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Immigration and the States Project Request for Proposals

The tentative project schedule is outlined below. All dates are subject to change at the sole discretion of The Pew Charitable Trusts (Pew).

KEY DATES	
Issuance of Request For Proposals (RFP)	February 9, 2015
Deadline for Questions	February 23, 2015
Answers/ Addenda from Pew	March 2, 2015
Proposal Submission Deadline	March 20, 2015
Anticipated Notification Date	April 13, 2015
Contract Award*	April – June, 2015
Final Deliverable Due Unless Otherwise Determined by Pew*	March 2016

*For projects Pew selects at the proposal stage.

UPDATE March 2, 2015: Questions regarding the RFP that were sent to Pew and Pew's responses have been included in Appendix C.



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About Pew

The Pew Charitable Trusts (Pew) is driven by the power of knowledge to solve today's most challenging problems. 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.

Pew is a nonprofit charitable organization with offices located in Philadelphia, Washington, DC, Brussels and London, and staff that span other regions of the United States and Australia.

Background

Pew's [Immigration and the States project](#) is exploring the intersection of federal and state immigration policies and their fiscal and economic impacts on states and localities by investigating:

- What the federal-state immigration relationship looks like, where there is friction, where effective collaboration is taking place, and where there are opportunities for improvement;
- The fiscal and economic impacts of existing immigration policies on states and localities; and
- How federal immigration reform may impact states.

Scope of Work

Pew wishes to expand its existing research base by contracting with individuals and institutions to engage in research in three areas:

- 1) The impact of federal immigration laws and policies on states and/or localities;
- 2) The impact of immigrants admitted by the federal government on the states and/or localities where they settle; and
- 3) The impact of immigration-related state and/or local laws and policies on states and/or localities.

In order to identify projects for contracts, Pew seeks eligible proposals that include both new policy and data analysis and unpublished academic work. Proposals will be given priority that either:

- Build upon Pew's existing immigration work;
- Provide analysis across all 50 states and the District of Columbia;
- Address questions that incorporate findings from all relevant jurisdictions that have taken a similar policy choice (e.g. in-state tuition or driver's licenses for the unauthorized); or
- Highlight regional findings or comparisons across different states and/or localities.

Regarding impacts, Pew is interested in laws' and policies' direct and indirect impact on state and/or local budgets and economies. Proposals should include analysis that assesses these



impacts on state and/or local budgets and economies in a rigorous, evidence-based, and balanced way, taking into account associated costs and benefits.

Pew is unable to fund projects with an advocacy-driven agenda, and is unlikely to fund projects that focus on the impacts to immigrants themselves or analyze impacts in only one jurisdiction. We encourage comparative and interdisciplinary work.

1. Impact of federal immigration laws and policies on the states

The federal government is responsible for admitting immigrants into the country, removing immigrants from the country, and enforcing federal immigration laws. Even though Congress has not enacted major immigration reform, the federal government continues to conduct a wide range of activities in the states through its facilities and personnel located in the states. Furthermore, a wide range of policies are being set by administrative action that impact states and localities. These policies, and any future federal activity through legislation or executive action, are likely to have real fiscal and economic impacts on states and localities. Pew requests proposals related to:

- **The impact of changes to federal immigration policies.** What impact do federal policy changes have on states and/or localities? For example, what has been the impact of the Deferred Action for Childhood Arrivals program (DACA)? What impacts would be expected with the expanded deferred action program or other measures taken by the executive branch? Are there increased costs for such areas as education, public services, etc., and what are the anticipated fiscal and economic benefits related to these federal policy changes?
- **The impact of federal immigration enforcement.** What is the impact of federal immigration enforcement on states and localities, including law enforcement, detention, and social services? How does the existence of a federal immigration-related facility (port of entry, detention center, etc.) and associated personnel affect the local economy in which it is located; e.g., tax revenue, economic development, housing, and education costs?

