



## REQUEST FOR PROPOSAL

### SABS-SAS Survey Administration & Management Project

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**FILING DEADLINE: *August 26, 2021 by 3:00 PM ET***

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#### **I. OVERVIEW**

The Corporation for Public Broadcasting (“CPB”) seeks a consultant to provide administrative, operational, and analytical support for CPB’s online survey modules.

CPB created and maintains an online database that gathers essential data from our grantees, both public television and public radio stations. The data gathered is used to calculate the amount of each station’s annual community service grant (“CSG”). The online database consists of three independently maintained modules, namely a station grants management module, a Station Activities Benchmarking Survey module (“SABS”) and a Station Activities Survey module (“SAS”). Stations use our proprietary online database to manage their grants as well as to complete these annual surveys. Currently, the Station Activities Benchmarking Survey is completed by television stations and the Station Activities Survey is completed by both television and radio stations.

In providing administrative and operational support to grantees for the online survey modules, the key components will be updating, launching, and managing the surveys; providing customer support to CPB and participating stations; as well as providing CPB with ad hoc analysis of the data collected, as detailed in the work scope. These services will be required year-round and will necessitate increased staffing support during peak activity times. Additional details on the level of staffing required during peak times is explained in the Work scope below.

This contract will cover a 24-month period, beginning **September 1, 2021 through August 31, 2023** and CPB will compensate the consultant on a fixed fee basis. The contract will be renewable at CPB’s sole discretion for up to two additional two-year terms to provide the same or similar services.

## **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 remains focused on facilitating a public media system that is valued by all Americans and reflects a diversity of ideas, content, talent, and delivery. 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 digital, dialogue and diversity. CPB invests in approximately 1,500 local radio and television stations: programs, services, and other initiatives to serve and engage the public. CPB funds diverse and innovative programming and other media content that is educational, informative, and cultural. CPB has a mandate to ensure over-the-air access to public television for all Americans.

## **III. WORK SCOPE**

The consultant must be able to seamlessly accommodate fluctuating needs throughout the year. Currently, this project is being supported by two contractors working approximately 40 hours per week. Higher demand times typically coincide with the launch, collection and CPB's approval of both surveys which occurs annually from January through May. During this period, the consultant must make at least four additional individuals available for a total of six, to allow each to work up to 40 hours per week to meet this project's increased service requirements.

Throughout the term, the consultant will be expected to assist with the following and other similar activities.

### **Survey Support**

- Survey Updates: Assist with survey revisions as CPB updates them to capture increasingly relevant data as the public media system changes.
- Data Checking: Perform data checks and follow-up with stations to correct missing or possibly incorrect survey data. Annually, stations submit approximately 720 surveys total. This number may fluctuate annually depending on the number of grantees.
- Survey Support Materials: Assist with the maintenance and dissemination of survey materials, copies of which are located on the [CPB](#) website. Examples of those materials are linked ahead. (i.e. [SAS instructions](#), [SABS instructions](#), survey FAQs, the [FTE Workbook](#), and versions of both surveys in Excel format). The FTE Workbook is a standardized tool that allows stations to methodically estimate FTE (Full Time Equivalent) within their organizations. We encourage stations to use the FTE Workbook as it ensures that the expenses and staffing data that we collect in the Station Activities Benchmarking Survey are standardized across stations. The FTE

Workbook may need to be updated if we make changes to the *Expense* and *Staffing* sections of the Station Activities Benchmarking Survey.

- Online System Enhancements: Identify and implement CPB approved enhancements to the online system and surveys.

### **Analytical Support and Survey Review Support**

Consultant will provide the following ad hoc analysis and services upon CPB's request.

- Conduct financial analysis of station revenues and expenses for the stations and CPB.
- Analyze and prepare in-depth reports to identify trends within a variety of public broadcasting station cohorts and for individual stations to compare their performance to that of other stations in their cohort based on a variety of different criteria (e.g. budget size, licensee type, etc.).
- Develop reports and recommend analysis that would benefit CPB, stations and the public broadcasting system. Examples of ad hoc analyses that we have requested in the past are survey late filing reports as well as analyses on staffing trends.
- Participate in the survey review process and attend strategy and consultation meetings, assist with reduction of data duplication, and identify new data metrics. Virtual meetings are expected until in-person meetings may be held safely.
- Assist CPB with developing new survey support materials.
- Coordinate with CPB's application developer to ensure survey revisions are integrated into our online database.

### **Training Support**

The consultant must:

- Conduct a minimum of six live content-based webinars per CPB fiscal year, three must review the Station Activities Benchmarking Survey and the other three webinars must review the Station Activities Survey. All training must be recorded and at least one webinar per survey each fiscal year made available for CPB to upload to our [training webpage](#) to make available to stations.

