

Message Delivered

A GUIDE TO SELECTING AND
WORKING WITH PR FIRMS AND
COMMUNICATIONS CONSULTANTS



PUBLIC
INTEREST
PROJECTS



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WORKING WITH PR FIRMS AND
COMMUNICATIONS CONSULTANTS

WRITTEN BY THEODORA LURIE



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Foreword

Strategic communications play a paramount role in shaping public opinion and attaining policy and organizing goals. At Public Interest Projects (PIP), and at PIP's Four Freedoms Fund—which helps build the field for immigrant rights and integration—we see a greater need for resources and expert talent to help advocates tell their story to the media and to key constituents.

Any advocacy organization playing a local or national leadership role will have to assess its capacity for engaging the debate. At that time, serious consideration may be given to bringing in extra firepower. *"Message Delivered: A Guide to Selecting and Working with PR Firms and Communications Consultants"* arms you with the tips, tactics and know-how that will enable you to get the most out of your use of project-related specialists and communications professionals. Above all, read this publication before signing any contracts (an example of which, by the way, is included). A good client is an informed client.

Although most of the case studies are from the immigrant rights field, the lessons learned and advice offered transcend issues. Whether it's rebranding your organization, launching a web-based media campaign or rolling out a traditional public relations effort, you can learn a lot about what makes an effective partnership between you and your consultant. The word consultant itself comes from the Latin word *consultare*, which means to discuss. Discuss your goals and vision with your consultant, informed by the advice and case studies presented here, and then embark on a fruitful partnership.

Each short-term consultant experience will help strengthen your long-term communications capacity. Strong capacity means more compelling storytelling, persuasive messaging and better communications planning. All of which empower you to change the narrative—from divisiveness and discrimination to justice and fairness—on the most pressing issues of our time.

ROBERT BRAY, director of Communications, Public Interest Projects, and director of the Four Freedoms Fund Strategic Communications Initiative.

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Why this Guide?

Influencing the public debate about social issues requires thoughtful consideration of the best way to engage different audiences and motivate them to take specific actions. This usually involves a range of activities that fall under the broad category of strategic communications. While some social justice groups have an in-house communications professional, many do not have a staff member with this kind of expertise. As a result, a growing number of organizations are hiring PR and communications consultants to help strengthen their public outreach and policy advocacy. Even groups that have a communications staff may turn to outside consultants for tasks that require special skills and experience, such as polling, message development, media training, advertising, issue campaigns, and organizational branding.

EDITOR'S NOTE:

The information in this guide is based on interviews with immigrant rights advocates and communications specialists, a range of PR consultants, and the writer's own experience hiring and managing PR firms to work on advocacy campaigns.

Although produced primarily as a resource for the immigrant rights and integration community, and drawing on experience of Four Freedoms Fund grantees, this guide is designed to help any non-profit organization navigate the process of selecting and working with communications consultants to help ensure the most benefit from their investment. It is not meant to be a definitive statement—nothing is set in stone when it comes to working with consultants on different kinds of projects, and each group's experience can vary. But it does provide general guidance on:

1. When it makes sense to hire an outside communications consultant
2. How to reach out, interview and assess candidates
3. What consultants can do for you and ballpark costs of different services
4. Defining the scope of work and deliverables
5. Managing the relationship for maximum impact

LEARNING FROM YOUR COLLEAGUES

Many advocates have expressed interest in learning how their colleagues are handling communications challenges, and what has worked well and less well for them. We have included tips and several brief case stories from Four Freedoms Fund grantees that illustrate a range of experiences with communications consultants, with useful lessons that are applicable more broadly.

We hope the guide will be a dynamic resource that promotes this kind of peer-to-peer learning. We welcome your thoughts and encourage you to share your own experiences with us.

When should you hire a PR firm or communications consultant?



REASONS TO HIRE A COMMUNICATIONS CONSULTANT

1. *No one on staff has the expertise or specific skills you need.*
2. *You have the in-house expertise but not the time.*
3. *You have an ambitious communications plan but lack the staff to implement it.*
4. *You need public opinion or other research and analysis that cannot be done in-house.*
5. *You need media training or help developing and cultivating media contacts.*

PR and communications professionals can help you strengthen messages, improve communications skills and vehicles, develop and implement advocacy campaigns, and connect more effectively with journalists, policy makers and other specific audiences—all of which can help promote your social change goals.

Depending on the scope and budget of your project, you may decide to hire a full service PR firm, an individual communications consultant, or a small team with a particular specialty, such as public opinion research. Since this guide is meant to cover all possibilities, we use *PR firm* and *communications consultant* or *specialist* interchangeably.

Hiring consultants usually works best if you have first developed a general communications plan for your organization and assessed your in-house capacity—the communications skills and experience of your staff—and available resources. These steps will make it easier to determine the kind of outside help you might need when you undertake a specific project or campaign. They will also allow you to incorporate a communications strategy into fundraising proposals.

HOW DO YOU KNOW YOU NEED A CONSULTANT?

Determine the scope and goals of your communications project and who you want to influence. Some goals might be immediate and straightforward: putting some information into the public record, making people aware of an event, showcasing



QUESTIONS TO CONSIDER

- ▶ Do you have the staff and skills to develop and implement the communications project?
- ▶ Do you have the relevant media contacts?
- ▶ How much time can your staff give to the communications effort?
- ▶ Do you need research—such as public opinion polling—that requires outside expertise?
- ▶ Can any components, such as media work or written materials, be handled in-house?
- ▶ Who on your staff could assume the added responsibility of managing the work of a consultant?

noteworthy research or reports, organizational branding, mobilizing action around a legislative bill or electoral referendum (within non-partisan, 501c3 legal parameters). But others call for a prolonged strategy, carried out on many fronts: changing the policy debate or public conversation about an issue; drawing attention to a neglected problem; correcting a widely held misperception; engaging new allies.

WHAT CAN COMMUNICATIONS SPECIALISTS DO FOR YOU?

Typically, an organization might seek the services of an outside communications firm or consultant for one or more of the following:

- ▶ To brand or re-brand your organization
- ▶ To conduct a communications needs assessment
- ▶ To promote a report or special event
- ▶ To conduct a media audit that analyzes how a specific issue is being covered
- ▶ To conduct public opinion research
- ▶ To help you frame an issue and develop messages for specific audiences
- ▶ To help you cultivate media contacts and generate coverage
- ▶ To help develop and implement a communications strategy for your organization
- ▶ To mobilize public opinion or action around a specific issue
- ▶ To create ads
- ▶ To produce publications
- ▶ To help you make effective use of blogs and social networking media tools
- ▶ To help develop and implement a policy-related or other campaign in which strategic communications is needed.

FINDING A PR OR COMMUNICATIONS CONSULTANT: HOW TO IDENTIFY GOOD CANDIDATES

Seek recommendations from advocacy and other non profit organizations in your area, and query national or state-based immigrant rights groups. The Four Freedoms Fund can also provide names of firms with relevant experience, although it does not endorse any specific firm.

Involve your board

Don't overlook the expertise of your board members. Some might have communications, media or advertising experience, and would be able to advise on a communications plan or help select a consultant.

“We had to gain experience knowing how to use consultants in order to get the most out of their help. There were things that we thought we couldn’t do ourselves but actually could, and things that the communications consultant could have done that we didn’t think of until we had more experience.”

Director, state-based immigration policy center

WHAT DOES IT COST?

Before reaching out to firms or consultants, it’s critical to create a budget for the communications effort. Knowing how much you can allocate will help guide your choice of consultant and also prepare you to negotiate a project rate. If you set a cap on what you can spend, consultants will be able to tell you what they can take on—and deliver—for that amount.

