



## **Request for Applications (RFA)**

RFA No.: VIP-2017-03

RFA Topic: Transition of Voting Information Project (VIP)

Issuance Date: June 15, 2017

Deadline for Questions: 5:00PM ET on July 11, 2017

Informational Conference: 10:00AM ET on July 18, 2017

Deadline for Applications: 5:00PM ET on August 21, 2017

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### Table of Contents:

Section 1: Introduction

Section 2: Background on VIP

Section 3: Key Principles Governing the Transition of VIP

Section 4: RFA Process and Timeline

Section 5: Application Submission Requirements

Section 6: Evaluation of Applications

Section 7: Award Process

Appendix A: Conditions of Agreement

Appendix B: Cover Letter for Applications

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## 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).

Pew recently announced that—after ten years—it will soon be winding down its direct investment in and management of the Voting Information Project (“VIP”). Since its inception in 2007, VIP has become an essential part of the Election Day experience for hundreds of millions of Americans by making polling place locations, ballot information, and other details about the voting process easily searchable online, on a range of platforms. The VIP website can be found here: <https://www.votinginfoproject.org/>. Pew hopes to identify and transition VIP to a new “home” in time for the 2018 general election.

The purpose of this RFA is to identify one or more entities who—with some level of initial operational support from Pew (and, potentially, grant funding from Pew)—will assume responsibility for VIP in early 2018 and commit to its long-term success by:

- Providing a home for VIP’s ongoing operations in the 2018 election cycle and beyond, and;
- Serving as a platform for VIP’s continued growth into new jurisdictions and types of services.

Applicants responding to this RFA are responsible for ensuring that their responses are received by Pew in accordance with the instructions, terms, and conditions described in this RFA. Failure to adhere with instructions described in this RFA may lead to disqualification of a response from consideration.

## 2. Background on VIP

VIP works with state election officials to aggregate information that voters need to cast a ballot, including “where is my polling place?”, “is early voting available to me?” and “what’s on my ballot?” VIP makes this key information available across the web, to any user who enters an address.

State election officials make VIP possible by providing official information linking street segments to polling places. VIP, through collaboration with Google, provides quality assurance and testing of the data, and places this information into the Google Civic Information API. The Google Civic Information API is open-source, and thus available for developers to build tools from. Additionally, Pew has created three easy-to-use tools, which allow users to directly retrieve VIP’s election information. These include the GetToThePolls.com website, an embeddable Voting Information Tool that can be customized and placed on any website, and an

SMS tool that allows voters to retrieve voting information by texting VOTE to GO VOTE (short code 468-683). In 2016, entities ranging from social media giants to presidential campaigns used VIP's data.

States provide various kinds of files to VIP. Some states use the VIP 5.1 specification to appropriately format their data and share it through a dashboard. Others provide non-standard files of various kinds. VIP provides assistance to states as needed, pulling them along the spectrum toward increased quality and automation of their feeds. For the general election in 2016, forty-four (44) states plus the District of Columbia provided official information to VIP.

End users across the country drove 123 million impressions of VIP data in 2016. Some organizations built tools directly from the API, devoting developer resources toward creative uses of VIP's data. Others used Pew's tools, which are free to anyone. In many cases, state and local governments are end users, making use of these free tools to serve their voters. Many election-focused entities use the data and the tools regularly, including the DNC and RNC, RockTheVote, VotoLatino and others. Additionally, in advance of high profile general elections, social media companies and corporations with a strong web presence either build their own tools using VIP data (Twitter, Foursquare, Tumblr), or point to GetToThePolls.com from their platforms (Facebook, Etsy, Firefox/Mozilla). VIP does not charge any fees for use of the tools, or for queries of the API.

Pew's *Trust Magazine* recently published additional details on the VIP here: <http://magazine.pewtrusts.org/en/archive/winter-2017/online-voting-tools-used-more-than-ever-in-2016>

### **3. Key Principles Governing the Transition of VIP**

In preparation for VIP's eventual transition, Pew convened a group of stakeholders and partners to discuss the desirable characteristics of the project going forward. Those meetings resulted in the following statement of principles regarding VIP's future (please note that VIP is referred to as "the project" in this section):

Since its inception, VIP has been a partnership among Pew, state and local election officials, and Google and other tech partners dedicated to providing voters with answers to key questions about the election process. One key to the project's success over time has been the dedication to providing a publicly-available resource aimed at assisting election officials and voters alike by building a set of tools that harnesses existing voting information and sharing it with voters in such a way as to be widely accessible and available. Consequently, Pew and its partners want to ensure that VIP continues and thrives for the foreseeable future in this important role.

