



## Request for Proposals (RFP) Strategic Education Consulting

**December 2013**

**FILING DEADLINE: MONDAY, JANUARY 13, 2014 (5 P.M. ET)**

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### I. PROJECT OVERVIEW

CPB is seeking proposals from firms to provide strategic education consulting services to expand and advance CPB's overall education mission and goals. Currently, CPB provides funding and support for two major strategic educational initiatives – Ready To Learn (RTL) (<http://www.cpb.org/rtl/>) and American Graduate: Let's Make It Happen ([www.americangraduate.org](http://www.americangraduate.org)). The Ready To Learn initiative is a partnership among the U.S. Department of Education, CPB, PBS, local public media stations and their community-based partners. The initiative's primary goal is to improve the math and literacy skills of children aged two to eight (particularly those from low income families) through innovative, high-quality content delivered via the Internet, broadcast television, and other dynamic new technologies. American Graduate is a multi-year public media initiative designed to assist local communities in identifying and implementing solutions to the high school dropout crisis, and in developing ways to address the crisis working with key stakeholders.

CPB also provides funding for the creation of children's educational content and resources on a wide range of platforms. Educational resources include television programming, online and mobile apps, games, and content developed exclusively for use on the web. In addition to supporting the work of local public media stations and national organizations, CPB has and expects to continue funding education related research, and the capacity building efforts of public media stations to create educational content and sustainable education services.

CPB will retain the firm, under a fixed-fee consultancy, for a one year term, renewable on an annual basis for up to two (2) additional years, at CPB's discretion. The consultant will be expected to provide approximately forty (40) hours of effort per month, with some months requiring more and some less effort.

## **II. ABOUT CPB**

The Corporation for Public Broadcasting (CPB) is a private, not-for-profit, non-governmental corporation authorized by Congress in 1967 through amendments to the Communications Act of 1934. CPB is exempt from taxes under Section 501(C)(3) of the Internal Revenue Code. CPB promotes non-commercial public telecommunications services (television, radio, online, and digital) for the American people. CPB also provides financial support and a variety of services to more than 1,300 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 a national system of interconnection.

## **III. SCOPE OF WORK**

### **1. Strategic Advice and Research**

The consultant will be required, upon CPB's request, to provide strategic education consulting services to expand and advance CPB's overall education mission and goals, as well as strategic advice and research services similar to those described below:

- a. Provide CPB with counsel, guidance and recommendations to inform CPB's education portfolio in key areas of education including early childhood education, k-12 education, dropout prevention and youth engagement, English Language Learning (ELL), and workforce education.
- b. Provide input and information to assist CPB in creating a comprehensive short term (1-2 year) and long term (3-5 years) strategic education plan.
- c. Proactively provide CPB with the necessary information to remain current on new trends in education, whether it be providing updates on changes in federal and state education policies, education trends and activities, federal education funding, and/or issues affecting the Elementary and Secondary Education Act reauthorization, and assist CPB in developing a plan and materials to inform public media stations of these trends and funding opportunities
- d. Provide CPB with up-to-date information about upcoming education grant programs (federal, state or private) that complement CPB's education policy, and to which public media stations and organizations might be eligible to apply.
- e. Review environmental scans of national and local education services provided by public media, and make recommendations to CPB on how best to aggregate this information to highlight what works best, ways to scale that work, and the best method of communicating impact. A copy of such environmental scans will be provided to the selected applicant.
- f. Assist CPB in the construction of appropriate and effective messaging (for audiences within and outside of public media system) about public media's

education initiatives and the impact of those initiatives on communities and the American public.

- g. Occasionally, CPB is invited to attend and participate in meetings that focus on education, which may be hosted by federal agencies, national education and private sector organizations, Congress, or the White House. In the event that CPB participates in such meetings, the consultant may be asked to assist CPB in drafting speeches, talking points, and/or organizing compelling presentations, ensuring that messaging effectively communicates the goals and impact of the educational efforts undertaken by CPB and public media.
- h. Provide strategic project management of tasks, including creating consensus goals, objectives and timelines, thereby ensuring timely and successful completion.

## **2. Document Drafting and Review**

From time to time, the consultant will be required to draft and/or review materials related to CPB's overall education case statements, policy and strategy memos or analyses, reports, research summaries, fact sheets, presentations, communications, and planning materials.

## **3. Liaison**

Occasionally the consultant will be expected to assist CPB in identifying, coordinating, and collaborating with key stakeholders, external partners and organizations as appropriate in order to, among other things, maximize public media's role and engagement in the education field, including leveraging relationships in the education community (e.g. such as foundations, non-profit organizations and others).

