



## Request for Proposals (RFP)

RFP No.: ARP-2017-01

Description of RFP: Research on the impact of management practices on antibiotic use in food-producing animals

Issuance Date: November 28, 2017

Amendment Date: December 4, 2017

Deadline for Questions: 5:00PM ET on December 21, 2017

Deadline for Proposals: 5:00PM ET on February 1, 2018

Point of Contact: Richard Heyeck, [PewRFPantibiotics@pewtrusts.org](mailto:PewRFPantibiotics@pewtrusts.org)

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This RFP, 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.

## 1. Introduction

The Pew Charitable Trusts (“Pew”) is a global charitable and educational organization that applies a nonpartisan, rigorous, analytical approach to improve public policy, inform the public, and invigorate 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. Pew is a nonprofit organization and section 501(c)(3) public charity, with offices located in Philadelphia, Washington DC, Brussels, and London, and staff that span other regions of the United States, the European Union, and Australia. For more information about Pew, please visit [www.pewtrusts.org](http://www.pewtrusts.org).

One of Pew’s initiatives is the Antibiotic Resistance Project (ARP), which supports efforts to address the problem of antimicrobial resistance by developing and advocating for policies to spur the discovery and development of new antibiotics and reduce inappropriate antibiotic use in people and animals. Under ARP, Pew is making funding available for a research project on the impact of different management practices on the need to use antibiotics in food producing animals. For more information about ARP, please visit <http://www.pewtrusts.org/en/projects/antibiotic-resistance-project>.

The purpose of this RFP is to solicit proposals from entities – including academic institutions, non-profit organizations, and from the private sector –addressing the research questions described herein. Specifically, the research project should systematically synthesize and evaluate the available scientific evidence regarding the impact of different management practices on the need to use medically important antibiotics to prevent, control or treat disease in food producing animals. The research project should further characterize existing data gaps related to the impact of management practices on the need to use medically important antibiotics, and make recommendations regarding the types of scientific studies and data needed to fill those data gaps.

Respondents to this RFP are responsible for ensuring that their offers are received by Pew in accordance with the instructions, terms, and conditions described in this RFP. Failure to adhere with instructions described in this RFP may lead to disqualification of an offer from consideration.

## 2. Scope of Work

### **Background on antibiotic resistance**

Each year, at least 23,000 Americans die and some 2 million are sickened from antibiotic-resistant bacterial infections. Antibiotics are crucial to the health of people and animals, but any use endangers their efficacy, as bacteria develop resistance to them over time. To help preserve the effectiveness of antibiotics, Pew is working to ensure that these drugs are used in humans and food animals only when medically necessary to prevent or treat a specific disease.

Management practices related to nutrition, housing, age at weaning, movement and mixing of animals of different origin etc. can have significant impacts on the prevalence of diseases in food producing animals and the resulting need to use antibiotics. The goal of this research project is

to survey and synthesize the available data on the impact of different management practices on the need to use antibiotics in food producing animals to provide scientifically based information to stakeholders on the optimal management strategies to reduce the need for antibiotics.

### **General considerations for all proposals in response to this RFP**

To assure the study will be of maximum scientific rigor and practical relevance, Pew will convene an advisory group of experts with relevant technical expertise. The advisory group will provide feedback and guidance to Pew in the selection, development, and implementation of the research project. Respondents to this RFP should consider, and incorporate into the approach as necessary, that Pew intends active engagement and oversight by the advisory group. Respondents also should consider that Pew expects the research to be submitted to an appropriate peer-reviewed journal for publication.

The research for this study should be based primarily on systematic review and meta-analysis. Respondents may choose to combine this approach with other appropriate research methodologies, such as surveys or expert elicitations to address some of the research questions. However, the evaluation of the efficacy of different management practices in reducing disease prevalence and the need to use antibiotics should be based solely on a systematic review of the available scientific evidence and preferably draw upon randomized controlled intervention trials in target animals or well-designed observational studies that were appropriately controlled. Pew recognizes the interdisciplinary nature of the research questions outlined below, and strongly encourages applications from multidisciplinary research teams that may, for instance, include expertise in veterinary medicine, animal husbandry, physiology, biostatistics, and microbiology. Projects should be conducted within 6 months and should not exceed a total cost of \$150,000 including any indirect costs.

