the RFP process and after signing the contract will be Michael Lloyd, marketing Director. Questions about this proposal shall be directed to Michael in writing by email to michael@ustaxshield.com.

Any additional information given concerning this RFP will be furnished to all who express an intention to submit a proposal as an addendum to this RFP.

IX. PROPOSAL EVALUATION

Evaluation Criteria: Each proposal will be evaluated by US Tax Shield based on the following:

30%— Creativity in combining the mission of US Tax Shield and the objectives of the direct response campaign.

25%— Price of data management, letter, envelope, Snap Pack and postcard production, and export of data.

25%—Demonstration of Ability to Perform Work - Proposals will be evaluated on the ability of the contractor to perform the work as described.

15%—References / similar work performed.

5%— W/MBE or DVBE consideration

The marketing panel of US Tax Shield will evaluate all proposals and recommend the selection of a contractor.

X. CONTRACT TERMS AND REQUIREMENTS

The contents of the proposal prepared by the successful contractor, with any amendments approved by US Tax Shield, will become a part of the contract that is signed as a result of this RFP process. The selected contractor will be required to:

Work with US Tax Shield staff and its consultants to provide planned services to US Tax Shield on matters that may arise in connection with the Project.

Maintain accurate accounting records and other evidence pertaining to costs incurred in providing services, and, on US Tax Shield's request, to make such records available to US Tax Shield at all reasonable times during the contract period and for one (1) year after the date of the final payment to the contractor under the contract.

US Tax Shield reserves the right to terminate any contract entered into as a result of this RFP at any time, provided that written notice has been given to the contractor at least thirty (30) days prior to such proposed termination date.

XI. MISCELLANEOUS CONDITIONS

A. Obligation Only on Formal Contract

The issuance of this RFP, the submission of a response by any contractor, and the acceptance of such response by US Tax Shield does not obligate US Tax Shield in any manner. Legal obligations will only arise on the execution of a formal contract by US Tax Shield and the contractor selected by US Tax Shield.

Responses to this RFP will be prepared at the sole cost and expense of the proposing contractors.

No materials submitted in response to this RFP will be returned and may be used by the US Tax Shield as may be in its best interest. If the contractor does not desire for proprietary information in the proposal to be disclosed, the contractor

must identify all such proprietary information in the proposal. Identification shall be submitted concurrently with the proposal. Failure to do so indicates that those sections are non-proprietary and may be made available by US Tax Shield to third parties, upon request, after evaluation and selection.

B. US Tax Shield Reservation of Rights

US Tax Shield may (i) amend, modify, or withdraw this RFP, (ii) revise requirements of this RFP, (iii) require supplemental statements or information from any contractor, (iv) accept or reject any or all responses hereto, (v) extend the deadline for submission of responses thereto, (vi) negotiate or hold discussions with any respondent and waive defects and allow corrections of deficient responses that do not completely conform to the instructions contained herein, and (vii) cancel this RFP, in whole or in part, if US Tax Shield deems it in its best interest to do so. US Tax Shield may exercise the foregoing rights at any time without notice and without liability to any proposing contractor or any other party for their expenses incurred in the preparation of the responses hereto or otherwise

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