



Corporation
for Public
Broadcasting

Corporation for Public Broadcasting

Request for Proposals Economy Response Grant Program

Matching Grant Program

Overview:

CPB has created the Economy Response Grant program in response to the widespread economic downturn, and is open to all CPB-qualified public radio and television stations. The program seeks to support stations' efforts to help their communities through initiatives that establish collaboration with community partners and that raise awareness of the impact the current economic crisis is having on the station's community.

Project deliverables must be created in response to the needs of the community and will include on-air content, new media and outreach materials, and evidence of significant community partnerships and community involvement. CPB will fund matching grants of up to \$100,000 per qualifying station, with a total investment of up to \$1 million.

Release Date: Wednesday, March 25, 2009

Closing Date: Friday, April 17, 2009 - 5:00 PM (EST)

Project Manager: Patricia Lanas-Espinosa

Corporation for Public Broadcasting
401 Ninth Street, NW
Washington, DC 20004-2129
Attention: Patricia Lanas-Espinosa
Via email: planas-espinoza@cpb.org

Please submit proposals electronically on or before the closing date. CPB reserves the right to reject proposals submitted after the closing date.



Request for Proposal
For
Economy Response Grant Program

Matching Grant Program

The Corporation for Public Broadcasting (CPB) is seeking proposals from CPB-qualified public television and radio stations for the new “Economy Response Grant Program”. CPB expects to fund matching grants of up to \$100,000 for each qualifying grantee, with a total investment in the program of up to \$1 million.

I. Description of the Grant Program

The United States is in an unparalleled economic crisis that has created widespread challenges for communities across the country. The Economy Response Grant Program will fund projects that connect communities to crisis resources through a network of trusted community partners and that raise awareness of the impact this crisis is having on the station’s community. The core deliverables of this project — on-air content, new media and outreach materials, and evidence of significant community partnerships and community involvement — will be created in response to the needs of each community.

The Economy Response Grant projects must be designed from the bottom-up by identifying a crisis topic within the community, developing and delivering content with community guidance, and implementing a project plan that is built upon constant involvement with community partners and using new strategies for station teamwork. Successful projects will have not only quantifiable results, but will create a long-term shift in the station’s relationship with its community. Stations will receive this grant only if they are able to demonstrate that they are committed to transforming their approach and relationship with their communities through this project.

The nation’s economic crisis is upon us, and time is of the essence for beginning these projects. As such, the proposal process has been outlined in two phases. The first phase is designed to allow for stations to quickly assemble their project ideas into a brief proposal. If that summary proposal is selected, stations will be invited to submit a full proposal in the second phase.

Phase One will allow stations to identify their community’s crucial issue, develop their concept, identify potential partnerships, and craft their overall approach to the project. CPB will not provide funding for this initial phase. Stations must submit a brief summary (one to two pages) of their proposed project based on the scope outlined below. CPB will review the responses to Phase One and provide feedback to help stations tailor their responses for Phase Two. Stations with unacceptable Phase One proposals will not be asked to participate in the second phase and will not be eligible for these grants. An

invitation to submit a full proposal does not guarantee a grant, and funding will not be provided for the proposal development process. For Phase Two, stations must assemble a detailed response including a comprehensive project plan, details on community partnerships and matching funds, and a complete listing of all deliverables as described below.

II. Scope

Radio and/or television stations must identify a crucial issue that significantly affects the community as a result of the nation's economic crisis. Examples of some appropriate issues include unemployment, retraining the workforce, personal credit, and access to health care. CPB will not fund projects that focus on the mortgage crisis in this grant program since we are already investing in a significant project on that topic led by KETC and KNPR. Stations must provide quantitative and qualitative data to substantiate the extent of the problem and how it is manifest in the community. Data should be gathered from national sources such as the Bureau of Labor Statistics or Federal Reserve, as well as from local sources such as county and state governments. Stations must make a clear and compelling case in the proposal and provide the necessary data to support their case.

Proposals for the Economy Response Grant Program should be structured according to The Road Map for Engagement ("Road Map"), a planning template originally created as part of the KETC/Channel 9 initiative *Facing the Mortgage Crisis*. The Road Map for Engagement can be found in Appendix A of this RFP. The Road Map should be viewed as an example of a successful model for creating sustainable community engagement networks. It illustrates how stations can transform their relationship with the community by marshaling local resources and building trusted partnerships to develop and disseminate information. The Road Map also provides project management guidance and specific recommendations for internal collaboration, as well as a structure for using new media tools for internal and external communication.

While stations may use the Road Map to guide the structure for their proposed project, partnerships and community engagements will drive the development of content. Content should include a significant new media component (online video, social networking, blogs) in addition to on-air content (segments on radio or television magazine shows such as *Morning Edition* or *All Things Considered*, local television magazine shows, interstitials, town meeting programs, promo spots, or call-in talk programs) and community engagement materials (flyers, presentations to local groups, websites.) The project should also incorporate the framework developed by CPB's Public Awareness Initiative, *My Source*, which uses authentic testimony by individuals positively affected by a project to communicate station impact and relevance.

CPB will fund *up to* \$100,000 of the project's total costs, including content development. These grants require matching funds preferably from external sources. Under no circumstances will CPB fund more than half of the total project cost.

