



## **Request for Proposals**

### **Design and Production of CPB Annual Reports for FY 2016, FY 2017 and FY 2018**

**Proposals due DATE – Aug. 24, 2017 at 5 p.m.**

The Corporation for Public Broadcasting (CPB) is seeking a contractor to assist in the design, content development and production of three Fiscal Year corporate annual reports covering FY 2016, FY 2017 and FY 2018.

Offerors responding to this Request for Proposals (RFP) should have experience in marketing and/or public relations communications, designing and creating high-quality reports, with visual appeal and information graphics, for businesses and educational or other not-for-profit institutions.

Each fiscal year annual report is to be prepared as a printable booklet in PDF format suitable for users to view online or download for printing. Actual printing and binding of the report is **not** a part of this project's scope of work.

The completed files must be delivered to CPB for final inspection and acceptance no later than:

- December 6, 2017 for the FY 2016 annual report,
- June 6, 2018 for the FY 2017 annual report, and
- March 15, 2019 for the FY 2018 annual report.

## **BACKGROUND**

CPB is a private, not-for-profit, non-governmental corporation authorized by Congress in 1967 through amendments to the Communications Act of 1934. CPB is exempt from taxes under Section 501(c)(3) of the Internal Revenue Code. CPB promotes non-commercial public telecommunications services (television, radio and digital) for the American people. CPB also provides financial support and a variety of services to locally owned and operated public television and radio stations nationwide. Such support helps guarantee universal access to public broadcasting's educational services and programming, and ensures that stations can exchange program materials through national systems of interconnection. For more information see [www.cpb.org](http://www.cpb.org).

CPB invests in 575 grantees operating nearly 1,500 local radio and television stations – their programs, services and other initiatives to serve and engage the public. CPB funds diverse and innovative multimedia content that is educational, informative and cultural.

CPB-funded television programs are primarily distributed through PBS. The radio programs that CPB funds are distributed primarily through NPR, American Public Media, Public Radio International and the Public Radio Exchange. CPB does more than invest in high-quality programming; it helps parents and teachers educate children by providing resources that enhance the learning process.

## **WORK SCOPE**

CPB seeks a vendor to design and produce print-ready versions of CPB’s Fiscal Year Annual Reports for FY 2016, FY 2017 and FY 2018. Each report shall include highlights, photographs, graphs and success stories of CPB from the respective Fiscal Year, as well as detailed information on CPB grants to stations, producers and other system support. The report design must be professional and easy to read, and design elements should have visual appeal and flow throughout the document. Each Fiscal Year report is to be produced as a “printable booklet” PDF file, downloadable from the CPB website, with active hyperlinks. Examples of previous CPB Annual Reports can be found

<http://www.cpb.org/aboutcpb/financials>

[http://www.cpb.org/files/cpb\\_2014\\_annualreport.pdf](http://www.cpb.org/files/cpb_2014_annualreport.pdf)

This project is expected to involve the following elements:

- I. Required Content (for each Fiscal Year 2016, 2017 and 2018)
  - A. Front and back covers
  - B. Letter from the CEO
  - C. Overview: Brief introductory written and visual matter, highlighting the mission, agenda and accomplishments of CPB in support of public media during that Fiscal Year.
  - D. Highlights: A longer narrative text that underscores the value of public media content and services to the nation, highlights CPB’s work during that Fiscal Year in support of local public media organizations and the producers of content and services for public media, and showcases industry accomplishments and advancements for which CPB provided support
  - E. Financial Statements: CPB’s combined audited financial statements and report of independent certified public accountants for each respective Fiscal Year.

