



Request for Proposals

Project: Web-Based Self-Directed Major Giving Practices Curriculum
Department: System Development and Station Grant Administration
Date Posted: August 25, 2006
Deadline: September 22, 2006
Selection Date: October 27, 2006

This serves as the Corporation for Public Broadcasting's ("CPB") request for proposals ("RFP") for the creation of a web-based application that provides a structured learning experience for the curriculum of Major Giving theory and practice developed for the Public Television Major Giving Initiative. The proposal submission deadline is **September 22, 2006**. If necessary, follow-up phone-based interviews will be scheduled as soon as the initial proposal review has been completed. CPB may or may not conduct follow-up interviews with each RFP respondent, at CPB's sole discretion.

Background

The Public Television Major Giving Initiative ("MGI") was created in response to the findings of a study commissioned by CPB that sought to identify new or increased sources of revenue for public television stations ("Stations"). The findings suggested that there was significant growth possible by attracting more major gifts from individuals.

MGI is a multi-phased program offered to all Stations, and so far more than 100 Stations are participating. The MGI began with a series of meetings for Station leaders followed by a six-part curriculum in major giving delivered via web lecture and conference call. The curriculum covered the philosophy and the tasks of major giving and prepared Stations to create an Integrated Development Plan ("IDP") with a strong major giving component. This was followed by an eighteen month implementation period during which stations received on-site consulting help from development consultants ("Consultants") to put their IDP into action. Stations are now completing implementation of their IDPs, which has been complemented by tools and services developed specifically for the Initiative that are available at the project website: www.majorgivingnow.org. The web lectures which formed the basis for the curriculum are also available at the site.

Objective of Current RFP

To ensure that the curriculum developed for the MGI is available to all public broadcasting fundraising professionals, managements and boards, CPB would like to create a secure, user friendly web application that allows individuals to use structured MGI coursework in a format that accommodates users with varying skill levels and experience.

The RFP seeks an external service provider (“ESP”) to design and develop a web-based application (“Application”) transforming the MGI curriculum and other MGI materials into an interactive, graphical interface. The primary users of this Application will be public television employees including development professionals, Station general managers and others.

CPB Requirements

The responsibilities of the ESP will include overall project management of creating the Application, including development of an implementation calendar and regular project updates to CPB, as well as budget oversight. The ESP will facilitate and participate in preliminary consultations with end-users to guide the development of a beta version of the Application, as well as in subsequent sessions to collect feedback for the final version of the Application. The ESP will also take action in a timely manner to investigate, track, diagnose and resolve any problems through the conclusion of the project.

Guidelines for the MGI Self-Directed Curriculum, Web-based Application

The Application shall have the following qualities:

- Be designed for a broad base of public television end users, varying in experience. The system should provide a specific progressive structure for inexperienced users but allow experienced users to quickly bypass familiar material to access more advanced tools and modules. The system should provide a search function that allows advanced users to find specific tools or modules quickly.
- Provide registered access to the MGI curriculum system.
- Incorporate the six-part curriculum and other material and tools found at the CBP MGI website into a single integrated application (see www.majorgivingnow.org for more information). These tools, where interactive, (i.e. Excel workbooks) should be made available with accompanying multimedia tutorials. These tutorials should be modular and allow user to select tutorials based on skill level.
- Provide creative *interactive* exercises converted (as applicable) from the currently available static tools available at the majorgiving.now.org site to teach users how to use those tools. Users should have the opportunity to test their knowledge gained through use of the system.
- Incorporate the ability to access external web resources as applicable. These resources should be researched and catalogued and, where appropriate, integrated into exercises.

- Log and record each user's application use to help the user understand the cognitive path they have taken to understand the tools and to track the usage of various modules within the curriculum tool. Additionally, the system should track how often particular interactive elements are used and provide information back to CPB to assist in developing system refinements.
- Enable the users to export the worksheets and documents from the Application into an Excel, Word, or PDF Format.