Rates vary from firm to firm and among consultants. Within PR firms, there can be a wide range between junior and senior staff. Usually a firm will calculate a flat fee by estimating how many hours its staff will spend on your project. Many PR firms that have a mix of corporate and nonprofit clients offer a lower “nonprofit rate” so be sure to ask.

A PR firm’s rates can range from \$225-\$350 an hour for the firm’s principals, \$140-\$160 an hour for senior-level project managers, and \$70-\$90 an hour for the work of junior staff. Experienced individual consultants may charge between \$150 and \$200 an hour, although most will negotiate a flat project rate.

Approximate cost of some services

There are many variables that affect the cost of services, as explained below.

POLLS: Usually conducted by telephone, the cost depends on the geographic scope of the poll and the number of people it will include. Polling firms also provide analysis of the results and in some cases suggested message frames based on the findings. The cost can range from \$6,000 to \$60,000 and above. You can also explore existing poll results related to immigration reform and immigrant rights that are available on different websites. *See Attachment B.*

MEDIA TRAINING: Improving the skills of spokespeople so they can effectively get their message across in media interviews. This usually involves on-camera simulation of media encounters, critiquing the performance and strengthening what needs to be improved. Trainers should also provide a list of general tips on handling print and broadcast media interviews. The cost will depend on how many people are being trained on camera and whether the training is to deliver already-prepared messages or will require feedback to refine messages. The cost can range from \$1500 to \$10,000.

MEDIA OUTREACH: Cultivating reporters, pitching stories, arranging interviews and/or background meetings with journalists. The work can also include developing press materials, such as backgrounders on your organization’s work or a specific campaign, press releases and pitch letters. Depending on the scope of the assignment, firms can charge between \$3,000- \$12,000 a month. Individual consultants usually charge \$150 and above an hour.

Stretching a limited budget

Explore free communications resources and reduced rate services available to nonprofits. *See Attachment B for a list of resources.*

For example:

- ▶ The Opportunity Agenda provides communications toolkits, public opinion and media analyses, and message frames for immigrant rights advocacy. www.opportunityagenda.org
- ▶ Check with national or regional immigrant rights organizations working on similar issues. They might have conducted research or media outreach relevant to your project, or have sample press releases, photos or video clips they can share. Some might also be planning to conduct polls or focus groups to test messages and would be willing to add a few questions useful to your specific project.
- ▶ There are numerous online resources that offer guidance on a range of communications needs - from writing press releases to developing a comprehensive communications plan and making effective use of social media. *See Attachment B*
- ▶ Local radio stations often will run Public Service Announcements for free or a small fee.
- ▶ A number of billboard companies will provide nonprofits with free space for their ads, which they will post where they have empty slots.
- ▶ And remember, “earned” media—coverage you secure by cultivating journalists and pitching stories—costs nothing when you do it on your own.
- ▶ Don’t overlook the ethnic media outlets, which can reach wide audiences.

Selecting and Managing your Consultant

Before you begin the search, it is important to have a very clear sense of the scope of your project, budget, audiences you want to reach, how you would like those audiences to respond and the desired outcome. A good firm can help you refine each point, but clarifying what you want to accomplish before you choose a consultant could make the difference between a frustrating or rewarding experience. First, defining your goals and audiences will give you a better idea of the kind of communications specialist best suited to your needs. Second, it will help you judge if a candidate's proposed activities are on target. Finally, it will help ensure that you set the agenda and remain the guiding force of the communications effort.

"The selection process is really good because it forces you to make a coherent statement of what you want to accomplish and what you want a firm to do for you. It's very important to be extremely clear from the beginning about what you want to get out of this."

Director, immigrant rights organization

Who to Look for

Generally, it makes sense to look for consultants who specialize or have experience in public interest communications rather than, say, commercial promotion or personal publicity. Public interest PR firms usually have a general understanding of the issues and policy debates in a given field, and tend to have contacts among the relevant reporters and policy "gatekeepers."

You want to find people with the expertise and experience suited to your project. But a PR consultant need not be a specialist in your particular issue to qualify. The best ones are quick learners who can apply their expertise to various projects. It helps for the firm to have some basic acquaintance with the issues and media in question, though your particular focus and approach may be new to them.



GUIDING QUESTIONS FOR THE INTERVIEW

- ▶ What is their range of clients? You want to make sure they don't represent groups with an opposing agenda.
- ▶ What other projects similar to yours have they worked on and what were the outcomes?
- ▶ What is their knowledge of your issue? Have they worked on projects in this area?
- ▶ Do they have any initial ideas for strategy they would develop for your project and specific services they could provide?
- ▶ What are their media contacts and how will they use social networking media and other online tools (if applicable)?
- ▶ Who would be working on your project and what is their expertise and experience?
- ▶ Can you see examples of materials they have produced, and media coverage they helped generate, for other clients?
- ▶ Contact information for two references. Ask the references about their experience with the consultants—did they work well with the organization and other stakeholders, meet deadlines, achieve the desired outcomes, produce useful materials?

Look for firms with a good track record promoting social issues, who share your values, demonstrate cultural sensitivity, and can get along well with people in the field. The number of firms that fit this profile is growing, but it can still be a challenge to find the right match. Unless you're certain from the start that you want to work with a particular firm, it's best to interview several candidates.

How to reach out to candidates

Generally, you can initiate contact with firms or consultants through an email or phone call where you describe briefly your organization and the type of assistance you're seeking. If the consultant is interested in learning more, you would send a followup letter with:

- ▶ Background on your organization—include website address for more information.
- ▶ Description of the project, goals, and desired outcomes.
- ▶ The help you want a firm or consultant to provide. Be as specific as possible.
- ▶ The timeframe for the project.
- ▶ Your approximate budget.

For a large project, with a heftier budget—such as organizational branding or a major campaign - you might consider sending out a detailed Request for Proposals (RFP). *See Attachment C for a sample RFP*

INTERVIEWING CANDIDATES

Before meeting with candidates, ask them to send you descriptive materials about the firm, a representative list of clients, bios of key staff, and descriptions of a few projects they have handled that are similar to yours. Much of this information might be on their websites.

The interview is your opportunity to get a better sense of the PR firm or consultants' skills, experience, track record, and initial ideas for your specific project. It also gives you a chance to determine whether you would feel comfortable working with them and how well they would get along with others they would need to interact with.

AFTER THE INTERVIEW: ASSESSING THE CANDIDATES

The interview and your conversations with the references provided by the candidate will help you make an informed decision. Generally, the firm or consultant should:

- ▶ Have a good track record developing and managing issue-oriented projects.

"We've worked with some local firms that mostly do product promotion and don't have a lot of experience working with non-profits. They may instinctively promote messages they think are sympathetic but which can actually reinforce negative stereotypes. They often want to highlight individual stories, but we need to get across that the issues are systemic, not individual... It's important to find a firm that understands social justice messaging."

Director, immigrant rights advocacy organization

"It's good to find people who are knowledgeable about what you do and your field. But some people say they are knowledgeable when they actually are not. It's better to have someone be a really good communications professional and admit they don't know a lot about immigration and want to learn than appear to know more than they do."

Director, state-based immigration policy center

- ▶ Show an engagement with your issue and demonstrate that they "get" your perspective and goals. Are they good listeners?
- ▶ Have some good initial ideas about how to proceed.
- ▶ Have the expertise to handle your specific needs.
- ▶ Have the right media contacts relevant to your project and ideas for reaching other key audiences, such as policy makers (if applicable).
- ▶ Be able to stay within your budget or have clarified what they can take on for that amount.
- ▶ Inspire confidence that they can work well with you and other groups they might need to interact with.

THE PROPOSAL

It's usually clear after the interviews which firm will be best for your project. In some cases, though, you might want to get preliminary proposals from more than one. The proposal should include:

- ▶ Statement of agreed-upon goals, target audiences and scope of assignment.
- ▶ A plan with strategy and proposed activities, with approximate cost of each.
- ▶ A timeline for activities and specific "deliverables" (such as public opinion research, message development, press materials, trainings, media interviews, etc.).
- ▶ A plan for providing progress reports at crucial points along the timeline and a final debrief to assess what worked well and less well.

