



CORPORATION FOR PUBLIC BROADCASTING

Request for Proposal

For Consulting and Facilitating Services For Strategic Analysis and Application of Public Television Audience Research

The Corporation for Public Broadcasting (“CPB”) is hereby announcing a Request for Proposal (“RFP”) to take results of audience research that has been commissioned by CPB concerning public television audiences and provide

- the services required to facilitate two (2) public broadcasting working groups in analyzing and understanding the data and then working with the two (2) groups together agree on the major strategic implications of the data;
- develop and implement a plan to determine the strategic implications of the research data in order to increase the reach of public television, the frequency viewers tune to public television and the loyalty of those viewers as expressed by their desire to financially support public television; and
- memorialize the results of these efforts in the 2007 Edition of the Framework for a Public Television Primetime Strategy.

This process has previously been undertaken and involved the four steps set forth below. Analyze, interpret and then present the audience research data in an organized fashion to two (2) separate public broadcasting working groups in a way that each may develop a deep understanding of the data and be able to then think strategically about the implications and applications of the data relative to the public television primetime program service;

1. work with these two (2) groups of individuals to reach a consensus on the major implications of the data;
2. facilitate* the groups through the process of developing the major implications of the data, as well as agreeing upon a set of action items that should be implemented in the following year by the public television system to strengthen the National Program Service (NPS) in primetime (“Priorities”);
3. develop a written report that memorializes the analysis and subsequent implications of the data and the Priorities to be used to aid in the allocation of resources for the National Program Service; and
4. then through a series of presentations to the public broadcasting system at large, disseminate the results of the process and the resulting 2007 Strategic Framework (collectively the “Project”).

*Successful facilitation is predicated on the development of an effective strategic plan that sets forth the process required to accomplish the goals of this RFP. . Applicant may either follow the same four-step process described above or recommend an alternative plan that will accomplish the above stated goal.

The deadline for submitting proposals is **July 18, 2006**. CPB retains the right to decide whether or not to accept any proposals submitted after this deadline. Follow-up phone-based interviews will be scheduled as soon as the initial proposal review has been completed.

I. Background

In fall 2002, CPB working with public television stations and PBS, undertook a research effort to determine how to stabilize and strengthen public television. The goal of this effort was to ensure that national program commissioning and development be more strategic in its design and execution so that:

Decisions about the National Program Service (NPS) in primetime – its content, its carriage, and its promotion – could be guided by a widely shared and broadly supported strategy that has been informed by a deep knowledge of the attitudes and behaviors of the adult primetime viewing audience.

Consumer Insight & AAU Study

The initial working groups agreed that in order to obtain a deep knowledge of viewer attitudes to shape the strategy, audience research was commissioned by public television. This research began with the *2003 Consumer Insight Study*. The *2003 Consumer Insight Study* included in-depth interviews and focus groups with 200 viewers of public television and resulted in the development of an *Audience Awareness, Attitude and Usage Study* (“AAU Study”), which was fielded in January 2004.

The *2004 AAU Study* was a quantitative study consisting of approximately 30-minute telephone interviews with a national sample of 1,481 adults 18+ who watch television in primetime and a sample of 627 known public television members from five markets (Boston, Portland, St. Louis, Phoenix, and Atlanta).

Segmentation Analysis

In conjunction with the *2004 AAU Study*, CPB commissioned a segmentation analysis of the national survey data.¹ That analysis, in turn, produced a statistically valid and reliable map of the U.S. adult primetime viewing audience that situates viewers with respect to their attitudes toward and usage of public television and simultaneously provides knowledge of their overall television viewing behaviors, their access to technology, and their genre and programming preferences.

Working Groups

The results of the *2003 Consumer Insight Study*, the *2004 AAU Study* and subsequent segmentation analysis were shared with two (2) working groups of professionals from within the public broadcasting system, the **NPS² Advisory Group** and the **NPS Strategy Group**. The NPS Station Advisory Group is made up of five (5) general managers and five (5) television programmers from across the public television system. The NPS Strategy Group is made up of the heads of national programming for WGBH, WNET, PBS and CPB along with one station representative who sits on both working groups.

2005 & 2006 Editions of a Framework for a public Television Primetime Strategy

The working groups reviewed the *2003 Consumer Insight Study*, the *2004 AAU Study* and the subsequent segmentation analysis and through a series of group meetings, conference calls and one-on-one in person conversations, identified a set of priorities which were set forth in a publication entitled the *2005 Edition of a Framework for a Public Television Primetime Strategy*. This publication was later refined based on new research completed in the Spring and Summer of 2005³ and experience gained from the implementation of the priorities set forth in the 2005 Framework. Based on those efforts, the priorities were updated and included in an even later publication entitled the *2006 Edition of a Framework for a Public Television Primetime Strategy*.

