



Corporation
for Public
Broadcasting

Request for Proposals Program Manager PBCore 2.0 Development

The Corporation for Public Broadcasting (“CPB”) invites you to submit a proposal to manage the *PBCore 2.0 Development* in accordance with the information and guidelines published below.

Release Date: Thursday, September 3, 2009

Closing Date: Friday, October 2, 2009 - 5:00 PM (EST)

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Please submit proposals on or before the closing date. CPB reserves the right to reject proposals submitted after the closing date. Do not submit samples, unless requested by CPB, and do not submit proposals by fax. They will not be accepted.

Applicants are responsible for providing all required materials. CPB may, at its discretion, initiate discussion with any applicant to obtain clarification or additional information. Any submission to CPB will become the property of CPB (not including any intellectual property rights contained in such submission).

Each applicant guarantees that the full and complete rights to all information and materials have been secured. Each applicant also guarantees that all such materials are not defamatory and do not infringe upon or violate the privacy rights, copyrights, or other proprietary rights of any third party. CPB is not responsible for any violation of copyright, trademark, patent, trade secret, or other rights that may result from disclosure made by response to this RFP.

By submitting a proposal in response to this RFP, each applicant grants to CPB the right to duplicate, use, disclose, and distribute all of the submitted materials for purposes of evaluation, review, and research. CPB will not consider the proposal or any of its supporting materials to be confidential. CPB intends to disclose the materials to various employees and possibly to experts outside CPB’s employ to determine the merits of the proposal. It is understood that no confidential relationship is entered into by reason of CPB’s consideration of the proposal or any of the materials.

CPB is not responsible for loss or damage to the materials submitted to CPB, or for any unauthorized use or misuse of the submitted materials by any third party. CPB is not required to return any submitted materials to any applicant. Applicants may withdraw a proposal at any time by written notice to CPB. Solicitation of proposals by CPB does not constitute an agreement by CPB to extend funding to any party under this RFP. CPB may, in its sole discretion, elect not to pursue projects under this RFP in any manner.

PBCore 2.0 Development Program Manager Request for Proposals (RFP)

1. Objective

The objective of this RFP is to solicit proposals to be the Project Manager (“PM”) of the PBCore 2.0 Development more specifically described below. The Project Manager, working in close consultation with CPB over a period of 12 months, will recommend and initiate development of an operational infrastructure including an organizational and legal structure, resource group, and advisory board; develop a medium and long-term sustainable operating model; gather requirements from the user community including producers, archivists, content managers and vendors, oversee the update and revision of the current PBCore version 1.2 to version 2.0, and define and establish processes for future application development; outreach to stations, producers and related organizations to formally establish PBCore as the Public Broadcasting metadata standard to facilitate the description, preservation and sharing of content efficiently within and across organization and continue as a cornerstone of collaboration with other international standards; re-design and update PBCore website and create a PBCore on-line community; and provide on-going training and technical support to the user community on the functionality, structure, implementation and use of PBCore 2.0. The Project Manager will report directly to CPB’s Vice President of Digital Media Strategy.

2. Background

Six years ago, CPB made an important investment in the development of PBCore to establish a metadata standard for public broadcasting (<http://www.pbcore.org>). At that time, five public media institutions contributed metadata schemas: PBS, NPR, MPR (Minnesota Public Radio), University of Utah, and WGBH to serve all public media and institutional partners. PBCore is currently endorsed by national public broadcasting organizations, including PBS, NPR, NETA and IMA, as well as by recognized standards experts for moving image collections and preservation from the Library of Congress. Many public radio and television stations as well as related domestic and foreign organizations, within and beyond public broadcasting, are using PBCore to describe their digital media collections. Given the increasing importance of adhering to both domestic and international metadata standards CPB has decided to fund a second phase for the development of PBCore that includes a sustainable long-term operating model.

Shortly after the creation of PBCore and in an effort to help advance and support the application and the user community the PBCore resource group was put in place. Representing a diversity of roles in public media, this informal and volunteer group consists of 15 people from a variety of respected local stations, national organizations and productions in public television and radio, as well as leaders in moving image standards and initiatives. After CPB’s funding ended, the Resource Group members have continued to support and promote PBCore among the user community and also identify and discuss needs and opportunities. In addition, hosting for the application is currently provided *pro bono*.