THE CONTRACT/LETTER OF AGREEMENT

Once you choose a firm, you can work together to refine the scope of activities and the timeline. The contract should clearly delineate responsibilities—what is expected of the consultant and what your organization will provide—and the payment terms. (*See attachment D, Sample Letter of Agreement*)

Contracts usually include clauses that:

- ▶ Allow you to terminate the agreement for any reason, incurring only the cost of services rendered prior to the termination.
- ▶ Stipulate that any materials or products prepared by the consultant will be the sole property of your organization.
- ▶ Require confidentiality of all information regarding your organization and any communications produced in connection with the project.

A FEW TIPS AND CAVEATS

"If you can find a firm with a genuine commitment to your core issue or your organization, it makes an enormous difference. It carries you through the difficulties that inevitably arise."

Director, immigrant rights organization

"Don't be shy about asking questions and questioning their approaches. Remember, they are communications experts but you are the expert in your field."

Director, state-based immigrant rights organization.

1. Who will work on the project?

It's not unusual for some PR firms to bring in their big guns to land the job and then delegate much of the project work to junior staffers. Get a commitment that the person or team you have interviewed will be the one(s) working on your project. If the key person who will do most of the work is not at the interview, make sure you meet that person before signing a contract.

2. Be a judicious consumer of PR services.

PR firms have an ever-expanding menu of tools they are eager to use and not all are necessary or cost effective. If you have questions about some components, press them to explain the value and comparative merits of the activities they propose.

3. Discuss at the start the expectations on both sides.

This will help ensure that you have reasonable expectations of the consultant and also clarify upfront what the consultant expects from you – for example, a timely approval process and being able to work with just one designated person in your organization who has decision-making authority.

4. Don't be shy about questioning the consultant's suggestions or approaches.

For example, an immigrant rights organization that had a very positive experience with the PR firm managing their re-branding process rejected the firm's first few name change recommendations. Together, they explored other options and ended up with a name they were all happy with. Another organization that worked with an excellent advertising firm with a good grasp of social justice messaging, had to point out that some suggested messages would be inappropriate for their particular state.

"It was very helpful to have someone on our staff with communications experience, who could help bridge the gap between the communications experts and the in-house immigration policy experts. Sometimes the two can be very out of synch on terms of their understanding of what is effective or possible."

*Communications coordinator,
state immigrant rights coalition*

"Working with outside communications consultants can help you accomplish much more than you could do on your own, but they can't do this without your participation. Be prepared for a time-intensive commitment on your part."

Director, national immigrant rights organization

MANAGING THE RELATIONSHIP

A positive experience with PR consultants depends on setting clear goals from the start, having realistic expectations, allocating sufficient resources, and committing the necessary time to work with them.

Make sure you give the consultants all relevant information your organization already has at hand, such as surveys, opinion research, message development and press materials.

Assign one in-house person with the authority to make critical decisions to serve as the main contact with the firm. No matter how smart the consultant or PR team, it will take time for them to understand your organization's goals and values and to get up to speed on the specific issue. The internal liaison will need to work closely with them as they scale that learning curve, oversee all major decisions, and make sure contracted activities progress in a timely manner.

The consultants may be representing your work or issues to the media and other external audiences, and you need to feel comfortable with how they will do that. This requires careful oversight of the "narrative" and materials they develop.

Schedule regular check-ins—depending on the project these can be daily or weekly debriefs—to discuss activities, progress to date, and challenges. Be prepared for the possibility of course corrections to adapt to a changing policy environment or to take advantage of unanticipated opportunities.

WHAT DID YOU LEARN?

An added advantage of working closely with communications consultants is that it gives you an opportunity to learn what they do and how they do it so your organization might be able to take on some of this work in the future. Each experience also helps you become a more informed consumer of these services. And usually there are useful "leave-behind" materials such as templates for press releases and pitch letters, a list of media contacts, message frames and talking points.

Make sure you schedule a debrief with the consultant at the end of the project. While most social justice work is a long term process of building power and influencing attitudes, each communications project you pursue can help advance your broader mission. If you set clear, achievable goals within the allocated time frame (such as getting out the vote, increasing membership, mobilizing support for a policy campaign) you will be able to assess what worked well and less well and use that knowledge to strengthen your advocacy and communications work going forward.



ENSURE A POSITIVE EXPERIENCE WITH A PR FIRM OR COMMUNICA- TIONS CONSULTANT

1. *Determine in advance the scope of your project and allocate the necessary resources.*
2. *Set clear and reasonable goals you want the consultant to help you achieve. Keep in mind, for example, that media coverage is unpredictable and can be influenced by factors beyond your control, so even an excellent consultant cannot guarantee a specific number of stories.*
3. *Select a firm or individual whose expertise and values are a good fit and with whom you feel you can work well.*
4. *Set very specific tasks for the consultant. Create a timeline for deliverables and do your best to stick to it. But be prepared to make course corrections to respond to unanticipated challenges or opportunities.*
5. *Designate an internal project manager with decision-making authority to be the main contact with the consultant.*
6. *Be prepared to commit the necessary time to work with the consultant.*
7. *Respect the consultant's expertise and professional advice, but keep in mind that you're the expert on your issue and don't hesitate to question approaches.*

TIPS FROM GROUPS IN THE FIELD

HOW TO BE BETTER CONSUMERS OF PR AND COMMUNICATIONS CONSULTANTS

- ▶ It's important not to rush things and it's ok not to hire the firm or consultant you already know.
- ▶ Before looking for a consultant think through what you really want to accomplish, the specific tasks you need the consultant to perform, and the amount of money you will need to allocate.
- ▶ Set very specific and doable tasks for a communications consultant. Be clear about deliverables and desired outcomes.
- ▶ Make sure you know who is going to work on your project and make an effort to meet that person (or people) before you commit to a contract.
- ▶ Create a realistic timeline and stick to it. Be sure to allow enough time to develop and revise materials. Count on it taking twice as long as you expect.
- ▶ Designate an internal project manager with full decision-making authority to serve as the main contact with the consultant.
- ▶ Air concerns on both sides up front and work them out.
- ▶ Ask the consultant or firm what they will need from your organization so it's clear what each party expects from the other.
- ▶ Ask what could go wrong on the project so you can put in place a process to address possible problems.
- ▶ Don't be shy about asking questions and questioning their approaches. Remember, they are communications experts but you are the expert in your field.
- ▶ Work closely with communications consultants and learn as much as you can about what they're doing and how so you can do some of it yourself in the future.
- ▶ Put people on your board who have communications, media or advertising experience.
- ▶ Be creative in finding free or low cost resources and services available to nonprofits.
- ▶ Working with outside communications consultants can help you accomplish much more than you could do on your own, but they can't do this without your participation. Be prepared for a time-intensive commitment.

CASE STORY

Re-branding an Organization

This is an example of a successful experience working with a PR firm. The goal was to develop a new name for a six-year old immigrant rights organization with a strong presence in its state and nationally. But the lessons and tips shared by the organization's executive director can be useful to any social justice group planning to work with communications consultants.

THE COMMUNICATIONS CHALLENGE

In 2008, Hate Free Zone(HFZ)—now OneAmerica—sought the assistance of a communications firm to help develop a new name and logo for the organization. The decision to change its name emerged in the course of a strategic planning process launched two years earlier that resulted in a new vision statement and a three-year organizational development plan.