III. Criteria for Selection

CPB evaluation process will include the following criteria:

1. Identification of Crisis and Partnership Opportunities
 - Compelling quantitative and qualitative data to substantiate the need for the project
 - Identification of key partners in the community, proposed collaboration structure and structure of Advisory Panel
 - Evidence of what others within the community are doing to address the need and the station's plan to coordinate resources with them
2. Approach to Project Management
 - Identification of Project Manager – the project lead at the station
 - Indication of cross-departmental coordination within the station and use of technology to share information
 - Indication of nature and extent of coordination with external partners and Advisory Panel
3. Approach to Content Development
 - Collaborative approach, both internally and externally, to content production
 - Delivery of content on a variety of media platforms with links to external resources that will also serve the station's community in the identified crisis
 - Transformative approach to new media, including social media
 - Well-structured communications plan, including integration with *My Source*
4. Approach to Community Outreach
 - Breadth and depth of access within the community through multiple outreach efforts
5. Outcomes Measurement
 - Use of performance indicators for measuring outcomes, including quantitative and qualitative data

IV. Major Deliverables

Detailed Project Plan

The station should provide a complete project plan including a timeline for all production materials, major milestones, and deliverables required under the terms of this grant.

Partner Endorsements

The station should provide documentation describing the partnerships formed for this project. The documentation should include an endorsement from each partner and details of any matching funding and/or other resources.

Production Material

The station should provide CPB with copies of all print, video, and audio components produced for the project. This material should include, as applicable:

- DVDs of television segments, interstitials, promos and IDs
- CDs of radio segments, interstitials and promos
- Copies of print material
- Copies of online material
- Audio copies of webinars

Audience/Web Data

The station should provide CPB with the summary data it collects and uses to analyze the impact of its initiative. In similar past projects, these data points have included web metrics, viewership statistics, telephone call center traffic, quantities of print materials distributed, etc.

Presentation Material

The station should make available presentation materials for use at national meetings. These presentations, assessments and case studies should indicate the impact and effectiveness of the project at achieving its goals.

Project Evaluation Plan

The project should have measurable outcomes. For example: How many jobs have been created? How many people have been trained? How many people have been treated in health clinics? How many families have successfully completed a program in “surviving the current economic crisis?”

Applications should include a list of relevant performance indicators and a plan for gathering both quantitative and qualitative data. Chosen applicants will be expected to report periodically on the progress of their projects. A preliminary evaluation is expected at the mid-point of the project and a complete evaluation will be included in the final report. Approximately 5% of the Grant Project funds should be allocated towards the cost of preparing the evaluation.

V. Questionnaire for Phase Two RFP Response

Please attach a separate sheet with your responses. Your response to this section should not exceed ten pages. *As noted in Section I, only stations with acceptable project summaries provided during Phase One will be asked to submit full proposals in Phase Two. Do not provide answers to this section for Phase One.*

1. Please provide the quantitative and qualitative data that helped you identify the community crisis. What evidence did you gather from community feedback, media articles or other local resources that led you to choose this issue?
2. Who are the partners you plan to collaborate with? Please describe their role in the community and their anticipated role in the project, as well as a primary contact person in the organization. How do you plan to coordinate resources? As part of the proposal review process, CPB may contact the potential partners you have identified.
3. Describe your approach to using an Advisory Panel to guide the development of content and methods of outreach. List the organizations and individuals you plan to include on the panel. Keep in mind that a large Advisory Panel is not necessarily the most effective Advisory Panel.
4. Please provide the names of the key station personnel, their responsibilities and time allocated towards the project. Include similar information from your partner organizations, if available.
5. Please provide a detailed project plan including internal and external meeting schedules, key deliverables, milestones and other significant dates.
6. Describe your approach to internal and external communications and how you plan to use technology to share information.
7. Describe the content you plan to produce, including all on-air, written, and online content. Provide a detailed list of the number and length of television and/or radio segments, interstitials, promotion spots, identification messages, local public affairs programs and/or call-in programs, and any other content you plan to produce. How will you collaborate internally and externally to create the content? How will you incorporate a graphic identity throughout the content?
8. Specifically address your approach to incorporating new media into the project, including the use of social media and other online resources.
9. Describe your plan for community outreach. Who will be responsible for outreach for the project? What venues do you plan to use?
10. How do you plan to disseminate information to a wide variety of constituencies in the community?
11. How will you measure success? How will you assess the impact of the project? What data do you plan to use to track your progress?

12. The project you are proposing should be an outcome of your current strategic plan. Please provide a signed letter from the station's Board on how the proposed project fits with the station's overall strategy.
13. Provide a detailed budget for this project, including all projected expenses. A budget narrative must also be included which clarifies line items. If you submit your proposal as a single PDF, you must also include a separate Excel file for the project budget.

VI. Proposal Submission Timeline

Below are the key dates in the proposal process. The timeline has been compressed in recognition of the urgency of the current economic situation and the need to begin the proposed projects as soon as possible.

- RFP released **March 25, 2009**
- Phase One of the proposal is due to CPB by **5 PM (EST) April 17, 2009**
- CPB provides initial feedback by **May 4, 2009**
- Phase Two of the proposals (by invitation only) due to CPB by **5 PM (EST) June 5, 2009**
- Notifications of CPB's intent to fund by **July 13, 2009**

VII. Conditions of Grant

1. Eligibility Requirements for the Public Television or Radio Grantee

An applicant must be a non-commercial radio or television broadcast licensee that receives an annual CPB Community Service Grant ("CSG"). Previous recipients of Local Service Initiative (LSI) grants and all recipients of the "Mortgage Crisis" grants are not eligible.