## **Customer Support**

The consultant must:

- respond promptly to questions and technical issues raised by stations and CPB regarding the completion of the surveys and the navigation of the survey modules in the online database; and
- assist stations with filling extensions for both surveys via the survey module in the online database.

## **IV. EFFORT**

CPB estimates that the level of effort (hours) required is approximately 1,700 hours per year as shown below.

<b>Area of Effort</b>	<b>FY1Q</b>	<b>FY2Q</b>	<b>FY3Q</b>	<b>FY4Q</b>	<b>Annual</b>
Analytics and Survey Review	175	175	75	75	500
Survey Support	275	275	100	100	750
Knowledge Support	75	125	10	15	225
Training	150	50	25	0	225
<b>Total</b>	<b>575</b>	<b>525</b>	<b>310</b>	<b>290</b>	<b>1700</b>

## **V. PROPOSAL REQUIREMENTS**

Applicants must submit separate technical and cost proposals. No cost information may be included in applicant's technical proposals. CPB reserves the right to disqualify applicants that include cost information in their technical proposal.

All responses to this RFP must include the following:

1. Cover Page: The project title ("SABS-SAS Survey Administration & Management Project"), primary contact name, mailing address, e-mail address and telephone number.
2. A technical proposal that is consistent with the cost proposal. The technical proposal should identify each phase of the project and should include an estimated timeline complete with the hours and staff needed to complete each phase. Attention should be paid to:

- i. Applicant's approach to managing the project, including method for onboarding its team.
  - ii. The consultant's plan to support fluctuating workflow, particularly during the peak period of January through May.
  - iii. A list of the proposed staff who will be assigned to the project.  
Please include for each person a summary that details all relevant experience and assignments along with bios and resumes. Relevant experiences and assignments should highlight the following:
    - Knowledge of public broadcasting finance;
    - Experience with benchmarking and survey development;
    - Knowledge of current public media business models;
    - Knowledge of regulatory issues affecting broadcast television stations; and customer service experience.
3. Examples of no more than three projects similar to the one described in this RFP that the applicant and the proposed staff have completed in the past five years.  
Please be sure to include a brief description of the work performed for each project.
  4. Examples of instructional and training materials written for past projects.
  5. At least three references from the projects listed in the proposal, including name and contact information.

Cost proposals must include the following:

1. Cost Breakdown: A breakdown of applicant's costs by major task used in its technical proposal with the number of hours and rates for each proposed staff member during the contract term and the hourly rates for any renewal periods.
2. Travel Costs: With COVID-19 pandemic still in place, there is currently no expectation of travel. However, some travel may be required later in the term when safe and consistent with the Centers for Disease Control's guidelines. All travel is subject to CPB's advance written approval and must be in accordance with CPB's Expense Guidelines set forth in Section X of this RFP.

## **VI. EVALUATION CRITERIA**

Proposals will be evaluated based on the following factors (with the weight of each factor expressed as a percentage). CPB may request the top scoring applicants to present their proposals virtually. If selected, CPB will contact the applicant to schedule a time.

- A. Approach: The quality of applicant's approach to the project and whether it demonstrates applicant's ability to seamlessly maintain and update the online system to meet the fluctuating project demands advise CPB on issues around broadcast engineering services. (20%).
- B. Examples: Quality of the project examples provided, as distinguished from the writing samples, and whether the project examples demonstrate that the applicant has the requisite knowledge and expertise to complete the project described in the RFP. (30%).
- C. Experience: The experience of applicant, the proposed staff, whether it demonstrates their ability to support and update the online system. (15%)
- D. Writing Samples and References: Quality of training and instructions examples as well as the quality of references submitted. (5%)
- E. Cost: Reasonableness of proposed cost (30%).

## **VII. PROPOSAL SUBMISSIONS**

Proposals should be submitted in either Microsoft Word or PDF format and are due **August 26, 2021 at 3:00 PM (ET)**.

Applicants must prepare and submit separately, their technical and cost proposals through CPB's electronic grants management system. To gain access to the system, please send an email request to Kortnei Morris, Project Manager, [kmorris@cpb.org](mailto:kmorris@cpb.org), no later than 3:00 PM ET on **Thursday, August 5, 2021**. CPB will provide access to eligible applicants within two business days.

All questions related to this RFP must be submitted in writing no later than **Friday, August 20, 2021** to Ms. Morris at the email address above. The questions and CPB's responses will be posted on CPB's website without attribution.

Below are the key dates for the RFP proposal process:

<b>Activity</b>	<b>Date</b>
Deadline to request access to Grants Management System	<b>Thursday, August 5, 2021</b>

Deadline for questions	<b>Friday, August 20, 2021</b>
Proposal submissions due, 3:00pm ET	<b>Thursday, August 26, 2021</b>
Proposal Selection	<b>Monday, September 27, 2021</b>

### **VIII. CPB Terms**

This RFP does not constitute an agreement by CPB to extend funding to any party. CPB may, in its sole discretion, elect not to pursue this project. Proposals submitted in response to this RFP shall be valid for at least 90 days following the closing date. Additional terms follow.

