Request for Proposals for The Pew Charitable Trusts (Pew)

RFP No.: 2024-SHS-01

RFP Issue Date: August 12, 2024

RFP Title: State Health Solutions

Point of Contact (POC): Patial Sherzai, senior associate, statehealthsolutionsRFP@pewtrusts.org

Key Dates:

Deadline for notification of Expression of Interest	August 26, 2024
Deadline for requests for clarifications	August 26, 2024
Anticipated release of Pew's responses to requests for clarifications	September 3, 2024
Deadline for submission of proposals	September 17, 2024
Anticipated date of Award	October 2024
Anticipated start date of awarded agreement(s)	November 2024

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.

1. Introduction

RFP Overview:

Through this Request for Proposal (RFP), The Pew Charitable Trusts (Pew) is soliciting proposals from organizations (Respondents) to conduct research that describes and assesses past and current partnerships between state public health departments and state Medicaid agencies, as further set forth herein and in the Scope of Work attached hereto as Appendix A (Scope of Work).

Through its state health solutions project, Pew aims to create data-driven partnerships between state public health departments and state Medicaid agencies that will make targeted improvements to clinical practices and management of chronic and infectious diseases. Collaboration between these state agencies will encompass analysis of shared health data and alignment of interventions that could better support the improvement of population health. To develop a sustainable and scalable framework for such partnerships, better understanding is needed of past and current examples of partnerships between the two state agencies.

The selected Respondent will execute research that describes how these agencies have or are working together, identifies facilitators and barriers to successful partnerships, and assesses the impact of these partnerships on health outcomes. Products from this research will include a series of case studies highlighting successful partnerships and a summary of high-level takeaways on how states might approach sustained partnerships moving forward.

Background on The Pew Charitable Trusts:

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.

2. 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. Resumes and or CVs
    b. Past performance examples
    c. References
    d. Required Appendix forms (listed at the bottom of this RFP):
        - Completed budget template
        - Completed Provider 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 and/or services, including the methodology, approach, and timeline for implementing the Scope of Work attached in Appendix A, and if applicable, the specifics of how Respondent would perform the work and any limitations or assumptions.
    b. Resumes/CVs, specific qualifications, and proposed role of key individuals, and any subcontractors, who will carry out the Scope of Work.
    c. Brief description of Respondent's capabilities and past performance of completed projects of similar size and complexity.
    d. Description of Respondent's commitment to diversity, equity, and inclusion and what specific steps it will take to ensure that commitment is demonstrated in its work with Pew in the Scope of Work.
    e. Two (2) or three (3) references from clients to which Respondent provided a similar service or project of similar scope and complexity. Each reference must include:

- the organization's name, address, contact person, current email address, and phone number
- a brief description of the work performed
- a reference to any key individuals involved that would be engaged under the Scope of Work
- the duration (including the dates) of the work
- fees associated with the contract if not confidential

Pew reserves the right to obtain past performance information from other sources in addition to those identified in proposals.

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.

3. Evaluation of Proposals.

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

1. Approach and methodology
2. Commitment to diversity, equity, and inclusion
3. Timeline
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.

4. 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.

5. Appendices

Appendix A: Scope of Work (below)

Appendix B: Budget Template (attached)

Appendix C: Provider Summary Form and Vendor Data Notification (attached)

Appendix D: Conditions of Agreement (below)

Appendix E: Personal Data (below)

Appendix F: Pew's Guidelines for Survey Methods Statements (below)

Appendix G: Pew's Expectations for Review of Research (below)

Appendix A
Scope of Work

State public health agencies play a critical role in detecting, monitoring, and preventing the occurrence of chronic and infectious diseases in the U.S. However, these agencies are often limited in their access to real-time data, hindering their ability to develop and promote the adoption of targeted, evidence-based prevention strategies. By comparison, payers, like state Medicaid agencies, receive data from providers in the form of health care claims. While this data could provide critical insight for public health agencies, these agencies do not often collaborate to exchange, analyze, and leverage claims data to support public health interventions. Additionally, while these agencies serve overlapping populations, the focus of the organizations differ—with Medicaid focused on supporting quality of care for individual patients while public health is focused on broader community-focused health improvement efforts. Partnerships between these state agencies to analyze shared data and align interventions could enhance their individual organizational goals and better support improved population health.

While there have been some examples of state public health and Medicaid agencies partnering to share data, these efforts have been largely one-off partnerships focused on a specific health issue. More research is needed to better understand the impact of these partnerships and approaches for building more sustained partnerships between these agencies moving forward. The primary Scope of Work in this RFP is to gain a deeper understanding of previous and current partnerships through in-depth conversations with public health and Medicaid officials across states. Outcomes of this research will include information on how these agencies are currently working together, any facilitators and barriers to successful partnerships, and the impacts of these partnerships on health outcomes—including impacts on issues of health equity. This research will ultimately be used to create a series of case studies highlighting successful state partnerships, along with high-level takeaways on how states might approach sustained partnerships moving forward.