### **Research questions for proposals**

In response to this RFP, Pew seeks proposals that address all of the following research questions for one or more of the major food-producing animal species in the United States.<sup>1</sup>

#### **A. Research question # 1: What is the scientific evidence for the impact of different management practices on disease prevalence and the need to use medically important antibiotics in food producing animals?**

Pew seeks a systematic analysis of the available scientific data on the efficacy of different management practices in reducing disease prevalence and the need to use medically important antibiotics in food producing animals. Data sources to be analyzed include, for example, peer-reviewed scientific publications, conference proceedings, information in relevant text books, data contained in surveys such as the National Animal Health Management Program, and other relevant sources. Primary endpoints in these studies should be directly relevant to antimicrobial consumption and/or animal health, such as animal morbidity or mortality rates. Secondary endpoints, such as animal productivity impacts, also

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<sup>1</sup> Major food-producing species in the United States are cattle, swine, chicken, and turkey. For the purposes of this research, chicken are specified as broilers, not layers.

may be included in the analysis. The analysis may include any and all management practices that could reasonably be applied on U.S. livestock operations, regardless of whether these practices are currently being used.

The research should include:

1. Development of a rigorous, systematic, and reproducible literature search strategy, including a list of relevant keywords and databases to query and scientifically-based criteria for the inclusion or exclusion of research identified through the literature review.
2. A catalogue of relevant evidence based on the above literature review.
3. Evaluation of the scientific strength of the catalogued evidence based on widely-accepted scientific approaches, such as the Grades of Recommendation, Assessment, Development and Evaluation (GRADE) approach.
4. A meta-analysis and/or meta-regression of the quantitative efficacy data that are extracted from the catalogued evidence.

**B. Research question # 2: What are key data gaps in the scientific evidence for the impact of different management practices on the prevalence of disease and the need to use medically important antibiotics in food producing animals, and how do such gaps impede scientifically-based decision-making regarding the use of different management practices?**

Pew seeks a systematic evaluation of the gaps in available scientific data. The evaluation should address the following issues:

1. For the management practices for which the literature search identified relevant data, is the evidence sufficient to reach a scientifically-based determination regarding their impact on disease pressure and the need to use antibiotics? What currently missing data are needed to reach such a determination?
2. Which other management practices are being used or experimented with (either in the U.S. or in other countries) for which the literature search did not identify relevant data? What data are needed to reach a scientifically-based determination about their impact on disease prevalence and the need to use antibiotics?

**C. Research question #3: What research is needed to fill the data gaps identified in question #2?**

To help inform future research efforts, Pew seeks a systematic analysis of research studies that could fill key data gaps. The analysis should address the following issues:

1. What studies are needed to fill existing data gaps and enable final determination regarding the impact on disease prevalence and the need for antibiotics?
2. How should such studies be designed? What key challenges exist and how could they be surmounted?
3. What incentives and research approaches might spur generation of the necessary data? Can incentive structures from other scientific areas be applied to this research area?

### 3. RFP Process and Timeline

**Questions:** Questions or requests for clarification regarding the technical or administrative requirements of this RFP must be submitted no later than 5:00PM ET on December 21, 2017, by email to Richard Heyeck, [PewRFPantibiotics@pewtrusts.org](mailto:PewRFPantibiotics@pewtrusts.org). Questions must be submitted in writing via email; phone calls will not be accepted. Questions and requests for clarification—and the responses thereto—that Pew believes may be of interest to other potential respondents will be circulated to all RFP recipients. Pew will aggregate and anonymize the questions and issue a document containing answers to questions submitted by potential respondents.

Only the written answers issued by Pew will be considered official and carry weight in the RFP process and subsequent evaluation. Any verbal information received from employees of Pew or any other entity should not be considered as an official response to any questions regarding this RFP.

**Proposal Submission:** All proposals must be submitted electronically (either in PDF or Microsoft Word document format) to Richard Heyeck, [PewRFPantibiotics@pewtrusts.org](mailto:PewRFPantibiotics@pewtrusts.org). **Proposals must be received by 5:00PM ET on February 1, 2018.** Please reference the RFP number in any response to this RFP. Respondents will be notified that their proposal has been received. Respondents who do not receive confirmation of receipt of their proposal before the deadline should not assume the proposal has been received and should resubmit. Offers received after the specified time and date will be considered late and will be considered only at the discretion of Pew.

