



Request for Proposals Digital Infrastructure Strategy Expert

Proposals Due: March 15th, 2021 at 4:00pm ET

I. OVERVIEW

The Corporation for Public Broadcasting (“CPB”) seeks the services of an expert (“Expert”) to provide digital strategic planning expertise, business and financial analysis, guidance, and recommendations to advance the long-term strategic initiatives and projects in CPB’s Digital Strategy and Innovation portfolio.

Digital has been a CPB strategic pillar for years, and the pandemic’s impact on business and media has presented new opportunities and a sense of urgency for public media stations and content producers to accelerate their digital transformation. CPB supports both public media national organizations (PBS, NPR) and stations in their efforts to build and enhance their digital “might” across multiple channels and platforms. This includes system-wide investments in digital infrastructure technologies, software solutions, services, and platforms provided through grants to the national organizations to target and acquire new and diverse audiences, deliver relevant, personalized, and engaging public media content, and build and retain loyal audiences.

To support the complexity, scope, and multiple phases of current and upcoming strategic digital infrastructure projects, CPB expects to retain the Expert for a one-year term, renewable for two consecutive one-year terms, at CPB’s discretion. CPB will compensate the Expert on an hourly agreed upon rate. The project is expected to require up to forty hours of work per month, which may vary.

To ensure significant progress and timely outcomes are achieved on projects, digital expertise support for grant projects in the portfolio will include due diligence/discovery for potential new projects, strategy and roadmap planning, budget forecasting, operational planning, strategic oversight of large, complex projects, public media system communications support, and public media system partner management. The work includes developing several RFPs for new, complex system-wide digital infrastructure projects and digital initiatives as well as providing strategic planning support and oversight for these projects. It also includes strategic planning for new phases or expansions/extensions of existing system-wide digital infrastructure grant projects. Specific portfolio initiatives for which the Expert will provide support include but are not limited to: an enterprise consolidation of Customer Relationship Management (“CRM”) systems; the expansion of an enterprise Content Management System (“CMS”) solution; and new digital proposals from national organizations and other public media representatives. Details of these and additional work are included in the Work Scope below.

II. BACKGROUND

CPB is a private, non-profit corporation authorized by Congress in 1967 to receive federal government appropriations and to use those funds to promote the growth and development of public broadcasting and public telecommunications services. CPB is not a government agency.

CPB invests in approximately 1,500 local radio and television stations whose programs, services, and other initiatives serve and engage the American public.

Public media's mission is to provide programs and services that inform, educate, enlighten, and enrich the public and help inform civil discourse essential to American society. For more than fifty years, this national federated network of independently owned and operated 501(c)3 public radio and television stations have served the mission, bringing free broadcast programming and services to nearly 98 percent of the U.S. population.

The challenges for public media are complicated by its unique business model. Unlike most commercial media, which is largely supported by advertising and subscription revenue, public media's economy is largely dependent on voluntary donations that are independently nurtured, solicited, and managed at each local station.

III. WORKSCOPE

A. The Expert will assist CPB on the following digital infrastructure projects:

- **Enterprise CRM Solutions - RFPs and Engagements:** an assessment of the current state of public media's existing CRMs and data exchange systems and the development of a consolidated CRM/data exchange infrastructure technology ecosystem for a more seamless, interoperable system-wide solution.
- **Enterprise CMS Solution Expansion:** an expansion of the deployment of an enterprise CMS platform across the public media system.
- **Public Media Data Security Assessment:** a current state assessment of public media stations' data privacy and security practices.
- **Data Analytics Platform:** an evaluation of a new public media system-wide data analytics platform for national organizations and stations.
- **Public Media System Data Literacy Assessment and Education Program:** an assessment of the public media system's digital personnel's data analytics skills and gaps; and the development of a system-wide education program to enhance data literacy, as delivered by a third-party data analytics/business intelligence Expert.
- **New Digital and Technology Proposals:** as received from national organizations and other public media representatives.

Working with CPB, the Expert will perform the following or related activities on the projects listed in Section III-A above:

B. Strategic Planning, Advice and Counsel

- Assist CPB in creating and developing strategic and operational plans, gap analyses, and related phased short/medium/long-term roadmaps for potential investments in critical digital infrastructure solutions and digital programs that create scale, interoperability, and system efficiencies.
- Provide CPB with due diligence/discovery on potential new projects and RFPs, short-term and long-term strategies, input on tactical approaches, business analysis, budget forecasting, and tactical program oversight for initiatives listed above in Section III-A throughout the project lifecycle phases (i.e. planning, implementation, deployment).
- Review, assess, vet, and provide expert input and counsel on the viability of prospective, new digital and/or technology initiatives as well as proposals from national organizations and other public media representatives.
- Identify and manage strategic project issues, considerations, and dependencies to ensure roadblocks are minimized; risks are mitigated, and there is alignment among all key stakeholders.
- Provide strategic program oversight on projects to ensure timelines are on track and there is tight stakeholder coordination.
- Develop long-term budget forecasts and financial analysis that supports project roadmap and initiatives, including the development of business cases.