1. **Multiple Applications.** Neither multiple nor alternate applications will be accepted.
2. **Confidential Information.** Applicant should clearly identify any portion of its proposal that it considers confidential, proprietary commercial information or trade secrets.
3. **Subcontractors.** Applicant must identify all subcontractors and advisors and include a description of their roles.
4. **Exceptions.** Applicants selected for funding are deemed to have accepted the terms in this RFP. Any exceptions to these terms must be clearly identified in their proposals. CPB, at its sole discretion, may reject proposals that include exceptions.
5. **CPB Information.** In reviewing Applicant's proposal, if CPB's shares materials, data, other information and analyses (collectively, "Information") with Applicant, Applicant shall be deemed to agree to protect, preserve and maintain Information on a strictly confidential basis, and to promptly return to CPB, upon its request, all tangible copies of Information in Applicant's possession.
6. **Proposals.** By submitting a proposal, 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, Applicant guarantees that it has full and complete rights to all the same and guarantees that 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 loss or damage to materials that Applicant provides to CPB in conjunction with this RFP. Upon submission, said materials shall become CPB's property (not including any intellectual property rights contained in such submission), and CPB is

not required to return the same. Applicant is responsible for any violation of copyright, trademark, patent, trade secret, or other rights related to such material.

#### **IX. CONDITIONS OF AGREEMENT**

CPB is not responsible for any costs incurred by Applicant in preparing and submitting its proposal in response to this RFP, or in performing any other activities relative to this solicitation. If a proposal is selected for funding, Applicant must sign a binding agreement that meets with CPB's approval (Agreement). Until the Agreement is executed by both parties, no express or implied commitment has been made to provide funding. Applicant is not authorized to commence any work until the Agreement is fully executed, nor will CPB compensate it for the same.

Applicant must guarantee that, among other things, any work it undertakes is not defamatory and will not violate or infringe upon the privacy rights, copyrights or other proprietary rights of any third party. Applicant must also agree to indemnify CPB against any loss resulting from breach of any of the representations and warranties in the Agreement.

The Agreement will contain additional requirements, including but not limited to the following:

1. Applicant's Financial Position. Applicant must demonstrate that it has adequate financial support to complete the work and to deliver reports and/or other intellectual property set forth in the Agreement;
2. Record Keeping. Except for the work that Applicant completes pursuant to a fixed price fee structure, Applicant must provide CPB with documentation that evidences the actual costs of the project (including timesheets or other relatively contemporaneous record-keeping documents), and supporting documentation that demonstrates that all costs were reasonable, necessary, and incurred for the project;

Applicant must maintain, for three years following the final payment for the project, all financial records to the project, which shall be accessible to CPB and to the U.S. Comptroller General or other representatives of each for examination and audit purposes. Applicant will additionally ensure that any subcontractors or consultants it engaged for the project also maintain such records for the same period and under the same terms;

3. Applicant must maintain, for three years following the final payment for the project, all subcontracts and other agreements, licenses, clearances and other documents related

to the work undertaken, copies of which shall be made available to CPB and to the U.S. Comptroller General or other representatives of each upon request;

4. U.S. Comptroller Audits. Applicant must provide CPB with a copy of any U.S. Comptroller General audit report issued in connection with the project;
5. Equal Employment Laws. Applicant must comply with all applicable equal employment opportunity and nondiscrimination laws and policies;
6. Governing Law. The Agreement shall be governed by and construed in accordance with the laws of the District of Columbia without regard to its conflict of law provisions;
7. Restrictions. Applicant is strictly prohibited from using any funds provided by CPB:
  - a. for any activity designed to influence legislation or appropriations pending before the United States Congress or any state legislature; or
  - b. to conduct any reception or provide any other entertainment for any officer or employee of the federal government or any state or local government.
8. CPB's Appropriation. CPB's primary source of funding is appropriations made by the U.S. Congress. Therefore, if CPB's appropriation is reduced and that reduction materially affects CPB's ability to meet its obligations under the Agreement, then CPB and Applicant, at CPB's discretion, may agree to enter good faith negotiations to modify the Agreement.
9. Research and Materials. 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 Applicant will be required to assign all right, title and interest in and to such research and materials to CPB. Applicant further agrees that neither it, nor any of its 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.

## **X. EXPENSE GUIDELINES**

### **Non-Employee Travel Expense Guidelines**

Travel expenses incurred by non-CPB staff (including consultants) must 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 to realize cost savings and travelers are required to accept the lowest fare available for the required itinerary.

Private automobile use will be reimbursed at the prevailing IRS rate, 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 reimburse only 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, shoeshines, 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.