To determine whether the priorities achieved the anticipated results, CPB commissioned a new *Audience Awareness, Attitude and Usage/Segment Tracking Study in January 2006*. The data collected from this quantitative national phone survey of 1,508 adults 18+ who watch television in primetime, 660 known public television members from five (5) public television stations and 1,110 primetime television viewers who participated in an online panel is currently being analyzed.

At this stage, CPB and the working groups anticipate the need to once again develop strategic Priorities for 2007.

¹ Eight segments were generated in 2004 using latent class modeling – a statistical method which does not impose preconceived segmentation categories in advance, but discovers natural groups which exist in the population. Fifty variables (i.e., 50 responses to the 75 questions in the survey) were used to generate the segments. Narratives for each segment available at www.cpb.org/stations/npsresearch.

² National Program Service (“NPS”).

³ A palm card summarizing the key findings from the Consumer Insight Research on Primetime Public Television research completed in 2005 (*The Changing Viewing Landscape and the Role of Documentary and Performance Programming in the NPS*) is available at www.cpb.org/stations/npsresearch

II. 2007 Strategic Framework: Design, Analysis, Planning, Facilitation and Presentation Project

The two (2) working groups are diverse, have a variety of experience and perspectives, and individually and collectively need a consultant (or team of consultants) with experience as a strategist, analyst, and facilitator to assist them in understanding the research data, determining the implications of the research data, and to assist the working groups in reaching a consensus on the Priorities suggested by the research. (In the 2005 Strategic Framework, seven (7) strategic priorities were identified by the working groups. In the 2006 Strategic Framework, five (5) priorities were identified.)

Applicant's proposal should include the cost of services required to design a comprehensive plan, analyze and interpret the research data, and facilitate at the number of meetings, conference calls and one-on-one interactions that the Applicant believes would be necessary to reach the desired outcome of this project. Applicant must also provide high-level strategic measurement and marketing guidance and leadership in the development of national television programming services. The Applicant may propose an alternative approach to developing the **Strategic Framework 2007**.

1. **Station Advisory Meetings** – Working in collaboration with CPB, organize and facilitate a sufficient number of full day meetings to assist the group in reaching a consensus on the Priorities; the meetings could be held in CPB's offices in Washington D. C., or in the offices of WNET in New York or WGBH, in Boston; the participants do not pay their own travel costs; the applicant should estimate the cost of meals and materials required for each meeting; meetings should be scheduled between September, 2006 and January, 2007 in order that the *2007 Strategic Framework* is completed and ready for publication no later than January 31, 2007; applicant is responsible for working with CPB and other members of research team to develop agendas, materials and presentations for the meetings.
2. **Strategy Group Meetings** – Working in collaboration with CPB, organize and facilitate a sufficient number of full day meetings to reach a consensus on the Priorities; the meeting locations could be held in CPB's offices in Washington D.C., or in the office of WNET, New York or WGBH, Boston; the cost of these meetings will be the same as those in Paragraph 1 above; these meetings should be scheduled between September 2006 and January, 2007 in order that the *2007 Strategic Framework* is completed and ready for publication no later than January 31, 2007; applicant is responsible for working with CPB and other members of the research team to develop agendas, materials and presentations for the meetings.
3. **Combined Meetings** – organize and facilitate a sufficient number of full day meetings of the combined Station Advisory and the Strategy Groups in order to reach a consensus on the Priorities; the meeting locations and the costs of these meetings will be the same as those in Paragraph 1 above; these meetings should be scheduled between September, 2006 and January, 2007 in order that the *2007 Strategic Framework* is completed and ready for publication no later than January 31, 2007; applicant is responsible for working with CPB and other members of the research team to develop agendas, materials and presentations for the meetings.
4. **Learning Aids** – create tools, materials and learning aids to assist the working groups in understanding the audience research data; for example in the past tent cards, palm cards, and a

variety of reference booklets were used to facilitate learning as the working groups are diverse and include people with a wide range of experience and expertise.

5. **Presenting the 2007 Edition of a Strategic Framework** – applicant will present the status of efforts undertaken, seek input and feedback on draft versions of the 2007 Strategic Framework (or present the final version of the 2007 Strategic Framework if completed) at the following conferences; work with input from CPB, to develop and distribute materials at these conferences; Applicant should estimate travel, registration fees, lodging and the costs of materials for each in his proposal.

October 2006: PBS Development Conference in Baltimore, MD (one day)

October and November 2006: Joint Round Robin Meetings* (Five, two day meetings in at least four different cities: Chicago, DC, San Francisco, and one southern city TBD)

November 2006: Public Televisions Programmer's Associate Meeting, Amelia Island, FL (one day)

January 2007: NETA Conference, Norfolk, VA (one day)

February 2007: PBS General Manager's Planning Meeting, DC (one day)

*The Joint Round Robin Meetings are sponsored by CPB and PBS. General Managers from public television stations attend these meetings.