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 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 pre-existing intellectual property rights contained in such submission), and Pew is not required to return any submitted materials to any respondent.

**Timeline:** The anticipated timeline for this RFP is outlined in the table below. All dates are subject to change at Pew's discretion.

Issuance of RFP	November 28, 2017
Amendment Date	December 4, 2017
Deadline for questions regarding this RFP	December 21, 2017
Anticipated release of Pew's answers to questions raised	January 12, 2018
<b>Deadline for submission of proposals in response to this RFP</b>	<b>February 1, 2018</b>

Anticipated date of Pew’s determination of finalists for award	February 2018
Anticipated execution of award(s)	May 2018 (early May)
Anticipated start date of awarded agreement(s)	June 2018

**Proposal Validity:** All proposals, including offered pricing, submitted in response to this RFP must be valid for at least one hundred and twenty (120) days following the RFP deadline for submission of proposals.

#### 4. Proposal Submission Requirements

Proposals in response to this RFP must be submitted in PDF or Microsoft Office format, using 8.5” x 11” sized layouts. Proposals may not exceed not 5 pages maximum, with at least 10-point font and 1-inch margins. This page limit excludes attachments such as CVs and a completed Provider Summary form.

Proposals in response to this RFP must contain at least the following minimum information:

- **Technical proposal:** Provide a profile of your organization, articulate the approach and methodology for implementing your approach to the SOW requirements, describe past performance information of completed projects of similar size and complexity, and describe the capabilities of proposed staff. Please include the following information in the technical proposal, at a minimum:
  - **Description of entity:** A description of your entity, its full legal name, a brief business history, and a point of contact for all proposal-related correspondence. Indicate the name of the researcher(s) involved and a reference to the specific animal species addressed by the proposal. If you will rely on any subcontractors or non-employees to complete this project, please describe those entities here.
  - **Proposed approach and methodology:** The proposal must describe the approach your organization proposes to follow to deliver the scope of work described in Section 2 (“Scope of Work”) above. Describe the proposed research approach and methodology, including data sources. If applicable, methodology should indicate how approval of an institutional review board will be secured. This section also should indicate any limitations to broader applicability of the findings.
  - **Work plan:** Delineate the deliverables to be created and tasks to be conducted and outline a timeline for completing those activities. The workplan must result in a document that could be submitted to and published in an appropriate peer-reviewed journal as a manuscript branded by the Respondent organization. The timeline should indicate when Pew and the advisory committee will review and deliver edits to drafts. Project deliverables must include submission of a detailed final report to Pew, with a collaborative review process conducted with Pew staff. All work must be completed by December 2018 unless approved in writing by Pew. The specific deadlines will be determined in consultation with Pew staff, depending on the project’s scope and the timeline for other Pew activities.

- **Anticipated challenges:** Describe any challenges that could prevent the project from being completed and plans for addressing those barriers.
- **Past performance:** Describe any previous experience(s) and similar projects that make your organization qualified for this project. If subcontractors are used, describe the qualifications of subcontractors and why they are required.

Please include information for at least three (3) references for activities of similar technical scope and complexity. The information supplied must include (a) the organization name, address, contact person, and current email address and phone number; (b) a brief description of the work performed; (c) the duration (including the dates) of the work and value of the contract/agreement. Pew reserves the right to obtain past performance information from other sources in addition to those identified by the respondent. Pew shall determine the relevance of similar past performance information.

- **Personnel qualifications:** Describe the qualifications of the key personnel involved in implementation of the SOW, including their roles and qualifications. Include short biographical summaries for each key personnel that specify the individuals' qualifications to implement the proposed approach. Provide a staffing plan that aligns with your approach to the project, including staff availability to complete the project in the designated timeframe, and their roles and time commitments to the project. Curricula vitae (CV) may be included for each key personnel in an attachment to the proposal, as needed; CVs do not count towards the overall page limit of the technical volume. Firms should also note any affiliates, sub-contractors, or subsidiaries that might be utilized and describe how the firm would interact with Pew using examples of similar engagements.
- **Cost proposal:** Provide a complete cost proposal using the budget template provided in Appendix B of this RFP, including all line items and following the instructions included therein. No cost information may be included in any other section of the proposal submission.
- **Provider Summary form:** Provide a completed copy of Pew's Provider Summary form found in Appendix D of this RFP.
- **Cover letter and conditions of agreement:** Respondents must include and complete the cover letter found in Appendix C ("Cover Letter for Proposals"). Please note that Appendix A ("Conditions of Agreement") of this RFP details some of Pew's standard terms and conditions that would govern any agreement resulting from this RFP. If a Respondent to this RFP cannot agree to any of these specific terms and conditions, it must adjust the cover letter language accordingly and provide (in an attachment to its proposal) a statement as to which condition(s) it cannot agree to, an explanation as to why (including citations to any relevant statutes that may govern such position), and what alternative language it can agree to with respect to the subject matter of the condition(s). Selection of a Respondent that proposes

