



# Request for Proposals (RFP)

## Data and Policy Analyst for Radio and Television Community Service Grants System Consultation

**FILING DEADLINE: May 30, 2018**

### I. PROJECT OVERVIEW

The Corporation for Public Broadcasting (CPB) seeks to engage an Analyst to assist and advise CPB with a review of its Community Service Grant (CSG) programs for public television and radio stations. CPB is funded through an annual appropriation from Congress, and the CSG programs are the mechanism for distributing 65% of the appropriation directly to stations. This review will examine the policies governing CSGs to ensure effective stewardship of the federal appropriation while meeting the mandates of federal laws concerning public broadcasting.

Multiple factors make this CSG review timely and relevant. A decade after an economic recession, there are uneven patterns of recovery around the nation that may affect stations' ability to fundraise. CPB's federal appropriation has been flat for seven years. Digital technology is changing the way audiences find, consume, and interact with content. The review process will take these circumstances and others into account as it examines whether any revisions are needed in the CSG program.

### II. OBJECTIVES

The objectives of the entity selected as the Analyst are to:

- Provide CPB with clear, concise analysis of data as it relates to the CSG program.
- Complement the knowledge and expertise of CPB staff with ideas, approaches, and case studies that broaden our perspective.
- Provide written and oral presentations and reports that are easily understood and can be shared with stakeholders.

The Analyst will help CPB examine whether the CSG programs meet the broad objectives (CPB Objectives) set forth for CPB in its establishing legislation:

- Ensure universal service and access;
- Support service to unserved and underserved audiences;
- Help meet stations' financial needs in relation to the communities and audiences they undertake to serve;
- Enhance new and existing sources of non-Federal financial support (NFFS);
- Encourage the growth and development of non-broadcast telecommunications technologies for the delivery of public telecommunications services; and
- Promote a healthy public media system.

### III. ABOUT CPB

CPB is a private, not-for-profit, non-governmental corporation authorized by Congress in 1967. Through amendments to the Public Broadcasting Act of 1967, CPB is exempt from taxes under Section 501(c)(3) of the Internal Revenue Code. CPB promotes non-commercial public telecommunications services (television, radio and digital) for the American people. CPB also provides financial support and a variety of services to locally owned and operated public television and radio stations nationwide. Such support helps guarantee universal access to public broadcasting's educational services and programming and ensures that stations can exchange program materials through national systems of interconnection.

For more information, see [www.cpb.org](http://www.cpb.org).

### IV. CSG BACKGROUND

CPB provides financial support in the form of CSGs to 572 grantees operating more than 1,500 local radio and television stations, whose programs, services and other initiatives serve and engage the public to ensure a civil society. (When referring to the CSG Program, public broadcasters generally use the terms "grantees" and "stations" as synonymous, although strictly speaking, a "grantee" is the licensee of one or more "stations.") The purpose of CSGs is fundamentally the same for public television and radio stations, but the policies governing the separate grant programs have differences. Generally, CSG recipients are required to meet specific eligibility criteria, including minimum amounts of NFFS.

Detailed information about the Radio and TV Community Service Grant programs can be found at [cpb.org/stations](http://cpb.org/stations).

CPB will conduct an Applicant webinar ("Webinar") on May 17, 2018 to answer questions submitted to CPB. Potential Applicants must register for the Webinar in advance. Details are below in Section XIII.

The Public Broadcasting Act sets the foundation for CSG grantmaking. It also permits CPB to add policies as necessary and requires it to periodically review grant criteria in consultation with the public media system.

CPB recently conducted three television CSG reviews that included an extensive review of all CSG program policies and a special focus on policies related to the TV broadcast incentive auction. The first review was held prior to the TV Broadcast Incentive Spectrum Auction in 2015 to develop policies in anticipation of it; the second was held in 2015-2016 to thoroughly examine all the television CSG program policies; the third occurred in 2017 to review the auction's impact and consider if additional policies were necessary. These three review sessions allowed CPB to conduct extensive assessments of television CSG policy, to check in with the system at a series of on-site and online meetings over the course of three years, and to queue a policy matter for further review in 2018.

CPB's last radio CSG review concluded in early 2013 when several eligibility criteria were revised. While the impact of current criteria forms the starting point for a radio CSG review, CPB intends to conduct a more general review of radio CSG policies. Part of that review will include a system-wide survey of general managers to collect input on how current policies affect their stations.

