

Request for Proposals
Digital Infrastructure Assessment
Response Deadline: 5:00 PM EST, December 9, 2016

I. OVERVIEW

Public media stations and their national organizations have been building infrastructure to support their digital presence, but generally not in close coordination or with common standards. CPB is seeking the services of a consultant (“Consultant”) to assess the current state of public media’s digital infrastructure, including its capacity, adaptability and flexibility to meet future needs, and to recommend ways of creating more effective and efficient uses of digital platforms, services and tools. The elements of infrastructure to be analyzed include technology standards, content delivery systems, customer relationship management and marketing platforms, donation platforms, analytics platforms, content management systems, identity management systems, social media platforms, data protection and security, data warehousing, hosting, etc.

The Consultant will work closely with CPB and a digital taskforce made up of approximately ten public media digital leaders. The Consultant’s assessment will include detailed findings and recommendations, with accompanying rationales and supporting plans for implementing the recommendations. It is expected that the assessment will include interviews with public media stakeholders, a detailed review of existing technologies currently used by the public media system, the public media system’s digital capacity, a comprehensive gap analysis, and an evaluation of the public media system’s ability to make changes consistent with the Consultant’s recommendations. The Consultant will be required to make in-person presentations to public media system leaders and funders, as appropriate.

The Consultant must have an extensive background in digital technology and broadcast media and significant experience in managing complex digital ecosystems, including data intelligence, audio/video delivery, and publishing/distribution systems. The Consultant must also be able to clearly and effectively communicate complex technology information to all levels of an organization. Previous experience working with public media entities is preferred, but not required.

CPB will compensate Consultant on a fixed fee basis. The project must be completed within six months of the contract’s execution. CPB may extend the term of the agreement, at its sole discretion, for two consecutive three-month terms in the event it determines that additional work is required.

II. BACKGROUND

Public media's mission is to provide programs and services that inform, educate, enlighten, and enrich the public, promoting civil discourse which is essential to American society. For nearly fifty years, a national federated network of locally owned and operated noncommercial, educational public radio and television stations have served that mission, bringing programming and services to nearly 98 percent of the U.S. population.

Over the course of its history, the public media system has developed a broadcast infrastructure that supports the seamless delivery of content from multiple sources through local radio and television stations. The current system enables national distribution of linear programming while preserving the organizational independence of stations to provide local programs and services to their communities.

In the past decade, public media has not embraced digital transformation as a strategic priority because the overwhelming majority of its audience continued to access content through linear broadcast channels. Although some organizations have made significant digital investments, the system has not collaboratively developed a digital infrastructure on a scale necessary to compete within today's burgeoning digital media ecosystem.

The challenges are further complicated by the unique nature of the public media economy. Unlike most commercial media that is supported by advertising and subscription revenue, public media's three billion dollar economy¹ is primarily dependent on individual donations that stations independently solicit and manage at the local level.

In a world of fragmented content delivery and consumption across O&O, OTT, social media and other platforms, the stations' risk losing the direct audience relationships which sustain their relevance to the viewers and listeners that support them financially. At present, public media's digital content flows, data analytics, audience intelligence, distribution systems and audience engagement are not coordinated or integrated in a way that can position the system to survive and thrive in today's digital landscape. This project will position the public media system to build and strengthen the digital foundation it needs to continue its valued service to the American public.

III. ISSUES TO BE ADDRESSED

Public media's principal national organizations, NPR and PBS, have developed infrastructure to support their digital products and, to various degrees, their member stations. At the same time, a number of public media stations have made significant progress with digital systems to improve service to their communities. Because these

¹ Source: 2015 Public Broadcasting Revenue Report

systems have not been built in coordination or with common standards and services in mind, public media has not realized the benefits of system integration on a network scale. CPB's goal is to improve public media's service through a collaborative digital infrastructure while retaining the independent nature of the system.

