Pew

Request for Proposal (RFP):
Research, Analysis, and Modeling to Help States Conduct Long-Term Expenditure Forecasts

June 25, 2025

Request for Proposals for The Pew Charitable Trusts (Pew)

RFP No.: 2025-SFH-01

RFP Issue Date: June 25, 2025

RFP Title: Research, Analysis, and Modeling to Help States Conduct Long-Term Expenditure Forecasts

Point of Contact (POC): Tina Smith, csmith@pewtrusts.org

Key Dates:

Deadline for notification of Expression of Interest	July 16, 2025
Deadline for requests for clarifications	July 16, 2025
Anticipated release of Pew's responses to requests for clarifications	Aug. 1, 2025
Deadline for submission of proposals	Aug. 14, 2025
Anticipated date of Award	August-September 2025
Anticipated start date of awarded agreement(s)	October 2025

If you need assistance or accommodation to participate in the RFP process, please reach out to the Pew Point of Contact as soon as possible.

*All proposals, including pricing, must be valid for at least one hundred and twenty (120) calendar days from the date of submission.

RFP OVERVIEW

Through this RFP, Pew's state fiscal policy project is soliciting proposals from organizations (Respondents) to produce research, provide analysis, and develop tools to help states conduct expenditure forecasts. Pew is seeking to expand and strengthen states' capacity for long-term expenditure forecasting by demonstrating effective methods and producing practical, actionable guidance. To achieve this, the work product under this RFP is intended to A) develop a typology of possible approaches to long-term expenditure forecasting, B) identify or develop a promising approach, C) produce an example forecast, and D) produce a draft guidebook to support implementation. Additional details are further set forth herein and in the Scope of Work attached hereto as Appendix A (Scope of Work).

BACKGROUND ON PEW

Pew is a United States (U.S.) nonprofit organization and Section 501(c)(3) public charity. Pew is driven by the power of knowledge to solve today's most challenging problems in the U.S. and globally. Pew applies a rigorous, analytical approach to improving public policy, informing the public and invigorating civic life. Pew partners with a diverse range of donors, public and private organizations and concerned citizens who share its commitment to practical, fact-based solutions and goal-driven investments to improve society. For more information about Pew, please see www.pewtrusts.org.

INSTRUCTIONS

All communications related to this RFP must be conducted via email with the Pew Point of Contact (POC) and by the Key Dates listed on Page 1 of this RFP. Questions must be submitted in writing via email; **phone calls will not be accepted.** Phone calls not initiated by Pew to discuss the RFP or ask questions **are not** permitted. **Pew reserves the right to modify or cancel this RFP, including Key Dates, at any time and to make all decisions respecting this RFP in its sole discretion.**

Expression of Interest. Any entity interested in submitting a proposal in response to this RFP must submit an Expression of Interest (EOI) via email by the date and to the POC listed on Page 1. Pew will only send additional materials, clarifications, and answers to questions to those entities that have submitted an EOI by such date. EOIs are not binding; submission of an EOI does not obligate a Respondent to submit a proposal. Any EOI must include, at a minimum:

- Entity's legal name; and
- Point of contact details, including name, phone number, and email address.

Requests for clarifications. All questions, and the responses thereto, that Pew believes may be of interest to other potential Respondents will be circulated to all Respondents who have submitted an EOI. Only written responses issued by Pew will be considered official. Any verbal information received from employees of Pew or any other entity should not be considered an official response to any requests for clarifications regarding this RFP.

Submission Instructions:

1. Proposals must be submitted via email to the POC by the date listed on the first page. Please reference the RFP number in the subject line of any response to this RFP. Pew reserves the right to accept or reject, without consideration, proposals that are received late or obtain proposals from, and negotiate with, third parties outside of this RFP at any time.
2. Pew will endeavor to confirm receipt of all properly submitted proposals. If Pew does not confirm receipt, Respondent should assume its proposal has not been received and resubmit before the deadline.