alternative or revised terms and conditions in its proposal shall not obligate Pew to consider or accept any such revised or proposed terms for inclusion in a definitive agreement.

## 5. Evaluation of Proposals

All proposals submitted in response to this RFP will be assessed on their responsiveness and relevance to the objectives and requirements stated in this RFP. Respondents must ensure that their proposal clearly articulates the approach and directly responds to this RFP. Pew and the advisory committee will review the technical sections of all proposals and recommend award allocation, with final selection made by Pew at its sole discretion. Please note that if there are significant deficiencies regarding responsiveness to the requirements of this RFP, a proposal may be deemed “non-responsive” and thereby disqualified from consideration. Pew reserves the right to waive immaterial deficiencies at its discretion.

Proposals in response to this RFP will be evaluated by Pew based on the following criteria:

- **Approach and methodology.** How detailed is the proposal? Will the approach accurately and comprehensively meet the goals as outlined by Pew? How scientifically rigorous is the scientific approach and will it accurately and comprehensively meet the goals outlined by Pew? How broadly applicable would the findings be? How would the findings complement, add to, and advance the current research in the field?
- **Anticipated challenges.** Have anticipated challenges been sufficiently thought through and addressed? Are any of the anticipated challenges likely to make the research unachievable or make the findings unreliable?
- **Staffing.** Who are the individuals dedicated to this project, and what are their qualifications? Does the entity have relevant subject matter expertise and contact with key stakeholders, and/or prior experience and a proven track record of success in conducting similar work?
- **Past performance.** Does the organization or entity have prior experience conducting similar work? Does the organization have a proven track record of success in similar work?
- **Timeline.** Is the proposed timeline appropriate and efficient? Does the proposed timeline realistically reflect the length of time required to execute the scope of work?
- **Cost.** How competitive is the cost proposal? How detailed is the budget? Are the proposed costs reasonable?
- **Conditions of agreement:** Are there any terms or conditions that are problematic for the Respondent? Does the Respondent present any risk in terms of ability to comply with a resulting agreement?

Best-offer proposals are requested. It is anticipated that award will be made solely on the basis of these original quotations. However, 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. Upon completion of the review of all submissions—and a decision to proceed with the selected respondent(s)—Pew will contact each Respondent to advise whether or not its submission has been accepted. All accepted submissions are subject to Pew's contracting process (as described in the "Conditions of Agreement" section below).

While preference will be given to Respondents who can address the full technical requirements of this RFP, Pew may issue a partial award or split the award among various Respondents, if in the best interest of Pew.

## 6. Award Process

**IMPORTANT:** 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. This RFP does not constitute a binding agreement between Pew and any Respondent. Selected Respondent(s) will be required to enter into a contractual agreement with Pew upon award. Pew also retains the right to modify or cancel the RFP at any time at its sole discretion.

If a Respondent's proposal is selected for award, that selected respondent ("Selected Respondent") will be required to sign a binding Master Terms and Conditions (MTCs) and a Project Agreement (Project Agreement) that, together, are collectively referred to as the "Agreement." Until both Pew and the Selected Respondent have signed the Agreement, no express or implied commitment has been made by or on behalf of Pew to provide financial support. The Selected Respondent is not authorized to commence work until the Agreement is fully executed. If a Selected Respondent opts to commence work prior to execution of the Agreement, it does so at its own risk. No oral or written statement other than the signed, written Agreement will govern or modify the relationship.