2. Impact of immigrants in the states

The federal government decides how many immigrants to admit to the U.S. and what characteristics those immigrants have. Once admitted, unless they are required to attend a specific educational institution or work for a specific employer, immigrants may live anywhere in the U.S. Immigrants affect state and local economies and budgets as workers, taxpayers, consumers, and users of services. Pew requests proposals related to:

- **The impact of immigrants as workers on jobs and the economy.** How do immigrant workers impact state or local economies? For example, do immigrants impact the mix of industries and services offered in a region? Are private sector location choices related to immigrant flows or vice versa? Are immigrants responding differently than natives to



changes in the labor market? How does the flow of immigrants through gateway communities impact the local labor market and economy?

- **The impact of immigrants on new gateway states and regions.** Building upon Pew’s [county-level demographic work](#), what is the economic impact in areas where the native-born population is declining and the foreign-born population is growing? What is the impact of immigrants on non-traditional immigrant-receiving states’ budgets and expenditures as related to tax revenues, or the costs of education and public benefits? How does this impact relate to traditional receiving states?

3. Impact of immigration-related state and local laws and policies

Over the last two decades, the number of immigration-related bills introduced in state legislatures has increased, and localities have enacted immigration-related laws and policies as well. Some jurisdictions have focused on immigration enforcement while others have created policies aimed at welcoming and integrating immigrants into their communities. Pew requests proposals related to:

- **The impact of laws supporting immigrant integration.** What are the direct and indirect fiscal and economic costs and benefits of such measures as extending in-state tuition or drivers licenses to unauthorized immigrants? How do these policies affect such factors as employment, mobility, public safety, and the economy?
- **The impact of state and local economic development policies.** What are the direct and indirect fiscal and economic costs and benefits of fostering immigrant employment and entrepreneurship? Are there specific state immigration laws or policies that contribute positively or negatively to state and regional economic development goals? Are the associated costs and benefits of these policies and programs quantifiable?

Other proposals not specifically listed above. While the Immigration and the States project is especially interested in the questions posed above, we also welcome proposals addressing other questions that fit into the three categories of research and are related to immigration federalism.

Proposal Requirements

Unaffiliated individuals and individuals and research teams from academic institutions and for-profit and nonprofit organizations are eligible to apply. Pew will consider proposals that will result in traditional research papers or other publication types, such as briefs, fact sheets, or data visualizations. Pew will likewise consider project proposals in varying dollar amounts, assuming the proposed budget is appropriate for the project deliverable and work plan.

Proposals must include all of the following and total no more than six (6) pages (not including appendix):

- **Cover page:** On a single page, list the name and contact information for a single point of contact for proposal correspondence. Please include a cost proposal and a brief abstract of no more than 150 words summarizing the work being proposed.
- **Project proposal:** In three (3) pages or less,



- Articulate what research questions the analysis seeks to answer, why they are important, and how they link to the Immigration and the States project's focus on immigration federalism.
- Provide a description of the methodological approach, including datasets to be used, how they will be acquired, and what methods of analysis will be employed.
- Delineate the deliverables to be created, the tasks to be conducted, and a timeline for completing those activities.
- **Staffing plan:** On a single page, describe the qualifications of the key project personnel. Include a short bio for each key staff member which specifies the researcher's qualifications to implement the proposed design and provide phone and email contact information (full resumes or curriculum vitae can be included in an appendix).
- **Estimated budget:** Using the attached budget template (Appendix B), provide an estimate of the costs of your proposed research. If your proposal is accepted, itemized expenses by task will be required to be agreed upon.

Submission Process

Questions: Questions concerning the application process must be directed to the project team at immigration@pewtrusts.org by 5:00 p.m. Eastern time on February 23, 2015. Pew will not comment on individual proposals or make any preliminary substantive decisions about individual proposals during this period. Pew will respond to questions on March 2, 2015. Please do not contact Pew staff directly. QUESTIONS AND ANSWERS ARE INCLUDED IN APPENDIX C.

Proposals: All proposals must be submitted electronically (in PDF or Microsoft Word document format) to immigration@pewtrusts.org. Proposals must be received by 5:00 p.m. Eastern time on March 20, 2015. 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.