Proposal Requirements. Proposals must:

1. Be submitted in Adobe PDF or Microsoft Office format, using 8.5" x 11" sized layouts.
2. Not exceed ten (10) pages. This page limit does not include the following:
    a. Required Staffing Plan:
        - Resumes/CVs, specific qualifications and proposed role of key individuals, and any subcontractors, who will carry out the Scope of Work attached in Appendix [A].
        - A staffing plan that aligns with Respondent's approach to the project, including staff availability to complete the project in the designated time frame and their roles and time commitments to the project and, broadly, to other projects. If the Respondent is not yet able to confirm the full teaming structure, they must explain why and demonstrate that comparable experience and capabilities currently exist within their organization.
        - A point of contact for all proposal-related correspondence.
    b. Required Appendix forms (listed at the bottom of this RFP):
        - Completed budget template
        - Completed Respondent Summary Form
        - A detailed response of your organization's ability to comply with critical Conditions of Agreement that will govern the resulting agreement (Agreement) as further set forth in Appendix D.
3. Contain at a minimum the following information:
    a. Description of Respondent's proposed project, including data source(s), methodology, and analytic approach and how such tools will help Respondent deliver the Scope of Work. This section should indicate if any proprietary and/or sensitive data will be used, and if applicable, how such data will be managed and safeguarded.
    b. Discussion of any limitations to the proposed methodology, including any limitations to broader applicability of findings. This section should discuss any challenges anticipated for the project and how such challenges would be addressed. Please also include a brief description of how your organization approaches quality control (e.g., fact checking and data checking for accuracy, external review of draft product, etc.).
    c. Delineation of the deliverables to be created and tasks to be conducted. A detailed timeline for completing those activities and a plan for communicating with and reporting to Pew throughout the project.
    d. Description of Respondent's capabilities and past performance of completed projects of similar size, scope, and complexity, including discussion of results and impact.
    e. Description of Respondent's experience addressing the sub-bullets below. Please note that it is *preferred but not required* for the Respondent to have experience leading a project that involves the following:
        i. Securing and conducting interviews with state officials and reviewing and analyzing state materials; AND
        ii. Developing expenditure forecasts that are methodologically sound and produce credible results; AND
        iii. Developing practical materials and resources for state officials, informed by original research and analysis.
    f. Respondent may also comment, if deemed appropriate, on any aspect of the RFP, including suggestions on possible alternative approaches to the tasks set forth in Appendix A.

By submitting a proposal, each Respondent grants to Pew and its designees the right to duplicate, use, disclose, and distribute all materials (and information contained therein) submitted for purposes of evaluation, review, and/or research. In addition, each Respondent guarantees that (1) it has full and complete rights to all information and materials included in the proposal and (2) 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. Additionally, each Respondent agrees to defend, indemnify, and hold harmless Pew with respect to any claims or losses arising from the aforementioned guarantees. Each Respondent further agrees that in addition to this RFP, which is owned by Pew, any submission to Pew (including, without limitation, all materials and information contained therein) will become the property of Pew (not including any of Respondent's preexisting intellectual property rights contained in such submission), and Pew is not required to return the proposal, including any submitted materials, to any Respondent.

EVALUATION OF PROPOSALS.

Pew will review and evaluate proposals based on the following criteria:

1. The proposed approach and methodology, which must reflect specific tactics for achieving deliverables and risk management techniques.
2. Familiarity with state budgeting, long-term expenditure forecasting, and key budget drivers (e.g., K-12 education, higher education, Medicaid, long-term liabilities).
3. Timeline for launch and implementation.
4. Staffing.
5. Background and past performance.
6. Cost and budget.
7. Agreement with Pew's Conditions of Agreement.

Pew will review all proposals and recommend award allocation, with final selection made by Pew at its sole discretion.

