



Request for Proposals (RFP) **Technical Assistance for Local Station Education** **Needs Assessment and Strategic Planning**

July 2, 2018

FILING DEADLINE: July 19, 2018

I. OVERVIEW

The Corporation for Public Broadcasting (CPB) seeks an individual or firm to design and lead a four-hour training session for 50 public media stations, teaching them how to assess the educational needs of their local communities and how to create a project plan that includes a logic model and or theory of change (the “Training”). In addition, for CPB, the individual or firm will help establish short and long-term metrics to measure the success of the overall project described below. The training will be part of a larger two-day meeting in Washington, D.C. that CPB is sponsoring for those stations. Approximately two representatives from each station will attend the session, tentatively scheduled for September 2018.

The Training will leverage \$10,000 grants CPB has awarded to each station, designed to spur innovation in station education efforts and enhance capacity to provide educational services in new ways (the “Project”). The successful applicant (hereinafter “Consultant”) will work with CPB in advance of the Training to plan the agenda for the training session. Stations will pay for their own travel and accommodations and CPB will be responsible for selecting and paying for the cost of the hotel where the training session will be held.

We anticipate this engagement will last approximately three months and the Consultant will be compensated on a fixed fee basis. CPB, at its sole discretion, may extend the agreement for an additional three-month term during which the Consultant will provide any required follow-up work and be compensated at an hourly rate.

II. CPB

CPB, a private, nonprofit corporation created by Congress in 1967, is the steward of the federal government’s investment in public broadcasting. It helps support the operations of more than 1,500 locally-owned and operated public television and radio stations nationwide and is the largest single source of funding for research, technology and program development for public radio, television and related online and mobile services.

In addition to funding the production of children’s content and educational media for multiple platforms, CPB’s education goals include helping public media stations thrive and contribute to the evolving educational media landscape nationally and locally. As technology has provided individuals with greater access to learning content and greater control of their own learning experiences, public media stations have a new opportunity to serve as an educational media partner in their local communities. The Education Innovation Grants

provide an opportunity to support stations in conducting needs assessments and the development of logic model planning to help ensure that each station has the tools to be successful in this dynamic media and education environment. For more information about the Education Innovation Grants, visit <https://www.cpb.org/grants/education-innovation-station-planning-grant>

III. SCOPE OF WORK

The Consultant's work will include the following.

- A. In preparation for the Training, review the 50 successful grant applications and provide CPB with a report evaluating each. The report should identify potential issues, common themes and include recommendations to tailor the training for the grant recipients as well as suggested baseline metrics (see #B). Each application is approximately 10 pages long and a sample is available at:
<https://www.cpb.org/file/6699/download?token=hipjdkmG>
- B. To assist CPB in determining the Project's success, recommend baseline metrics. For example, did the Training and grant funding broaden the station's perspective (if so, how would this be measured) and improve the station's reach into its community by connecting with new partners. The Consultant should propose short (6 month) and longer-term (1-2 years after the grant term) metrics.
- C. Work closely with CPB in creating the Training program. During the planning stage, the Consultant must meet with CPB at its office in Washington, D.C. at least once to discuss. Travel will be reimbursed in accordance with CPB's travel policy (see Exhibit A attached hereto).
- D. Manage and oversee the Training in collaboration with CPB. Deliver the Training in person during a two day meeting in Washington, D.C. tentatively scheduled for September. The session should be creative, informative and interactive with the following objectives:
 1. Builds station capacity to execute a needs assessment process in their communities;
 2. Provide stations with the tools to develop their own theory of change/logic model or equivalent based on results of the needs assessment.
- E. Present the results of the project at CPB's office or an industry meeting, if required by CPB.
- F. Provide any required follow-up work related to the project. The work may include providing technical assistance to stations on needs assessment planning and implementation, logic model planning and development, and assisting CPB in collecting and evaluating the established metrics.

IV. PROPOSAL COMPONENTS

Applicants must provide the required information and separate their cost and technical proposals. Failure to do so will disqualify the applicant.

A. Technical proposals must include the following components.

1. Qualifications narrative describing the firm's experience providing logic model or theory of change planning and developing metrics, and the assigned staff's relevant expertise and resumes;
2. Three examples (or links to the examples) of logic model planning training provided to clients which involved developing and reporting against those metrics over the short and long term. The examples should be of work projects completed within the past five years, and include the objectives, results and any lessons learned that would inform this project.
3. A detailed description of the Consultant's proposed approach to the Training and to the development of the recommended metrics, with the hourly rates and assigned staff for each major task. CPB expects that staff named in the Applicant's proposal will remain assigned to the major tasks for the duration of the work. Any changes will require CPB approval which may not be given.