In the event a proposal is selected for award and funding by Pew, a summary of some critical Conditions of Agreement that will govern the resulting Agreement are included in Appendix A. This is not an exhaustive summary of terms and conditions that will be included in the final Agreement. Pew reserves the right to add to and modify these terms and conditions. In addition, please note that if the Selected Respondent is organized outside of the United States or will be performing work internationally, additional terms and conditions may be required.

The Selected Respondent must be able to comply with a number of requirements that will be included in the Agreement, including but not limited to those set forth on Appendix A attached hereto. As noted above, if a respondent cannot agree to any specific term or condition of agreement set forth in Appendix A, it must provide (in an attachment to its proposal) a statement indicating which condition(s) it cannot agree to, an explanation as to why (including citations to any relevant statutes that may govern such position) and what it can agree to with respect to the subject matter of the condition(s). Selection of a respondent that proposes alternative or revised

terms and conditions in its proposal shall not obligate Pew to consider or accept any such revised or proposed terms for inclusion in the Agreement.

## **Appendix A: Conditions of Agreement**

In the event a proposal is selected for award and funding by Pew, a summary of some critical Conditions of Agreement that will govern the resulting Agreement are described below. This is not an exhaustive summary of terms and conditions that will be included in the final Agreement.

1. The Selected Respondent must make the following representations and warranties (among others): that (a) all work under the Agreement shall be performed, and the Work Product (as defined in the Agreement) be produced, in a professional manner consistent with reasonable commercial standards in its industry; and (b) the Selected Respondent's employees and/or subcontractors shall be experienced, properly trained, or otherwise qualified and capable of performing the work required by the Agreement.
2. The Selected Respondent must agree to the following indemnification provisions:
  - a. The Selected Respondent shall indemnify, protect, defend and hold harmless Pew and its officers, directors, employees, agents, affiliates and contractors from and against any and all claims, liabilities, damages, losses, expenses, demands, suits and judgments, interest, and expenses including without limitation reasonable attorneys' fees and costs, arising from or relating to (i) Selected Respondent's breach of any provision, representation, warranty, covenant or obligation under the Agreement; (ii) Selected Respondent's performance under the Agreement and (iii) the intentional misconduct or negligent acts or omissions, of Selected Respondent or Selected Respondent's employees and/or subcontractors in connection with its performance under the Agreement.
  - b. In the event that any federal, state or local government or administrative agency, or other regulatory entity, or any court determines that Selected Respondent or Selected Respondent's employees and/or subcontractors acted as an employee of Pew in conducting work under the Agreement, Selected Respondent (i) waives any and all claims that Selected Respondent may have as a result of any such determination and acknowledges that Selected Respondent agreed to work with the understanding that neither Selected Respondent nor its employees and/or subcontractors has any right or entitlement to any benefit under any of Pew's employee benefit plans or programs; and (ii) agrees to indemnify and hold Pew harmless from all liabilities, costs and expenses (including, but not limited to, reasonable attorneys' fees) incurred by Pew as a result of, or related to, such a determination.
3. Limitation of liability: Recourse against Pew under the Agreement shall in no event include incidental, consequential, special, punitive, or indirect damages.
4. The Selected Respondent must agree that (a) all Work Product (as defined in the Agreement) developed under the Agreement shall be either a "work owned by Pew" or a "work made for hire" for Pew under Section 101 of Title 17 of the United States Code as it now stands or as later amended, and (b) Pew will own the intellectual property created

under the Agreement. The Selected Participant also shall provide Pew, in a form satisfactory to Pew, a copy of any and all Datasets (as defined in the Agreement) and grant to Pew a nonexclusive, royalty-free, irrevocable, worldwide license to use Datasets for non-commercial purposes (and, if necessary, obtain such licenses for Pew from third parties).

5. If the Selected Respondent wishes to publish any portion of the Work Product developed under the Agreement, the Selected Respondent must agree that:
  - a. Pew has the right of first publication and distribution of the Work Product and that the Selected Respondent may only pursue publication of derivative works of the Work Product after Pew has published the Work Product.
  - b. The Selected Respondent will provide due recognition of Pew's role in originating and funding the research in any publication of the Work Product.
6. At the Selected Respondent's expense, the Selected Respondent shall procure and maintain the following insurance coverages for itself and its employees, if any, during the term of the Agreement. Please note that these are minimum insurance requirements; there may be additional insurance requirements applied in the resulting Agreement, depending on the nature of scope of work to be performed.
  - a. General Liability insurance covering bodily injury, property damage and contractual liability with limits of not less than \$1,000,000 per occurrence, \$2,000,000 aggregate. Pew shall be added as an additional insured to the Selected Respondent's general liability insurance policy. The Selected Respondent's general liability insurance policy shall be primary and Pew's insurance shall not contribute until the Selected Respondent's insurance is exhausted.
  - b. Workers' Compensation insurance in accordance with the statutory requirements of the state or states in which the Selected Respondent will work under the Agreement, and Employer's Liability insurance of 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.