### V. SCOPE OF WORK

The Analyst will assist and advise CPB in a CSG review that will examine both television and radio CSG

programs. The reviews will take place concurrently, but the scope of work for the reviews will differ somewhat. The Analyst is expected to anticipate and identify where similarities offer efficiencies.

Generally, the Analyst will be required to 1) analyze the impact of existing CSG policies on public television and radio stations nationally; 2) analyze the socioeconomic factors that affect station revenue potential in particular regions; and, 3) assist in identifying and determining the impact of any new policies that may emerge from the CSG review process, ensuring fair and equitable distribution of CSG funds (Services).

The Analyst will be required to work closely with CPB and will have access to CPB's electronic database of annual financial statements of stations receiving a CSG grant. The Analyst may also need to collect external data that would indicate stations' future growth potential, the economic health of a station's market, and other data and information that would typically be required when conducting this type of analysis.

More specifically, the Analyst's Services will include but not be limited to:

- Financial and socioeconomic benchmarking of various stations, markets, and system cohorts, as requested;
  - Benchmarking may include but is not limited to: average and median household income; demographic breakdowns; population above and below poverty level; unemployment, etc.
- Providing recommendations on additional data to be collected and/or analyzed;
- Presenting the financial analyses, data and methodologies in a clear and logical fashion to CPB staff, management and Board of Directors, as requested; and
- Providing periodic reports that outline the work conducted and includes all data examined.

CPB anticipates this work will require a 12-month review process beginning upon the execution of a contract agreement.

It is expected that the Analyst will begin by examining and conducting preliminary analyses on the extensive financial and operational data that CPB collects from CSG recipients. Grantees' reporting to CPB – and hence CPB's available data – is annual and has a latency of 18-24 months. After that, the Analyst would examine CPB's data within the context of other relevant national or regional socioeconomic data to produce a broader analysis than is possible with CPB's station data alone.

Additionally, the Analyst will perform an incentive grant analysis for both television and radio grantees. CPB's analysis of grantee annual financial reports over time shows a growing gap in revenue between stations of various budgets, target audiences, and geographic areas. Since the majority of CSG funds are distributed to grantees in the form of an incentive grant that is calculated on NFFS, analyzing the incentive grant pool is necessary to ensure CPB Objectives are met.

The Analyst will also provide Services specific to the television and radio CSG programs as described below.

### **TELEVISION PROJECT SCOPE**

The primary objective of this external review is to conduct an analysis of the incentive and base grant portion of the Television CSG. The Analyst will:

- Examine whether grant awards are in proportion to station needs such as necessary personnel and operating costs, and whether incentive grants are reasonably serving the needs of all grantees including those that serve unserved or rural audiences. If not, identify program adjustments that could have measurable impact;
- Evaluate the potential use of socioeconomic factors in television CSG grant calculations;

- Consider whether incentive grants achieve the Communications Act’s goal to “maintain existing, and stimulate new, sources of NFFS by providing incentives for increases in such support.” If not, identify measures that could produce meaningful change;
- Analyze selected revenues that are currently NFFS-eligible or ineligible;
- Explore and possibly recommend alternative approaches for calculating the incentive grant portion;
- Evaluate the use of CSG funds to incentivize mergers and consolidations; and
- Assess current CSG policies in multi-provider markets.

There are 172 grantees currently eligible for the Television CSG program. Each of them receives a base grant and an incentive grant component, calculated on the amount of NFFS the station earns. Eligible stations receive supplemental grants, including the Universal Service Support Grant (USSG) and the Distance Service Grant (DSG). The Healthy Network Initiative (HNI) also provides supplemental grants, but grantees must apply for these. Each CSG award includes an Interconnection Grant component that is funded with system support funds.

### TELEVISION REVIEW TIMELINE

April 6, 2018	Release RFP
May 30, 2018	RFP deadline
June 2018	Execute contract(s)
July – November 2018	Work with Analyst: review/analysis/modeling/testing. Reports to CPB Board (October and December)
November 2018	Panel consultation webinar
December – January 2019	Additional review/analysis/modeling testing
February 2019	Panel consultation on-site Report to CPB Board of Directors
March 2019	Fine-tune proposals with consultant and finalize with panel
April 2019	Public media system presentations
June 2019	Policy proposals to CPB Board

### RADIO PROJECT SCOPE

The Analyst will examine the policies (Radio Policies) that govern eligibility requirements and the current funding structure of the Radio CSG program (Radio Program). Grantees are required to meet specific criteria to become and remain eligible (Eligibility Criteria) for the Radio Program, including NFFS and Audience Service Criteria (ASC). The ASC is based on metrics designed to measure a station’s service.