THE PROCESS OF FINDING A CONSULTANT

With a budget of \$25-\$30,000 for the re-branding project, the organization issued a Request For Proposals (RFP) to ten pre-selected communications firms of different types and sizes. (*See Attachment C, Sample RFP.*)

The RFP provided:

- ▶ An overview of Hate Free Zone's history, mission, activities, and accomplishments.
- ▶ The organization's vision statement and guiding values.
- ▶ The context for the decision to re-brand the organization—the reasons for seeking a new name and the challenges this change would likely face.
- ▶ The qualifications and experience they were seeking in a consultant.
- ▶ The scope of work and time frame for the project.
- ▶ Detailed information about what the proposal should include and the submission process.

The re-branding project had an ironclad deadline. Hate Free Zone planned to announce its new name and logo at its annual fund-raising dinner the first week of May 2009.

This created a tight timeframe. The RFP was sent out December 2008, proposals were due early January 2009, and the selected consultant would need to begin working by the end of that month. To help ensure they would receive proposals that met their needs, HFZ made a point of being as specific as possible in stating the project's goals and challenges, the scope of work for a consultant, and desired outcomes. This exercise paved the way for a productive communications effort.

"The RFP process is really good because it forces you to make a coherent statement of what you want to accomplish and what you want a firm to do for you. It's very important to be extremely clear from the beginning about what you want to get out of this," said Pramila Jayapal, HFZ's (OneAmerica) executive director.

After reviewing the submissions, the organization selected three finalists and met with each one. Hate Free Zone's executive director, communications director, and a board member with communications experience attended all the interviews. They hoped to find a firm that shared the organization's values and had a good track record working on issue-oriented campaigns.

GETTING OFF TO A GOOD START

The selected firm, a DC-based political and communications consulting group with some high-profile clients, met all the criteria. But there were concerns. "Our budget was so much smaller than what they were accustomed to being paid and we worried we would get lost among their larger projects. We didn't want to be treated like a minor client," said Jayapal. These concerns were aired at a follow-up interview with the firm's president. "We asked him why we would be important and merit his attention," said Jayapal. "He addressed all our questions really well."

The firm had some concerns of its own. First, to stay within budget they could not be expected to go back to the drawing board too many times. HFZ negotiated a maximum of three revisions of the branding work. Second, the firm wanted HFZ to designate one internal project manager who had decision-making authority. Jayapal delegated this responsibility to the communications director, who served as the main liason with the consultants and also coordinated all the internal components.

MANAGING THE RELATIONSHIP

Sharing concerns on both sides and clarifying from the start how the relationship would work set the project on a good course. It also helped that the communications firm believed in HFZ's mission and was enthusiastic about helping to promote it. The firm put together a high-level team for the rebranding project, led by a senior vice president.

"We were thought partners on this project, but they were the implementers," said Jayapal. "We got great service from them. They were really excited to do this project for us. If you can find a firm with that kind of genuine commitment to your

core issue or your organization, it makes an enormous difference. It carries you through the difficulties that inevitably arise.”

THE FIRM’S ACTIVITIES

Jayapal gave the firm a list of “must haves” that she considered non-negotiable, such as staff and board buy-in to the name change, and a list of “nice to haves.” The latter included coming up with a name that signaled the organization was state-based but worked on national issues, and would not be shortened to an acronym. “The progressive movement is full of acronyms that only the inner circle knows,” said Jayapal.

Working with a communications firm that “gets” and supports your mission is particularly important when the consultant needs to interact with key stakeholders to get buy-in for a specific action. As part of the re-branding process, the firm facilitated separate sessions with the staff and board to hear their thoughts about the organization’s values and strengths. It also conducted 30 external interviews with policy makers, journalists, funders, and community representatives.

In addition, HFZ posted an e-survey on its website and electronic newsletter. “We wanted to let people know we were in the process of changing our name,” said Jayapal. “The purpose was to elicit feedback and also to encourage buy-in to the name change.”

A SUCCESSFUL OUTCOME

The research explored how Hate Free Zone and its name were perceived by a range of stakeholders, and identified the core characteristics people associate with the organization. After reviewing the results, and keeping in mind the goals HFZ hoped to achieve with its name change, the PR firm came up with three options and recommended its first choice. HFZ did not like the first suggestion and then rejected the two others. “This was a tense moment, and it seemed like they would have to go back to the drawing board,” said Jayapal. But one member of the PR team suggested they share a few names the firm had come up with that had not made their final cut. That’s when “OneAmerica” was put on the table. “We all really liked this one right away,” said Jayapal.

With the new name decided upon, the PR firm developed a logo and graphic identity, created a plan for its announcement, provided staff and board with talking points and coaching to deliver them concisely. The project stayed within budget and met its deadline.

LESSONS

Jayapal identified some broader lessons that can help ensure a productive relationship with a PR firm:

- ▶ It's important not to rush things and it's ok not to hire the firm or consultant you already know.
- ▶ The selection process forces you to think about what you really want to accomplish.
- ▶ Set clear deliverables with enough time to revise. Count on it taking twice as long as you expect.
- ▶ Create a realistic timeline and stick to it.
- ▶ Designate an internal project manager with full decision-making authority to serve as the main contact with the firm or consultant.
- ▶ Air concerns on both sides up front and work them out.
- ▶ Ask the firm what they will need from your organization so it's clear what each party expects from the other.
- ▶ Ask the firm what could go wrong on the project so you can put in place a process to address possible problems.
- ▶ Working with outside communications consultants can help you accomplish much more than you could do on your own, but they can't do this without your participation. Be prepared for a time-intensive commitment on your part.

CASE STORY:

A Short-Term Contract Falls Short of Expectations

This is an example of a disappointing experience with a communications consultant that yielded some useful lessons.

THE COMMUNICATIONS CHALLENGE

The Colorado Immigrant Rights Coalition (CIRC) sought the help of a consultant to strengthen its external communications and media outreach. With a limited budget, they contracted for ten hours a month of the consultant's time over a period of three months.

WORKING WITH A CONSULTANT

In the beginning, the consultant helped the organization build a media list, reviewed and gave feedback on press releases and wrote a few releases herself. But after two months she became harder to reach. "The consultant fell off the radar," said Chandra Russo, CIRC's communications coordinator. "She had been very responsive at first, but basically disappeared by the end of the contract."

While the organization did not get the level of assistance it had hoped for, the experience was not a total bust. Russo credits the consultant with helping them write better press releases and "demystifying the process of reaching out to the media." Says Russo: "We discovered that it's not rocket science. We learned to be less panicky and intimidated when dealing with journalists. It's about building relationships and providing good stories."

Afterwards, the consultant shared her perspective, explaining that ten hours a month was not enough time for her to fully engage, learn about the organization's programs and give proactive advice. With such a limited time commitment built into the contract, she felt she could not justify dropping other projects to attend to CIRC's needs as they arose in the course of each month.

LESSONS

Russo offers two lessons from this experience:

1. If you're using a consultant for a limited number of hours, be sure to set very specific and doable tasks. "I realized that we had created a scope of work that was too vast for just one person, and we were floundering to figure out how best to use the 10 hours a month we contracted for," she says.
2. With limited funds, it might be better to invest in a shorter, more intensive relationship with a consultant to ensure you get the level of attention that makes the investment worthwhile. "We learned that with a bare bones contract of a few hours a month, the work for our organization was not considered a priority."

CASE STORY:

Getting the Right Message

This is an example of an experience that confirmed the importance of hiring an advertising firm that understood how to communicate a social justice message. It also illustrates how you can learn from a consultant's expertise.

THE COMMUNICATIONS CHALLENGE

Nebraska Appleseed Center for Law in the Public Interest sought outside help to develop immigration messages and images geared to Nebraska that could be used in billboard ads and a variety of other settings. "At first, I thought we should use a local firm because they would be better at developing messages that resonate locally," said Darcy Tromanhauser, director of Nebraska Appleseed's Immigrant Integration and Civic Participation program.

FINDING THE RIGHT CONSULTANT

One local firm in particular seemed a good candidate because it supported the goals of the campaign and had significant expertise developing content for Nebraska audiences.