Upon completion of Pew's preliminary review, expected by April 13, 2015, Pew will contact all respondents to confirm if their proposal has been accepted. Pew may also request additional or revised information from respondents during this timeframe. Accepted proposals are subject to a methodology review and contracting process with Pew.

The tentative submission and award timeline is outlined below. All dates are subject to change at the sole discretion of Pew:

- Deadline for Questions: February 23, 2015;
- Answers and Addenda from Pew: March 2, 2015;
- Proposal submission deadline: March 20, 2015;
- Anticipated Notification date: April 13, 2015;
- Contract Award: April – June, 2015;



- Final Deliverable Due unless otherwise determined by Pew through contract negotiations: March 2016.

Selection Process

All proposals will be assessed on their relevance to the objectives stated in this RFP. Respondents should ensure that proposals clearly articulate the objectives, approach, relevance, and usefulness of the research as well as its compatibility with Pew's priorities. Respondents should further ensure the suitability of the analytical methods, appropriateness of the data sources, and adequate budget, personnel, and work plan to carry out the proposed project in the proposed timeline. A Pew committee will review all proposals with final decisions made by Pew.

While Pew anticipates selecting six (6) to eight (8) proposals to make subsequent contract awards, the number of contracts or total amount awarded is subject to change, depending on the breadth of research proposed, fit with Pew's priorities, and available funding at time of award.

Terms of Funding

The following terms may apply to the project but are subject to change at Pew's sole discretion:

- Funds will be made available through a contractual agreement with selected providers, to be prepared by Pew and signed after providers have been selected. Deliverables will include submission of a 15-30 page report, or alternative format as agreed to by Pew, and participation in a collaborative editing process with Pew staff. The report will be published and owned by Pew with the authorship acknowledged.
- All work must be completed by March 2016 unless otherwise determined by Pew. The specific deadline for each project will be determined in consultation with Pew staff, depending on the project's scope and the timeline for other Pew releases.
- Provider will provide Pew, in a form satisfactory to Pew, a copy of any and all data, datasets, source documents or other information used to develop their work product. In the case of restricted use data, the researcher will be asked to provide their programming code.
- Additional terms may be included in the contract.

Note: Neither this RFP nor an accepted proposal represent a contractual agreement by The Pew Charitable Trusts. Selected providers will enter into a contractual fee-for-service agreement and accompanying terms and conditions with Pew following decision. Pew retains the right to modify or cancel the RFP at any time before the award.

General Terms and Conditions

Respondents' response to this RFP indicates its understanding and agreement that:

1. This RFP and its attachments are considered confidential and/or proprietary by Pew and will not be duplicated, used or disclosed in whole or in part for any purpose other than for



reviewing, evaluating and/or preparing a response to this request without the express written consent of Pew. Please indicate in your proposal the extent to which any information provided by your company is considered proprietary.

2. Respondent grants to Pew the right to duplicate, use, disclose and distribute all of the information and other materials submitted in response to this RFP.
3. Respondent represents and warrants that it has full and complete rights to all of the information and materials included in the proposal.
4. Respondent guarantees that all such information and materials included in the proposal are not defamatory and do not infringe upon or violate the privacy rights, copyrights or other proprietary rights of any third party.
5. Any submission to Pew will become the property of Pew (not including any intellectual property rights contained in such submission), and Pew is not required to return any submitted materials to any respondent.
6. Pew has the right to reject any proposal for any reason.
7. Pew is not liable for any costs incurred for the preparation and submission of a response to this RFP.

The Conditions of Agreement are attached as Appendix A.