2. Duration

The grant will be a one-time only grant that can provide funding to the project for no more than one year. Only one project per public radio or television CSG grantee will be funded; however, grantees may reapply for grants if previous applications have been rejected and if CPB offers additional rounds of funding.

3. Amount of Grant

The amount of each grant will not be greater than **\$100,000**. The amount requested should adequately reflect the scope of work, length of time and potential impact of the project. Many projects will be able to be completed for significantly less than the maximum allowed.

4. Use of Funds

Funds may be used for the development of content, new media and outreach materials and expenses. The costs for new services and/or enhancements to current services may be included. Grant funds may not be used for current on-going expenses, capital expenses,

construction, endowment contributions, social activities, ceremonies or entertainment. Funds must be used within one year of the grant's contract start date, consistent with the grant terms.

5. Matching

The station will be required to match 100% of the total grant on a one-to-one basis, with a strong preference given to external funding sources.

6. Final Report

A final report, which will include a final project evaluation, must be submitted in order to receive the final payment. The final report should include a detailed statement of expenses in the format of the agreed upon project budget.

VIII. Multiple Public Television/Radio Grantee Application

Multiple grantees with a shared economic crisis topic may apply for the grant together. In such cases, only one application should be submitted with grantee information combined. In such cases, CPB may award a grant that is **greater than \$100,000 total, but will not award more than \$100,000 per station grantee**. Joint licensees will be considered a single grantee.

As in single station grants, the amount requested should adequately reflect the scope of work, length of time and potential impact of the project. One station should be designated as the fiscal agent and the sole contact for CPB. All payments will be made to the fiscal agent and it will be the fiscal agent's responsibility to distribute the grant properly and ensure all grantees are meeting the matching requirements.

While the total amount awarded will not be greater than \$100,000 per grantee, one of the grantee stations in a partnership may match more than \$100,000 to assist the other grantee(s) that are not able to match \$100,000. For example, if three public television grantees apply for a \$300,000 grant, station A could match \$200,000, station B could match \$75,000 and station C could match \$25,000. It is up to the partnership to determine how the CPB grant funds are distributed between the stations. The budget in the proposal must clearly identify which items will be covered by each grantee.

If the total group of grantees is not able to provide a 100% match to the requested grant amount, then the group's grant will be reduced to the total of the match.

IX. University Licensee Overhead Cap

CPB limits the maximum overhead allowed for a proposal submitted by a university licensee to the lower of either 19% or the station's modified cost rate. A station's modified cost rate is calculated in line 2c in Section B Worksheet 1 of the station's 2005 AFR. The 19% standard rate is based on the median modified cost rate for all stations in the 2005 AFR.

This overhead cap applies only for university licensees that are required by their license holder to include overhead in a budget proposal and receive indirect support by the university. For university licensees that are applying together in a multiple station application, overhead will be capped at 19% and will be divided among all stations in relation to the percentage each station is providing towards the match. The fiscal agent is not allowed to receive additional overhead dollars from the overhead line item. The fiscal agent, however, can receive additional dollars for managing the project if the amount is provided as a separate line item and is agreed upon by all stations applying together. If the station includes an overhead line item in the Project Budget, it also must include a description of the costs associated in overhead.

X. Application Deadline

The deadline for submission of Phase One of the proposal is **April 17, 2009**. The deadline for submission of Phase Two is **June 5, 2009**. All proposals should be sent via email to **Patricia Lanas-Espinosa at planas-espinoza@cpb.org**. If there is any information that would be useful to you as you prepare your proposal, please submit it in writing to Patricia Lanas-Espinosa at the email address above.

XI. Proposal Evaluation and Grant Distribution Timeline

Phase Two proposals will be evaluated from June 6 – July 12, 2009. Selected grant recipients are expected to be notified by July 13, 2009. Agreements must be executed within 30-45 days of notification, at which time the first grant disbursement will be made.

XII. Summary of Required Contracting Provisions

If a proposal is selected for funding, the applicant will be required to sign a binding agreement with CPB. Until both parties have signed an agreement, no expressed or implied commitment has been made to provide financial support. Applicants are not authorized to commence work until the agreement is fully executed. If applicants 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.

The selected grant applicants must be able to comply with a number of requirements that will be included in the operative agreement between the applicant and CPB, including the following:

- (1) Applicants must agree to comply with the applicable provisions in CPB's Terms and Conditions, a copy of which is available at www.cpb.org;
- (2) Maintenance, for three (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; (Contractors 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 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; and

(4) Compliance with equal employment opportunity and nondiscrimination laws and policies.

Addendum 1

Conditions of Agreement

If a proposal is selected for funding, applicants 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. Applicants are not authorized to commence work until the agreement is fully executed. If applicants 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, applicants 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. Contractors 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 resources 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;
- (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) Applicants who plan to engage sub-contractors will be expected to obtain competitive bids, and to provide assurances that the prices obtained for any such services are fair and reasonable;
- (6) Applicants 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; and

(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 applicant will be required to assign all right, title and interest in and to such research and materials to CPB. Applicants 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.

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

Appendix A

Road Map for Engagement

Note: The following was developed as a planning template as part of the KETC/Channel 9 initiative, Facing the Mortgage Crisis. The Road Map should be viewed as an example of a successful model for creating sustainable community engagement networks which in turn create measurable beneficial change in the community. It illustrates how stations can transform their relationship with the community and benefit the community significantly by marshaling local resources and building trusted partnerships to develop and disseminate information. The Road Map also provides project management guidance, recommendations for internal collaboration, and the structure for using new media tools for internal and external communication.