AWARD

Upon completion of the review of all proposals. and a decision to proceed with the selected Respondent(s) (Selected Respondent(s)), Pew will contact each Respondent to advise whether or not its proposal has been accepted. This RFP, and any award resulting from it, does not constitute a binding agreement between Pew and the Selected Respondent. All future work with Pew is contingent upon Pew and the Selected Respondent(s) signing a mutually acceptable Agreement as further set forth in Conditions of Agreement described above. Selected Respondents who are notified that Pew is interested in their services/products/project shall not start any work for Pew, or incur any expense, before an Agreement between Pew and Selected Respondent is fully executed.

Confidentiality

This RFP, including the attached appendices [and any other materials provided by or on behalf of Pew in connection with this RFP], are Pew's confidential and proprietary information and, without the express prior written consent of Pew, may not be duplicated, used, or disclosed (in whole or in part) for any purpose other than for reviewing, evaluating, and/or preparing a proposal in response to this RFP. Confidential information shall not be deemed to include information that is rightly obtained from another source, was independently developed, or is in the public domain.

No Financial Liability for Proposal Preparation

Pew is not liable, financially, or otherwise, for any costs associated with the preparation, submission, or presentation of any proposals in response to this RFP. By submitting a proposal, Respondent acknowledges and agrees it has read, understands, and accepts the RFP documents, including all appendixes and attachments (including, without limitation, the Conditions of Agreement). The person submitting the proposal on behalf of Respondent has all necessary authority to act on behalf of Recipient.

Best Offer

Best-offer proposals are requested. Pew reserves the right to conduct negotiations with and/or request clarifications from any Respondent prior to award. Respondents may be required to submit additional information during Pew's evaluation process.

APPENDICES

Appendix A: Scope of Work
Appendix B: Price Proposal Template
Appendix C: Respondent Summary Form
Appendix D: Conditions of Agreement
Appendix E: Personal Data
Appendix F: Pew's Guidelines for Survey Methods Statements

APPENDIX A
Scope of Work

I. Project Description and Purpose
This project is focused on developing research and tools to help states conduct expenditure forecasts.

In a time of great fiscal uncertainty, state leaders are grappling with understanding whether state and federal budget decisions will be manageable over the long term or will jeopardize their ability to solve state problems or even sustain programs and services in the future. Long-term budget assessments—revenue and spending forecasts that look at least three fiscal years into the future and use those projections to analyze ongoing fiscal sustainability—can help to inform key fiscal decisions, including whether a state can afford new costs or whether it needs to make adjustments to maintain a balanced budget.

The revenue component of long-term budget assessments is well studied, but there has been less research and fewer guidelines published on the expenditure component. In May 2024, Pew commissioned a report from the Government Finance Research Center at the University of Illinois Chicago that looked at the challenges states face when forecasting expenditures. Although the researchers uncovered several barriers, they also found a strong interest in improving forecasting methodology and in collaboratively developing best practices and common standards within governmental offices and across states.

Building on that interest, Pew seeks to expand and strengthen states' capacity for long-term expenditure forecasting by demonstrating effective methods and producing practical, actionable guidance. To achieve this, the work product under this RFP is intended to A) develop a typology of possible approaches to long-term expenditure forecasting, B) identify or develop a promising approach, C) produce an example forecast, and D) produce a draft guidebook to support implementation.

II. Proposed Work Plan and Deliverables
Respondents shall produce and deliver research to Pew for Pew's use and potential publication. Pew may use the research to inform and shape our future work in this area. Pew may also choose, at its discretion, to publish the work, and/or a summary, publicly on Pew's website. As a part of the research, Respondents shall complete the following:

