**Request for Proposals**

1. **Introduction**

The National Organization of Social Security Claimants’ Representatives (NOSSCR) seeks to establish affinity and royalty agreements. NOSSCR is a specialized bar association for attorneys and advocates who represent Social Security Disability Insurance and Supplemental Security Income claimants throughout the disability adjudicative process. Since 1979, NOSSCR has been providing continuing legal education to its thousands of members and public policy advocacy on behalf of its members and the people with disabilities they represent.

NOSSCR has thousands of members across all 50 states; most are self-employed or work in small business law firms. Through affinity and royalty agreements, we aim to provide our members access to efficient, comprehensive, and cost-effective practice management tools at preferential rates while enhancing your reach and brand recognition within our community. In so doing, we will adhere to IRS standards limiting our services in order to avoid or limit “unrelated business income tax (UBIT).”[[1]](#footnote-2)

1. **Background and Objectives**

Our members represent claimants before the Social Security Administration and in Social Security appellate advocacy before federal courts. Our members also practice in adjacent and complementary practice areas, including Veterans’ disability, workers’ compensation, personal injury, and bankruptcy.

Our members’ practice management needs are met through a diverse range of individual solutions. By establishing an affinity and royalty agreement with a reliable service provider, we hope to:

* **Streamline internal processes** for our members, many of whom are small business owners, so that they can provide excellent customer service and high-level legal representation to their clients.
* **Reduce costs** for our members through negotiated discount rate options.
* **Reduce administrative burdens** associated with intake, case management, calendaring, document management, and other tasks essential to efficient legal practice.
* **Generate revenue** for NOSSCR through royalties based on member purchases.

1. **Scope of Services**

We are seeking solutions to increase efficiency and reduce the administrative burden for NOSSCR members. These services should offer, for example:

* Streamlined client intake and onboarding
* Efficient case and document management
* Automated calendaring and deadline tracking
* Tools to facilitate client communication
* Features to support billing and accounting
* Customizable solutions tailored to the unique needs and preferences of individual law firms
* Scalability to handle both small and large case volumes
* Cost-saving strategies and pricing models
* Reliable and effective customer support services

1. **Evaluation Criteria**

Proposals will be evaluated based on the following criteria, as relevant:

* **Specialized expertise:** Understanding of the legal field and member needs, particularly regarding the challenges of diverse legal practices.
* **Customization and flexibility:** Ability to adapt to individual practitioners' and law firms' needs and preferences.
* **Cost-effectiveness:** Transparent pricing and the ability to offer strategies to help firms optimize their workflows and processes.
* **Excellent service:** Proactive communication, timely responses to inquiries, and reliable customer service.
* **Compliance and ethics:** Strict compliance with data privacy laws and regulations, commitment to ethical business practices, fair treatment of candidates, and protection of law firm and client confidential information.
* **Integration capabilities:** Seamless integration with other commonly used legal software and platforms.
* **Marketing and communications support:** Creativity and effectiveness of proposed marketing initiatives.

1. **Submission Instructions**

Please submit your proposals electronically to [lb.waller@nosscr.org](mailto:lb.waller@nosscr.org). The proposal should address each of the sections outlined above and include the following information:

* Company overview and relevant experience
* Detailed description of the product or services and pricing model
* Implementation and training plan
* Compliance with all applicable laws and regulations
* Marketing and communication strategies
* Reference list of other affinity arrangements
* Potential conflicts of interest, interested parties serving either on NOSSCR’s Board of Directors or a similar ownership role or governing body of the provider

We encourage creativity and proposals that go beyond standard offerings. We are open to exploring different types of arrangements, including tiered pricing structures, co-branded marketing initiatives, and joint educational events.

1. **Selection Process**

A selection committee composed of NOSSCR staff and the NOSSCR President will review all proposals on an ongoing basis. Shortlisted vendors may be invited for presentations and Q&A sessions. All proposals will be kept confidential, considered by and available to only NOSSCR staff and the NOSSCR President (and NOSSCR’s legal counsel as needed), and not available to other members of NOSSCR’s Board of Directors or membership.

1. **Contact Information**

For any questions about this RFP, please contact Laura Beth Waller at [lb.waller@nosscr.org](mailto:lb.waller@nosscr.org).

Thank you for your interest, and we look forward to reviewing your proposal.

1. For an explanation of this concern and the general tax issues involved, consider this resource from the American Bar Association: “Endorsements. When a nonprofit endorses a vendor’s product or service (often referred to as a nonprofit “affinity” program) but does nothing to market the product or service to its members (leaving this task to the vendor), this can be viewed as, in essence, nothing more than an exclusive license of the nonprofit’s name, logo and (sometimes) membership list to the vendor (in connection with the vendor’s promotion and sale of that product or service to the nonprofit’s members, and possibly to others in the industry or profession as well). As stated above, if the nonprofit gets paid for this exclusive license—even if such payments are calculated as a percentage of gross sales of the endorsed product or service to the nonprofit’s members—then the payments will constitute royalties and will be tax-free to the nonprofit. If, however, the nonprofit does market the product or service to its members, then the tax issues become more complex,...” https://www.americanbar.org/groups/business\_law/resources/business-law-today/2021-november/unrelated-business-income-tax/ [↑](#footnote-ref-2)