Certificates of insurance evidencing the required coverages must be submitted to Pew before work may begin and Selected Respondent must certify that its permitted subcontractors, if any, have the required coverages. The Selected Respondent and its applicable insurance carriers must waive subrogation rights against Pew. The Selected Respondent will ensure that its insurance carriers notify Pew within thirty (30) days if any of the Selected Respondent's policies are canceled, not renewed, or materially altered.

7. The Selected Respondent must agree not to actively recruit anyone then currently working for Pew during the term of the Agreement, and for twelve (12) months thereafter.

8. The Selected Respondent must agree that the Agreement will be governed and construed in accordance with the laws of the Commonwealth of Pennsylvania and that the state and federal courts in Philadelphia, Pennsylvania will have exclusive jurisdiction over any and all disputes arising out of, or in any way related to the Agreement, and that the Selected Respondent shall submit to the personal jurisdictions of such courts.
  
9. The Selected Respondent must not use the names, logos, or any other marks owned by or associated with Pew, including any Pew department or project name, for marketing or advertising purposes, or on any form of publicity (including in the Selected Respondent's publicly distributed client lists, on the Selected Respondent's websites, or in any of the Respondent's other promotional materials) without Pew's prior written consent in each instance which consent may be withheld by Pew in its sole and absolute discretion.

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

## Appendix B: Budget and Payment Schedule Template

Detailed budget information must be provided in each proposal. Please use the below template for providing budget information. **Please note that for salary-related information, there are two different formats – one for non-profit [501(c)(3)] organizations and one for for-profit organizations.**

Format for salary-related information for **non-profit [501(c)(3)] organizations:**

<b>Salaries</b>	
[insert name], [insert title], at [insert daily rate] per day for [insert number] days per month for [insert number] months. Total number of days: [insert number]. <i>[daily rate example]</i>	\$
[insert name], [insert title], at [insert daily rate] per day for [insert number] days per month for [insert number] months. Total number of days: [insert number]. <i>[daily rate example]</i>	\$
<b>Salaries Subtotal</b>	<b>\$</b>
<b>Employee Benefits</b>	
Based on [insert number]% of total salaries	\$
<b>Employee Benefits Subtotal</b>	<b>\$</b>
<b>Indirects</b>	
Based on [insert percent]% of total salaries and benefits	\$
<b>Indirects Subtotal</b>	<b>\$</b>

Format for salary-related information for **for-profit organizations:**

<b>Salaries</b>	
[insert name], [insert title], at [insert daily rate] per day for [insert number] days per month for [insert number] months. Total number of days: [insert number]. <i>[daily rate example]</i>	\$
[insert name], [insert title], at [insert daily rate] per day for [insert number] days per month for [insert number] months. Total number of days: [insert number]. <i>[daily rate example]</i>	\$
<b>Salaries Subtotal</b>	<b>\$</b>

**All organizations** must provide their additional costs in the following format:

<b>Travel</b>	
<i>{when there is one traveler use this format}</i> \$[insert amount per trip] for [insert number] trip(s) from [insert departure location] to [insert arrival location] to [insert purpose] for ([insert name if there is more than one person listed in the fees section]). Each trip includes:	
<i>{when there is more than one traveler use this format}</i> \$[insert amount per trip] per trip per person for [insert number] people ([insert names or describe the group of people]) for [insert number] trips from [insert departure location] to	\$

