

Public Television Major Giving Initiative  
funded by the Corporation for Public Broadcasting 

Consulting Services: Request for Proposal  
January 31, 2005

## **Introduction**

The Corporation for Public Broadcasting releases this Consulting Services Request for Proposal for the Public Television Major Giving Initiative. The proposal submission deadline is February 18, 2005. *When appropriate follow-up phone interviews will be scheduled.*

The Public Television Major Giving Initiative, funded by the Corporation for Public Broadcasting is a multi-year project to develop sustainable major giving programs at public television stations around the country ("MGI"). The MGI is underway with 33 stations currently participating in a 6 part major giving curriculum and 79 stations already receiving onsite consultation support.

## **Background**

Public television stations operate some of the most sophisticated direct marketing operations in the not-for-profit world, but their expertise in, and income from, major gifts and planned gifts has lagged far behind that of other non-profits. In order to pursue this potential, the MGI was designed. Funded by the Corporation for Public Broadcasting, the MGI seeks to develop sustainable major and planned giving programs at public television stations around the country. The MGI is composed of a 3 part process as outlined below.

1. Regional workshops for station General Managers, Chief Development Officers and Key Trustees (completed November 2004).
2. A 6 part curriculum delivered via web lectures and conference calls designed to build the key functional capacities necessary for the implementation of a major giving program. The creation or refinement (for station's with an existing plan) of an integrated development plan by each station is a desired outcome of this process (scheduled completion May 2005).
3. Onsite consulting assistance to assist stations in the implementation of their development plan, scheduled to begin in June 2005 and continue for approximately one year. The onsite consulting assistance is the subject of this Request for Proposals ("RFP")

The provision of consulting assistance should take approximately 18 months for each interested station, and CPB is supporting the process through the creation of a "tool-kit" of print materials, templates, training guides, video support materials and a project website (<http://majorgiving.cpb.org>).

## **Proposed Consulting Services**

CPB intends to engage consultants (“Consultants”) to assist stations in the implementation of their development plan.

Thirty-three public television stations, with annual total revenues ranging from \$2 million to over \$50 million are currently enrolled in the MGI and are developing or refining their plans for major gifts fundraising as a part of a 6 month curriculum scheduled to be completed in May of 2005. A list of the participating stations and their locations is included in the Appendix. Applicants who are interested in learning more about the MGI curriculum may visit the MGI’s website, located at <http://majorgiving.cpb.org>, to view samples of the curriculum presentations.

Stations that complete the curriculum will be eligible for up to 12 days of onsite consulting services to assist them in the implementation of their plans. Public television stations vary widely in their degree of sophistication surrounding major giving topics and the requested assistance may range widely from the development of a major giving program in a resource limited environment where none has existed, to the refinement of specific aspects of a mature and sophisticated major giving program.

CPB intends to match stations with Consultants in such a way to enhance the possibilities of shared learning from stations that are similarly situated.

CPB expects that the 12 days of consulting services will take place within a 1 year time frame, with the initial visit designed, in part, to develop that yearly plan. In response to this RFP, applicants may propose to work with as few as 4 stations (approximately 48 days of onsite consulting services) or as many as 18 stations (approximately 216 days of consulting services). CPB anticipates that there will be multiple successful applicants to this RFP.

## **Scope of Work and Deliverables**

Consultants will provide the following consulting services:

1. Up to 12 days of onsite consulting services to each station based upon a plan developed by applicant and station and approved by CPB.
2. Written reports for both CPB and stations after each station visit.
3. Quarterly progress reports on each station.
4. Ongoing availability for telephonic consultation with stations between station visits.
5. Regular communication with CPB on the status and progress of the consulting services.
6. Attendance at a 1-day workshop for all successful applicants, tentatively scheduled during the month of May, 2005)

7. Final narrative report on the progress of each station and summary overview of applicants work.

### **Who may apply**

This RFP is open to qualified consulting firms or individual practitioners that possess demonstrated experience and familiarity with major gifts fundraising. Applicants should be prepared to speak to their specific prior experience, outlining in brief the nature of their experience(s) and the duration and significant outcomes achieved.

### **Proposal Requirements**

1. Proposals are limited to no more than 10 pages unless such a limit would restrict the applicant from providing relevant and essential information. The proposal should include:
  - Name(s) of the applicant's officers, principals and a brief biography and summary of credentials of same, as well as those of any subcontractors or affiliates the applicant would employ in the course of the agreement. Specific reference to prior engagements on behalf of public broadcasting entities is desirable, whether or not such work was undertaken in conjunction with or on behalf of or under the auspices of a prior CPB grant.
  - A description of relevant experience. Particular attention should be paid to those experiences which, in the opinion of the applicant, took place in situations that most closely resemble those faced by public television stations. A description of significant outcomes achieved should be included.
  - A staffing plan indicating roles, responsibilities and areas of expertise among members of applicant's team.
  - An itemized budget, indicating the person days and day rates for the scope of work, including honoraria or fees to subcontractors, and other related project costs. These line items should be calculated and displayed in a standardized fashion: number of units, type of unit, cost of unit and total. Since it is impossible for applicants to accurately estimate travel costs without information about which stations may be a part of their portfolio, agreement upon those costs will be a part of the contractual process between CPB and selected applicants. Only travel expenses which comply with CPB published guidelines are subject to reimbursement.