- F. **Financial Infographics:** At least three statistical graphics or tables, with accompanying text and labels, providing a brief visual introduction to the financial activities of CPB and the public media industries
- G. **Programs and Related Projects (P&P):** Views or displays of data identifying and describing all programs, other media content and related projects (approximately 250-300 rows of data per fiscal year) that received direct grant support from CPB during each Fiscal Year or were provided support indirectly through the PBS National Program Service, the Independent Television Service, the National Minority Consortia, or other fiscal agents, including data showing:
  - 1. the name and principal location of the organization that (or person who) received the grant or sub-grant,
  - 2. the program or project title,
  - 3. the total amount of the grant or the amount drawn from each specific pool of CPB funds,
  - 4. the grant type or specific pool(s) of CPB funds from which the grant or allocation was drawn,
  - 5. at least 25 still photographs illustrating programs or projects on which production has been substantially completed by the time this annual report is developed,
- H. **Board:** the names and titles of members and officers of CPB's board of directors as of May 15, 2017, (for FY 2016 report), May 15, 2018 (for FY 2017 report), and May 15, 2019 (for FY 2018 report), with portrait photographs and brief biographical information including their terms of office on the board.
- I. **Corporate Officers:** the names and job titles of CPB's corporate officers as of May 15, 2017 (for FY 2016 report), May 15, 2018 (for FY 2017 report), and May 15, 2019 (for FY 2018 report).
- J. **Funding by State:** individual pages with an overview of public media activity in each state or territory, comprising:
  - 1. **State Map:** a map display of the full power radio and television broadcast stations benefiting from a Community Service Grant from that Fiscal Year
  - 2. **State Financial Overview:** a chart showing the total amount of each type of grant or allocation made by CPB during the respective Fiscal Year
  - 3. **Community Service Grantees:** a display of the total numbers of television and radio Community Service Grantees from that Fiscal Year in that state and list(s) identifying all these grantees with hyperlinks to CPB's station finder pages.
  - 4. **Grant Recipients by City:** a list of all grants and allocations made by CPB to organizations and individuals in that state, including

name of each recipient, the city of each recipient's principal location, and the dollar amount of each grant type or specific pool(s) of CPB funds, in the respective Fiscal Year.

- K. Awards: Names and descriptions of noteworthy industry awards made to CPB and its grantees during the Fiscal Year of the report.

## II. Information Organization, Writing and Editing

- A. Before beginning development of the Fiscal Year annual report, the contractor will deliver to CPB, with maximum time allowed for comments and revisions, a detailed outline of the report structure and content organization.
- B. The contractor will be responsible for:
1. researching and writing certain portions of the report such as table of contents, headlines, subheads, introductory summary or "teaser" copy, captions, cutlines, credit and permission acknowledgements, legends, labels, and "Alt" tags for all image files used,
  2. designing and creating at least three distinct types of information graphics to include CPB and public media industry financial overviews and grant allocations by state, CPB will provide the data to the contractor,
  3. designing and creating small (approximately 1/4-page) maps of each U.S. state or territory (55 instances), on which to display the geographic distribution of public radio and television stations using geospatial data CPB provides to the contractor,
  4. editing and proofreading all text and data provided to the contractor by CPB, and
  5. compiling, revising and editing the *entire* annual report as CPB requests, so as to create a well-written and well-organized document that reflects a logical flow of ideas and compelling presentation of information.
- C. CPB will provide to the contractor:
1. approved text for the CEO's Letter, Overview and Highlights
  2. full data sets (including descriptive text) for Funding by State, P&P, and for the information graphics that preface the Financials section
  3. still photographs and biographic information for Board
  4. a list of corporate officers with job titles
  5. still photographs of a collection of CPB-supported public media stations, programs and projects funded in the respective Fiscal Year
  6. list of awards in that Fiscal Year recognizing CPB supported public media stations, programs and projects
- D. Under the CPB project officer's supervision and with his or her consent, the contractor will collect, confirm or clarify information as needed from CPB staff and from the staff of other public media organizations in person, by telephone or by email.