<p>[insert arrival location] to [insert purpose]. Each trip includes:  <i>{complete the relevant categories}</i></p> <ul style="list-style-type: none"> <li>• \$[insert total amount for airfare per trip] for roundtrip airfare</li> <li>• \$[insert total mileage amount per trip] for mileage at approximately [insert number] miles per trip at \$[insert IRS mileage rate] per mile</li> <li>• \$[insert total amount for lodging per trip] for lodging at \$[insert nightly rate] per night for [insert number] night(s)</li> <li>• \$[insert total amount for meals per trip] for meals at \$[insert daily rate] per day for [insert number] day(s)</li> <li>• \$[insert total amount for ground transportation per trip] for [insert ground transportation type, e.g. taxi, car rental, subway, etc.] at \$[insert daily rate] per day for [insert number] day(s)</li> </ul>	
<p><i>{when there is one traveler use this format}</i>  \$[insert amount per trip] for [insert number] trip(s) to [insert location] to [insert purpose] for ([insert name if there is more than one person listed in the fees section]). Each trip includes:</p> <p><i>{when there is more than one traveler use this format}</i>  \$[insert amount per trip] per trip per person for [insert number] people ([insert names or describe the group of people]) for [insert number] trips from [insert departure location] to [insert arrival location] to [insert purpose]. Each trip includes:  <i>{complete the relevant categories}</i></p> <ul style="list-style-type: none"> <li>• \$[insert total amount for airfare per trip] for roundtrip airfare</li> <li>• \$[insert total mileage amount per trip] for mileage at approximately [insert number] miles per trip at \$[insert IRS mileage rate] per mile</li> <li>• \$[insert total amount for lodging per trip] for lodging at \$[insert nightly rate] per night for [insert number] night(s)</li> <li>• \$[insert total amount for meals per trip] for meals at \$[insert daily rate] per day for [insert number] day(s)</li> <li>• \$[insert total amount for ground transportation per trip] for [insert ground transportation type, e.g. taxi, car rental, subway, etc.] at \$[insert daily rate] per day for [insert number] day(s)</li> </ul>	\$
<p><b>Travel Subtotal</b></p>	\$
<p><b>Subcontracts/Subgrants</b></p>	
<p>[insert name], [insert title] ([insert location]), [insert brief description of what they will do]</p> <p><i>Fees:</i> \$[insert total fee amount]  [insert number] days at \$[insert daily rate] per day (approximately [insert number] days for [insert number] months)</p> <p><i>Travel:</i> \$[insert total amount for travel]</p> <p><i>{when there is one traveler use this format}</i>  \$[insert amount per trip] for [insert number] trip(s) from [insert departure location] to [insert arrival location] to [insert purpose] for ([insert name if there is more than one person listed in the fees section]). Each trip includes:</p> <p><i>{when there is more than one traveler use this format}</i>  \$[insert amount per trip] per trip per person for [insert number] people ([insert names or describe the group of people]) for [insert number] trips from [insert departure location] to</p>	

<p>[insert arrival location] to [insert purpose]. Each trip includes:  <i>{complete the relevant categories}</i></p> <ul style="list-style-type: none"> <li>· \$[insert total amount for airfare per trip] for roundtrip airfare</li> <li>· \$[insert total mileage amount per trip] for mileage at approximately [insert number] miles per trip at \$[insert IRS mileage rate] per mile</li> <li>· \$[insert total amount for lodging per trip] for lodging at \$[insert nightly rate] per night for [insert number] night(s)</li> <li>· \$[insert total amount for meals per trip] for meals at \$[insert daily rate] per day for [insert number] day(s)</li> <li>· \$[insert total amount for ground transportation per trip] for [insert ground transportation type, e.g. taxi, car rental, subway, etc.] at \$[insert daily rate] per day for [insert number] day(s)</li> </ul> <p>Meetings: \$[insert total amount for meetings]</p> <p>\$[insert amount per meeting] to [choose one: host or attend] [insert conference name] to [insert purpose for meeting] for [insert number of people] to be held in [insert location] on [insert dates]. Costs include:  <i>Complete the relevant categories</i></p> <ul style="list-style-type: none"> <li>· \$[insert total amount for event space per meeting] for event space at \$[insert daily rate] per day for [insert number] day(s)</li> <li>· \$[insert total amount for A/V per meeting] for Audio/Visual at \$[insert daily rate] per day for [insert number] day(s)</li> <li>· \$[insert total amount for food &amp; beverage per meeting] for food and beverages at \$[insert daily rate] per person per day for [insert number] day(s)</li> <li>· \$[insert total amount for supplies per meeting] for [insert supply name, e.g., flipcharts and nametags]</li> <li>· \$[insert total amount for registration fee] for meeting registration fee to attend [insert meeting/conference name] on [insert dates] for [insert names]</li> </ul>	
<p><b>Subcontracts Subtotal</b></p>	\$
<p><b>Conferences and Meetings</b></p>	
<p>\$[insert amount per meeting] to [choose one: host or attend] [insert conference name] to [insert purpose for meeting] for [insert number of people] to be held in [insert location] on [insert dates]. Costs include:  <i>Complete the relevant categories and then delete the others</i></p> <ul style="list-style-type: none"> <li>· \$[insert total amount for event space per meeting] for event space at \$[insert daily rate] per day for [insert number] day(s)</li> <li>· \$[insert total amount for A/V per meeting] for Audio/Visual at \$[insert daily rate] per day for [insert number] day(s)</li> <li>· \$[insert total amount for food &amp; beverage per meeting] for food and beverages at \$[insert daily rate] per person per day for [insert number] day(s)</li> <li>· \$[insert total amount for honoraria] for honoraria at \$[insert daily rate] per person per day for [insert number] people</li> <li>· \$[insert total amount for supplies per meeting] for [insert supply name, e.g., flipcharts and nametags]</li> <li>· \$[insert total amount for 3<sup>rd</sup> party travel] for third-party travel costs for [insert number of people and description (e.g., researchers)] at \$[insert amount] per person <ul style="list-style-type: none"> <li>o \$[insert total amount for lodging per trip] for lodging at \$[insert nightly rate] per night for [insert number] night(s)</li> </ul> </li> </ul>	