A. Develop a typology of approaches to long-term expenditure forecasting. The typology should outline the advantages and limitations of each approach, identify common challenges, and offer potential solutions. It should also provide guidance on how states might choose a method by considering trade-offs such as methodological robustness, data availability, ease of implementation, and adaptability to different contexts (e.g., differences in staffing capacity or technical expertise). To develop the typology:
    a. Identify and interview key state officials/staff in at least 10 states, including from both executive and legislative branches, who are knowledgeable about their state's long-term expenditure forecasting practices.
    b. Explore, critically review, and analyze what interviewees, state materials, research organizations, academic literature, and any other relevant resources say about the most helpful methods for forecasting expenditures.
B. Building on findings from the typology work, identify, adapt, or develop a promising approach, i.e., an approach that is methodologically sound, feasible to implement in a range of state

contexts, produces credible results, and is responsive to known forecasting challenges, for long-term expenditure forecasting that meets the following criteria:

a. Forecasts all expenditure categories, with category-specific methods for key budget drivers, including K-12 education, higher education, Medicaid, long-term liabilities (pensions and other retirement benefits, infrastructure maintenance and replacement, and debt), and any additional unique state cost drivers. Other categories may be addressed collectively or through other simplified methods, where appropriate.
b. Forecasts at least three fiscal years beyond the current year. Captures pending policy changes beyond the forecast period that could materially change the budget outlook.
c. Accounts for the cost to maintain current services incorporating fiscal, economic, demographic, climate, and technological factors where applicable.
d. Includes an analysis of the primary factors driving the results and incorporates uncertainty by showing how the numbers might vary under different scenarios, assumptions, or methodologies.
e. Distinguishes between one-time and ongoing spending.

C. Using the forecasting approach identified in II.B, produce an example expenditure forecast as a proof of concept. This forecast may be based on a real state (with appropriate data and permissions), a simulated state, or a generalized model.
   a. Provide all data, assumptions, formulas, and results.
   b. Provide an evaluation of the forecast's credibility, including a discussion of potential limitations and conditions required for successful implementation.

D. Develop a draft guidebook for state analysts that outlines how to apply the forecasting approach identified in II.B. Designed as a practical resource for states beginning or seeking to improve long-term expenditure forecasting, the guidebook should:
   a. Include step-by-step guidance, explanations of key concepts, and illustrative examples.
   b. Where possible, identify simplified options for constraints such as limited expertise, data, staff time, or technology.

E. For the work in II.A through II.D, regularly collaborate with Pew staff as well as an advisory group comprising state analysts and other experts convened in consultation with Pew. Engagements should include check-ins with Pew staff approximately every four to six weeks and participation in four to five advisory group meetings aligned with key project milestones. Pew will coordinate logistics for advisory group meetings and other convenings.

III. <u>Additional Expectations and Requirements</u>

A. The work product should be written for a relatively technical audience with an understanding of state budget processes and analyses.
B. Deliverables should include sufficient documentation to allow for replication and adaptation by external users, including datasets, working files, and explanatory notes.
C. Any data obtained from state agencies or other organizations is expected to comply with any relevant data use agreements, confidentiality terms, and permissions.
D. The selected contractor is expected to communicate proactively with Pew staff, respond to inquiries in a timely manner, and flag any risks to deliverables or timeline as early as possible.

IV. <u>Budget Limitations and Timeline</u>

Pew expects the work product to cost between $125,000 and $175,000. The work product should be completed in a 12-to-15-month time frame.

APPENDIX B

Price Proposal Template

Please provide the proposed budget in the template provided.

(SEE ATTACHED)

APPENDIX C

Respondent Summary Form

Please complete the attached.

(SEE ATTACHED)

APPENDIX D

Conditions of Agreement

A summary of some critical Conditions of Agreement that will govern the resulting agreement (Agreement) are described below. As stated previously, these are not the actual provisions or an exhaustive summary of terms and conditions that will be included in the final Agreement. For example, different conditions may apply if Pew is funding the Selected Respondent's project through a grant and the project supports the Selected Respondent's own charitable work, as a nonprofit organization or university, as opposed to Pew purchasing a service. Also, Pew's funders may have additional requirements. In addition, if the Selected Respondent is organized outside of the United States or will be performing work in any country outside of the United States, additional terms and conditions may be required.

