

The Pew Charitable Trusts RFP - Research, Analysis, and Modeling to Help States Conduct Long-Term Expenditure Forecasts - Q&A

Q1. Could you provide any additional guidance about what the Expression of Interest should include?

A1. Your expression of interest is simply letting us know that you are planning to submit a proposal. Your email below is sufficient. It is not binding so if something were to change and you were not able to submit a proposal after all, that is also okay. It helps us gauge interest and also means we will email you directly the answers to all the questions that have come in, in addition to posting the answers on the Pew website.

Q2. The RFP talks about entities and organizations. Does this mean that a proposal cannot be submitted on behalf of a single researcher?

A2. The RFP is open to anyone that can perform the work. If a single researcher has the capacity to do so, it is up to them to show that in their proposal.

Q3. Is there a maximum percentage for indirect costs?

A3. Attached you will find the letter regarding Pew's standard policy for indirect costs for projects with universities and other pass through organizations.

Q4. Are there any restrictions on how work completed under this project may be leveraged in future consulting engagements or academic research after the project period concludes?

A4. We understand there is some confusion based on conflicting terms mistakenly included on Page 10 of the RFP under 1. Intellectual Property. In the resulting agreement, one of the two options there will apply, based on the tax status of the awarded counterparty. Please see below for additional clarification.

For nonprofit organizations (e.g., universities): The nonprofit respondent will retain ownership of the work product and grant Pew a broad, nonexclusive, irrevocable, perpetual, royalty-free license to use it for non-commercial purposes. This means the nonprofit may reuse the work in future academic research or some consulting engagements. However, any such use must remain consistent with the charitable purpose of the original funding and must not result in undue benefit to any private party.

For for-profit entities (e.g., individuals, corporations): Pew owns all rights, title, and interest in the work product. It is considered a “work made for hire,” Section 101 of Title 17 of the United States Code, and if that designation does not apply, the contractor assigns all intellectual property rights to Pew. As a result, the contractor may not reuse or repurpose the work in future engagements or research without Pew’s explicit written permission.

Q5. Will applicants be asked to identify external reviewers to evaluate the proposal?

A5. No. Applicants will not be asked to identify external reviewers for the proposal itself. However, proposals must describe your organization's approach to quality control, such as how it would handle the external review of the work product.

Q6. The RFP mentions meetings with advisory groups. How many such meetings are anticipated, and what are expected formats (e.g., virtual, in-person) and durations? If travel to Philadelphia is required or preferred, should associated expenses be included in Appendix B (Price Proposal)?

A6. We anticipate holding four to five virtual advisory group meetings related to this project, each lasting about an hour. There are no travel requirements.

Q7. Will there be a webinar or meeting for prospective respondents to review responses to submitted questions?

A7. Due to the short timeline of the RFP process, there will not a webinar or meeting to review responses to questions. If chosen as a finalist by the project team, there will likely be an opportunity for a virtual meeting to answer questions and negotiate various aspects of the proposal at that time, or questions needing clarification may be resolved over email.

Q8. We wanted to clarify whether the objective of the forecast was to model:

- the demand for the publicly provided services - which is largely an economic problem - or
- the actual expenditures by the state to address that demand - which has political components as well as economic components.

A8. The objective is to project the cost to maintain the current level of services, incorporating fiscal, economic, demographic, climate, and technological factors where applicable. For example, if K-12 enrollment is expected to fall, that would lower the cost of education for the state. But if the state passed a law hiring many new teachers starting in FY2027, that should increase the cost of education. The forecast should not attempt to model changes in public demand or the future decisions of policymakers.



March 8, 2024

To Whom It May Concern:

This letter is in response to your inquiry regarding Pew's policy for indirect costs. Our standard practice for projects with universities, or pass through organizations, limits the line item in the budget for indirect costs to 10 percent of all direct costs.

Should you have any further questions, please do not hesitate to contact me by phone at 215-575-9050 or by e-mail ssenno@pewtrusts.org.

Sincerely,

Sarah Senno

Sarah Senno
VP, Finance and Treasurer