Appendix A

Conditions of Agreement

1. If a proposal is accepted, the selected respondent (“Selected Respondent”) shall be required to sign a Master Terms and Conditions and a Project Agreement (collectively “Agreement”) with The Pew Charitable Trusts (“Pew”). Until both parties have signed such Agreement, no express or implied commitment has been made by Pew. The Selected Respondent is not authorized to commence work prior to full execution of the Agreement with Pew. No oral or written statement other than the signed written Agreement will govern or modify the relationship between Pew and the Selected Respondent.
2. The Selected Respondent must be able to comply with a number of requirements that will be included in the Agreement. These requirements include, but are not limited to the following:
 - a. The Selected Respondent must agree that all work product developed under the Agreement shall be 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.
 - b. The Selected Respondent must represent and warrant that: (i) all work shall be performed, and the work product produced, in a professional manner consistent with reasonable commercial standards in its industry; and (ii) its employees and contractors will be experienced, properly trained or otherwise qualified and capable of performing the work required.
 - c. The Selected Respondent must 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) the Selected Respondent’s breach of any provision, representation, warranty, covenant or obligation under the Agreement; (ii) the Selected Respondent’s performance under the Agreement; or (iii) the intentional misconduct or negligent acts or omissions of the Selected Respondent or the Selected Respondent’s personnel in connection with its performance under the Agreement.
 - d. The Selected Respondent must agree not to 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 Selected Respondent’s publicly distributed client lists, on the



Selected Respondent's websites or in any of the Selected 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.

- e. The Agreement will be governed and construed in accordance with the laws of the Commonwealth of Pennsylvania without regard to its conflict of law provisions.
- f. 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.
- g. At the Selected Respondent's expense, the Selected Respondent must procure and maintain the following insurance coverages¹ for itself and the Selected Respondent's Personnel during the term of the Agreement:

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 products/completed aggregate, \$1,000,000 personal and advertising, \$2,000,000 aggregate. ²
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Workers Compensation and Employers' Liability Insurance in accordance with the Commonwealth of Pennsylvania statutory law 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.

- h. Certificates of insurance evidencing the required coverages must be submitted to Pew before work under the Agreement may begin. The Selected Respondent and its applicable insurance carriers must waive subrogation rights against Pew. The Selected Respondent must 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.

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

¹ Additional insurance may be required pursuant to the Agreement.

² Pew must be added as an additional insured to the Selected Respondent's general liability insurance policy. The Selected Respondent's general liability insurance policy must be primary and Pew's insurance shall not contribute until the Selected Respondent's insurance is exhausted.



Appendix B

Budget Template

You may fill in this template or create your own, provided you include all of the line items listed below and answer all of the associated questions.

ESTIMATED PROJECT BUDGET	
Labor	\$
Is this an annual/hourly/daily rate?	
Benefits	\$
<i>Subtotal salary and benefits</i>	
	\$
Travel	\$
Conferences/Meetings	\$
Communications	\$
Office Supplies	\$
Datasets/Software	\$
Other	\$
Include description of other expenses on separate sheet	
<i>Subtotal expenses</i>	
	\$
Indirect Costs	\$
Is this an institutionally set rate?	
<i>Subtotal indirect</i>	
	\$
TOTAL	\$



Appendix C

Questions and Answers

Pew has reviewed all of the questions regarding the RFP we received prior to February 23, 2015, 5:00 p.m. EST. Below we provide responses grouped by category. Similar questions have been combined, and several questions have been edited for clarification.

General Eligibility

Q.1: May organizations submit multiple proposals under this RFP? Would an organization be eligible for more than one award under this RFP?

A: Yes, Pew will consider more than one proposal from an individual or organization for separate awards.

Q.2: If one accepts Pew support, what, if any, constraints would be placed on the work product?

A: The terms and conditions are listed in Section 2(a) of Appendix A. Any additional terms will be negotiated during the contracting process and included in the agreement between Pew and the provider.

Q.3: The terms of funding state that the Provider must provide Pew with a copy of all data used to develop the work product. Will Pew use or analyze these data in the future for their own purposes? Or is this requirement for accountability, data checks, and verification?

A: Pew will verify and check the accuracy of the data. Additional terms and conditions for future use of the data will be negotiated as part of the contracting process.