C. Stakeholder and Partnership Management

- Assist CPB in identifying, coordinating, and collaborating with key public media stakeholders from NPR, PBS and public media representatives and external partners, as appropriate, to build consensus around strategic digital plans, roadmaps, goals, and timelines.
- Assist in CPB's efforts to evangelize, educate, and champion the value proposition and adoption of new digital infrastructure solutions and services across the public media system.
- Participate in regular cross-organizational working group meetings, third-party vendor, and public media system meetings and calls to drive progress and outcomes and support digital strategies and projects as they evolve.

D. Public Media Affiliate and System Communications

- Assist CPB in planning and developing compelling presentations and communications for multiple public media audiences including public media station affiliate groups and association meetings and conferences which showcase and communicate the value of key CPB digital infrastructure investments and help to influence wide-scale system adoption.

E. Deliverables

- Provide project activity reports and invoices, and copies of any materials generated during the reporting period to CPB.

IV. REQUIRED PROPOSAL CONTENTS

Applicants must submit separate Technical and Cost proposals; no cost information may be included in the technical proposals.

A. Technical Proposal – The Technical Proposal should include the following:

1. Cover Page: Include the project title (“Digital Infrastructure Strategy Expert”), primary contact name, mailing address, e-mail address, and telephone number.
2. Experience: Background on the Expert, including the following:
 - i. Resume for any anticipated team member who will work on the project with the following qualifications:
 - a) Experience in the due diligence/discovery process for new digital projects and drafting RFPs; short-term and long-term strategic planning for a digital media business; budget forecasting and financial analysis and planning; operations; communications support; a solid understanding of digital transformation strategies; and experience in business development and partnership management.
 - b) Knowledge of digital infrastructure technologies (e.g., CMS, identity management services, CRM solutions, business Intelligence platforms/ data analytics, data security) and an understanding of the platforms and technologies needed to deliver relevant, personalized content and services to meet audience needs.
 - c) Experience in digital media product strategy, roadmap planning and agile product management, preferably in a media company.
 - d) Experience in developing strategies for, overseeing, and executing large-scale, complex digital programs and projects in a decentralized organization with many stakeholders, including third-party vendors.
 - e) Knowledge of and/or experience with the public media system’s institutional dynamics, stakeholder and system needs, operations, digital distribution products and services, and technical infrastructure.
 - ii. Not more than three (3) recent examples of projects which demonstrate the Expert’s success at providing due diligence, strategic planning, financial analysis, budget forecasting, operational oversight

- implementation, communication support, partnership management, and operational planning for large-scale and complex digital programs.
- iii. References from project examples provided, including telephone and e-mail contact information.

B. Cost Proposal must include the following information:

1. The hourly rates of staff that may be required during the contract term and any renewal period.
2. Anticipated travel costs. With COVID-19, there is no expectation of travel for the near future. However, with 12 months and possible longer contract term, it is possible Expert's work will eventually require travel including up to one to two conferences in a year, which is subject to CPB's advance approval and in accordance with CPB's Expense Guidelines set forth in Section X of this RFP.

V. EVALUATION CRITERIA

Proposals will be evaluated based on the following factors with the assigned weights.

1. **Skills and Experience (40%)** – Whether the Expert's prior experience is relevant to the proposed scope of work.
2. **Quality of Examples (40%)** - Whether they demonstrate applicant has the requisite knowledge and expertise in providing strategic planning, due diligence, financial analysis, budget forecasting, operational oversight implementation, communication support, partnership management, and operational planning for large-scale and complex digital programs.
3. **Price (20%)** – The reasonableness of the proposed hourly rates.

VI. PROPOSAL SUBMISSION

Applicants must submit their Proposals through CPB's electronic grants management system.

To gain access to the electronic grants management system, please send an email request to Flaka Krajkova, Project Manager, at fkrajkova@cpb.org, no later than **Monday, March 8th, 2021 at 5:00pm ET**. CPB will provide access to applicants within two business days. If your organization already has an account within CPB's electronic grants system, you must still request access to this specific RFP.

Once access is granted, respondents will be able to upload their narrative and cost proposals separately in the appropriate fields. Proposals are due **Monday, March 15th, 2021 at 4:00 pm Eastern Time**. All questions related to this RFP must be submitted in writing no later than **Friday, March 5th, 2021** to Ms. Krajkova at the email address above. The questions and CPB's responses will be posted on CPB's website without attribution.

VII. TIMETABLE

Below is the anticipated timetable.

ACTIVITY	DATE
Deadline for questions	March 5, 2021
Deadline to request access to the Grants Management System	March 8, 2021
Proposal Submissions Due, 4 pm ET	March 15, 2021
Proposal Review and Selection	April 2021

CPB may request the applicants with the highest scores to present their proposals to CPB, virtually. If selected, CPB will contact the applicant to schedule a time for the presentation.

VIII. CPB TERMS

Proposals submitted in response to this RFP shall be valid for at least 90 days following the closing date.

Neither multiple nor alternate applications will be accepted. Applicant (“Applicant”) should clearly identify any portion of its proposal that it considers confidential, proprietary commercial information or trade secrets. In addition, Applicant must identify all subcontractors and advisors and include a description of their roles.