But the firm mostly worked on commercial projects and did not have much experience with nonprofits.

"Their heart was in the right place, but we realized it would take a lot of time and effort to get them up to speed on social justice message frames. This was not the kind of work they normally do," said Tromanhauser. "Our situation echoed what I had heard from another nonprofit that had worked with an advertising firm that mostly did commercial product promotion. They may instinctively promote messages they think are sympathetic but which can actually reinforce negative stereotypes. Also, they often want to highlight individual stories, while we need to get across that the issues are systemic, not individual."

In the end, the organization hired an advertising group in California that had a lot of experience with social justice messaging. This level of understanding more than compensated for the firm's lack of a Nebraska connection, but it meant Nebraska Appleseed had to provide the local perspective. "There were times," Tromanhauser said, "when I had to weigh in and tell them something would just not fly in Nebraska."

LESSONS

The experience provided useful lessons not only about the importance of finding a firm that “gets” social justice message frames, but also about the nature of billboard advertising.

“The advertising firm helped us understand that you can’t overburden billboard ads with too much information,” said Tromanhauser. “We kept thinking we had to get everything into that one ad. This group understood the larger social justice campaign and also what the specific advertising component could do.

“They showed us that you need to use different layers of a campaign to get your information across, and not to expect just one specific component to do it all. The goal of the advertising is to get viewers to pause—to create a space that allows the rest of the campaign to provide information and education.”

CASE STORY:

Changing Hearts and Minds

This example illustrates the importance of finding a consultant whose expertise and experience match your particular needs. While the person hired for the initiative described below was very skilled, the organization learned that a good track record on short-term wins does not necessarily make someone the right fit for a longer-term effort to change attitudes.

THE COMMUNICATIONS CHALLENGE

The Tennessee Immigrant and Refugee Rights Coalition (TIRRC) sought the help of an outside firm to develop a pilot communications effort for their Welcoming Tennessee Initiative, which seeks to promote dialogue about immigration in receiving communities and raise awareness of its positive effects. “It’s not easy to find local firms that do the kind of value based communications work we need,” said Stephen Fotopulos, TIRRC’s executive director.

WORKING WITH A CONSULTANT

TIRRC hired a consultant at a Tennessee-based firm that specialized in political campaigns. With only \$10,000 to spend on a 4-month effort in one small town, the organization wanted to keep a tight focus on earned and paid media. The consultant advised that it would cost at least \$30,000 to have an impact in this timeframe.

To keep within TIRRC’s budget, the consultant reluctantly scaled down his scope of work. His firm helped create a communications plan and found a pollster to conduct a phone poll of 300 people in the pilot site for \$3,000. “This was very useful in helping us understand current perceptions of immigration,” said Fotopulos. The consultant analyzed the findings and worked with TIRRC to develop messages to use in media outreach and to feature in billboard ads.

“The consultant wanted to spend a lot more money. But grassroots organizations pursue other ways to have an impact. We always try to be creative about doing communications that won’t cost us too much,” said Fotopulos.

For example, the consultant estimated that billboard advertising would cost \$15,000. But TIRRC arranged to get a “nonprofit special,” where the billboard company gives the space for free and places the ads where it has open slots. This meant TIRRC had to get the artwork done on its own and had no control over where the ads would end up. But their messages did get featured around town. In addition, TIRRC secured its own media coverage, particularly by reaching out to the ethnic media, and got some local radio stations to run public service announcements for a small fee.

LESSONS

The experience convinced Fotopulos that to be truly helpful, a communications consultant needs to understand the nature of social justice work and the challenges his organization faces in accomplishing its mission.

“The consultant was used to working on election campaigns. He felt you could not have an impact without a major financial investment and that success can only be measured by doing an after-poll that shows you’ve made a difference,” said Fotopulos. “But our work is about long-term power building and for us success is changing hearts and minds. We learned that you really need more time to do this kind of work. And it’s not a perfect fit to get a consultant who is accustomed to short-term projects.”

ATTACHMENT A:

GLOSSARY OF PR TERMS

Understanding the terms used by PR firms to describe their services, or to recommend activities for your particular project, can help you make informed decisions. If you are knowledgeable about the different options, you will be better prepared to get the most benefit from engaging a communications consultant.

AUDIO NEWS CONFERENCE: A press conference using audio news conferencing technology; particularly useful when the participants are far flung and in remote locations not easily accessible to the media. Reporters are advised of the date, time and purpose of the audio news conference, and given an access telephone number to call. Participants make their presentations as they would at an ordinary news conference, and reporters then queue up to ask questions. The conference can be digitally recorded and made available to reporters on the web.

AUDIO NEWS RELEASE: Also known as a radio news-feed, this is a story produced by an organization that wants to get a story out without relying on journalists to cover it; the audio equivalent of a press release. An audio news release is relatively inexpensive to produce and can be distributed free to radio stations via the Internet or compact disc. Most popular with small and mid-sized radio stations.

BACKGROUND: A document distributed to reporters, often as part of a media kit, which summarizes the pertinent facts about the issue at hand. Unlike a press release, it is usually neutral in tone.

BRANDING: A term borrowed from commercial marketing, branding is a shorthand way of communicating a complex idea so that it is widely understood by people across geographic, political and cultural lines. In the context of the not-for-profit world, branding an organization means finding a way to describe its work and mission in a succinct and catchy way. Branding (or “rebranding”) is often accomplished through an organization’s name, logo, and tagline.

CAMPAIGN: In communications parlance, a “campaign” is more than a one-time media event. Rather, it is an effort to reach and persuade people over a period of time, often by employing various communications tools. For example, a communications campaign to influence public policy might include the release of a special report at a press conference, followed by an effort to inform and activate public support through a public speaking tour, media outreach, public service announcements, ads, a campaign Web site, and the use of social networking media.

DAYBOOK: The daily listing of events for journalists (press conferences, rallies, etc.) maintained by individual media organizations and by news services like the Associated Press (AP). Reporters often check the daybook first thing in the morning to see what news is being made that day.

EARNED MEDIA: A PR term for news coverage that has not been purchased (a paid advertisement) and is, instead, the result of effective media outreach. PR firms and communications professionals like to use the term because it conveys the idea that obtaining news coverage takes work.

ETHNIC MEDIA: There are more than 3,000 ethnic media outlets that serve a wide range of immigrant and longer-established communities. By targeting specific ethnic media you can greatly extend the reach of your communications effort.

FOCUS GROUP: A tool used by public opinion researchers to learn how the public is thinking and talking about a given issue. Considered a qualitative method for conducting research, focus groups are usually held prior to conducting a public opinion poll (a quantitative research method) to ensure that the questionnaire is well-constructed. They may also be held to test messages with target audiences. Focus groups can be organized according to demographics (all women; all

African American; all young adults), political leanings, level of education, etc. There are firms that recruit and host focus groups, and most equip their facilities with one-way mirrors to enable the client to observe the discussions.

FRAMING THE ISSUE: Defining how an issue is portrayed in the media. Whoever helps the reporter frame the issue gets the best news coverage. How an issue is framed may determine who is in the story and who is not, who is the “good guy” and who is the “bad guy,” etc. In the context of post-9/11, for example, the U.S. government’s frame was that national security required the use of ethnic profiling as a counter-terrorism tool. The ACLU’s frame, on the other hand, was that we can be “safe and free,” and that profiling undermines the very principles the government says it wants to safeguard.

LEAD: The first line or paragraph of a story, the lead should convey the central theme or point of what follows. The lead in a press release has to grab the reporter’s attention so that he or she will continue to read through to the end.

MASS MEDIA: Newspapers, magazines, television and radio are considered mass media because they deliver messages to a widespread, anonymous audience.