<ul style="list-style-type: none"> <li>o See additional examples in the travel section</li> <li>· \$[insert total amount for registration fee] for meeting registration fee to attend [insert meeting/conference name] on [insert dates] for [insert names]</li> </ul>	
<b>Conferences and Meetings Subtotal</b>	\$
<b>Communications and Materials</b>	
[Insert purpose]: (e.g., Production and printing of brochure, stickers and signs) <ul style="list-style-type: none"> <li>· \$[insert total amount for this line item] for [insert number] [insert name of item] at \$[amount per piece] per [insert name of item] (e.g., \$500 for 1,000 signs at \$0.50 per sign)</li> </ul>	\$
<b>Communications Subtotal</b>	\$
<b>Equipment</b>	
[Insert purpose]: (e.g., Data Storage for raw data) <ul style="list-style-type: none"> <li>· \$[insert total amount for this line item] for [insert number] [insert name of item] at \$[amount per piece] per [insert name of item] (e.g., \$100 for 2 external hard drives at \$50 per hard drive)</li> </ul>	\$
<b>Equipment Subtotal</b>	\$
<b>TOTAL</b>	\$

### Payment Schedule

Pew expects to make milestone payments in accordance with the delivery and acceptance of deliverables provided. Please fill in the sample chart below with any relevant details. The number of deliverables can be adjusted as needed by Respondent.

Deliverable/Milestone	Total Cost
Deliverable 1 (to be defined by Respondent)	
Deliverable 2 (to be defined by Respondent)	
Deliverable 3 (to be defined by Respondent)	
Deliverable 4 (to be defined by Respondent)	
<b>Total</b>	

Payments will be made upon successful completion of deliverables as outlined in the final Scope of Work. The final payment schedule will be developed with the Selected Respondent prior to the execution date of the definitive agreement.

### **Appendix C: Cover Letter for Proposals**

*For any proposal submitted in response to this RFP, the following letter must be placed on Respondent's letterhead and completed/signed by a representative authorized to sign on behalf of the Respondent:*

To:               The Pew Charitable Trusts  
                      Attention: Richard Heyeck  
                      901 E Street NW  
                      Washington, DC 20004

Reference:       Request for Proposals No. ARP-2017-01

To Whom It May Concern:

We, the undersigned, hereby provide the attached proposal to perform all work required to complete the activities and requirements for The Pew Charitable Trusts, as described in the above-referenced Request for Proposals (RFP).

We hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFP.

We hereby certify that the enclosed representations and other statements are accurate, current, and complete.

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Date: \_\_\_\_\_

Full Organization Legal Name: \_\_\_\_\_

**Appendix D: Provider Summary Form**

(Please see the attached Word document.)