The provider will be responsible for the following:

1) Developing, administering, and analyzing a screening questionnaire (“screener”) to gain background knowledge on state public health and Medicaid partnerships.
    a. Drafting the screener and sharing with Pew for review/feedback prior to finalizing.
    b. Identifying target public health and/or Medicaid officials in all 50 states to target for initial outreach and developing an outreach strategy. This list and outreach strategy will be shared with Pew for review/feedback prior to finalization.
    c. Distributing the screener.
    d. Analyzing and summarizing the results of the screener in a report to Pew for internal use.
    e. Identifying, in partnership with Pew, 15-20 states that have current or past partnerships to conduct in-depth interviews.
2) Conducting and analyzing in-depth interviews with public health and Medicaid officials in 15-20 states.
    a. Developing an interview guide to gather information on the example partnerships, including how they were formed, facilitators and barriers to implementation, key takeaways or lessons learned, impacts on population health outcomes, and potential

approaches to building more sustained partnerships moving forward. The interview guide will be shared with Pew for review/feedback prior to finalizing.

b. Describing the informed consent procedures for interviewees and sharing with Pew for review/feedback prior to finalizing.
c. Identifying individuals to interview, including those who responded to the screener as well as additional key members of the partnership.
d. Piloting the interview guide in one or two states and revising the interview guide as needed.
e. Conducting interviews with the identified individuals in 15-20 states and generating a recording and transcript of each interview.
f. Developing an analytic plan for summarizing interviews and sharing the analytic plan with Pew for review/feedback prior to finalizing.
g. Generating a summary memo for each interview.
h. Drafting a case study report detailing the partnership in each state as well as high-level takeaways and themes across states. The report should include a methods section detailing screening, data collection, and analysis procedures.

Throughout the project, the provider should meet with Pew on at least a monthly basis, or more often as needed, to provide updates and discuss the work. The provider will collaborate with Pew to ensure the case studies align with Pew's expectations as detailed in Appendix G.

Appendix B
Price Proposal Template

Please provide the proposed budget in the template provided.

(SEE ATTACHED)

Appendix C

Provider Summary Form and Vendor Data Notification

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. Intellectual Property. 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. Datasets. 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. Representations and Warranties. 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. No Campaign Intervention. 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.

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

How the Data Were 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.

Appendix G
Pew's Expectations for Review of Research

The purpose of this document is to summarize and share Pew's expectations for review of research, including review of methodologies, data- and fact-checking, and external peer review research.

Please reach out to the Research Quality and Support team with questions.

Review of Methodology
Pew's methods review is a collaborative effort between Pew staff and their providers/grantees (when applicable) to discuss the study design, data collection, analysis, and other methodological elements of the project and research.

- Some research projects may not require methods review if a research proposal contains detailed information, or if the project consists exclusively of primary data collection via a survey. The need for a methods review should be discussed with Research Quality and Support at the beginning of a project.
- Approach: Methodology reviews may be completed by exchanging information over email or holding a meeting.

General Expectations for Review of Research Products
The expectations below apply to data checks, fact checks, and external peer reviews of research products.

- Independent checkers/reviewers: Data-checkers, fact-checkers, and peer reviewers are, at a minimum, independent from the project. This is a core requirement to help ensure independence and objectivity. Peer reviewers are, additionally, not employed or funded by Pew or Pew's providers/grantees, nor otherwise conflicted.
- Record-keeping: Maintain version control of relevant materials, record key analytic steps and stages of data processing, code development, map production, etc., and keep records of the reviews, including the date(s), name of checker(s), and the reviews.

Data Check
Pew's data-checking verifies the numbers and statistics, including raw data and code, that underlie the findings of research products. This check includes looking at data sourcing and datasets, statistical code, and products. The elements of a data check may vary based on the specific project design, methodology, and outputs.

Data checks may involve either reproducing the findings by executing tasks such as confirming data sources and running statistical code and/or confirming that research materials are notated so that an independent researcher could reproduce the findings (e.g., statistical code is annotated, data analysis is recorded).

- Timing: Data checks take place toward the end of a research project when the data is nearly finalized and a draft product is available.
- Products that do not contain quantitative data are not data-checked.

Fact Check
Pew's fact-checking verifies the nonnumerical content of the research product or output, including facts, citations, attributions to outside sources, and proper nouns.

- Timing: Fact checks take place toward the end of a research project when a draft product is available.
- Fact checks do not confirm quotes from outside sources.

Peer Reviews

Pew obtains external peer reviews from experts who are independent from the project, not employed or funded by Pew or Pew's providers/grantees, nor otherwise conflicted. The external experts provide feedback that: verifies the validity of the research design, the soundness of the methods used to collect and analyze information or data, and the logic of any arguments, whether the conclusions are appropriately drawn from the analyses; anticipates any criticism; and provides an opportunity to improve the work before publication.

- Timing: Peer review takes place toward the end of a research project when a draft product is available; either concurrent or in sequence to data/fact checks.
- Peer reviewers sign Pew's Conflict of Interest (COI) forms to affirm no conflict and agree to nondisclosure; COI forms are collected prior to the review.
- Pew teams and their providers/grantees (when applicable) select peer reviewers and they are not approved by RQS.