Any submitted proposal must indicate which condition(s) the Selected Respondent cannot agree to, an explanation as to why (including citations to any relevant statutes or Selected Respondent policies that may govern such position), and any proposed alternatives related to that condition. Selection of a Respondent that proposes alternative or revised conditions in its proposal shall not obligate Pew to consider or accept such revised or proposed conditions for inclusion in the Agreement.

1. <u>Intellectual Property</u>. Pew shall own the Work Product. "Work Product" consists of the deliverables and other materials, including drafts thereof, prepared by Selected Respondent and its personnel under the Agreement.

   Selected Respondent will own the Work Product. "Work Product" consists of the deliverables/milestones and other materials, including drafts thereof, prepared by Selected Respondent or its subcontractors to support the purpose (and funded) under the Agreement. Selected Respondent grants Pew an unrestricted license to the Work Product for non-commercial purposes.

2. <u>Datasets</u>. Depending on the Scope of Work, Selected Respondent may be required to provide Pew, in a form satisfactory to Pew, a copy of datasets used in connection with the Work Product and grant Pew an unrestricted license to all such datasets.

3. <u>Representations and Warranties</u>. Selected Respondent is required to represent and warrant that its personnel are experienced, properly trained or otherwise qualified and capable of performing the work and that the Work Product and any applicable datasets shall not infringe any intellectual property right of any third party. This is not an exhaustive list of the representations and warranties in the Agreement.

4. <u>No Campaign Intervention</u>. Selected Respondent cannot use Pew funds to participate or intervene in any political campaign on behalf of, or in opposition to, any candidate for public office.

5. Ethics Requirements. Selected Respondent may not use funds provided under the Agreement to give anything of value to a government official or employee without prior written approval from Pew.

6. Insurance. Depending on the Scope of Work, Selected Respondent may be required to maintain insurance coverage including, but not limited to, General Liability ($1,000,000 per occurrence, $2,000,000 aggregate, $1,000,000 personal and advertising, $2,000,000 aggregate); Workers Compensation and Employer's Liability (not less than $500,000 each accident for bodily injury by accident, and $500,000 each employee and policy limit for bodily injury by disease); Professional Liability (with a minimum limit of $3,000,000 each claim/aggregate); Umbrella Liability (with a $3,000,000 limit). As a reminder, if for any reason, Respondent cannot meet Pew's insurance requirements (for example, if Respondent is self-insured or otherwise), Respondent should state the reasoning and its current insurance coverage in the proposal.

7. Indemnification. Selected Respondent is required to indemnify Pew and certain related parties for any costs or claims arising from (i) Selected Respondent's breach of the Agreement, (ii) performance under the Agreement, or (iii) intentional misconduct or negligent acts or omissions, of Selected Respondent or its personnel.

8. Pew Limitation of Liability. Recourse against Pew under the Agreement shall in no event include lost profits, incidental, consequential, special, punitive, or indirect damages, regardless of whether advised of the possibility of such damages. Selected Respondent's liability will not be limited under the Agreement.

9. Termination Rights. Each party may terminate the Agreement upon the other party's breach and failure to cure within the notice and cure period(s) set forth in the Agreement. Pew may terminate at any time, without cause, by giving 30 days' prior written notice to Selected Respondent, and if applicable, Selected Respondent shall cooperate with Pew in transitioning the Agreement to a new provider during the wind-down period. Termination remedies are specified in the Agreement.

   Pew may terminate the Agreement upon Selected Respondent's breach and failure to cure within the notice and cure period(s) (if any) set forth in the Agreement. Pew may terminate at any time, without cause, by giving 30 days' prior written notice to Selected Respondent. Termination remedies are specified in the Agreement.

10. Governing Law. The laws of the Commonwealth of Pennsylvania shall govern the Agreement, and the state and federal courts in Philadelphia, Pennsylvania, shall have exclusive jurisdiction over any disputes arising under the Agreement.