From storage and preservation to retrieval and repurposing, metadata is critical to the persistence and availability of information for public media. Continuing these efforts on a volunteer and *pro bono* basis, however, is not sustainable and formal leadership and organization is essential for the successful continuation and further development of PBCore as a useful and maintained standard. CPB recognizes the need for a clear roadmap where the fundamental aspects of the application are clearly defined for users (including the producer and education community) in order to improve scope, interoperability structure, customization, and a robust outreach program to establish metadata as an integral part of the workflow. In the context of the American Archive investment, a system-wide initiative led by CPB to preserve content at the local and national level PBCore will be a critical component to enable effective distribution and sharing of information.

3. Scope of Work

The Program Manager will work in close consultation with CPB during a 12-month period to develop and implement PBCore 2.0. The Program Manager must provide a complete and detailed project plan with milestones and deliverables that establishes PBCore as a public media standard. The following focus areas must be included:

a) Operational and Legal Structure Recommendation

1. Recommend an operational infrastructure for the maintenance and improvement of PBCore.
2. Recommend a legal structure to ensure the usability and viability of PBCore as a standard for both public media, as well as utility to non-public media entities.
3. Establish a supporting technical resource group for development and evolution of PBCore with representation from relevant public media and outside audiences and user groups.
4. Recommend advisory board for the strategic development of PBCore.

b) Business Plan and Sustainability Plan

1. Identify existing potential standard organizations for partnership in maintaining and evolving PBCore, including an analysis of how potential partnerships would be structured.
2. Create a short-term (2-3 year) and long-term (3-5 year) business plan that includes a long term sustainable operating model and scenario analysis based on both an independent standards organization and partnership with existing standards organization.
3. Develop a five-year operational budget and financial projections for PBCore.
4. Provide market analysis of the potential revenue streams, including membership opportunities that support business plan and financial projections.

c) Requirements Gathering and Application Update & Development

1. Provide requirements gathering plan that includes audiences within and beyond Public Broadcasting and detailed implementation plan.
2. Gather requirements from the user and developer communities. Primary audiences include public media producers, archivists, digital asset managers, general managers and education specialists. Conduct primary interviews with a representative body of stations,

as well as national entities such as PBS, NPR, American Public Media, Public Radio Exchange, and Public Radio International among others.

3. Gather requirements from the user community including possible solutions to harmonization, compatibility and/or interoperability of the Broadcast Exchange Format (BXF protocol) with PBCore.
4. Select a qualified vendor to complete the update and development of PBCore and supervise all development and implementation activities.
5. Oversee the update and revision of the current PBCore version 1.2 to version 2.0, including revisions to the PBCore data dictionary, the XMS Schema, and PBCore's recommendations on underlying standards.
6. Secure participation of stakeholders and the archival community to validate development milestones.
7. Ensure that the contracted developer documents the PBCore 2.0 build and oversee the creation of online technical code documentation/revision processes for future application development.

d) Outreach and Communication Plan

1. Create and implement an outreach plan educating them on the usage and value of PBCore 2.0 to public television and radio stations as well as related organizations within and beyond Public Broadcasting.
2. Create and implement an outreach plan that includes key vendors supporting metadata-related activity within the Public Broadcasting community, regarding implementation, validation and exchange of PBCore across systems.
3. Develop a communications plan that describes how PBCore will be formally established as the Public Broadcasting metadata standard to facilitate the description, preservation and sharing of content efficiently within and across organization and continue as a cornerstone of collaboration with other international standards.
4. Provide details of presentations, events, conferences, etc where PBCore would be promoted during the 12-month contract period.

e) PBCore Website

1. Select a qualified vendor to complete the update and development of the PBCore website. Supervise all design, development and implementation activities.
2. Through the website create and/or expand tools that grow the PBCore on-line community to support the establishment of PBCore as a standard and its evolution to benefit public media and beyond.
3. Establish online community-driven forums regarding implementation and use of PBCore.

f) Training and Technical Support

1. Provide on-going training and technical support to the user community on the functionality, structure, and use of PBCore.
2. Provide training materials.
3. Provide complete technical and functional documentation for the updated application.
4. Provide online knowledge resources driven by the PBCore developer as well as by the user community.

g) Reporting

1. Provide monthly status reports on activities to CPB
2. Provide monthly financial reports to CPB.

4. Project Management Structure

CPB will work in a collaborative manner with the PM who will ensure all activities in the work scope are completed as required and on schedule. The PM and CPB will agree on a review structure before the start of work which ensures that the project leverages the organizational capabilities of the PM while meeting the CPB’s requirements.

5. Term

This RFP seeks proposals from applicants to serve under contract to CPB as the PBCore 2.0 Development Program Manager for a 12-month term beginning on/about November 1, 2009 and ending on/about December 31, 2010.

The following is a high level proposed project timeline.