There are 408 CSG grantees currently eligible for the Radio Program. The Radio Program is tiered with four qualification levels to accommodate the diversity of the public radio landscape. Each grantee is assigned a CSG level based on multiple qualification factors, including NFFS, coverage area population density and Sole Service status. Grantees can also be designated as Rural Audience Service Stations (RASS) or Minority Audience Service Stations (MASS) if they meet the designating criteria. Each grantee receives a base grant based on its CSG level and additional incentive funding based on its level and designation.

Analyst will evaluate the impact of current Radio Policies in relation to station cohorts and socioeconomic conditions. Additional analysis will include a review of the current Eligibility Criteria, distribution of the Radio CSG grant pool, economic potential of station cohorts, as well as the implications of any proposed changes to Radio Policies. The Service performed by the Analyst will help CPB to ensure that the Radio Policies meet

CPB Objectives described above.

Specific examples may include, but are not limited to:

- Examination of grant awards in proportion to the financial needs of the communities' public radio stations serve;
- Evaluation of the potential use of socioeconomic factors in grant calculations for the Radio Program;
- Review of the current configuration of grant levels and provide recommendations for a simplified approach while accommodating public radio's diversity;
- Analysis of current metrics and funding for RASS and MASS stations to assess whether they adequately account for their unique circumstances;
- Analyze revenues that are currently NFFS-eligible or ineligible to determine if certain revenues provide (dis)advantages for stations in the CSG program; and
- Explore and possibly recommend alternative approaches to Radio Policies, including Eligibility Criteria to ensure universal service and system health.

The review process will include a series of meetings with a formal review panel comprised of representatives from the public radio system to achieve consensus among stakeholders. Analyst will be required to work with CPB throughout this process which may include attending panel and other meetings (in-person or electronically) to present its findings and recommendations. CPB anticipates that the Radio scope will occur over a twelve-month period, concluding in June 2019.

#### **RADIO REVIEW TIMELINE**

April 11, 2018	Release RFP
May 30, 2018	RFP deadline
June 2018	Execute contract(s)
July 2018	Launch moderated online focus groups (separate RFP posted for this work with deadline of April 30)
July 2018 – September 2018	Work with Analyst: Review/analysis/modeling/testing
October 2018	Consultation panel meetings begin (up to 4 meetings anticipated), Work with Analyst: Review/analysis/modeling/testing continues
November 2018 – March 2019	Additional review/analysis/modeling testing; reports back to panel
April 2018	Management Recommendations
June 2019	Policy proposals to CPB Board

## **VI. PROPOSAL COMPONENTS**

Analyst candidates must provide both a Technical Proposal and Cost Proposal with the following components:

The Technical Proposal must include:

### **A. Executive Summary**

A written narrative (4-page maximum) clearly outlining:

- Summary of qualifications for all staff assigned to this project based on requirements stated above;
- Summary of approach and methodology to accomplishing the work described herein.

## B. Project Narrative

A written description (4-page maximum) of the Project that clearly addresses the:

- Project requirements;
- Applicant's fit with the required qualifications;
- Applicant's detailed approach and methodology for meeting the objective(s).

## C. Additional Information

- Examples of data collection and final reports from similar recent projects;
- Not more than three (3) references from within the past two years that can attest to your policy and data analysis skills.

The Cost Proposal must include:

- Hourly rates of all staff assigned to this project;
- Estimated travel and out-of-pocket expenses.

Please ensure that the Cost Proposal is provided as a separate document as explained in Section VII below.

## VII. SELECTION CRITERIA

CPB will use the following nonexclusive factors to review and evaluate proposals:

1. Demonstrated Success of Proposed Approach (25%)– the organization must provide a description of the methodology that will be applied to analyze the data, and examples of prior work engagements in which this methodology was applied successfully.
2. Relevant Experience (25%)– the organization/project lead must have five to ten years of experience providing analytical data such as that described herein, and all individuals assigned to this project must have relevant qualifications and expertise, such as national policy, economics, and grant-making. The proposal must include the CV of each person assigned to work on this project.
3. Adequate Workforce Resources (25%)– the applicant must have the capacity to perform the analysis and the flexibility to respond quickly to the work requests.
4. Cost (15%) – a detailed budget identifying each person assigned to the project, their hours and rates; travel expenses must comply with the Travel Expense Guidelines below; any work that will be subcontracted must be identified, along with the cost.
5. Reference Feedback (10%).