11. Best Rate Available. Selected Respondent must agree that as of the start date of the Agreement, the pricing (including all rates in which the pricing is based) reflects the best rate available. If, after the start date of the Agreement and before the services are performed, Selected Respondent charges another client a lower fee for the same or similar services,

Selected Respondent agrees that this lower fee will apply to the Agreement (and the Agreement will be amended to reflect the lower pricing).

12. Right to Audit. Selected Respondent must agree, during the Agreement term and for three (3) years thereafter, to maintain complete and accurate books and records to substantiate the Selected Respondent's charges to Pew under the Agreement.

13. Personal Data. Selected Respondent must agree to comply with all applicable laws, regulations, and personal data requirements, which are attached as Appendix E to this RFP. Depending on the Scope of Work, additional requirements may be included in the Agreement.

14. Code of Ethics and Values. Selected Respondent must agree that it has read, and understood Pew's Code of Ethics and Values, located here https://pew.org/455vyL7 and agrees to comply with its terms.

Other material terms and provisions will be set forth in the Agreement provided to the Selected Respondent.

APPENDIX E
Personal Data

Unless otherwise specified in the Agreement, Selected Respondent represents and warrants that no Personal Data (defined below) relating to non-U.S. residents shall be processed or transferred from the European Union or any other jurisdiction outside of the United States to the United States under an Agreement. Pew represents and warrants that Pew shall not knowingly transfer Personal Data relating to non-U.S. residents to Selected Respondent under any Agreement.

If processing, including transferring, of any Personal Data is performed under an Agreement, Selected Respondent shall comply with the Data Protection Law (defined below) in connection with the processing, including transfer, of Personal Data for purposes of the Agreement. Specifically, Selected Respondent represents and warrants that: (i) it shall not disclose any Personal Data except where it is lawful; (ii) it shall carry out the sharing of any Personal Data obtained from Data Subjects (defined below) pursuant to the Agreement in accordance with any notices supplied to, and consents obtained from, Data Subjects; (iii) it shall enter into any additional contractual clauses or addenda as may be necessary for compliance with the Data Protection Law; and (iv) it shall not process any Personal Data other than in accordance with (a) any applicable consents, (b) any applicable privacy policies or other conditions as notified to Selected Respondent by Pew, and (c) applicable law, including the Data Protection Law.

Selected Respondent agrees to provide Pew written notice of any reasonably suspected or actual information security or other incident that compromises the security, integrity, confidentiality, or availability of Personal Data, and any such incident shall be deemed a breach of the Agreement. Within seventy-two (72) hours of discovery of the data security incident, without waiver of any other rights and remedies available to Pew, including, but not limited to, Pew's rights under the indemnification section of the Agreement, Selected Respondent shall cooperate (and cause its Personnel to cooperate) with Pew on taking reasonable steps to ensure the security, integrity, confidentiality, and/or availability of the data.

Each Party shall also, upon request of the other Party, provide all such assistance as the other Party may reasonably request to comply with its obligations under Data Protection Law (including responding to any requests from a supervisory authority or Data Subject and providing copies of any and all notices and consents a Party has provided to Data Subjects) in relation to the transfer of the Personal Data to the other Party.

For the purposes of the Agreement:

(i) "Data Protection Law" means any applicable data protection or privacy laws to which either Party, as applicable, is subject to in connection with the Agreement; and

(ii) "Personal Data" means any information relating to an identified or identifiable natural person (a "Data Subject").

APPENDIX F

Pew's Guidelines for Survey Methods Statements

The information in this appendix describes Pew's transparency and disclosure standards. It is included in this RFP as a reference to potential offerors.

The following items are required to be included in methods statements to describe how the survey was conducted. The information should either be included in the document or released upon request. The method statement and topline must be available at the time that the survey results become public.

Prior to public release, completed methods statements should be reviewed by Pew's survey methods team, who can be reached at survey@pewtrusts.org.

