



**Request for Proposals (“RFP”)
Consultant for Editorial Leadership Meeting**

Deadline for response: 5:00 PM EDT, August 14, 2015

1. OVERVIEW

The Corporation for Public Broadcasting (“CPB”) seeks a consultant (“**Consultant**”) to facilitate a first-ever meeting of local/regional editorial leaders (“**Editorial Leadership Meeting**”) to drive the momentum of collaboration to the next level: building a neural network of public media journalism. The Consultant must be a facilitator with significant experience facilitating large groups of 30 or more managerial-level participants with a wide range of differing views.

The meeting is tentatively scheduled for **October 29-30, 2015**. The Consultant will work closely with CPB and a small group of advisory editorial leaders selected by CPB to plan the agenda. CPB anticipates the meeting will include between 30 and 40 editorial leaders from CPB-funded Local Journalism Collaborations (“**LJCs**”) and Regional Journalism Collaborations (“**RJCs**”), and key editors from flagship national public media news programs.

2. OBJECTIVES

The objectives for convening the Editorial Leadership Meeting are as follows:

- a. advance local/regional/national content sharing and co-production for higher impact;
- b. encourage sharing of best practices and lessons learned from journalism collaborations;
- c. accelerate the evolution of public media stations into multi-media news production operations; and
- d. foster discussion around public media's editorial standards, ethics, and practices.

3. BACKGROUND

Over the past several years, one of CPB’s priorities has been to augment journalism quality and quantity in local public media. CPB continues to believe that supporting local journalism capacity strengthens the local-national partnerships developed through the LJCs and RJCs and enables public media to address the information needs of local communities and the entire country. Initial CPB support in this area has resulted in the Northwest News Network (N3), Project Argo, LJCs, RJCs, and various Education reporting initiatives. Several of these collaborations were profiled by the Pew Research Center’s Journalism Project.

4. PROJECT SCOPE

The facilitation process is expected to include, but is not limited to, the following:

- a. Develop, in cooperation with CPB, the agenda for the Editorial Leadership Meeting and any necessary supporting materials;
- b. assist CPB in planning discussions and meetings (via conference calls);
- c. provide advice and suggestions for preparatory materials for the Editorial Leadership Meeting, to be distributed to attendees prior to the meeting;
- d. identify speakers and/or moderators for the Editorial Leadership Meeting;
- e. produce follow-up materials to provide to attendees after the Editorial Leadership Meeting concludes;
- f. conduct a survey of attendees after the meeting to establish the value of the Editorial Leadership Meeting ("**Survey**"). The Survey will be developed with input from CPB and consist of approximately seven to 10 questions. The Survey will be conducted using Survey Monkey or another similar application. The results of the Survey must be presented in publishable form, as it may be distributed by CPB to the public media system; and
- g. provide CPB with a short report detailing recommendations on how CPB could structure a second meeting.

5. PROPOSAL REQUIREMENTS

Applicants must separate their technical and cost proposals.

a. **Technical Proposals** - should include the following information in the order specified:

(i) **Executive Summary** (Microsoft Word or Adobe format) Written narrative (1 page maximum) clearly outlining:

- (A) Summary of the Consultant's qualifications for this project, based on requirements stated above;
- (B) Consultant's knowledge of and familiarity with public media and journalism, and current issues facing each; and
- (C) Summary of the approach to facilitating the meeting.

(ii) **Project Narrative** (Microsoft Word or Adobe format) - A written description of the project that clearly addresses the following in the order specified:

- (A) the Consultant's approach to facilitating the meeting, including preparing the agenda and materials for the meeting, conducting the Survey, and providing CPB with publishable results (two page maximum);

- (B) a detailed breakdown of the major elements of the project, which may be similar to those below, and the number of hours and staff assigned to each element (two page maximum):
- preparation of the agenda and meeting materials;
 - conducting the facilitation;
 - developing and administering the Survey; and
 - creating the final recommendations for CPB
- (C) a description of how the Consultant has addressed conflicts and issues that arose in prior facilitations and what actions the Consultant took to ensure that the meeting stayed on course and that the meeting objectives were met (one page maximum);
- (D) examples of facilitations the Consultant has conducted with groups of 30 or more managerial-level (or higher) participants with differing views. Please include examples (or links to examples) of materials developed for the meetings, details of any surveys conducted, and examples of reports written after the facilitation summarizing the results of the facilitations and recommendations for the meeting hosts. The examples should demonstrate the Consultant's ability to:
- summarize and articulate rapidly evolving ideas and themes;
 - synthesize large volumes of complex information; and
 - strategically guide discussions.

(iii) References - References from three clients for whom the Consultant has provided facilitation services similar to those being requested, during the past five years. The references will be asked to attest to the Consultant's ability to summarize and articulate rapidly evolving ideas and themes, and the Consultant's ability to synthesize large volumes of complex information and strategically guide discussions. Please include the telephone number and email address of each reference.

b. Cost Proposals - should include a detailed breakdown of the Consultant's fees by task, including:

- (i) The hourly and daily rates of the assigned staff to prepare for and conduct the facilitation;
- (ii) The cost of any materials the Consultant expects to develop for the facilitation;
- (iii) A detailed list of any other anticipated expenses; and
- (iv) An acknowledgement that the Consultant has read and will follow CPB's travel policy (attached as Exhibit A), which states that all travel must be pre-approved in advance by CPB.

6. SELECTION CRITERIA

Proposals will be evaluated based on the following criteria, with the associated weights.