MEDIA ADVISORY: A document typically sent to reporters to announce a news event (press conference, demonstration, conference) which lists the “Five W’s” – who, what, when, where and why—after the headline and a lead paragraph.

MEDIA ANALYSIS: An examination of how the media has covered an issue or problem during a specific time frame.

MEDIA MARKETS: Geographical areas that share a common set of media outlets (newspapers, TV channels, radio stations); used by communications professionals to measure audiences for strategic planning purposes. The ten largest media markets are New York, Los Angeles, Chicago, Philadelphia, San Francisco, Boston, Dallas-Ft. Worth, Washington, D.C., Atlanta and Detroit.

MEDIA MONITORING: Paying close and critical attention to how your issue is being covered in the media. Comprehensive media monitoring may require you to contract with a clipping service. Most PR firms can also provide this service.

MEDIA OUTLETS: Generic term for newspapers, magazines, TV and radio stations, and Internet news sites.

MEDIA TRAINING: Improving skills of spokespeople so that they speak in compelling sound bites and get their messages across. Often done by simulating real-life media encounters (newspaper interviews, hostile radio debates, news conferences), video-taping the simulations, and then critiquing them.

MESSAGE DEVELOPMENT: Condensing the issue you are communicating about into a clear and concise “message” which conveys your frame, your position, and your call for action. A message should capture the essence of the issue in a way that resonates with the core values of your audience. You may develop different messages for different audiences.

MESSENGER: Your choice of the person who delivers your message may be as important as the message itself. Messages are more credible if they are delivered by a spokesperson in whom your target audience has confidence. For example, a police chief would be a highly credible messenger for an anti-racial profiling message.

NARROWCASTING: Instead of trying to reach the broadest possible audience, narrowcasting involves directing messages to very specific segments of the reading, listening or viewing public. It requires a determination of who must be reached in order to advance the communications goal.

NEWS CYCLE: Different media have different news cycles. A daily newspaper has a relatively short cycle, meaning a reporter generally has to file his or her story by 5:00 p.m. on any given day. Therefore, if something newsworthy occurs at 3:30 p.m. it is much better to call reporters on the telephone than to sit down and draft a press release. A monthly magazine, on the other hand, has a much longer news cycle. Many internet-based outlets have a continuous cycle.

NEWS HOOK: News hooks make stories seem timely and therefore more newsworthy and more likely to catch a reporter's attention. One tried and true news hook is an anniversary. For example, Martin Luther King, Jr. Day can be a good time to release a new report on racial equity issues because reporters will be on the lookout for civil rights news.

PAID MEDIA: As distinct from "earned," or free media, paid media usually refers to advertising. There are two significant costs associated with paid media: creative costs and media placement costs. The creative fee is what you pay an advertising firm to develop and produce an ad or series of ads. The placement fee, which is by far the greater expense, is what you pay the media outlet to carry your ad. Placement costs vary widely depending on media market and size of circulation.

PITCHING A STORY: A communications term of art which means "selling" a news story to a reporter, editor, or producer. Pitching is usually done over the phone, although it can also be done in person. The news media is always in need of good stories. The trick is to pitch the right story at the right time to the right reporter.

POLLING: A quantitative method used in public opinion research to test arguments and messages and to measure the extent of support for or opposition to a given issue. Polling is generally done through a telephone survey, according to a carefully constructed questionnaire. The data that is collected is then subjected to various analyses, depending on the purpose for which the poll was taken. Polling results can be used as news or for internal strategic planning purposes.

PUBLIC OPINION RESEARCH REVIEW: A scan of existing research data and analysis. A great deal of current public opinion research data is published and accessible online, at websites like www.ropercenter.uconn.edu. This information can be used for purposes of framing an issue and message development.

PUBLIC SERVICE ANNOUNCEMENT (PSA): Short spots produced for the print or electronic media to perform a public education function, for which the media waives its usual placement fees. The advantage is that aside from the production costs associated with making the PSA, they are carried for free. The disadvantage is that they may be played during off-peak hours.

SATELLITE FEED: Technology that makes it possible to transmit live or taped visual images to many media outlets throughout the world from one central location.

SOCIAL MEDIA: This includes Facebook, Twitter, YouTube and other social networking tools. Social media can help you connect with targeted and broader audiences to advance your advocacy work. To make effective use of these tools it's important to first create a communications plan for your organization or campaign and then determine how social media will help you achieve your goals.

SOUNDBITE: A short, attention-getting quote that communicates the gist of your message. TV and radio soundbites last no more than 10 seconds.

STAYING ON MESSAGE: A fundamental premise of communications is the importance of staying on message—repeating your key messages over and over again until they sink in. This means avoiding the temptation of being led by a friendly and inquisitive reporter into tangents, or goaded by opponents into debating side issues. The reporter and your debating partner are not your audience. The public is. A message won't stick unless you focus on it.

STRATEGIC COMMUNICATIONS: Using communications tools and techniques (print and broadcast media, publications, ads, websites, social media, public speaking, etc) to advance public policy. More than the simple sharing of information, strategic communications involves:

clearly identifying your goal—policy change, attitude or behavior change—then determining who you need to reach in order to achieve your goal, what information or message would move them to support your position, and the most effective messengers and tactics to deliver that message.

TALKING POINTS: Concise bullets of information that can be spoken easily and forcefully. These are the arguments and facts that support your message.

TARGETING YOUR AUDIENCE: This is the predicate for developing any strategic communications plan. Who you are trying to reach will determine the scope and nature of the outreach. There may be one target audience or several. Once the target audiences have been identified, the next step is to find out how they get their news and information and who they consider trusted messengers.

VIDEO NEWS RELEASE (VNR): A prepackaged, TV news story produced by an organization that wants to get a story out without relying on journalists to cover it; the video equivalent of a press release. VNRs are usually offered free via satellite feed to news stations across the country, in the hope that they will be aired as news stories. They are most likely to be used by resource-strapped local stations. Major national broadcast networks almost never run a VNR.

ATTACHMENT B:

COMMUNICATIONS RESOURCES

THIS IS ONLY A PARTIAL LIST OF POSSIBLE RESOURCES AND IS NOT MEANT TO BE ALL-INCLUSIVE OR EXHAUSTIVE.

The **OPPORTUNITY AGENDA** provides immigrant rights advocates with relevant research, public opinion and media analysis, messages, talking points, communications toolkits, and other useful resources. www.opportunityagenda.org

"*Smart Chart*" by **SPITFIRE STRATEGIES**. Available in print or online interactive editions, the Smart Chart is a planning tool that helps nonprofits develop high-impact communications strategies. Available at: <http://www.smartchart.org>

"*Why Bad Ads Happen to Good Causes*," "*Storytelling as Best Practice*," "*Why Bad Presentations Happen to Good Causes*," and other publications by **ANDY GOODMAN**. The publications offer nonprofits guidance on creating effective ads, crafting powerful stories, and making presentations that engage, educate and persuade. Publications and a monthly e-newsletter called "free-range thinking," which provides other communications tips, are available at: www.agoodmanonline.com

"*Now Hear This: The Nine Laws of Successful Advocacy Communications*," "*Making a Name for Yourself: Branding for Nonprofits*," "*Now Advertise This: 10 Tips on How to Make News with Public Interest Advertising*," and other guides for nonprofit and social change communications published by **FENTON COMMUNICATIONS**. Available in print or downloadable pdf at: www.fenton.com

"*The Communications Toolkit: A Guide to Navigating Communications for the Nonprofit World*," published by **CAUSE COMMUNICATIONS**, provides guidance on all aspects of developing and implementing a communications plan for your organization. This publication and other useful guides are available in print for no cost and as downloadable pdf under Resources at: <http://www.causecommunications.org>

SPIN PROJECT provides online, and downloadable, communications "tutorials" that provide guidance on such topics as "*Developing Relationships with Reporters*," "*Writing News Releases*," and "*Strategic Communications Planning*." Available at: <http://www.spinproject.org>