This assessment will address issues such as:

- i. To what extent can public media increase its service effectiveness and sustainability via a more strategic approach and investment in digital infrastructure?
- ii. Are there common standards and/or shared technology infrastructure services that public media can use to leverage its federated network structure to both operate more efficiently and achieve economies of scale?
- iii. How can public media use audience intelligence data to improve the audience experience and increase support, such as using shared standards, identity management, authorization, customer relationship management, marketing automation, analytics and other tools and services (e.g. gesture management, preferences and recommendations, and user journeys)?
- iv. Can public media increase its reach and efficiency through improvements to content management and media distribution (text, image, audio, video) or other systems?
- v. Can public media improve the overall audience experience by optimizing audience interactions with public media brands, and/or through the use of content and membership messaging across platforms, devices and environments via shared frameworks and search, curation and discovery tools?

IV. PROJECT SCOPE

The consultation process is expected to include the following:

A. Assessment

Consultant must assess the current state of public media's digital infrastructure. The assessment will include interviews with stakeholders, a review and documentation of what the public media ecosystem comprises, including current key systems, technical capabilities, current vendor agreements, and research and case studies.

i. Interviews

Interviews must include public media national organizations, stations and external partners/vendors. The Consultant must propose which interviews should be in-person and if any should be conducted through surveys. In addition, the Consultant may propose an alternative

approach to gathering the required information. Consultant must work closely with CPB and the digital taskforce to identify the interviewees. CPB anticipates Consultant will interview between 10 and 20 individuals and survey others if necessary. Consultant must propose the number of in-person interviews and include the travel costs in its proposal.

1. Interview key stakeholders and other technology/digital staff to validate understanding of the current state/environment (e.g., major market stations, networks, and entities that are already leading key initiatives)
2. Interview and/or survey mid-small size range stations (representative range of stations of the public media system)
3. Current external system partners and organizations supporting its operations (e.g. Myers, Blackbaud, Salesforce, etc.)
4. Parties with responsibilities for design, development, and delivery of maintenance/support.
5. Extend interviews beyond just the tech team to also include collecting feedback from primary end users (eg. Content Management, Reporting Tools, etc.)

ii. Research

Gather, review and document public media and non-profit or similar system structure research.

1. Review previous research public media has conducted (public media documentation)
2. Provide/incorporate relevant research and data gathered/conducted previously
3. Gather/create case studies of similar systems (e.g., other federated systems or large non-profits)
4. Best practices used by others

iii. Review / Documentation

Review/Document the public media ecosystem to include:

1. Inventory of current platforms, tools, processes and services used across the system including, but not limited to architecture, publishing and distribution tools, communication tools, and data collection and reporting tools
2. Overall technical capabilities of public media digital infrastructure in terms of limitations, risks, redundancies and opportunities

3. Current software application development practices including development standards, documentation, security, and scalability
4. Software/Licensing agreements for platforms, tools and services
5. Monitoring and support of platforms, tools and services
6. Current spending against infrastructure and how that compares to the overall operating budget
7. Technical talent and capacity (including cultural readiness at the organization level)
8. Existing opportunities to collaborate across the system or across fewer system organizations
9. Collaborative frameworks that can help drive adoption and implementation
10. Gap Analysis between current capacity and future needs of stations and national organizations
11. Gap Analysis between internal (cohorts of stations and national organizations) and external (media industry)

iv. Rationale

Rationale that includes detailed findings from interviews, analysis and research, and rational for the importance and urgency of addressing infrastructure development.

Consultant must work closely with CPB and the core team throughout the project, providing CPB with regular feedback on the data collected, the project's status, any challenges or delays facing the project, and its recommendations on any changes that should be made to the project based on the interviews and research conducted to-date, including revisions to the scope and project structure.

B. Recommendations

Develop recommendations for public media to enhance its digital infrastructure to keep pace with the media industry, including:

- i. New technology, technology enhancements and/or overall consolidation
 1. Costs – price of each component of the roadmap, maintenance and IT support (staff, resources), along with general sizing for larger initiatives

2. Technology approach - build or buy, own or partner (e.g., public media owns user data, but doesn't need to own video streaming systems)
- ii. Improved scalability & maintenance
 1. Recommend how to efficiently and effectively scale and maintain the digital infrastructure
 2. Define best practices - including a framework for more effective system collaboration
- iii. Improved development plan
 1. Establish set of recommended development standards – information/research that will inform future phases of the work
- iv. Financial needs to keep pace with the media industry
 1. Forecast long-term financial needs to sustain digital infrastructure and keep pace with media industry/competitors
- v. Structure and governance – recommendations for and examples of building collaborative infrastructures in federated systems, including:
 1. Phased roadmap with a timeline and next steps
 2. Establish investments needed to support and grow
 3. Improved Software/Licensing agreements communication/collaboration
 4. Suggestions on how to improve system collaboration and commitment of the parties to participate in the evolution and continual advancement of digital infrastructure including recommendations for new business partnerships and relationships between parties
- vi. Sustainability plan for recommended approach(es)
- vii. Validation of recommendations with data/research/case studies and proof