1. INTRODUCTION / PROJECT MANAGEMENT

Project Overview

Facing the Mortgage Crisis has proven to be a unique initiative for KETC/Channel 9 — one that has been as substantive and fulfilling as it has been ground-breaking and complex. It has required us as a public television station to leverage our resources and assets strategically. The work enabled us to strengthen relationships with partner organizations and by doing so, deepened our significance in the community and directly supported our mission.

We have learned — and are still learning — many lessons through the development and implementation of this initiative. This *Road Map for Engagement* is our modest attempt to pass along some of those practical lessons that we thought could be useful to other stations that follow on this journey.

First, a few general observations:

- *Facing the Mortgage Crisis* is a community engagement initiative — one that deploys public media assets on-air, online and in the community. As such, community partnerships and collaborations are the single most important component of this work (more on that in Section 2).
- The project benefited from having overarching goals that were outcome-oriented and focused on solving a community problem. That enabled us as a station to bring together partners from a position of trust and do more than simply host meetings, but actually focus a group on problem solving.
- Buy-in and support from senior management in the station is essential. Only with the commitment from the highest level of leadership can this effort be cohesive and comprehensive enough to make an impact in the community.
- This project involved all the main departments within the station and required a higher level of inter-departmental collaboration than many other past initiatives. During a meeting, a team member commented that the project was like a four-legged stool — requiring the support of On Air and Online Production,

Community Engagement, and Marketing — to which someone else remarked “It’s actually more like a beanbag chair.” The rewards and benefits of this internal collaboration have been unexpected.

Project Management

The complexity of this work compels us to keep in mind a few critical tactics:

- Focus on the project purposes.
- Collaborate internally on a daily basis.
- Involve the community through partners and advisors and listen to them.

Focus on the Project Purposes

The identification of shared, common purposes is integral for convening community partners, making an impact with the project, and driving more internal collaboration. The two primary purposes of the project are:

1. Connect residents to resources through a network of trusted community partners mobilized through public media.
2. Raise awareness of the impacts of the crisis on the entire community.

It's also important to understand that while all staff works collaboratively, someone must be a central figure in managing the daily operations of the work.

Internal Collaborations and Morning Meetings

The work requires a multi-faceted approach consisting of components on air, online and in the community. This in turn requires staff from separate departments to collaborate and organize themselves around the goals. It no longer matters what department someone represents, because we act out of one shared vision, and that vision must be the driving force behind the entire project.

Daily morning meetings help to support this central purpose and solidify the team. These brief update meetings are designed to focus on the logistics of delivering multiple elements in a very short timeframe. The meetings are most successful when:

- They are organic and flexible — Oftentimes team members will ask questions of each other that will either raise new issues or present new ideas. By not having a pre-set agenda, the conversation stays fluid, which allows for maximum effectiveness and the best use of time.
- The conversation is managed — when conversations begin to veer off-track, it is helpful to have a designated person to focus everyone.
- The meetings are no longer than 30 minutes — the brief meeting time keeps the conversations more focused and on-point.
- The meetings are casual — while it is important for conversations to stay focused on the details of the project, it is also important that the meetings were allowed to take a collegial, light tone.

These morning meetings help “break down the silos.” Collaboration is essential to deliver the different project components and do it as efficiently as possible, without tripping over each other. People begin to make subtle shifts in the way they relate to one another. As the process becomes more familiar and the initiative gains momentum, it's easier to think of the station as an integrated whole, united around a common purpose.

Lessons Learned and Questions

What does collaboration look like?

Conversations — In a project built around collaboration, it is essential to communicate with work colleagues often and regularly. Only by being transparent and communicating openly and in a timely way can everyone understand what is going on to be able to respond to quickly-changing schedules and timelines. Make the most of every possible tool, including morning meetings, the team website, email, phone, etc.

Are morning meetings really necessary?

Yes, and while it was sometimes tedious, it really allows the project staff to coalesce and become a truly collaborative, working team. The benefits will impact the rest of the work of the station.

2. COMMUNITY ENGAGEMENT & MOBILIZATION

Facing the Mortgage Crisis is a **community engagement initiative** that leverages the station's assets on air, online and in the community.

Important Considerations:

- The community — through partners/advisors — helps guide the work on air, online and in the community.
- Partners and community members believe this kind of work is what public media organizations should be doing. They want their public television and radio entities to be relevant and important in the community.
- Selecting the right partners is imperative.

Partnership Development

Community partnerships and collaborations are the single most important component of this work. Partners are critical resources — not a “nice to have” but a **MUST HAVE**. Use your role as a trusted public media organization to coalesce and convene the key organizations in the region that have available resources and existing programs related to the mortgage crisis. Leverage what is already available in the community.

Working with the Right Partners:

The best partners have expertise related to the mortgage crisis and will help extend the boundaries and the impact of your work.

Criteria By Which Partners Must Be Considered:

- Direct service providers with long histories of community involvement.
- Trusted resources in your region. *Trust* is the single most important factor in partner selection — it's not enough that the organization knows the issues. If you can't verify how the organization operates in the community, they will only undermine the effort. Corroborate your information with other trusted organizations — they will help guide you.
- Organizations that provide a distinct strength and can complement others for the purpose of the project.
- Organizations that are part of highly respected and trusted national organizations.
- Level of commitment to the project.
- Leadership they provide to the work.

