



**Strengthening and Systematizing CPB's Information Processes
CORPORATION FOR PUBLIC BROADCASTING
Request for Proposals**

APPLICATION DEADLINE EXTENDED: Friday, August 4, 2017 at 12:00 PM EDT

I. RFP AT A GLANCE

The Corporation for Public Broadcasting (“CPB”) seeks to engage an organization (“Consultant”) to help CPB staff improve its data collection and analysis. As with any nonprofit funding organization, CPB conducts routine reviews of its processes and is currently looking to strengthen its measurement systems. With increasing access to data and information, CPB sees an opportunity to update and enhance its collection of metrics. The Consultant will: (a) assist CPB staff in improving its outcomes framework that will define future goals and metrics for CPB’s work; (b) assess and provide recommendations to enhance CPB’s current measurement process and data sets; and (c) provide recommendations on how CPB can advance its learning culture and its strategic use of information.

We anticipate this engagement will last approximately six months and the Consultant will be compensated on a fixed fee basis. CPB may extend the agreement to up to three additional six-month terms for the Consultant to provide any follow-up work, at CPB’s sole discretion.

II. ABOUT CPB

CPB is a private, non-profit corporation authorized by Congress in 1967 to receive federal government appropriations and to use those funds to promote the growth and development of public broadcasting and public telecommunications services. CPB is not a government agency.

CPB’s mission, as assigned by Congress, is to ensure universal access to high-quality content and services that inform, educate, enlighten, and enrich the public and help inform civil discourse essential to American society.

Accordingly, through its grantmaking, CPB encourages the development of content that involves creative risk and addresses the needs of unserved and underserved audiences, especially children and minorities. CPB’s core values of collaboration, partnership, innovation, engagement and diversity guide

its strategic approach to program investments system-wide and are reflected in the goals of its business plan as the Three D's: digital, dialogue and diversity.

Through its investments in approximately 1,500 local public radio and television stations, CPB also strengthens and advances a public media system that is valued by all Americans. With CPB support, local stations develop programs, services, and other initiatives that reflect a diversity of ideas, talent, and distribution, and actively serve and engage the public.

III. BACKGROUND

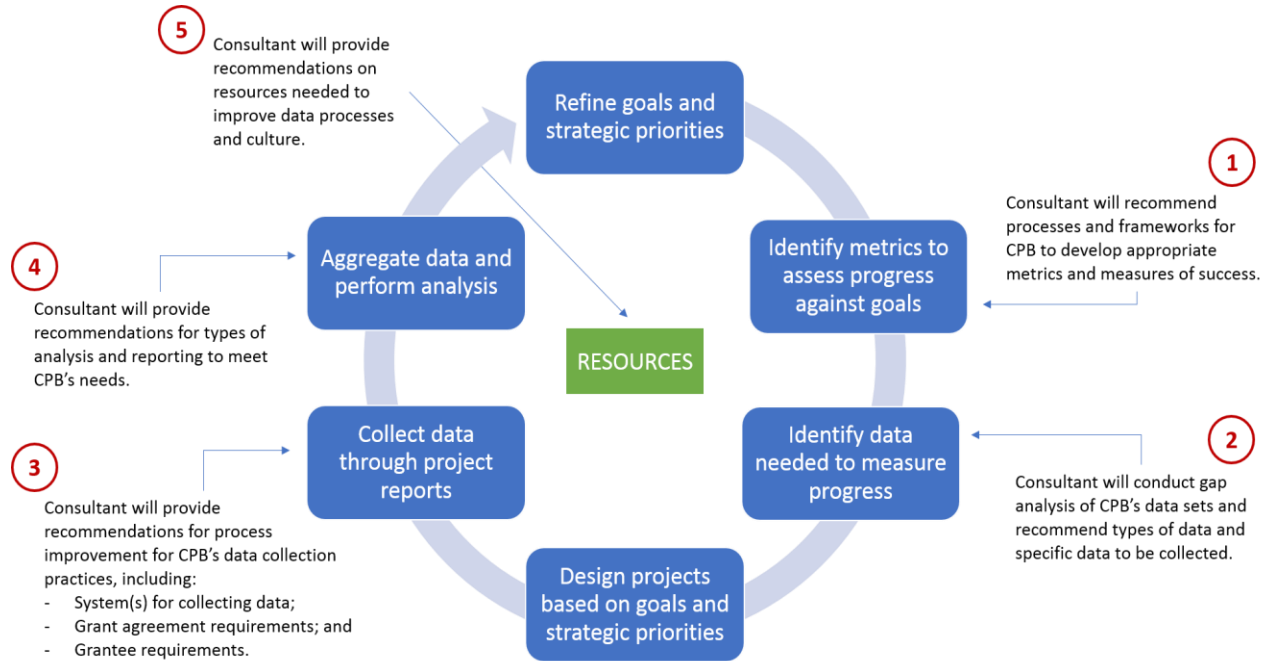
CPB funds projects and initiatives within four main areas: general audience content (television, radio, and multi-platform); early education content and services; journalism; and public media stations and infrastructure. Content projects include, but are not limited to: multi-episode, multi-platform series that are designated for national distribution; one-time programs or films; and professional development programs for under-represented independent filmmakers. Early education content and service projects include: young children's content (which includes the production of shows, web-based and mobile games and apps, and community engagement) and initiatives that strengthen the system's ability to engage teachers, parents, and caretakers. Journalism projects include: increasing journalism capacity in public media through collaborations; national journalism efforts; and professional development programs that increase the diversity of journalistic organizations and entities. Lastly, CPB provides infrastructure support and station support through its system development grants. Though CPB funding falls within four distinct areas, many grants are inter-related and often build off previously CPB funded initiatives.