C. Readout/Presentations

Creation and readout of work via presentations and/or handouts including:

- i. Executive Readout / Presentation to Digital Infrastructure digital taskforce
- ii. Final Executive Readout / Presentation to CPB and the team of stakeholders

- iii. Final Executive Readout / Presentation to public media:
 - 1. Executive leadership and board presentation. Consultant may be required to present the findings to CPB's Board of Directors.
 - 2. General audience (generating system-wide buy-in)
 - 3. Technical audience (include diagrams and charts/detailed presentation since they will be the ones executing)
 - 4. Customized report for the CPB board (awareness that this is a specific audience that will need to be addressed)
 - 5. Final Executive Readout to Public Media system stakeholders (5-10 presentations in person / virtually)

V. REQUIRED PROPOSAL CONTENTS

Each response to the RFP must contain separate Technical and Price proposals.

A. Technical Proposal – The Technical Proposal must include the following in the order specified.

- i. Cover Page: Include the project title (“Digital Infrastructure Assessment”), primary contact name, mailing address, e-mail address, and telephone number.
- ii. Proposal: A detailed description of the Consultant’s approach to the project, including:
 - 1. Project Schedule - major tasks, deliverables, timelines, etc.; and
 - 2. Execution Plan – methodologies, success metrics, and description of tasks the Consultant plans to undertake, number of hours each staff member is projected to spend on each task or phase of the project.
- iii. Experience: Consultant’s background, including the following:
 - 1. Not more than three examples of the Consultant’s recent experience in digital media industry leading to detailed executive level recommendations;
 - 2. Experience and skills of designated staff that directly relate to the topics identified above in the overview and work scope sections;

3. Knowledge of and/or experience with the public media system;
and
4. References from project examples provided, including
telephone and e-mail contact information.

B. Price Proposal

The Consultant must provide a fixed fee price proposal with a description of the tasks the Consultant plans to undertake and the number of hours each staff member is projected to spend on each task or phase of the project. For the optional renewal terms, please identify the hourly rates of the anticipated staff.

VI. EVALUATION CRITERIA

Proposals will be evaluated based on the following factors with the assigned weights.

1. Approach (25%) – The quality of the Consultant’s proposed plan, including demonstrated understanding of the problem, methodologies to be utilized, the likelihood of achieving the project goals, division of the problem into appropriate tasks, and the identification of staff and success metrics.
2. Skills and Experience (25%) – Whether the Consultant’s prior experience is relevant to the proposed scope of work and the quality of the examples.
3. Project Management (30%) – Whether the Consultant’s proposal demonstrates a clear understanding of the issues or problems that could arise and the ability to successfully resolve them.
4. Price (20%) – The reasonableness of the proposed price.

VII. PROPOSAL SUBMISSION

Separate narrative and cost proposals are due December 9, 2016 at 5 pm EST. Please include the words “RFP Digital Infrastructure” in the subject line of the emails submitting both technical and cost proposals. CPB will acknowledge by e-mail the receipt of each proposal that it receives.

Submit technical proposals and any samples of prior work by email (as a PDF attachment) to: Tom White, Project Officer, twhite@cpb.org.

Submit cost proposals separately by e-mail (as PDF or Excel attachment) to Jackie Livesay, Assistant General Counsel & Vice President, Compliance, jlivesay@cpb.org.

All questions must be submitted in writing to Tom White at the email address above. The questions and CPB's responses will be posted on CPB's Website without attribution. The top scoring applicant(s) may be required to present their proposals to CPB at its office in Washington, D.C. If required, CPB will contact the selected applicants to schedule the presentation dates and times.

VIII. TIMETABLE

Below is the anticipated timetable.