- E. The contractor will revise and edit — subject to approval and acceptance by CPB — all verbal copy and alphanumeric data to be included in the report, whether written by the contractor or supplied to the contractor by CPB. CPB and the contractor will work together until a final product is realized.
- F. Offerors responding to this RFP should describe how they propose to manage the iterative editorial process including tracking changes. Report data is expected to be converted into MS Word or other processing software after the PDF is finalized. Offerors should allow sufficient time for CPB's response to and approval of revisions of content.
- G. The contractor and CPB will exchange all verbal copy, other data, and audiovisual matter to CPB by email or other means of electronic data exchange or transfer. Upon request and with reasonable notice, the CPB project officer will arrange for a limited number of meetings in person between CPB staff and the contractor's personnel, generally at CPB's offices.

### III. Graphic Design

#### A. The contractor will:

1. develop two (2) graphic design concepts for the annual report, incorporating color palettes, rough prototype cover designs, typographic design, rough page layouts, and order within the booklet for each of the principal content elements as noted above.
2. meet with CPB staff to present and review graphic design concepts and make up to two rounds of revisions to one selected concept, and
3. deliver to CPB documentation of the final graphic design concept as comprehensive page layouts for an initial page and a subsequent page for each of the principal content elements.

#### B. The contractor will:

1. research visual images to be used in the report to supplement, as needed, CPB-supplied images with stock images. Following final image selection, CPB will pay for the cost of purchasing selected stock images or photo rights.
2. document and deliver to CPB written permissions, together with required credit language, for the use of all visual matter not created as a work for hire within the scope of this project
3. edit and/or prepare 25-30 still images for use in the report
4. secure — and deliver to CPB — licenses for the use of any typographic fonts, maps, diagrams, illustrations and other images to be used in the of the report.

**IV. Final Products**

1. The contractor will deliver to CPB for inspection and acceptance the following items by these deadlines for each annual report.
  - December 6, 2017 for the FY 2016 annual report,
  - June 6, 2018 for the FY 2017 annual report, and
  - March 15, 2019 for the FY 2018 annual report.
- a. written documentation of all permissions for the use of all visual matter that was not created as a work for hire within the scope of this project, and
- d. a single indexed PDF file of the “printable booklet” version (not to exceed 5 MB in file size and suitable for either downloading from a CPB website or emailing upon request), containing all pages, including front and back covers, CPB will not accept delivery of any materials that require it to assume or separately to acquire licenses for the use of any software or other intellectual property specifically for the Fiscal Year annual report.

**PROJECT DELIVERABLES TIMELINE**

The contractor will be required to provide the following deliverables in accordance with the timeline below. The deliverables must be of high quality as determined by CPB and at a minimum, conform to the specifications outlined in the Work Scope.

Deliverable	Due Date
Detailed outline of structure and content of report as well as production timeline	To be proposed by offeror
Documentation of final graphic design concept for printable booklet version — comprehensive page layouts	To be proposed by offeror
Initial report designed with content, data and photos for CPB review	To be proposed by offeror
Completed FY 2016 report in printable PDF booklet format	Wednesday, Dec. 6, 2017
Written documentation of all permissions for use of visual and audio/video matter in FY 2016 report	Wednesday, Dec. 6, 2017
Completed FY 2017 report in printable PDF booklet format	June 6, 2018
Written documentation of all permissions for use of visual and audio/video matter in FY 2017 report	June 6, 2018

Completed FY 2018 report in printable PDF booklet format	March 15, 2019
Written documentation of all permissions for use of visual and audio/video matter in FY 2018 report	March 15, 2019

**PROPOSAL SUBMISSION**

Consultant must submit separate technical and costs applications through CPB’s electronic grants management system.

To gain access to this RFP via the Grants Management System, please send an email request to Kimberly Bowser, Public Affairs Manager, at [kbowser@cpb.org](mailto:kbowser@cpb.org) no later than Thursday, August 17, 2017 at 12 p.m. EST. CPB will provide access to eligible applicants within two business days. Include the RFP title in the subject line. In your request, please provide your name, title, phone number, organization name, address and organization web address.

All questions related to this RFP must be submitted via email to Letitia King, SVP, Communications, at [lking@cpb.org](mailto:lking@cpb.org). CPB will post responses without attribution. The deadline for submitting questions is Thursday, August 17, 2017 at 12 p.m. EST.