CPB collects data and information from a multitude of sources. Much of this information is delivered at the project and initiative level, in which CPB measures against specific, contracted-for performance in grant agreements. These sources of information include, but are not limited to: grant reports for content, early education, and journalism projects; surveys of 581 local public media stations (which includes 67 questions for television and joint licensee stations, and 35 for radio stations) that report on financial and operational data; and third-party datasets (e.g. Census data, audience data, etc.). Often, grant reports for content and journalism projects will include station carriage information, social media and web analytics, media coverage and awards, and local station engagement efforts. Early education grant reports will often also include reach and usage, as well as research and studies on student learning gains. CPB receives grant reports at interim as well as at the end of the grant. Station surveys are conducted on an annual basis. Third-party datasets are received upon request.

New modes of content engagement, however, have introduced new data points. Technological advancements have also enabled increased access to data and information. Acknowledging these critical industry changes, CPB is interested in incorporating this information to more effectively assess public media's impact in terms of its mission.

While many companies are turning to data to drive strategy and decisions, CPB, as a nonprofit, mission-oriented organization, must continue to inform its work on behalf of its mission with its strategic use of information. By strengthening its current measurement systems and enhancing its data sets, CPB intends to increase the effectiveness of its grants, empower staff to define more realistic and measurable objectives, and advance its culture of learning. A balance of mission and data will inform future priorities, as well as establish an essential baseline for success.

CPB’S MEASUREMENT AND INFORMATION CYCLE:



IV. EXPECTED OUTCOMES FOR CPB

At the end of the engagement, CPB anticipates achieving the following outcomes:

1. Improved data collection process(es) (from grant reporting, system consultations, and other data sources) and analysis to allow for more systematic review of our progress, including:
 - a. Identifying untapped data sets and/or information that will enhance current measurement systems; and
 - b. Improving current benchmarking and trendspotting processes;
2. Ensure staff have the appropriate tools and skills to effectively and systematically use data.

V. PROJECT SCOPE

CPB is seeking a consultant that will assist CPB in improving its data collection and analysis. The engagement requires three key phases (the Consultant should propose the order in which to address these phases in its workplan).

1. Improve Outcomes Framework

Define the goals and metrics of our work.

- a. Review CPB goals and strategic priorities and recommend a model or framework (and identify best practices) for defining measurable and actionable outcomes. We will provide applicants with a copy of CPB's goals and strategic priorities upon receiving a signed non-disclosure agreement;
- b. With those recommendations, provide guidance to CPB on developing analysis models (including benchmarking and trendspotting) that will help inform future priorities;
- c. Recommend metrics that effectively measure expected outcomes and goals; and
- d. Recommend criteria that CPB might implement going forward to determine future priorities and the degree to which that criteria should include data.

2. Enhance Data Collection

Conduct a gap analysis and audit of existing datasets and processes. Provide recommendations on how to improve it.

- a. Conduct an assessment and gap analysis of the data and information CPB currently collects, and identify metrics or data sets that CPB should collect (and, if applicable, provide pricing models/recommend ways on how to access it). We will provide applicants with copies of several representative projects upon receiving a signed non-disclosure agreement;
- b. Review the financial and operational information that CPB collects from local public media stations and provide recommendations on improving the survey questions and use of the data. We will provide applicants with a copy of the survey questions upon receiving a signed non-disclosure agreement;
- c. Provide recommendations on data standards, including but not limited to:
 - i. How information is collected;
 - ii. Terminology and methodology; and
 - iii. Analysis;
- d. Provide recommendations on how to effectively build metrics and data into grant contracts and reporting, including but not limited to:
 - i. Language in contracts;
 - ii. Reporting mechanisms; and
 - iii. Frequency in which CPB collects data from grantees and other sources;
- e. Assess how much additional support CPB should provide to ensure grantees have capacity and resources to provide metrics and data; and

- f. Provide recommendations on a system or architecture that will allow for improved data storage, analysis, and reporting.

3. Advance Strategy and Learning Culture

Provide recommendations on how CPB will more effectively use data.