B. Cost Proposal, including:

1. Detailed breakdown of the project cost by major task, identifying the staff assigned, hours required and hourly rates;
2. Travel expenses; and
3. For the optional 3-month term, the hourly rates of the anticipated staff.

V. EVALUATION CRITERIA

Proposals will be evaluated using the following criteria and the associated weight.

1. Whether the qualifications of firm's staff, past firm experience and examples demonstrate the Consultant's ability to successfully assist CPB with this project (40%);
2. Quality of proposed overall approach and approach to metrics development, and whether the hours allocated are reasonable in providing the required services (35%);

and

3. Reasonableness of the project cost (25%).

CPB may request the top scoring applicants to present their proposals to CPB at its offices in Washington, D.C. If selected, CPB will contact the advisors to schedule the date and time of the meetings.

VI. TIMELINE AND PROPOSAL SUBMISSION PROCESS

Responses to this RFP are due Thursday, July 19, 2018.

Applicants must submit their technical and cost proposals through CPB's electronic grants management system portal. To gain access to the electronic grants management system, please send an email request to Megan Fitzpatrick, mfitzpatrick@cpb.org, no later than Thursday, July 12, 2018. CPB will provide access to eligible applicants within two business days. CPB will not consider applications submitted after this time. Please note: even if your organization already has an account with CPB's electronic grants portal, you must still contact Megan to request access to this specific RFP.

All questions must be submitted in writing to Megan Fitzpatrick, Education Coordinator, at mfitzpatrick@cpb.org. CPB will post all responses without attribution on CPB's website. The deadline for submitting questions is Monday, July 16, 2018.

Cost proposals may be in Microsoft Word, Excel or PDF format.

VII. GENERAL TERMS

Quotes submitted in response to this RFP by an applicant ("Offeror") shall be valid for at least 90 days following the closing date of this RFP.

Proposals must provide a straightforward, concise description of the Offeror's proposals to meet the requirements of this RFP. Neither multiple nor alternate proposals will be accepted. An Offeror 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 Offeror 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 Offeror's proposals.

By submitting an offer in response to this RFP, an Offeror, 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 Offerors. As a condition of receiving such Information, Offerors 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 Offeror. 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 RFQ.

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 Offeror 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 Offeror guarantees that the Offeror has full and complete rights to all of the information and materials included in the proposal. Each Offeror 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.

1. If a quote in response to this RFP is selected for funding, Offerors 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. Offerors are not authorized to commence work until the agreement is fully executed. If Offerors 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.
2. As a condition of agreement, Offerors 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. Offerors must also agree to indemnify CPB against any loss resulting from breach of any of the guarantees contained in the agreement.
3. If selected for funding, Offerors will not be eligible to apply for or receive CPB funding for any content or other production grant programs that are directly related to the scope of this project.
4. 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:

- a. 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;
- b. Maintenance, for 10 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. (Offerors will additionally ensure that any subcontractors or advisors under the agreement shall also maintain such records for the period specified and under the same terms);
- c. Maintenance, for 10 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;
- d. Submission to CPB of a copy of any U.S. Comptroller General final audit report in connection with the project;
- e. Compliance with equal employment opportunity and nondiscrimination laws and policies;
- f. Offerors 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
- g. 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 Offeror will be required to assign all right, title and interest in and to such research and materials to CPB. Offerors further agree 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.
- h. 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.

- i. Other material terms and provisions will be set forth in the documents provided to the Offeror that successfully completes the selection process.
5. CPB will have complete rights to the reports created as deliverables for this project.
6. CPB will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal, or in performing any other activities relative to this solicitation.

Exhibit A
CPB Non-Employee
Travel Expense Guidelines

1. Non-Employee Expense Form

Travel Expenses incurred by non-CPB staff (including consultants) must be itemized in the Non-Employee Expense Form. All expenses worth \$25.00 or higher denominations must be supported by original receipts. Expenses requiring CPB approval must evidence such approval. Reimbursement of travel expenses is subject to the following limitations:

2. 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 so as to realize cost savings, and are required to accept the lowest fare available for the required itinerary. Full fare coach may be used only in unusual and/or special circumstances and, in each such instance, a detailed explanation shall be provided and reimbursement shall be contingent upon approval by CPB.

Private automobile use will be reimbursed at the prevailing IRS rate of 50 cents per mile to CPB employees for 2016, but not in excess of the lowest available airfare. Taxi cab fare will be reimbursed to the extent reasonable and necessary. Rental car expense will be reimbursed only when the daily taxi fare would exceed 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.

3. Lodging

CPB will only reimburse 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, shoe shines, etc., are not subject to reimbursements.

4. 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 or included in connection with an activity.