Submissions are due no later than Thursday, August 24, 2017 at 5 p.m. EST. CPB will not consider applications submitted after this time.

CPB may request offerors with the top scores to meet with and present their proposal to senior management at CPB's offices in Washington, D.C. If so, CPB will notify applicants of the time and date.

Deadline summary

8/17/2017 – Request access to the Grants Management System

8/17/2017 – Submit questions

8/24/2017 – Submit proposal

**REQUIRED PROPOSAL CONTENTS**

I. Technical proposals

Technical proposals should address the offeror’s:

- A. demonstrated skill and experience in marketing and/or public relations communications, designing and producing similar high-quality reports with visual appeal including information graphics, including URLs or digital copies of PDF files for 3 to 5 printed or printable booklets completed recently

- B. staffing plan and proposed approach to accomplishing the specified work scope within the contemplated timeframe (i.e., the number and quality of staff to be assigned to this project, their division of responsibilities and the expected total-time-on-project for each of the principal staff), together with brief summaries of the duration of work and total-staff-time-on-project for the projects cited as evidence of the offeror's skill and experience
- C. plan for managing the project (and particularly the iterative creation, editing, revision and exchange of content and designs between CPB and the contractor), including a brief narrative describing an issue or obstacle that arose in any recent project, and how the offeror dealt with it, and
- D. proposed deadlines for delivery of intermediate project deliverables identified under "PROJECT DELIVERABLES TIMELINE", above.

## II. Fee proposals

CPB contemplates entering an agreement with the chosen offeror providing for a fixed fee covering all services and logistical expenses, including all travel expenses, typography, or other visual design elements in the creation of this CPB annual report.

Fee proposals, however, must also state the offeror's assumed or expected level of effort in terms of time (in hours) on the project for each of the principal personnel that an offeror proposes to assign to this project.

An all-inclusive fee should be stated for the FY 2016 report, and for each of the subsequent years — FY 2017 and FY 2018 — for which CPB would have an option to renew the agreement.

## **EVALUATION CRITERIA**

Proposals will be evaluated based on the following factors (with the weight of each factor expressed as a percentage):

- Skill and experience: as demonstrated in the quality of the offeror's examples of work in marketing and/or public relations communications as well as designing and producing products of recent work like this project (30 percent)
- Staffing plan: reasonableness of the offeror's staffing plans for the quality of staff and their time on the project (25 percent)
- Project management plans: offeror's understanding of issues or problems that could arise and flexibility in anticipating how to forestall them or deal with them as they arise (15 percent), and
- Price: reasonableness of the price, both in total and in view of the expected or assumed level of effort (30 percent).



## **CPB Terms**

The closing date for responses to this RFP is August 24, 2017. Proposals submitted in response to this RFP by an applicant (“Offeror”) shall be valid for at least 90 days following the closing date of proposals.

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Offeror's proposals to meet the requirements of this RFP. Neither multiple nor alternate proposals will be accepted. An Offeror 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 Offeror 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 Offeror’s proposals.

By submitting an offer in response to this RFP, an Offeror, 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 RFP review process, CPB may share materials, data, other information and analyses (collectively, “Information”) with Offerors. As a condition of receiving such Information, Offerors 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 your 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 Offeror. 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.

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 Offeror 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 Offeror guarantees that the Offeror has full and complete rights to all of the information and materials included in the proposal. Each Offeror 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.

## **Conditions of Agreement**

If a proposal in response to this RFP is selected for funding, Offerors 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. Offerors are not authorized to commence work until the agreement is fully executed. If Offerors 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, Offerors 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. Offerors 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 financial support 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 3 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. (Offerors 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) Maintenance, for 3 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) Submission to CPB of a copy of any U.S. Comptroller General final audit report in connection with the project;
- (5) Compliance with equal employment opportunity and nondiscrimination laws and policies;
- (6) Offerors will be required to provide documentation as to actual costs;
- (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 Offeror will be required to assign all right, title and interest in and to such research and materials to CPB. Offerors 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.

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