ACTIVITY	DATE
Proposal Submissions Due, 5 pm EST	December 9, 2016
Proposal Review and Selection	January 3, 2016
Contract Drafting and Execution	January 30, 2017

IX. PROPOSALS

Proposals submitted in response to this RFP by a Consultant shall be valid for at least 90 days following the closing date of the RFP.

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Consultant's proposals to meet the requirements of this RFP.

Neither multiple nor alternate proposals will be accepted from the same applicant. Consultant should give specific attention to the clear identification of those portions of its proposal that it considers confidential, proprietary commercial information, or trade secrets.

The selected Consultant shall be responsible for all products and services required by this RFP. Subcontractors must be identified and a complete description of their role relative to the proposals must be included in the Consultant's proposals.

By submitting an offer in response to this RFP, a Consultant, if selected for award, shall be deemed to have accepted the terms of this RFP. Any exceptions to this RFP must be clearly identified in the proposal. A proposal that takes exception to these terms may be rejected.

As part of the review process, CPB may share submitted proposals with external organizations who will help CPB with the selection process.

As part of the RFP review process, CPB may share materials, data, other information and analyses (collectively, "Information") with Consultants. As a condition of receiving such Information, Consultants responding to this RFP shall be deemed to agree to protect, preserve and maintain all such Information on a strictly confidential basis, and to promptly return to CPB upon its request all tangible copies of such Information in their possession.

CPB is not responsible for loss or damage to material submitted with or in support of this RFP. Any submission to CPB shall become the property of CPB (not including any intellectual property rights contained in such submission), and CPB is not required to return any submitted materials to any applicant. CPB is not be responsible for any violation of copyright, trademark, patent, trade secret, or other rights that may result from disclosure made by response to this RFP.

Solicitation by CPB of proposals does not constitute an agreement by CPB to extend funding to any party for the project under consideration. CPB may, in its sole discretion, elect not to pursue this project in any manner.

By submitting a proposal, each Consultant grants to CPB the right to duplicate, use, disclose, and distribute all of the materials submitted for purposes of evaluation, review, and research. In addition, each Consultant guarantees that the Consultant has final and complete rights to all of the information and materials included in the proposal. Each Consultant 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 will not be responsible for any costs incurred by a Consultant in preparing and submitting a proposal, or in performing any other activities relative to this solicitation.

X. CONDITIONS OF AGREEMENT

If a proposal in response to this RFP is selected for funding, the successful Consultant(s) 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. Consultants are not authorized to commence work until the agreement is fully executed. If Consultants 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, the successful Consultant(s) 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. Consultants 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) The Consultant will demonstrate adequate financial support to complete the work that has been contracted and to deliver reports and/or other intellectual property created pursuant to the Agreement;
- (2) The Consultant will maintain, for three (3) years following receipt of relevant funds, all financial records to the project, which shall be accessible to CPB and to the U.S. Comptroller General or other representatives for examination and audit purposes. (Consultants will additionally ensure that any subcontractors or consultants under the agreement shall also maintain such records for the period specified and under the same terms);
- (3) The Consultant will maintain, for three (3) years after approval of a final financial report, 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) The Consultant will comply with equal employment opportunity and nondiscrimination laws and policies;
- (5) The Consultant 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;
- (6) 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 Consultant will be required to assign all right, title and interest in and to such research and materials to CPB. Consultants 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;
- (7) The agreement will be governed as construed in accordance with the laws of the District of Columbia without regard to its conflict of law provisions;
- (8) No funds provided by CPB will be used (i) for any activity designed to influence legislation or appropriations pending before the United States Congress or any state legislature or (ii) to conduct any reception or provide any other

entertainment for any officer or employee of the Federal Government or any state or local government; and

(9) Consultants will be required to indemnify and hold CPB harmless from and against all claims, damages, liabilities, costs and expenses (including legal fees) arising out of or related to (i) any alleged or actual breach of any representation or warranty in the operative agreement; (ii) any other default by such Consultant of any term or provision of the operative agreement; or (iii) Consultant's performance under the project.

(10) The principal source of CPB funds is appropriations made by the U.S. Congress to CPB. In the event reductions occur in the amount of such appropriations that materially affect the ability of CPB to meet its obligations, then CPB and Consultant, at the option of CPB, agree to enter into good faith negotiations to modify the agreement.

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