Key Organizations to Consider:

- United Way — to provide triage support in the form of their existing 2-1-1 Call Center. United Way's 2-1-1 service covers 76% of the country. The 2-1-1 service

“This past spring, we formed the St. Louis Alliance for Homeownership Preservation consisting of five counseling agencies. Partnering with Channel 9 helped the group gel more quickly because we all came together and played a roll in the programming.”

**— Linda Ingram,
Beyond Housing**

is a “fast, free and confidential way to get help 24 hours a day, 7 days a week.” Residents use 2-1-1 to connect to resources that can help them with a wide range of problems and concerns, including foreclosure.

- Federal Reserve Bank — to provide the most accurate, reliable and timely economic data, as well as thorough analysis of this data. This information is useful for tracking key indicators. The Federal Reserve Bank comprises twelve districts that cover the entire country.
- Local and regional government entities such as city governments, county boards, etc.
- Federal agencies with a presence in your community.
- Other national organizations with a local presence — such as Enterprise Community Partners, Inc., NeighborWorks America, Salvation Army — are part of national nonprofit networks that provide financial resources as well as technical assistance.
- Public Library Systems to use their existing network to engage their constituents in person and through their extensive marketing efforts to expand the reach of the project.
- Nonprofit providers of legal services
- Other trusted organizations that can help expand the boundaries of the work.

Strategies to Guide the Work:

- Partner Engagement
 - Be clear and explicit about the purpose of this project.
 - Regular meetings and communication are essential to keep partners engaged.
 - Keep partners focused on the purpose of the project to create desired impact.
 - Listen to the partners for feedback to incorporate it into the work.
 - Ideally, partner meetings should occur every two weeks to advance the work and solicit feedback.
- Interaction with the partners occurs in two important ways:
 - Advisory Committee with regular meetings to connect partners to the work and to each other, thereby strengthening or developing networks.
 - Regular conversation with individual partners/advisors to guide the project and story development, collateral materials, and maintain focus. Partners like to be involved and integral to the work.
- Mechanics of Advisory Meetings:
 - Focus on Purpose — Restate the purpose of the project at the beginning of the meeting to keep partners focused and on track.
 - Be Open — Being open with partners is critical to gain buy-in. Show partners your work, and share your process for how the work is developing. Share your concerns and questions — you can't figure this out on your own, and the partners have key information.
 - Questions and Discussion — Meetings should be less about what the station is doing and more about getting the partners to connect with each other and

the station staff. Find out what partners perceive is happening regarding the mortgage crisis. Many of these organizations have the pulse on what's happening at the local and national level. They are critical to helping frame how this information informs the work.

- Food is always a good idea. Consider having the meeting over breakfast or lunch. People are appreciative when they feel valued.

Community Conversations

A useful tool to inform the project and learn more about how people in the community see issues are Community Conversations. These are an informal way to bring external information into the station to inform internal strategies. Community Conversations are also a tool for internal station use.

External Conversations:

- Have community conversations with existing groups within the community prior to beginning and throughout the project.
- When working with an issue like the mortgage crisis, people are hearing and reading new information from the media every day, so your conversations may take on different tones depending on how people are connected and what they've been exposed to.
- The more often you have conversations the easier it will be for you to make the community understand and feel comfortable just sitting and talking about what are their community's concerns and aspirations.

Internal Conversations:

- Have a conversation with station staff not directly involved in the project so they can give input and inform the project.
- Staff directly involved with the project might have different interests than those not directly involved. All station staff should have knowledge of what is happening and why.

Helpful Information:

- Community conversations related to the project can be held throughout the community with existing groups or with people who come together for the purpose of this conversation. Potential groups to consider:
 - Church groups and faith-based meetings
 - Senior Citizen groups
 - Neighborhood Associations
 - Civic organizations (economic development, Rotary, etc.)
- Have project resources (if available) to give out during community conversations.
- When introducing yourself, make it clear that you are there to have a conversation — there are no cameras and this will not appear on television. What you learn from the conversation will be brought back to the station and shared with all areas of the station to help inform the staff of the community's concerns.

- Ask everyone to introduce themselves and say where they live. If you need more information from your group, have a sign-in sheet with requested information such as age.
- Ideal size for a conversation is 20 to 25 participants; this allows all to participate. Be careful to not allow one or two people to dominate the conversation. Don't allow the conversation to focus solely on the negative.
- Use an additional staff person, volunteer or intern to take notes.
- Questions to start the conversation:
 - What are your aspirations and concerns about your community?
 - What are the two or three most important issues or concerns when it comes to the community?
 - How do these issues affect you?
 - If the specific issue of the crisis has not been voiced, this is an appropriate time to ask about the crisis/the economy and how it's affecting the community. Your time will be limited, so try to get to your targeted interest early in the conversation.
 - When it comes to the media, what have you heard about the issues?
 - What are the kinds of things that could be done that would make a difference to your neighbors and you?
 - End on a positive note and thank the participants. Explain that they are helping shape the station's work and how you'll use this information.

Community Presentations

Community presentations are a good vehicle to reach those individuals and organizations who you may not reach through your on-air or online efforts.