- a. Provide recommendations on staffing requirements and/or professional development that will enable more effective use of data; and
- b. Provide recommendations on sharing and disseminating findings to key stakeholders, including stations, producers, Congress, etc. Are there specific policies or best practices we should have in place?

The Consultant will be expected to update CPB biweekly on its progress, produce a final report on the project, and present the recommendations and results to CPB executive staff and/or CPB's Board.

VI. PROPOSAL REQUIREMENTS

Proposals should include a project proposal provided in Microsoft Word or Adobe PDF format and a cost proposal which must be submitted in Microsoft Excel format.

I. Project Proposal

The project proposal should include:

- 1. A detailed plan for managing the project, including:
 - a. A narrative description of the approach to completing the project;
 - b. A staffing plan identifying the number of staff to be assigned to the project, their division of responsibilities and expected total time on project for each staff; and
 - c. A project plan that summarizes the approach, staffing plan and timeline.
- 2. Three to four examples of recent projects demonstrating the applicant's experience in developing data management and data strategy for nonprofit funding organizations, including a detailed description of the services provided and the outcomes, along with the name and contact information for the clients referenced in the examples.
- 3. The resumes or curriculum vitae of staff allocated to the project, demonstrating skills and experience necessary to complete the project.

II. Cost Proposal

Proposals should include:

- a. A detailed breakdown of the project cost, identifying the staffing plan and rates for staff assigned to the project broken down by task assigned to the project and their hourly rates;

- b. Any travel expenses; and
- c. The hourly rates of the staff the Consultant may require during the optional six-month terms.

VII. SELECTION CRITERIA

The proposals will be evaluated using the criteria and weights below.

1. Approach and Timeline (40%)
The quality of the Consultant's proposed plan, including demonstrated understanding of the problem, methodologies to be utilized, division of the problem into appropriate tasks, and likelihood of achieving the project goals.
2. Skills and Experience (30%)
The Consultant has demonstrated experience in developing data management and data strategy for nonprofit funding organizations as evidenced by examples of its work; Consultant and staff must have experience and/or education relevant to the proposed scope of work as evidenced by staff resumes and curriculum vitae; and not more than three client references from the sample work, with their contact information.
3. Cost (30%)
The reasonableness of the proposed project cost.

VIII. SUBMISSION OF PROPOSALS

Applicants must submit their technical and cost applications through CPB's electronic grants management system.

To gain access to the electronic grants management system, please send an email request to Connie Jiang, Research & Strategy Analyst at cjiang@cpb.org, no later than **Thursday, August 3, 2017 at 12:00 PM ET**. CPB will provide a non-disclosure agreement for eligible applicants to sign and return within two business days. Once the signed agreement has been received, CPB will provide samples of the type of work the Consultant is expected to review and access to the electronic grants management system.

Applications are due no later than **Friday, August 4, 2017 at 12:00 PM ET**. CPB will not consider applications submitted after this time.

All questions must be submitted in writing to Connie Jiang at the email address above. The questions (without attribution) and CPB's responses will be posted on CPB's website.

CPB may request applicants with the top scores 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.

IX. TIMETABLE

ACTIVITY	DATE
Deadline to request access to CPB's electronic grants management system	12pm EDT August 3, 2017
Applications due to CPB	12pm EDT August 4, 2017
Proposal Review and Selection	August 18, 2017
Contract Drafting and Execution	September 8, 2017

X. PROPOSALS

- A.** 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.
- B.** Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Consultant's proposals to meet the requirements of this RFP.
- C.** Neither multiple nor alternate proposals will be accepted. A 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.
- D.** 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.
- E.** 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.
- F.** As part of the RFP review process, CPB may share materials, data, other information and analyses about the project with Consultant. As a condition of receiving this information, the Consultant are deemed to agree to protect, preserve and maintain all this information on a strictly confidential basis, and to promptly return to CPB upon its request all tangible copies of such Information in your possession.

- G.** 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 Consultant. 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.
- H.** 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.
- I.** 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.

XI. CONDITIONS OF AGREEMENT

If CPB funds a proposal, 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. Consultant are not authorized to commence work until the agreement is fully executed. If the Consultant 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 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. Consultant 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, which includes but are not limited to the following.

- 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 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. (The Consultant will additionally ensure that any subcontractors or consultant under the agreement shall also maintain such records for the period specified and under the same terms);

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. The Consultant who plans to engage subcontractors will be expected to obtain competitive bids, and to provide assurances that the prices obtained for any such services are fair and reasonable;
6. 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;
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 Consultant will be required to assign all right, title and interest in and to such research and materials to CPB. The Consultant 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;
8. 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;
9. 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
10. The Consultant 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.

Other material terms and provisions will be set forth in the documents provided to the Consultant that successfully completes the selection process. CPB will have complete rights to the reports created as deliverables for this project. CPB will not be responsible for any costs incurred by the Consultant in preparing and submitting a proposal, or in performing any other activities relative to this solicitation.

XII. 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:

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 55.5 cents per mile for 2013, 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.

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.

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.