## VIII. SUBMISSION OF PROPOSALS

Analyst must submit technical and cost applications through CPB's electronic grants management system.

To gain access to the electronic grants management system, please send an email request to [csg@cpb.org](mailto:csg@cpb.org), no later than May 2, 2018 at 5 pm EDT. CPB will provide a non-disclosure agreement for eligible applicants to sign and return within two business days. Once the signed agreement has been received, the Applicant will be given access to the electronic grants management system.

CPB will conduct an Applicant webinar ("Webinar") on May 17, 2018 to answer questions submitted to CPB. Potential Applicants must register for the Webinar by emailing [csg@cpb.org](mailto:csg@cpb.org) by May 2, 2018 at 5 p.m. EDT.

Applications are due no later than May 30, 2018 at 12 PM EDT. CPB will not consider applications submitted

after this time.

All questions must be submitted in writing to the email address above. The questions (without attribution) and CPB's responses will be posted on CPB's website. Please include "Data and Policy Analyst for Radio and Television Community Service Grants System Consultation" in the subject line of all emails.

Technical Proposals may be in Microsoft Word or PDF format, Cost Proposals must be in Excel format.

CPB may request the advisors with the top scores to meet with senior management at CPB's offices in Washington, D.C. If so, CPB will notify the selected advisors of the time and date.

## IX. TIMETABLE

Below is the anticipated timetable.

ACTIVITY	DATE
Release RFP	April 11, 2018
Deadline to request access to CPB's electronic grants management system and register for Webinar	May 2, 2018 - 12pm EDT
Webinar	May 17, 2018
Proposal Submissions Due	May 30, 2018 - 12pm EDT
Proposal Review and Selection	June, 2018
Contract Drafting and Execution	July, 2018
Engagement Begins	July, 2018

## X. CPB TERMS

Quotes submitted in response to this RFP by an Analyst shall be valid for at least 90 days following the closing date of this RFP.

Proposals must provide a straightforward, concise description of the Analyst's proposal to meet the requirements of this RFP. Neither multiple nor alternate proposals will be accepted. An Analyst should give specific attention to the clear identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets.

The selected Analyst shall be responsible for all services required by this RFP. Subcontractors must be identified and a complete description of their role relative to the proposals must be included in the Analyst's proposals.

By submitting an offer in response to this RFP, an Analyst, if selected for award, shall be deemed to have accepted the terms of this RFP. Any exceptions to this RFP must be clearly identified in the proposal. A proposal that takes exception to these terms may be rejected.

As part of the RFP review process, CPB may share materials, data, other information and analyses (collectively, "Information") with Analysts. As a condition of receiving such Information, Analysts responding to this RFP 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 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 Analyst. 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 Analyst grants to CPB the right to duplicate, use, disclose, and distribute all materials submitted for purposes of evaluation, review, and research. In addition, each Analyst guarantees that the Analyst has full and complete rights to all information and materials included in the proposal. Each Analyst 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.

## **XI. CONDITIONS OF AGREEMENT**

If CPB funds a proposal, the successful Analyst 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. Analyst is not authorized to commence work until the agreement is fully executed. If the Analyst opts 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 successful Analyst 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. Analyst 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, which includes but are not limited to the following.

1. A demonstration of ability 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. (The Analyst will additionally ensure that any subcontractors or Analyst under the agreement shall also maintain such records for the period specified and under the same terms);
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. The Analyst who plans to engage subcontractors will be expected to obtain competitive bids, and to provide assurances that the prices obtained for any such services are fair and reasonable;

6. The Analyst 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;
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 Analyst will be required to assign all right, title and interest in and to such research and materials to CPB. The Analyst further agrees 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;
8. 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;
9. No funds provided by CPB will be used (i) for any activity designed to influence legislation or appropriations pending before the United States Congress or any state legislature or (ii) to conduct any reception or provide any other entertainment for any officer or employee of the Federal Government or any state or local government; and
10. The Analyst will be required to indemnify and hold CPB harmless from and against all claims, damages, liabilities, costs and expenses (including legal fees) arising out of or related to (i) any alleged or actual breach of any representation or warranty in the operative agreement; (ii) any other default by such Analyst of any term or provision of the operative agreement; or (iii) Analyst's performance under the project.
11. Other material terms and provisions will be set forth in the documents provided to the Analyst that successfully completes the selection process. CPB will have complete rights to the reports created as deliverables for this project. CPB will not be responsible for any costs incurred by the Analyst in preparing and submitting a proposal, or in performing any other activities relative to this solicitation.