The Material produced for community presentation may be comprised of:

- PowerPoint presentation and script for presenter that includes:
 - Project mission
 - Evidence of national and local need (statistics)
 - Summary of initiative
 - Stories of project impact
 - Embedded video of locally produced interstitials
 - Partners
- DVD of interstitials and other produced project content
- Project collateral materials with pertinent information to connect audience to this work, including:
 - Project brand
 - Short summary of project
 - Project website
 - United Way 2-1-1 number (24-hour helpline)
 - Frequently-Asked Questions
 - Community Resource Partners with contact information listed for agencies that provide free counseling and services

- Partner agencies' brochures or flyers that will connect the audience to resources or allow them to spread the information in the community
- Station contact information for additional materials, flyers or information if needed

Presentation Format:

- The presentations are designed for 30-minute blocks, though the presentation can easily be condensed or expanded to meet the agenda of the organization.
- Bring your own equipment (laptop, speaker and projector).
- In some instances, a shorter presentation is needed. In this case, do not use the PowerPoint and instead, deliver the message verbally with a short segment on DVD of one of the interstitials created for the project.

Target Audiences:

- Use a staff member or volunteers to call targeted groups to be part of their monthly meeting agenda.
- At each Community Presentation, ask the attendees to spread the word about the presentation to other organizations they believe would benefit from this information. This creates a "grassroots approach" to finding appropriate agencies or meetings.

Suggestions:

- Highlight the need and purpose of the project by using the DVD to show examples of on-air resources and stories of impact.
- Have DVDs (if available) to give to organizations you are presenting to.
- Have background information on partners and their area of expertise.
- Connect with organizations that have existing programs that would reach the communities you are targeting.
- Find appropriate places to present. Use the Advisory Committee to help identify places.
- Technology can be a challenge, so the presenter needs to be flexible and adapt easily to different situations.

3. CONTENT

On-Air Production

The initiative requires the Production Department to approach the creative process in new, more collaborative ways, incorporating input from other departments and trusted sources in the community. This process involves a slight adjustment of the culture within the department and the station as a whole. From the project launch, it needs to be clear that we're all in this together, and the initiative will find greater success if we work more as members of the project team.

Long-Form Magazine Style Stories

We'd like to give you some insight as to how this worked at KETC. Our producers typically work within our own department on their pieces, but with *Facing the Mortgage Crisis*, we coordinated activities with other groups and partners to ensure that we were not duplicating work and not making multiple contacts with the same sources.

- Eight mortgage related stories (6 to 8 minutes long) were created for our weekly magazine program. Topics and contacts came from a variety of sources—starting with the partners and other project staff is a key starting point.

All the stories were developed with geographical diversity in mind to emphasize that the problem is widespread. Stories were developed with input from partners and advisors — they didn't influence the content; rather, they connected to great stories we may not have otherwise found. Some were generic stories that could have been set anywhere (e.g., how to avoid financial rescue scams), but some areas did present specific issues.

Suggestion:

- Make every attempt to personalize the stories as much as possible.

A story on mortgage scams that featured an FBI agent was personalized by featuring a segment about an elderly man who may have been defrauded in his sale of some properties.

Although we experienced some difficulties in finding people who would go on camera and tell their stories if it felt too personal, a story about Habitat for Humanity featured a young homeowner who had gone through pre-purchase counseling in order to avoid problems.

Interstitials

Short segments (TRT 1:00 to 1:30) can be localized and run between programs in various dayparts and designed to offer helpful information to those who might need to act immediately.

After identifying our HUD-certified housing agencies and conducting some pre-interviews, we quickly came up with 10 possible topics. Housing counselors and other experts were asked on camera to give us their best advice on what people

“I’ve worked at three radio stations and six television stations in six markets, and this is the most important thing that I’ve ever done. . . I went to a meeting of the Metro St. Louis Foreclosure Intervention Task Force. . . When I introduced myself and said I was from Channel 9, they all applauded.”

**— Ruth Ezell,
KETC Producer**

should or should not do. We also asked them to define terms that people should be familiar with.

The interstitials were created with the following format:

- Opening “Facing the Mortgage Crisis” graphic with music.
- Graphic read-out of a question (e.g. How should I deal with collection notices? What is *forbearance*?).
- Short on-camera answers from one or more housing counselors/experts.
- On-camera tag (don’t wait; help is available; many who have lost homes might have been helped but never asked). We shot three different versions in the field with different types of housing in the background.
- Final tag giving contact information, in our case, the United Way 2-1-1 help line and the KETC website.

A second set of interstitials was produced from questions and answers on our two Town Hall programs. The answers and discussion were less focused and editing was trickier, but it had the advantage of highlighting real people asking questions from the audience, as well as showing ongoing station involvement in the project.

Town Hall Programs

Production of the two one-hour specials was highly collaborative, and input from a variety of sources was critical to the success of the programs. From early meetings with Advisory Committee members, including the Federal Reserve Bank, we identified the key issues and experts who were working on it. From that point, it was possible to create a list of potential panelists and program outlines. Since the community engagement component is the critical part of the station-wide project, the organizations represented by the panelists on the show were also part of the Advisory Committee.

The shows combined elements of newscasts, public affairs dialogue and Town Hall meetings. The first half of each show was a panel discussion interspersed with pre-recorded stories to augment the discussion and move it forward. In the second half, panelists fielded questions from the studio audience as well as phone calls and emails from viewers.

It was apparent from the moment our call-in phone number and the United Way 2-1-1 service number were broadcast, that the specials fulfilled the mission of connecting people with resources. Channel 9’s phone bank was instantly jammed with callers, and The United Way and other agencies (especially Beyond Housing) also reported a significant increase in calls.