YOUTUBE NONPROFIT PROGRAM provides a platform to tell your story and connect with supporters, volunteers and donors. <http://www.youtube.com/nonprofits>

THE NEW ORGANIZING INSTITUTE specializes in training progressive organizations to use online organizing techniques and new media. It offers low cost one-hour webinars on a range of topics, such as website design, text messaging, social networking basics, online fundraising. Beginner webinars cost \$10 and advanced webinars cost \$25. <http://www.neworganizing.com>

PROGRESSIVE TECHNOLOGY PROJECT helps community organizers build their skills to integrate technology into their organization's work. The website offers a range of resources, guides, and training opportunities. <http://www.progressivetech.org>

THE ROPER CENTER FOR PUBLIC OPINION RESEARCH is the leading educational resource in the field of public opinion polling. Its website has a data base of polls covering a wide range of issues, including immigration-related topics. It also offers online guides, such as Polling 101, that explain the basics of public opinion polling. <http://www.ropercenter.uconn.edu>

NEW AMERICAN MEDIA is the first and largest collaboration of ethnic news organizations, www.newamericanmedia.org

AMERICAN FORUM, www.mediaforum.org, is a nonprofit media organization that works to encourage more citizen debate on important societal issues. It provides professionally prepared and easily used materials to print, broadcast and new media outlets, particularly opinion editorials, seeking commentary from a state point of view.

MAINSTREAM MEDIA PROJECT, www.mainstream-media.net, is a nonprofit public education organization that places top policy analysts, social innovators and on-the-ground organizers on radio and television stations across the country and around the world. It uses broadcast media and the Internet to raise public awareness.

MEDIA MATTERS FOR AMERICA, www.mediamatters.org, is a Web-based, not-for-profit, 501(c)(3) progressive research and information center dedicated to comprehensively monitoring, analyzing, and correcting conservative misinformation in the U.S. media.

FRAMEWORKS INSTITUTE designs, commissions, manages and publishes communications research to prepare nonprofit organizations to expand their constituency base, to build public will, and to further public understanding of specific social issues. www.frameworksinstitute.org

PUBLIC NEWS SERVICE is a member-supported news service that advocates journalism in the public interest. PNS's network of state-based news services distribute high quality public interest news and information to both mainstream and alternative media on a daily basis. www.publicnewsservice.org

PROGRESS NOW and its state partners serve as multi-issue advocacy organizations that promote progressive ideas and causes with creative earned media strategies, targeted email campaigns, and cutting-edge new media. www.progressnow.org.

ACTIVE VOICE uses film, television and multimedia to spark social change from grassroots to grass tops. www.activevoice.net

COMMUNICATIONS CONSORTIUM MEDIA CENTER (CCMC) is a public interest media center dedicated to helping nonprofit organizations use media and new technologies as tools for public education and policy change. www.ccmc.org.

ATTACHMENT C

Sample Request for Proposal

(CAN BE EXPRESSED IN THE FORM OF A "CONSULTANCY DESCRIPTION")

The following RFP was for a communications consultant for a three-month non-partisan immigrant civic engagement effort in Arizona. The consultant needed to manage all earned, paid and web-based communications, and needed to have a detailed knowledge of the local media, particularly Spanish language media.

Applicants are invited to submit proposals for a communications consultancy to last three months. The successful applicant will have considerable, demonstrated experience in the following activities and support the goals of the civic engagement campaign.

PURPOSE AND DURATION OF CONSULTANCY:

Oversee communications efforts that support the 2010 civic engagement/voter registration campaign priorities and goals.

The primary job of the Communication Consultant is to create and implement a multi-component communications strategy, including earned, paid, ethnic and web-based communications, that support the goal of attaining a target number of Latino voters.

The Communication Consultant will be contracted for three months, from mid-August 2010 up to and one week after the 2010 mid-term elections (exact start and stop dates to be negotiated).

PRINCIPAL DUTIES AND RESPONSIBILITIES:

- ▶ Manage all earned media, including producing and implementing campaign media plan and all related elements, pitching reporters, developing and maintaining relationships with media, staging and promoting media events, responding to media inquiries, op eds, letters to the editor, editorials, tracking of coverage and related activities.
- ▶ A special focus will be placed on communications and outreach with ethnic (Spanish language) media, including print, radio, blogs and other web-based outlets.
- ▶ Manage all paid media activities, including work with campaign leadership and allied groups on visuals and message content of ads, placement, tracking of hits, and ensure earned and paid media activities act in synergy.
- ▶ Help create, implement and manage web-based communications activities, such as campaign website, texting, Facebook, Twitter, blog and YouTube pieces, videos, ongoing web content and e-blasts.

- ▶ Manage any crisis communications activities and respond, as appropriate, to attacks and accusations by campaign opponents by providing facts, quotes and refutation as needed; maintain positive public perception of the integrity and “brand” of the campaign.
- ▶ Administrative and organizational reporting and representation, including work with campaign media subcommittee on coordinating with overall campaign goals and activities; secure all approvals for earned and paid media decisions and expenditures; inform and update campaign leadership as appropriate, account and bill for all appropriate expenses, and manage the communications budget (with media subcommittee oversight).

DIRECTION AND DECISION MAKING:

- ▶ Reports to Campaign Director and assigned Campaign Communications Subcommittee representative(s).
- ▶ The consultant will be expected to work closely with and coordinate among other immigration communications players in Arizona, including communications staff at field partners and other local and national groups.
- ▶ Must be able to work effectively with Campaign Director and affiliate organizations; must be proficient in Spanish.

IMPORTANT CONSULTANT QUALIFICATIONS:

- ▶ The consultant will be expected to understand and be sensitive to the multicultural and language values of the target audience, i.e., Latino voters.
- ▶ Experience developing and implementing strategy on a wide range of campaigns, including those involving community organizing, non-profit (and pertinent for-profit) media campaigns, as well as experience working with community allies.
- ▶ Thorough knowledge of media relations strategies and demonstrated experience in performing pro-active media outreach; maintaining good working relationships with journalists and generating positive media coverage.
- ▶ Working knowledge of electronic and/or print media systems; knowledge of advertising techniques, rates and placement strategies preferred.
- ▶ Working understanding and creative use of web-based/e-mail communications.
- ▶ Excellent writing, verbal, and analytical skills.
- ▶ College bachelors degree or higher preferred.

COMPENSATION: Negotiable for duration of Campaign.

To Apply: Please email proposal by [application deadline here] to [primary contact here].

ATTACHMENT D

Sample Letter of Agreement/Contract

[Sample contract, or “Letter of Agreement.” In this version, the agreement is from the consultant to the client. Note: this is a modified version of the actual agreement signed with the winning applicant in the campaign for which the sample RFP – “Attachment C” – in this guide was created. You may want to seek legal advice before signing any agreement or contract.]

[Date here]

Civic Engagement Campaign

Re: Letter of Agreement

Dear [principle contact with client]:

We are pleased to provide communications services to the civic engagement campaign. In this Letter of Agreement, we set out the terms of our arrangement with you under which [list name of consultant company] (“Agency”) will serve as communications agency of record for [your organization here] (“Client”).

This Agreement is for a period of 90 days and shall commence on [start date] and continue through [end date].

The Agency will provide communications services customarily performed, including, but not limited to, those services set forth in Appendix I, Agency Services / Compensation. The Agency bills at a blended hourly rate of [fill in negotiated rate here]. The Agency will be compensated a project fee of [fill in amount] for [fill in amount] hours of work. In addition, the Agency will donate [fill in amount hours of work to the campaign – a [fill in amount] value – for a total of 375 hours of work to be performed during the duration of the campaign. [Note: this consultant generously donated hours above and beyond that stipulated by the agreement.]