Q.4: Can providers later publish the results that they write up for the Pew report in academic journals? Could work be used for publication beyond Pew's own use such as a book project?

A: Pew may agree to license the work product back to the Provider for specific uses, including publication after a specific period of time. Terms and conditions for any such license or other future use of the data will be negotiated as part of the contracting process.

Q.5: Can researchers from quasi-governmental agencies such as the Federal Reserve Bank participate in the RFP process?

A: No, not for this project.

Q.6: Can we do a firm fixed price bid?

A: No.



Q.7: Is there a firm Pew would recommend we partner with? Who has Pew worked with in the past on immigration?

A: Providers are free to choose to collaborate with other partners and are encouraged to do so. All partners must be noted and included in the proposal.

Q.8: Would Pew consider research projects that extend beyond the March 16, 2016 final deliverable deadline?

A: Yes, Pew will consider proposals in which the final deliverable is due later than March 16, 2016. However, the proposal must clearly state why the later date is necessary and when the final deliverable will be produced.

Q.9: Are Providers advised to propose a project through an institution such as a University, or as independent researchers?

A: It is up to Providers to choose to have an institutional affiliation or not. Independent providers should review Appendix A to ensure they will be able to meet the conditions to contract with Pew. Those choosing to work through an institution should be mindful of any additional institutional requirements and/or approvals they need from their institution to enter into a contract with Pew.

Funding and Budget

Q.10: Will The Pew Charitable Trusts provide guidance on the size of projects Pew is considering funding?

A: Pew will review all proposals, regardless of the proposed budget. While Pew anticipates selecting six (6) to eight (8) proposals to make subsequent contract awards, the number of contracts or total amount awarded is subject to change, depending on the breadth of research proposed, fit with Pew's priorities, and available funding at time of award.

Q.11: Does Pew allow indirect costs and/or overhead? If yes, is there a percentage or cap?

A: Yes, Pew does allow indirect costs at a rate not to exceed 10 percent of salaries and benefits combined. Pew also allows benefits up to a rate of 32 percent of salaries.

Q.12: Can these grants be used to purchase course releases, summer salaries, or student research support?

A: Yes, these items may be included in the budget. Please include them on separate line items along with an explanation.



Scope of Work

Q.13: How do you define “impact”?

A: Pew is interested in the quantifiable direct and indirect fiscal and economic impact of laws and policies on states and/or localities. Pew is unlikely to fund projects that focus on the impacts to immigrants themselves. Proposals should include analysis that assesses these impacts on state and/or local budgets and economies in a rigorous, evidence-based, and balanced way, taking into account associated costs and benefits.

Q.14: The RFP states that Pew is "unlikely to fund projects that focus on the impacts to immigrants themselves." If a research proposal focuses on the impacts to immigrants as a first stage to develop more accurate estimates of cost and benefits to states and localities (second stage), would Pew consider this approach?

A: Pew’s primary interest is the impact on state and/or local budgets and economies. However, proposals that make a strong methodological case for addressing the impact on immigrants in order to address the impact on states and localities will be considered.

Q.15: The RFP mentions the significance of dovetailing proposals with Pew's current immigration work. Where are the best places to view of this work? What data does Pew have already available on immigrant populations, both legal and unauthorized?

A: All work published by the Immigration and the States project is available at www.pewtrusts.org/immigration.

Q.16: Is there data we can leverage from the Pew county level demographic work?

A: The data from Pew’s publication “Changing Patterns in U.S. Immigration and Population: Immigrants Slow Population Decline in Many Counties” is available in Excel format in the “Downloads” section of this webpage: <http://www.pewtrusts.org/en/research-and-analysis/issue-briefs/2014/12/changing-patterns-in-us-immigration-and-population>.

Q.17: Will Pew entertain proposals that focus on just a segment of the immigrant population, such as refugees?

A: Yes, proposals that fall into the second category of research, impact of immigrants in the states, may focus on one segment of the immigrant population.

Q.18: Will Pew entertain proposals that focus on county, local, metro, state, or national level analysis?