Promotional Spots

The creation of promotional spots also required close collaboration with other departments, especially Marketing/Communications to ensure that the scripts were consistent with the language used in print materials and the overall focus of the project.

Lessons Learned

- Improve efficiencies by breaking down the idea of separate departments working independently and developing new levels of cooperation with other departments and community resources.
- Think of the project not just from the perspective of creating on-air content, but from the bigger picture of participating in a collaborative project that ultimately serves the larger community.

Website / Online Strategy

The goals of the online elements for the *Facing the Mortgage Crisis* initiative are aligned with the goals of the project: first and foremost, connect those in need in our community to trusted resources, and secondly, raise awareness of the ripple effect of the crisis by aggregating and amplifying the content created for broadcast. To reach these goals you have to lose any distinction between what is created for on-air or online, and instead think in terms of overall content and how it could impact the community. Also, finding new ways to communicate internally will enable this project to go from conception to reality within a short timeframe.

“KETC is doing a wonderful job with the *Facing the Mortgage Crisis* project. The work you are doing is incredibly important to the community.”

**— Christopher “Kit” Bond,
U.S. Senator**

Internal Online Communication: Team Site

In order for everyone involved in the project to communicate needed information in a timely manner, there is a virtual community where information can be shared in real-time without the need for everyone to gather in one place. To meet these needs, we’ve created a team site for the project, using the social networking tool Ning (www.ning.com). A free service, Ning allows us to:

- Share updates on work being done via individual blogs for each team member.
- Create groups for all relevant project areas (i.e. Research, Community Mobilization).
- Collaborate around important topics with forum discussions.
- Pull in feeds from the public-facing online elements for easy access.

By having a one-stop shop for project information, we are able to reduce the actual physical time spent in meetings. “I’ll post it on the team site” becomes a phrase heard often, and it allows us to keep meetings short and focused.

External Online Communication: Website / Blog

In order to launch the online elements as quickly as possible — and to make the content available to the widest possible audience — existing, free, social media tools are the most efficient for presenting and housing the content.

The main Web presence for the initiative is on the hosted blogging service WordPress (www.wordpress.com). WordPress allows us to do many things that would otherwise be difficult, including:

- Have many contributors (some with little or no web programming experience) add content and share in the updating and maintaining of the site.
- Categorize and tag content for easy access in the Web 2.0 world, and present all content in a portable format via the perminks that are created automatically by WordPress for all pages and posts.
- Allow for the easy organization of the content and links by utilizing the WordPress design templates and customization tools.

We've customized the WordPress template by altering the provided cascading style sheet (CSS) to match the color of our branding logo and uploaded a custom header image. This was a custom upgrade to the basic WordPress service that costs \$15 per year; other than that, we implemented our online presence using the free WordPress tools and features. The right-hand navigation column includes the following widgets:

- Search
- Categories
- Recent Posts
- Text/HTML (to create navigation and links)

Important Considerations:

- Focus your attention on organizing and presenting the content. The easier the content is to find, the more people you will reach. Don't think in terms of video, text, audio, but rather in terms of what context makes sense for each piece of content regardless of the format.
- Gather feedback, but stay true to the goals. Even if everyone on the project team does not fully understand the need for using social media tools for the project, keep finding ways to put the project content and resources into these tools. As the impact grows others will come around.
- To extend the lifespan of the online portion, it helps to develop a tone and voice for the blog. At first, the produced content will drive online efforts, but as the project continues and grows, the focus will shift to context and providing a forum for the community.
It's helpful to find a dedicated resource, whether it's a staff member or someone in the community, who has good writing skills and can keep the content fresh. It can only help the project to include information and news on the current ongoing financial crisis since it is so intertwined with the mortgage crisis. In such a confusing situation, the more explanation a station can offer on the local level, the more value is added overall.

Social Media Tools

Online Video — YouTube

We have hosted all the KETC-produced video from the project on **YouTube** (www.youtube.com) to take advantage of the established audience YouTube already has. We strongly suggest this as a viable option for all stations. YouTube also provides the tagging and portability functionality so useful for spreading content in the Web 2.0 world. YouTube video is easily embedded into WordPress and every other blogging tool, as well as nearly every other type of website. We created a project-specific YouTube channel (the designation that YouTube uses for an aggregation point to organize multiple videos), but also posted or linked all videos to our station channel to take advantage of our built-in audience.

When adding videos to YouTube, try to maintain consistency in naming and tagging. This will help users who have found one video through a search to find other related videos with a similar search. We also suggest using a common set of tags to help with consistency of search results.

Social Mapping — Google Maps

Using **Google Maps** (www.maps.google.com) can help you present a visual representation of the story in your area. We turned our focus toward using the Google “My Maps” tool to plot the resources available in our community and to localize our video segments to help demonstrate the geographic scope of the crisis in our local community.

Social Network — Facebook

Create a fan page on the social networking site **Facebook** (www.facebook.com). We opted for a fan page as opposed to a group to allow viewing of the page by visitors who were not Facebook users. The features we have included on the page include:

- Video
- RSS Feeds (from project blog and project Twitter)
- Discussion Board
- Photo Album

Micro Blogging — Twitter

Use the micro-blogging service **Twitter** (www.twitter.com) to provide updates on new project content. We provided live micro-blogging during our two call-in programs through Twitter.