An initial payment of [amount] is due to the Agency by [date]. A second payment of [amount] will be due by [date] and a final payment of [amount] will be due by [date].

Primary reporting of activities and work being conducted will be done through

[client contact], Campaign Representative, on an ongoing basis throughout the time of the contract. Updates will also be needed to be conducted to media subcommittee and entire campaign members when appropriate.

Hard costs for outside expenses such as printing, photography, graphic design, clipping services, wire postings, etc. will be billed at net cost. Mileage to locations other than campaign headquarters at [list address] will be billed at \$.50 per mile and out-of-state travel expenses will be billed at net cost. All hard and additional mileage including out-of-state cost must be reviewed and approved by the Campaign Representative [name here] before incurring costs. The Agency agrees not to incur charges greater than 15 percent above written project estimates without the Client's approval.

Invoices for the Agency's services will be due on the dates outlined above. Payment for the Agency's reimbursement of out-of-pocket expenses will be payable within thirty days (30) of receipt of invoice. All out of pocket expenses must be reviewed and approved by Campaign Representative before incurring cost. Invoices not paid after 30 days will incur a 1.5% per month late payment penalty. Failure to pay the Agency's invoices within 30 days after the date of invoice may, at the Agency's discretion, result in suspension of any or all services to the Client until payment is received, and may result in termination of the Agreement. The Agency shall incur no liability of any kind to the Client for such suspension or termination. In the event that the Agency must retain counsel or other services to enforce this Agreement, the Client shall be responsible for all such costs and expenses, including reasonable attorney's fees.

During the term of this Agreement, the Agency agrees not to serve as a communications firm for any product or service that directly compete with any products or service offered by the Client without first obtaining written consent of the Client.

Upon termination of this agreement by either party for any reason, the Client remains liable for all fees, disbursements and other related charges incurred up to date of termination, as well as all amounts that the Agency's must pay to third parties pursuant to non-cancelable Agreements entered into in performance of this contract. Provisions in the Agreement related to payment, confidentiality, indemnification, dispute resolution and waiver shall survive termination of the Agreement.

Upon full payment for services, all works and materials developed on the Client's behalf during the term of this Agreement, including all files, input and output materials, the media in which they are located and all creative materials developed in the course of performing under this Agreement ("Work Product") shall be considered a "Work Made for Hire" under copyright laws. Accordingly, the Client shall be deemed the "author" of the Work Product for the purposes of the United States Copyright Act (17 U.S.C. Section 101 et seq.) and shall forever be the

exclusive owner throughout the world of all copyrights and all other proprietary rights existing therein.

If such Work Product is not considered a “Work Made for Hire” for any reason, the Agency hereby assigns and transfers, outright and forever, to Client all proprietary rights and all rights of every kind and nature described above for good and valuable consideration. The Agency also agrees to cooperate and sign such appropriate or necessary documents to register intellectual property rights in the name of the Client, upon the Client’s request. The Client is responsible for ensuring that any work completed by the Agency can be trademark or copyright protected.

The Agency takes seriously its duty to preserve the Client’s confidences and proprietary matters. The Agency shall not disclose information the Client designates as confidential without the Client’s written permission, other than to the Agency’s team members, counsel and other professional advisors the Agency’s believes necessary to fully meet the Agency’s obligations under this Agreement, or as required by applicable law or judicial or administrative order. The Agency may, however, disclose the Agency’s representation of the Client to other actual and potential clients. The Client and Agency are entering in a separate Confidentiality Agreement relative to the subject matter of the representation.

The Client acknowledges that the Agency cannot undertake to verify facts, information or materials supplied by the Client to the Agency, or factual matters included in materials prepared by the Agency and approved by the Client. The Client shall have the sole responsibility for authorizing and approving the dissemination of all information and materials released on the Client’s behalf. The Client shall be solely responsible for the accuracy, completeness and legal compliance of the information about the Client that the Client provides or approves for the Agency’s use. Accordingly, the Client agrees to defend, indemnify and hold the Agency harmless from and against any and all losses, claims, damages, expenses (including reasonable attorneys’ fees and disbursements) or liabilities which the Agency may incur:

- i. as a result of any material false data, information, releases, reports or other Clients materials supplied to the Agency by or on behalf of the Client or prepared by the Agency and approved by the Client prior to its dissemination;
- ii. resulting from disputes between the Client and third parties related to and/or within the scope of this Agreement, except if due to our negligence or misconduct; and
- iii. arising out of the nature or use of the Client’s products or services.

The above provisions (i.-iii) shall, along with the confidentiality provisions, survive the expiration or earlier termination of this Agreement. The Code of Professional

Standards, as adopted by the Public Relations Society of America, guides the Agency's operations for the practice of public relations.

The Client also agrees that during the term of this Agreement, and for one year following its termination, the Client will not solicit or encourage any employee or independent contractor associated with the Agency to end his or her relationship with the Agency. Further, the Client agrees that during such period the Client will not hire, retain or otherwise contract with any employee or independent contractor of the Agency.

The foregoing is the complete and sole Agreement between Agency and Client covering Agency's services to Client. It cancels and supersedes as of the date hereof any and all prior Agreements or understandings between Agency and Client hereto. These may not be changed except in writing and duly signed for by the parties. This Agreement shall be governed in accordance with the laws of the State of [your state here].

If this Agreement is acceptable to you, please sign below on two copies and return both sets to us. We will, in turn, sign and send one set to you with both signatures.

Thank you for this opportunity to be a part of the campaign team and we look forward to working with you.

Sincerely,

[name]

Principal

ACCEPTED FOR:

[Signatures and dates for both client and consultant here.]

[Note: This appendix to the letter of agreement lists duties specified in the consultant proposal (see Attachment C, Sample RFP-Consultancy Description) and compensation.]

APPENDIX I

COMMUNICATIONS CAMPAIGN

1. SERVICES

Under this Agreement [consultant] will provide communications service to the campaign. These services include:

Create and implement a multi-faceted communications strategy, including earned, paid, ethnic and web-based communications that will support the campaign's 2010 priorities and goals.

Manage all earned media, including producing and implementing a campaign media plan and all related elements such as pitching reporters, developing and maintaining relationships with media, staging and promoting media events, responding to media inquiries, op-eds, letters to the editor, editorials, tracking of coverage and related activities. A special focus will be placed on ethnic (Spanish language) media, including print, radio, blogs and other web-based outlets.

Manage paid media activities, including work with partner groups and campaign leadership on visuals and message content of ads, placement, tracking of hits, and ensure earned and paid media activities act in synergy.

Help create, implement and manage web-based communications activities, such as table website, texting, Facebook, Twitter, blog and YouTube pieces, videos, ongoing web content and e-blasts.

Respond, as appropriate, to attacks and accusations by campaign opponents by providing facts, quotes and refutation as needed; maintaining positive public perception of the integrity and "brand" of the campaign.

Administrative and organizational reporting and representation, including work with campaign media subcommittee on coordinating communications activities to meet campaign goals and activities, securing all approvals for earned and paid media decisions and expenditures, informing and updating table leadership as appropriate,

accounting and billing for all appropriate expenses, and managing the communications budget (with media subcommittee oversight).

2. AGENCY COMPENSATION

In consideration of the services outlined above, you shall compensate us with a project fee of [amount here] for [amount] hours of work. In addition, we will donate [amount; note, at the discretion of the consultant and not required] hours of work – a [amount] value – for a total of [amount] hours of work during the duration of the campaign. Hard costs will be billed separately at net cost and will be approved by you in advance. Mileage will be billed at \$.50 per mile. An invoice for hard costs will be generated immediately with payment due within 30 days. Invoices not paid after 30 days will incur a 1.5% per month late payment penalty. All hard and additional mileage cost must be reviewed and approved by Campaign Representative [specify individual's name] before incurring costs.