

Respondent Summary Form

Please complete the fields and questions below as accurately as possible. The Pew Charitable Trusts recognizes the information contained herein is business sensitive and will treat all information provided in this form as confidential. Sections A and B must be completed by all entities.

**Please be aware that the winning bid will receive a request through Pew's agreement management system to resubmit the information listed below. The selected organization may also be required to answer additional questions and provide their banking information for payment purposes at that time.*

A. Legal entity information¹

Organization/entity name:

Country of incorporation or legal organization:

Point of contact (name, pronouns, email address):

List any related entities:

Type of organization/entity (nonprofit, for-profit, government/Tribe, intergovernmental/multilateral/regional organization, etc.):

Second-level type (LLC, corporation, 501[c][3], 501[c][4], 501[c][6], regional organization, individual, etc.):

B. Questions for all respondents (1-5)

1. Will you or your organization be able to meet all operational financial obligations in a timely manner throughout the term of your proposal?

☐ Yes ☐ No

If no, please explain:

2. During the past two fiscal years, have you or your organization been involved in any active or threatened litigation or government investigation?

☐ Yes ☐ No

If yes, please explain:

3. During the past two fiscal years, has your organization had any negative publicity or scrutiny about financial, personal, and/or management integrity, or anything that might affect your ability to fulfill your obligations?

☐ Yes ☐ No

If yes, please explain:

4. Do you know of any actual or potential conflicts of interest?

☐ Yes ☐ No

If yes, please explain:

¹ As of 2020, payees that are subject to withholding and receive at least \$600 in reportable payments from The Pew Charitable Trusts in a calendar year will be issued a Form 1099 that includes all payments made. Nonreportable portions of payments will not be excluded. Payees subject to withholding include domestic individuals, sole proprietors, single member LLCs, partnerships, and LLC Partnerships, as classified on the IRS Form W-9.

5. Will you or your organization provide anything of value to a government official through this proposal?
☐ Yes ☐ No
If yes, please explain: _____

C. Questions for NONPROFIT ORGANIZATIONS ONLY

6. Will Pew funds associated with the potential agreement represent more than 50% of your organization's revenue?
☐ Yes ☐ No
If yes, explain why and provide estimated percentages: _____

7. Has an independent/third party audit/financial statement review occurred in the last 18 months?
☐ Yes ☐ No
If no, please explain. If yes, please answer questions 8 and 9: _____

8. Was the outcome of the review clean/unqualified?
☐ Yes ☐ No
If no, please explain: _____

9. Do you expect the next review to be clean/unqualified?
☐ Yes ☐ No
If no, please explain: _____

D. Questions for INDIVIDUALS ONLY (individuals, sole proprietors, and companies composed of only one employee)

10. Are you considered an employee of another entity? If yes, please name the entity and confirm that your organization allows you to work independently.
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