Lessons Learned

- The web is indispensable to use for internal as well as external communication.
- Social media tools have matured in terms of ease-of-use, functionality, and broad acceptance to add efficiency to the initiative.
- It's difficult to engage an active blogging community in a short time, but the activity will grow with time.

Online News Source — *St. Louis Beacon*

KETC's partnership with the *St. Louis Beacon* produced a wide variety of additional stories that are available at all times via links on the main website at www.ketc.org/mortgagecrisis in addition to www.stlbeacon.org. As a daily online news source staffed by veteran journalists formerly with the *St. Louis Post-Dispatch*, the *Beacon* stories add even more depth and perspective to the information provided to the community.

Since July 1, the following stories have appeared on both websites:

- Understanding the language of foreclosure
- Avoiding foreclosure: The options
- Ready to make the call? Here's your checklist
- Foreclosures: The problem is growing; seek help early
- Got a problem with your mortgage? There's hope and help
- Congress will pass foreclosure relief for homeowners, predicts McCaskill
- We want it now: Attitude fuels credit crunch and mortgage crisis
- The mortgage crisis is really a savings crisis
- Who are Fannie and Freddie and why are they spooking our economy?
- When all else fails and foreclosure looms, bankruptcy attorneys say give them a chance
- There's a scammer born every minute
- Need help for the long run? Better Family Life offers counseling on mortgages
- Federal Reserve Bank of St. Louis launches website to help homeowners
- Missouri foreclosure law gives homeowners little flexibility
- Don't expect immediate upswing in housing market from bailout, warn local analysts
- Local economist advises consumers to hunker down and take the long view

Think about the other local media outlets in your region. Are there any non-profit organizations that might be a content partner in your work? TAKE OUT THIS BLANK PAGE. COMMU

The *Facing the Mortgage Crisis* communications strategy:

- Phase 1 — Establish the identity of the initiative and your community role as outcomes-based convener and aggregator.
- Phase 2 — Identify resources, create connections, and aggregate and disseminate information on air, online and in print using a grass-roots approach.

“My clients who come in, sometimes they’ve seen me on TV. . . People who don’t know about housing counseling. . . who have never been in this type of crisis before have a certain trust level when they come in here because they trust Channel 9. And if Channel 9 says ‘call Beyond Housing,’ then it’s OK. Then we start off not having to prove ourselves.”

**— Linda Ingram,
Beyond Housing**

- Phase 3 — Create tools to help individuals in need and to help community partners and other community entities make presentations to groups.

There are likely many questions that you have about this work. What do we know about foreclosure? Will this make good TV? How many of our viewers would be at risk of foreclosure anyway? Where do we find accurate and useful information? How do we avoid the appearance of advocacy? And have people at risk of foreclosure just made foolish, greedy mistakes that had gotten them into trouble?

Once we better understood the situation in the St. Louis market — and realized that many people in need were afraid or embarrassed or didn't know where to turn — we focused on delivering simple, direct messaging on air, on our website, and by engaging a network of existing trusted organizations in grassroots communications. This should be an effective approach in other communities.

Identity

The graphic elements for this work should build a consistent look and feel around the initiative. These are all used in slightly different combinations for different media and situations. However, the overall intent is to closely identify public media as the locally-based public media station that is helping to connect people with resources.

Communication

A key document of Talking Points can be a useful starting point by answering questions for the media and community at large, such as:

- Why is [station] addressing this crisis with a community initiative?
- What is the best way residents of the region can find help during the crisis?
- What does the community initiative include?
- What community service organizations are involved in the initiative?
- What is being presented on [station], online or the community?

Print Materials Produced

A wide variety of communication materials can be produced and customized for different stations and markets. These include:

- Project Summary
- Project Flyer
- Partner DVD
- Brand Guidelines
- Press Releases
- Talking Points
- Church Bulletin Copy

For the production of materials:

- Listen to individuals and community partners first to understand the core issues, the barriers and the different needs in the community.
- In later phases, focus on how different users need the materials for different situations. Keep in mind ease-of-use and access to help drive the editing.

Lessons Learned

- Listen carefully and respect other opinions and new ideas.
- Value collective creativity, particularly in problem solving.
- Reach consensus and then honor it.
- Try not to duplicate efforts or work at cross purposes.
- Clarify lines of responsibility and accountability.
- Identify and follow the most efficient process.

5. RESEARCH & EVALUATION.....

Background Research

As a dynamic situation with new developments ongoing, it can be challenging to keep up with the latest news, but it is necessary to stay well-informed.

- Identify several national organizations (such as the Federal Reserve Bank) that are consistently relied upon for their information and data. These sources for analysis should provide more in-depth information than the standard news outlets, such as AP, CNN or MSNBC.

Local Resources

Each community has its own trusted journalistic resources. In our case, the local newspapers were excellent information sources. Seek out the media organization in your community to help understand the issues.

Local Economic Research

Communities will have their own area organizations that will be helpful in supplying information and data to communicate the stories in a comprehensive way at the local level. Governmental departments responsible for economic development can be extremely helpful in supplying this information.

“THANK YOU so much for the information you presented on the St. Louis area foreclosure issues facing many of us. Because of your broadcast I FINALLY knew where to turn for help and assistance. I only wish the broadcasts had been much earlier in the year. Perhaps then I wouldn’t find my husband and me in the situation we are now in. . . .”

**— *Mary Livingston,*
*Channel 9 Viewer***