If you are interested in proceeding toward the possibility of submitting a formal proposal, CPB may meet with you and may share materials, data, other information and analyses (collectively, "Information") with you. As a condition of receiving such Information, your expression of interest in proceeding shall be

deemed to constitute your agreement to protect, preserve and maintain all such Information on a strictly confidential basis, and to promptly return to CPB upon its request all tangible copies of such Information in your possession.

CPB is not responsible for loss or damage to material submitted with or in support of this RFP. Any submission to CPB shall become the property of CPB (not including any intellectual property rights contained in such submission), and CPB is not required to return any submitted materials to any applicant. CPB is not responsible for any violation of copyright, trademark, patent, trade secret, or other rights that may result from disclosure made by response to this RFP.

Solicitation by CPB of proposals does not constitute an agreement by CPB to extend funding to any party for the project under consideration. CPB may, in its sole discretion, elect not to pursue this project in any manner.

By submitting a proposal, each applicant grants to CPB the right to duplicate, use, disclose, and distribute all of the materials submitted for purposes of evaluation, review, and research. In addition, each applicant guarantees that the applicant has full and complete rights to all of the information and materials included in the proposal. Each applicant also guarantees that all such materials are not defamatory and do not infringe upon or violate the privacy rights, copyrights, or other proprietary rights of any third party.

### **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. Applicants must also agree to indemnify CPB against any loss resulting from breach of any of the guarantees contained in the agreement.

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

- (1) A demonstration of adequate financial support to complete the work for which they have been contracted and to deliver reports and/or other intellectual property created pursuant to the Agreement;
- (2) Maintenance, for 3 years following receipt of relevant funds, of all financial records to the project, which records shall be accessible to CPB, and to the U.S. Comptroller General or other representatives for examination and audit purposes. *(Applicants will additionally ensure that any subcontractors or consultants under the agreement shall also maintain such records for the period specified and under the same terms);*
- (3) Maintenance, for 3 years after approval of a final financial report, of a complete file of all subcontracts and other agreements, licenses, clearances, and other documents related to the work undertaken, copies of which shall be made available to CPB on request;
- (4) Submission to CPB of a copy of any U.S. Comptroller General final audit report in connection with the project;
- (5) Compliance with equal employment opportunity and nondiscrimination laws and policies;
- (6) 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 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.

CPB will have complete rights to the reports created as deliverables for this project.

## **Opportunity for Questions**

A questions and answers session, via conference call, has been scheduled for February 11 at 2pm Eastern Time to provide applicants with an opportunity to discuss any questions they may have regarding the RFP. Questions need to be emailed to [info@majorgiving.cpb.org](mailto:info@majorgiving.cpb.org) before February 9th in order to be addressed at the conference call. All applicants will be provided with the responses to the questions addressed during the conference call. To participate in the call, dial 1-866-393-8073 (toll free). You will then be prompted to enter the 'Meeting Number'. The Meeting Number is: \*7072709\* (please note: you must dial the \* (star) before and after the number).

## **Deadline**

Proposals are due by February 18, 2005 at 5pm EDT. Please send them via email to [info@majorgiving.cpb.org](mailto:info@majorgiving.cpb.org). Selection will be made and respondents notified by March 11, 2005.

## Appendix

### List of Stations participating in MGI

1. KUAC: Fairbanks , AK
2. KAKM - Alaska Public Telecommunications: Anchorage , AK
3. KOCE: Huntington Beach , CA
4. WPBT: Miami , FL
5. IAPT - KDIN: Johnston , IA
6. WFWA: Fort Wayne , IN
7. WNIN: Evansville , IN
8. KOOD - Smoky Hills Public Television: Bunker Hill , KS
9. WKYU: Bowling Green , KY
10. KET - Kentucky Network: Lexington , KY
11. WGBH: Boston , MA
12. WCMU: Mount Pleasant , MI
13. WKAR: East Lansing , MI
14. KTCA - Twin Cities Public Television: Saint Paul , MN
15. KETC: Saint Louis , MO
16. KUSM - Montana PBS: Bozeman , MT
17. KNME: Albuquerque , NM
18. KENW: Portales , NM
19. WNET: New York , NY
20. WNEO - Western New York Public Broadcasting: Buffalo , NY
21. WNEO: Kent , OH
22. WPTD: Dayton , OH
23. WLVT: Bethlehem , PA
24. WIPR: San Juan , PR
25. WMTJ: San Juan , PR
26. SDPB - South Dakota Public Broadcasting: Vermillion , SD
27. WCTE: Cookeville , TN
28. WLJT: Martin , TN
29. KUHT - Houston PBS: Houston , TX
30. KAMU: College Station , TX
31. KTXT: Lubbock , TX
32. KERA: Dallas , TX
33. WHTJ - WHTJ Charlottesville PBS: Charlottesville , VA