Applicants selected for funding are deemed to have accepted the terms in this RFP. Any exceptions to these terms must be clearly identified in their proposals. CPB, at its sole discretion, may reject proposals that include exceptions.

In reviewing Applicant’s proposal, CPB may share materials, data, other information and analyses (collectively, “Information”) with Applicant. As a condition of receiving such Information, Applicant shall be deemed to agree 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 Applicant’s possession.

CPB is not responsible for loss or damage to material that Applicant provides to CPB in conjunction with this RFP. Upon submission, said information shall become CPB’s property (not including any intellectual property rights contained in such submission), and CPB is not required to return the same to Applicant. Applicant is responsible for any violation of copyright, trademark, patent, trade secret, or other rights related to such material.

This solicitation does not constitute an agreement by CPB to extend funding to any party. CPB may, in its sole discretion, elect not to pursue this project.

By submitting a proposal, Applicant grants to CPB the right to duplicate, use, disclose, and

distribute the materials submitted for purposes of evaluation, review and research. In addition, Applicant guarantees that it has full and complete rights to all information and materials included in its proposal and guarantees that such materials are not defamatory and do not infringe upon or violate the privacy rights, copyrights, or other proprietary rights of any third party.

IX. CONDITIONS OF AGREEMENT

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

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

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

1. Applicant must demonstrate that it has adequate financial support to complete the work and to deliver reports and/or other intellectual property set forth in the Agreement;
2. Except for the work that Applicant completes pursuant to a fixed price fee structure, Applicant must provide CPB with documentation that evidences the actual costs of the project (including timesheets or other relatively contemporaneous record-keeping documents), and supporting documentation that demonstrates that all costs were reasonable, necessary, and incurred for the project;
3. Applicant must maintain, for three years following the final payment for the project, all financial records to the project, which shall be accessible to CPB and to the U.S. Comptroller General or other representatives of each for examination and audit purposes. Applicant will additionally ensure that any subcontractors or consultants it engaged for the project also maintain such records for the same period and under the same terms;
4. Applicant must maintain, for three years following the final payment for the project, all subcontracts and other agreements, licenses, clearances and other documents related to the work undertaken, copies of which shall be made available to CPB and to the U.S. Comptroller General or other representatives of each upon request;

5. Applicant must provide CPB with a copy of any U.S. Comptroller General audit report issued in connection with the project;
6. Applicant must comply with all applicable equal employment opportunity and nondiscrimination laws and policies;
7. The Agreement shall be governed by and construed in accordance with the laws of the District of Columbia without regard to its conflict of law provisions;
8. Applicant is strictly prohibited from using any funds provided by CPB:
 - a. for any activity designed to influence legislation or appropriations pending before the United States Congress or any state legislature; or
 - b. to conduct any reception or provide any other entertainment for any officer or employee of the federal government or any state or local government.
9. CPB's primary source of funding is appropriations made by the U.S. Congress. Therefore, if CPB's appropriation is reduced and that reduction materially affects CPB's ability to meet its obligations under the Agreement, then CPB and Applicant, at CPB's discretion, may agree to enter good faith negotiations to modify the Agreement.
10. All research and materials created, developed, compiled or produced pursuant to or as a result of this project (including but not limited to all reports) will be considered ordered and commissioned by CPB as works made for hire under the copyright laws, and made in the course of services rendered. If, for any reason, the proposed research and materials to be provided are not considered works made for hire under the copyright laws, then Applicant will be required to assign all right, title and interest in and to such research and materials to CPB. Applicant further agrees that neither it, nor any of its subcontractors, will have any copyrights or other intellectual property rights whatsoever in any research and/or materials created, developed, compiled or produced by them or by any subcontractor, or by any third party participating in the preparation of research or materials for this project.

X. EXPENSE GUIDELINES

Non-Employee Travel Expense Guidelines

Travel expenses incurred by non-CPB staff (including Experts) must be itemized in the Non-Employee Expense Form. Each expense of \$25.00 or more must be supported by an original receipt. Expenses requiring CPB approval must evidence such approval. Reimbursement of travel expenses is subject to the following limitations:

Transportation

Only coach or economy class airfare, rail fare, or bus fare will be reimbursed towards travel expenses. Travelers must make every effort to plan travel and book transportation sufficiently in advance to realize cost savings, and travelers are required to accept the lowest fare available for the required itinerary.

Private automobile use will be reimbursed at the prevailing IRS rate, not to exceed the lowest available airfare. Taxicab fare will be reimbursed to the extent reasonable and necessary. Rental car expense will be reimbursed only when the daily taxi fare would exceed the per-day car rental rate, or when no other convenient and less expensive form of ground transportation is available. Travelers may rent intermediate-size vehicles.

Lodging

CPB will reimburse only for reasonable, standard rate, single room accommodations, and appropriate incidental charges. Incidental expenses incurred for comfort, grooming, or personal enjoyment, such as airline and room movies, haircuts, shaving equipment, shoeshines, etc., are not eligible for reimbursement.

Meals

CPB will reimburse for meals up to a total of \$65.00 per day for domestic travel and \$75.00 per day for foreign travel, if meals are not otherwise furnished.