A: Pew is interested in county, local, metro, and state- level analysis. Pew is unlikely to fund proposals that only provide national-level analysis or that analyze just one jurisdiction.

Q.19: There is a stated preference for 50-state analysis. Will Pew entertain proposals for regional or state case studies? If a case study is proposed, must 50-state data also be included?



A: Yes, Pew will entertain proposals that provide analysis of specific states or regions provided they 1) analyze more than just one jurisdiction; 2) fit within the federalism framework; 3) focus on fiscal and economic impact on the specified regions or states; and 4) do not advocate specific laws and/or policies.

Q.20: Would Pew consider funding primary data collection? Will Pew consider new data rather than new analysis?

A: While Pew is interested in primary data collection, we are unlikely to fund primary data collection alone. Proposals must include data analysis and a written product.

Q.21: In looking across 50 states, can the analysis be both historical and contemporary? Or is there a preference for contemporary work in particular?

A: Pew prefers contemporary analysis. However, historical trends may be included to provide additional context.

Q.22: The RFP discusses immigrant and immigration related laws and policies. Will Pew entertain proposals that examine federal and/or state programs that are not narrowly focused on immigrants, but that could be better utilized to have positive impacts for immigrants and integration? That is, could a proposal examine how to better utilize an existing mainstream program without making changes to laws and policies specific to immigrants?

A: Yes, Pew will consider proposals related to non-immigration-specific programs if the connection to immigration is clearly stated and provided the proposal 1) fits within the federalism framework; 2) focuses on fiscal and economic impact on states and localities; and 3) does not advocate specific laws and/or policies.

Q.23: What is Pew's forecast horizon?

A: Pew does not have a specific horizon and encourages applicants to make projections to the extent that the data and methodology reliably allow.

Q.24: Does Pew have specific proposed policies in mind for the impact study?

A: Pew is interested in proposals that fit into the three categories listed in the RFP: 1) the impact of federal immigration laws and policies on states and/or localities; 2) the impact of immigrants admitted by the federal government on the states and/or localities where they settle; and 3) the impact of immigration-related state and/or local laws and policies on states and/or localities. Additional questions for inquiry are included in the RFP. Pew will welcome proposals addressing other questions that fit into the three categories of research and are related to immigration federalism.

Q.25: Should this work include unauthorized immigrants?

A: Yes, but inclusion of unauthorized immigrants is not required. Pew is interested in proposals that analyze the fiscal and economic impact of immigration-related laws and policies on states



and localities, including those laws and policies that focus on unauthorized immigration either alone or as part of a broader analysis with other immigrant groups.

Q.26: Does Pew have access to data beyond publically available data from the Census Bureau ending in 2011?

A: Providers may use any publicly available data. Pew research and data sources can be found at www.pewtrusts.org. Providers are expected to conduct their own research and access their own data sources, but Pew staff will be available for discussions regarding data, methodology, and resources during the contracting and research stages.

Q.27: Is Pew looking for policy suggestions or recommendations?

A: Pew is unable to fund projects that advocate a particular policy; rather, Pew is interested in projects that assess the impacts of policy choices that have been made or are being considered, based on evidence from similar policies in other jurisdictions. The evidence provided by the research should focus on quantifiable costs and benefits.

Q.28: Would Pew consider a proposal that would produce a landscape of current laws and regulations that have significant fiscal and economic ramifications, but that does not include an analysis of the fiscal and economic impact? Similarly, is Pew open to proposals seeking to identify what factors are associated with states' adoption of immigration-related legislation?

A: Pew will accept proposals for work on the fiscal and economic impact of immigration laws and policies that fit into one of the three categories listed in the RFP: 1) the impact of federal immigration laws and policies on states and/or localities; 2) the impact of immigrants admitted by the federal government on the states and/or localities where they settle; and 3) the impact of immigration-related state and/or local laws and policies on states and/or localities. Proposals that do not focus on fiscal and economic impact and do not fit into one of these three categories do not meet the criteria of the RFP and will likely not be funded through this process.