Who Sponsored the Research and Who Conducted It: Name the sponsor of the research and the party(ies) who conducted the study. If the original source of funding is different than the sponsor, this source will also be disclosed.

Measurement Tools/Instruments: Measurement tools include questionnaires with survey questions and response options, show cards, or vignettes. The exact wording and presentation of any measurement tool from which results are reported, as well as any preceding contextual information that might reasonably be expected to influence responses to the reported results and instructions to respondents or interviewers should be included.

Population Under Study: Survey and public opinion research can be conducted with many different populations including, but not limited to, the general public, voters, or people working in particular sectors. Researchers will be specific about the decision rules used to define the population when describing the study population, including location, age, other social or demographic characteristics (e.g., persons who access the internet), and time (e.g., immigrants entering the U.S. between 2015 and 2019).

Dates of Data Collection: Disclose the dates of data collection.

Method Used to Generate and Recruit the Sample. The description of the methods of sampling includes the sample design and methods used to contact or recruit research participants.

1. Explicitly state whether the sample comes from a frame selected using a probability-based methodology (meaning selecting potential participants with a known non-zero probability from a known frame) or from the rare use of a nonprobability sample (following review and approval by the RRS survey team and Pew Research Center leadership).

2. Probability-based sample specification should include a description of the sampling frame(s), list(s), or method(s).

1. If a frame, list, or panel is used, the description should include the name of the supplier of the sample or list and nature of the list (e.g., registered voters in the state of Texas in 2018, pre-recruited panel or pool).

2. If a frame, list, or panel is used, the description should include the coverage of the population, including describing any segment of the target population that is not covered by the design.

3. Provide a clear indication of the method(s) by which participants were contacted, selected, recruited, intercepted, or otherwise contacted or encountered, along with any eligibility requirements and/or oversampling.

4. Describe any use of quotas.

5. Include the geographic location of data collection activities for any in-person research.

6. Explicitly state if sampling came from a census of the target population Provide details of any strategies used to help gain cooperation (e.g., advance contact, letters and scripts, compensation or incentives, refusal conversion contacts) for participation in a survey. Describe any compensation/incentives provided to research subjects and the method of delivery (debit card, gift card, cash).

Method(s) and Mode(s) of Data Collection: Include a description of all mode(s) used to contact participants or collect data or information (e.g., CATI, CAPI, ACASI, IVR, mail, Web for survey; paper and pencil, audio or video recording, etc.) and the language(s) offered or included.

Sample Sizes (by sampling frame if more than one frame was used) and (if applicable) Discussion of the Precision of the Results:

1. Provide sample sizes for each mode of data collection (for surveys, include sample sizes for each frame, list, or panel used).

2. For probability sample surveys, report estimates of sampling error (often described as "the margin of error") and discuss whether the reported sampling error or statistical analyses have been adjusted for the design effect due to weighting, clustering, or other factors.

3. Reports of nonprobability sample surveys will only provide measures of precision if they are defined and accompanied by a detailed description of how the underlying model was specified, its assumptions validated, and the measure(s) calculated.

How the Data Was Weighted. Describe how the weights were calculated, including the variables used and the sources of the weighting parameters.

How the Data Was Processed and Procedures to Ensure Data Quality: Describe validity checks, where applicable, including but not limited to whether the researcher added attention checks, logic checks, or excluded respondents who straight-lined or completed the survey under a certain time constraint, any screening of content for evidence that it originated from bots or fabricated profiles, re-contacts to confirm that the interview occurred or to verify respondent's identity or both, and measures to prevent respondents from completing the survey more than once. Any data imputation or other data exclusions or replacement will also be discussed. Researchers will provide information about whether any coding was done by software or human coders (or both); if automated coding was done, name the software and specify the parameters or decision rules that were used.

A General Statement Acknowledging Limitations of the Design and Data Collection: All research has limitations, and researchers will include a general statement acknowledging the unmeasured error associated with all forms of public opinion research.