Technical Requirements

As the Application will be used through the CPB website, it must be compatible with CPB's current system. The following technical guidelines have been set forth in order to support the launch of the Application.

- Browser Compatibility: Internet Explorer 4+, Netscape Navigator 6+
- Browser-Level Presentation Languages: HTML, CSS, JavaScript, Flash 6+
- Chart Presentation: XML/SWF Charts (http://www.maani.us/xml_charts)
- Middleware: PHP (<http://www.php.net>)
- Database: MySQL (<http://www.mysql.com>)
- HTTP Server: Windows IIS

Deliverables

- The ESP will provide the following deliverables: Provide a visual example of the type of interface envisioned for the Application and an illustration of some of its capabilities.
- Design and program a beta and final version of the Application that incorporates previous research findings. Develop and execute a testing program that confirms Application usability and cognitive effectiveness.
- Train key CPB staff and public television system representatives in use and capabilities of the Application, to include providing necessary training documents in Word, or other formats designated by CPB.
- Test the final version of the Application and coordinate with CPB IT technicians in the launch of the Application.
- Develop appropriate Help files that may be accessed online or printed in a Word document.
- Provide six months of maintenance and support of delivered product (correcting any errors or failures to conform to functional specifications).
- Provide budget detail on maintenance and support beyond the first six months after the launch of the Application.

Submission Requirements

In your proposal, please provide as much specific and detailed information as is possible for each of the items below:

- Relevant experience, including a list of clients and examples of similar work
- Biographies of key personnel.
- Point(s) of contact for your organization (including telephone and email).
- Specific project timetables and pricing.
- A statement of educational technology experience.
- A statement of television or media experience (if any).
- A statement of non-profit experience (if any)
- References from three recent clients.
- Email final proposals in Word, Excel, and/or PDF documents to contact listed below by **11pm (EDT) September 22, 2006**

Criteria to be Used in Comparison of Proposals

Below is a non-exhaustive list of criteria that CPB may use in evaluating the RFPs:

- The quality of the concept and proposal (creative, well organized, well written, shows an understanding of the project as well as the end users, etc).
- The quality of the methodology used for building the Application.
- Relevant experience and expertise in designing web-based applications specifically for educational purposes.
- Sufficient budget detail and explanation.
- Budget is reasonable for the marketplace
- Experience in working with media and non-profit organizations.
- Demonstration of an understanding of the public broadcasting major gift fundraising system and the project.

Proposal Requirements

As part of this project, we may share with you other station financial data as needed (e.g., results from CPB financial surveys). Please read carefully the confidentiality paragraph below regarding this or any other data, other information and analysis (collectively, "Information"). Before receiving this Information, you must acknowledge your understanding and agreement with these terms in writing to Scott Lyons at slyons@cpb.org.

As a condition of receiving such Information, your expression of interest by providing a proposal to this RFP 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 the material submitted, or for any unauthorized use or misuse of the submitted materials by any third party. Any submission to CPB shall become the property of CPB (not including any intellectual property rights contained in such submission), and CPB is not required to return any submitted materials to any applicant. 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, the selected applicant 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, the selected applicant 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 financial support to complete the work for which they have been contracted and to deliver reports and/or other intellectual property created pursuant to the Agreement;
- (2) Maintenance, for three years following receipt of relevant funds, of all financial records to the project, which records shall be accessible to CPB, and to the U.S. Comptroller General or other representatives for examination and audit purposes;
- (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) 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 those that successfully complete the selection process.

If you have questions as you prepare your written proposal, please contact Doug McKenney at (202) 879-9824 or dmckenney-consultant@cpb.org. CPB looks forward to working with you.

Submission Information

Corporation for Public Broadcasting
Scott Lyons, Manager, Development Practice
401 Ninth Street NW
Washington, DC 20004
Phone: 202-879-9722
Email: slyons@cpb.org