Activity / Focus Area	Month											
	1	2	3	4	5	6	7	8	9	10	11	12
1 Operational and Legal Structure												
2 Sustainability Plan												
3 Requirements Gathering and Application Update & Development												
4 Outreach and Communications												
5 PBCore Website												
6 Training and Technical Support												

6. Eligibility Requirements

All applicants must explicitly state their acceptance and agreement to the terms outlined in Addendum 1 as applicable. In addition to the conditions listed in Addendum 1, to be selected the PM should:

- a) Demonstrate experience and expertise managing the definition of metadata schemas, implementing application profiles to allow customization, and managing Digital Asset Management systems;
- b) Demonstrate experience managing related large scale, multi-year projects;
- c) demonstrate familiarity with public media and familiarity with the Public Broadcasting system;
- d) Demonstrate expertise and relevant experience developing and implementing business plans;
- e) Demonstrate experience and expertise developing and implementing outreach and communications plans; and
- f) Demonstrate project management expertise in relevant areas/industries and specific examples of working and collaborating with multiple organizations and managing subcontractors.

7. Questionnaire

Proposals must specifically address items a) through g) below and should be clear and concise. The total narrative should not exceed 5 pages (*with one inch margins, single spaced, 12pt Times New Roman or similar font*). Two additional addenda must be included: brief resumes of key personnel and a proposed project budget including time, materials, travel, and estimated expenses. CPB will request additional material from applicants as necessary.

- a) Please describe your approach and provide specific examples of your experience and expertise managing the definition of metadata schemas, implementing application profiles to allow customization, and managing Digital Asset Management systems;
- b) Please describe your approach and provide specific examples of your experience managing related large scale, multi-year projects;
- c) Please provide specific examples of recent projects/activities that demonstrate understanding and familiarity with public media and the Public Broadcasting system;
- d) Please describe your approach in developing and implementing the PBCore 2.0 business plan;
- e) Please describe your approach to develop and implement PBCore 2.0 outreach and communications plan and provide specific examples of recent related work/projects;
- f) Please provide your approach to working and collaborating with multiple organizations and provide specific examples of related work;
- g) Please describe why organization is best qualified and positioned to manage this project.

Addendum 1

Conditions of Agreement

If a proposal is selected for funding, applicants will be required to sign a binding agreement. Until both parties have signed an agreement, no express or implied commitment has been made to provide financial support. Applicants are not authorized to commence work until the agreement is fully executed. If applicants opt to commence work, they do so at their own risk. No oral or written statement other than the signed, written agreement will govern or modify the relationship.

As a condition of agreement, applicants must guarantee that, among other things, any work they undertake on behalf of CPB is not defamatory and will not violate or infringe upon the privacy rights, copyrights, or other proprietary rights of any third party. Contractors must also agree to indemnify CPB against any loss resulting from breach of any of the guarantees contained in the agreement.

Those receiving funds from CPB must be able to comply with a number of requirements that will be included in the operative agreement. These requirements include but are not limited to:

- (1) A demonstration of adequate resources to complete the work for which they have been contracted and to deliver reports and/or other intellectual property created pursuant to the Agreement;
- (2) Maintenance, for three years following receipt of relevant funds, of all financial records to the project, which records shall be accessible to CPB, and to the U.S. Comptroller General or other representatives for examination and audit purposes;
- (3) Maintenance, for three years after approval of a final financial report, of a complete file of all subcontracts and other agreements, licenses, clearances, and other documents related to the work undertaken, copies of which shall be made available to CPB on request;
- (4) Compliance with equal employment opportunity and nondiscrimination laws and policies;
- (5) Applicants who plan to engage sub-contractors will be expected to obtain competitive bids, and to provide assurances that the prices obtained for any such services are fair and reasonable;
- (6) Applicants will be required to provide documentation as to actual costs, and provide supporting detail demonstrating that all costs are reasonable, necessary and allocable to the requirements and objectives of the work undertaken; and
- (7) All research and materials created, developed, compiled or produced pursuant to or as a result of this project (including but not limited to all reports) will be considered ordered and

commissioned by CPB as works made for hire under the copyright laws, and made in the course of services rendered. If, for any reason, the proposed research and materials to be provided are not considered works made for hire under the copyright laws, then the applicant will be required to assign all right, title and interest in and to such research and materials to CPB. Applicants further agree that neither they, nor any of their subcontractors, will have any copyrights or other intellectual property rights whatsoever in any research and/or materials created, developed, compiled or produced by them or by any subcontractor, or by any third party participating in the preparation of research or materials for this project.

Other material terms and provisions will be set forth in the documents provided to the applicant that successfully completes the selection process