6. **Other Meetings** – applicant should seek other opportunities to obtain input, feedback and present the 2007 Strategic Framework with the goal of educating public television professionals and building a consensus system-wide for the Priorities included in the *2007 Strategic Framework*.
7. **Other Services** – applicant should provide high level analysis and interpretation of complex audience research data, expert strategic measurement and marketing guidance and leadership, and credible and constructive review of the work product from members of the CPB research team and the working groups;
8. **Facilitation** – applicant will facilitate all working group interactions including, but not limited to conference calls, group and one-on-one meetings.
9. **Timeliness**- Promptly delivered notes, suitable for distribution, from working group interaction
10. **2007 Strategic Framework** – applicant will develop multiple drafts of the Priorities and the 2007 Strategic Framework as the document is developed and revised; the final version must be created as a Word document, suitable for publication, suitable for posting on CPB's web site, professionally designed, printed and bound; and produce 400 copies for distribution in addition to materials developed and distributed prior to finalizing the 2007 Strategic Framework.
11. **Required Skills** - provide high-level audience research design and analysis, the ability to effectively interpret complex audience research data in the context of network level programming services, multi-media strategic planning and leadership, and superior communication skills both oral and written.

III. Proposal Requirements

As part of this Project, we will share with the selected applicant confidential audience research data (e.g., results from the *2004 and 2006 AAU studies*, results from the 2003 and 2005

qualitative studies). 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 sign a non-disclosure agreement.

The following information should be included in your formal proposal:

- Detailed budget and proposed workscope including travel and other out of pocket expenses;
- Samples of writing, publications and other relevant support materials;
- A statement of television or media research experience;
- A statement of non-profit research experience;
- Résumés of researchers/consultants likely to be involved; and
- References from three (3) relevant and recent clients.

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 rights 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.

IV. Potential Selection Criteria

CPB expects to utilize the following criteria in evaluating proposals, although this is not a comprehensive list of factors that CPB may consider. The following criteria are not listed in order of importance to CPB:

- The quality of the plan and the proposal (comprehensive, concise, well organized, well written, shows a clear understanding of the project as well as the end users, etc).
- Relevant experience in designing, fielding, analyzing and interpreting qualitative and quantitative audience research.

- Evidence of ability to lead diverse groups through the process of translating complicated audience research data into strategic action.
- Demonstrated experience in facilitating a collaborative process, creating and maintaining trust among multiple stakeholders with divergent interests.
- Evidence of the design, implementation and analysis of successful media, marketing and measurement strategy for major media corporations.
- Evidence of superior communication skills both oral and written.
- Demonstrated experience in dealing with a diverse group of key stakeholders from the most senior media executives to Executive producers, producers, programmers and station managers.
- Demonstrated ability to deliver compelling presentations to both large and small audiences.
- Demonstrated ability to work collaboratively with other suppliers in attainment of project goals.
- Demonstration of an understanding of the public broadcasting system.
- Ability to travel.

V. Submission Requirements

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

- Relevant experience, including a list of clients.
- Resumes of key personnel.
- Point(s) of contact for your organization (including telephone and email).
- Specific project timetables and pricing.
- A statement of television or related media experience.
- 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 5pm (EDT) July 18, 2006. Our goal is to select a proposal by July 28 and immediately begin the contracting process. Expected start date of the project is September 1, 2006. Anticipated project end date is mid-February, 2007.

VI. Summary of Required Contracting Provisions

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

- 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 agree to indemnify CPB against any loss resulting from breach of any of the guarantees contained in the agreement.
- A demonstration of adequate financial support to complete the work for which applicant has agreed to perform and to deliver reports and/or other intellectual property created pursuant to the agreement;
- 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*);
- Maintenance, for three (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;
- Submission to CPB of a copy of any U.S. Comptroller General final audit report in connection with the project;
- Compliance with equal employment opportunity and nondiscrimination laws and policies;
- 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;
- 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
- 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;

- Applicant acknowledges that in the course of performing services hereunder you may obtain sensitive information relating to CPB or to public broadcasting, the disclosure of which could cause harm to CPB and to other public broadcasting entities. Applicant agrees to keep confidential and to refrain from disclosing such information without prior, express written permission from CPB. Applicant agrees to cause all of its employees and subcontractors to adhere to the provisions of this paragraph.
- The agreement will be governed by construed in accordance with the laws of the District of Columbia without regard to its conflict of law provisions.

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

If you have questions as you prepare your written proposal, please contact Terry Bryant at (202) 879-9830 or tbryant@cpb.org. We look forward to working with you.