## **4. Public Media Meetings**

At times, the consultant will be required to attend and participate in specific local and national education related meetings held at different locations which may include NETA, CPB Board Meetings, Public Media General Manager Meetings, American Graduate and/or Ready To Learn meetings, and the PBS Annual Meeting. The consultant may also be asked to assist CPB with meeting and presentation coordination and facilitation. Accordingly, the consultant must be available to attend up to six different meetings or conferences during each contract year.

## **5. Deliverables**

The consultant will be required to provide monthly project activity reports and invoices, and copies of any materials generated during the reporting period to CPB.

## **6. CPB Meetings**

The Consultant will be expected to maintain consistent on-going communications with CPB, meeting regularly in person and/or by telephone with CPB's Education and senior staff when requested. Applicants must be available to meet with CPB at its offices in Washington, D.C., at least six times each year.

## **IV. PROPOSAL COMPONENTS**

Applicants must separate their Technical and Cost proposals.

Technical Proposals must include the following in the order specified:

- A. cover page with project title ("Strategic Education Consulting RFP"), company name, primary contact name, mailing address, email address and phone number;
- B. qualifications narrative describing the person(s) assigned to this project and the firm's relevant experience and abilities related to the tasks in Section III;
- C. resume or Curriculum Vitae (CV) for assigned personnel;
- D. description of company's relationships with and connections to key education stakeholders and organizations and knowledge of key education areas;
- E. a narrative demonstrating the consultant's understanding and knowledge of CPB and public media educational initiatives and other educational media projects and/or services;
- F. two (2) samples of written work or presentations related to significant education policy issues, such as research documents, analyses, white papers, etc. that the person(s) assigned to this project completed within the last three years.

Cost Proposals must include the following:

A breakdown of the hourly rates for each assigned staff by month, assuming 40 hours per month, for the initial term and both renewal periods. In addition, the cost, if any, of the consultant's travel to CPB offices, assuming six trips per contract term. Travel for conferences and meetings should not be included in the budget. All travel expenses must be approved in advance by CPB and will be reimbursed in accordance with CPB's travel policy and approved travel attached as Exhibit A.

## **V. SELECTION CRITERIA**

Responses to this Request for Proposals will be evaluated based upon the following criteria and associated weight:

- A. qualifications of firm and personnel assigned to this project; (15%)
- B. the assigned personnel's in-depth knowledge and understanding of federal, state and local educational policy; (15%)
- C. the assigned personnel and firm's relationships, connections and knowledge of a broad

- range of education stakeholders and organizations; (15%)
- D. the consultant’s knowledge, understanding and expertise across all key education areas; (15%)
- E. the consultant’s understanding and knowledge of educational initiatives, including CPB and public media educational initiatives and other educational media projects and/or services ; (15%)
- F. Cost Proposal, including personnel, direct and indirect costs, and travel expenses. (25%)

## VI. SUBMISSION OF PROPOSALS

**Responses to this RFP are due Monday, January 13 at 5:00 PM (ET).** Applicants must separate their Technical and Cost Proposals, sending their Technical Proposals via email to: Fiona Macintyre, Project Manager, Education, at: [fmacintyre@cpb.org](mailto:fmacintyre@cpb.org). The Cost Proposals must be provided via email to: Jackie Livesay, Vice President, Compliance, at: [jlivesay@cpb.org](mailto:jlivesay@cpb.org).

All questions must be submitted in writing to Ms. Macintyre at the email address above. The questions (without attribution) and CPB’s responses will be posted on CPB’s website by January 7, 2014.

CPB may request that consultants with top scores meet with and present their proposal to senior management at CPB’s offices in Washington, D.C. If so, CPB will notify the selected brokers of the time and date.

Proposals may be in Microsoft Word, Excel or PDF format and the subject line must state “Strategic Education Consulting RFP”.

## VII. TIMELINE

ACTION ITEMS	DATES
RFP Announced	Monday, December 16, 2013
Proposals Due to CPB	5:00 pm ET, Monday, January 13, 2014
Award Announced	Early 2014
Contract Executed	February 2014 (estimated)

## VIII. CPB 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.

## **IX. CONDITIONS OF AGREEMENT**

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. 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:
4. 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;
5. Maintenance, for 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. (Offerors 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);
6. Maintenance, for 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;
7. Submission to CPB of a copy of any U.S. Comptroller General final audit report in connection with the project;
8. Compliance with equal employment opportunity and nondiscrimination laws and policies;
9. 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
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 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.

11. 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.
12. Other material terms and provisions will be set forth in the documents provided to the Offeror that successfully completes the selection process.
13. CPB will have complete rights to the reports created as deliverables for this project.
14. 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 – Non-Employee Travel Expense Guidelines**

Travel Expenses incurred by non-CPB staff (including consultants) need to 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:

### **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, 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.

### **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.

### **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, provided that meals are not otherwise furnished or included in connection with an activity.