- a. Proposed approach to conducting the facilitation and the suggested facilitation techniques (25%);
- b. The quality of the examples provided and whether they demonstrate the Consultant's ability to successfully act as the facilitator for the Editorial Leadership Meeting (25%);
- c. The feedback received from the references and whether it demonstrates the Consultant's ability to summarize and articulate rapidly evolving ideas and themes, synthesize large volumes of complex information, and strategically guide discussions (25%);
- d. Reasonableness of the proposed cost (25%).

7. SUBMISSION OF PROPOSALS

a. Applicants ("**Applicant**") must divide their proposals and submit their Technical Proposal in either Microsoft Word or PDF format via e-mail to Erin Day, Director of Journalism, eday@cpb.org. Applicants' Cost Proposals must be submitted in either format to Jackie Livesay, Assistant General Counsel & Vice President, Compliance, jlivesay@cpb.org.

b. All questions must be submitted to Ms. Day in writing at the email address above and will be posted without attribution and answered on CPB's website. CPB may request Applicants with the top scores to meet with senior management at CPB's offices in Washington, D.C. If so, CPB will notify Applicants to schedule these meetings.

c. The deadline for submission is **5:00 p.m. Eastern Daylight Time, August 14, 2015**. Each proposal received will be acknowledged upon receipt.

8. RIGHTS AND USE

a. CPB is not responsible for loss or damage to the material submitted, or for any unauthorized use or misuse of the submitted materials by any third party. 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.

b. 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.

c. By submitting a proposal, each Applicant 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 Applicant guarantees that the applicant has full and complete rights to all of the information and materials included in the proposal. 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.

9. RIGHTS AND RESPONSIBILITIES

a. All quotes and/or other proposals contained in an Applicant's response to this RFP shall be valid for at least 60 days following the RFP deadline.

b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Applicant's proposals to meet the requirements of this RFP. Neither multiple nor alternate proposals will be accepted. An Applicant should give specific attention to the clear identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets.

c. 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 proposal must be included in the Applicant's proposals.

d. By submitting a proposal in response to this RFP, an Applicant, 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.

e. As part of the proposal review process, CPB may share materials, data, other information and analyses (collectively, "Information") with Applicants. As a condition of receiving such Information, Applicants 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.

f. By submitting a proposal, each Applicant 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 Applicant guarantees that the Applicant has full and complete rights to all of the information and materials included in the proposal. 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. Additionally, each Applicant agrees to indemnify CPB with respect to the aforementioned guarantees.

10. PREVIEW OF GRANT REQUIREMENTS

Grant payments will be contingent upon the delivery of specific components related to project implementation, including, but not limited to, the agenda and meeting materials, the facilitation, the Survey and other follow-up materials, and the final recommendations.

11. CONDITIONS OF AGREEMENT

a. CPB will require all grant recipients to agree to these terms and conditions and does not plan to modify them for individual grant recipients.

b. If an proposal is selected for funding, Consultants 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.

c. As a condition of agreement, Consultants 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. Applicants must also agree to indemnify CPB against any loss resulting from breach of any of the guarantees contained in the agreement.

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

- (i) 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;
- (ii) 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. (Applicants 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);
- (iii) 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;
- (iv) Compliance with equal employment opportunity and nondiscrimination laws and policies;
- (v) 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 legislative 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;
- (vi) Applicants 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 applicant of any term or provision of the operative agreement; or (iii) Applicant's performance under the project;
- (vii) Applicants will be required to provide documentation as to actual costs; and
- (viii) The agreement will be governed by construed in accordance with the laws of the District of Columbia without regard to its conflict of law provisions.

e. Other material terms and provisions will be set forth in the documents provided to the Applicant who successfully completes the selection process.

f. CPB will be provided with non-exclusive rights to use and copy the reports created as deliverables for this project.

g. CPB will not be responsible for any costs incurred by an Applicant in preparing and submitting a proposal, or in performing any other activities relative to this solicitation.

EXHIBIT A

EXPENSE GUIDELINES

Non-Employee Travel Expense Guidelines

Travel expenses incurred by non-CPB staff (including consultants) need to be itemized in the Non-Employee Expense Form. Each expense of \$25.00 or more must be supported by an original receipt. Expenses requiring CPB approval must evidence such approval. Reimbursement of travel expenses is subject to the following limitations:

1. **Transportation**

Only coach or economy class airfare, rail fare or bus fare will be reimbursed towards travel expenses. Travelers must make every effort to plan travel and book transportation sufficiently in advance so as to realize cost savings, and are required to accept the lowest fare available for the required itinerary. Final fare coach may be used only in unusual and/or special circumstances and, in each such instance, a detailed explanation shall be provided and reimbursement shall be contingent upon approval by CPB.

Private automobile use will be reimbursed at the prevailing IRS rate of 57.5 cents per mile for 2015, but not in excess of the lowest available airfare. Taxicab fare will be reimbursed to the extent reasonable and necessary. Rental car expense will be reimbursed only when the daily taxi fare would exceed the per-day car rental rate, or when no other convenient and less expensive form of ground transportation is available. Travelers may rent intermediate-size vehicles.

2. **Lodging**

CPB will only reimburse for reasonable, standard rate, single room accommodations and appropriate incidental charges. Incidental expenses incurred for comfort, grooming or personal enjoyment, such as airline and room movies, haircuts, shaving equipment, shoe shines, etc., are not eligible for reimbursement.

3. **Meals**

CPB will reimburse for meals up to a total of \$65.00 per day for domestic travel and \$75.00 per day for foreign travel, provided that meals are not otherwise furnished or included in connection with an activity.