With that overall goal in mind, the group's discussions have been condensed into the following list of general principles, which we expect will serve as a background for evaluating any plans and proposals to transition VIP to a new home.

- As a threshold matter, the new home for VIP should have an established record of non-partisanship and experience in partnering with state government officials. Additionally, it is

preferable if the new home has experience working to expand access to civic information, handling complex data sets and/or improving the administration of elections. There should also be a plan at VIP's new home for ongoing operational and financial sustainability for the project.

- VIP should continue to provide voters with access to information that links their address to information they need to cast a ballot, particularly voting locations, including Election Day locations like polling places and vote centers as well as early voting locations, drop-boxes and other ways to cast a ballot. The project should also provide contact information for the responsible election official(s) in the voter's jurisdiction. Where available, VIP should also provide information about what contests appear on a voter's ballot.
- VIP coverage should include all federal and state elections, and where available, local elections as well.
- VIP data should be available before all federal and state elections, and where available, before local elections. The project may also want to explore whether it can provide basic voting information for the jurisdiction in the absence of a scheduled election.
- VIP data should continue to be available in all 50 states and the District of Columbia. If possible, VIP could explore providing data for Puerto Rico and other US territories.
- VIP data should continue to be collected from states, in the VIP data format, via a user-friendly dashboard for election officials, and other methods as needed, in order to achieve nationwide coverage. Eventually, the project should aspire to reduce the need to rely on manual creation of VIP data by obtaining automated feeds from every state.
- VIP should continue its strong partnership with states to achieve constant improvement of their data, including upgrades to newer data structures and compatibility with new methods of storing and accessing election data. The project should continue to provide states with the ability to check their data and establish processes for reporting and correcting any errors that arise.
- VIP should continue to maintain and update the project data specification and work with stakeholders to ensure the specification not only meets current needs but leaves room for innovation and growth.
- To facilitate efficient state data collection, VIP should extend its outreach to include partnerships with election management vendors to help produce feeds as well as outreach to, and cooperative efforts with, states and localities to aggregate data to the state level.
- VIP should continue to provide and share user-facing tools to distribute data. Currently, this suite includes a web-based lookup (GetToThePolls.com), an embeddable brandable ("white-label") widget known as the Voting Information Tool, and an SMS-based tool. These tools, and/or others that best serve a broad audience of partners and individuals, should continue to

be available, in a wide variety of languages – and the project should pursue ways to make them more broadly accessible to voters with disabilities.

- VIP should continue to work closely with technology partners that are crucial to VIP’s fundamental functionality and reach – especially Google, which provides engineering expertise and quality control, makes VIP data available via its Civic Information API, and enables users to integrate VIP data with its mapping services.
- VIP should maintain and advance error reporting protocols to ensure that the data is up-to-date and accurate. This goal should also apply to any large-scale use of VIP data through third-party apps or other products.
- VIP should promote increased adoption of VIP data and tools by public sector, non-profit, and private sector entities. This work advances a key VIP goal: to have voters find accurate, official voting information when they seek it – but also to have voters naturally encounter this information, during every day online activities, near an election or whenever they might need it.
- VIP should explore other opportunities in the election space without compromising its core mission of providing information to voters on or before Election Day. One such opportunity in which the project is particularly interested in exploring is real-time election night results reporting. Others might include poll worker recruitment, election calendaring or basic information on “who represents me?”
- VIP should be open to discussing how to make its data available post-election for research purposes and should consider whether and how to make arrangements with academic data repositories to accomplish this goal.

#### 4. RFA Process and Timeline

(A) **Eligible organizations**: Pew seeks applications from entities—either working alone or in collaboration with one or more other entities—to operate VIP in a manner consistent with the key principles described above. In order to submit an application, please adhere to the following key eligibility requirements:

- (1) Applications must address the full range of VIP’s services. An entity that cannot meet the full range of services is encouraged to apply with a co-applicant(s) or describe its plan to engage a contractor(s) to provide certain services.
- (2) Joint applicants, or single applicants that contemplate significant collaboration with other entities, must provide documentation (such as a letter of commitment, memorandum of understanding, or similar agreement, which must be signed by all parties that will be involved) outlining their respective roles/responsibilities for managing VIP.
- (3) An entity may be included in more than one application, as long as the documentation referenced above is included in each application, as applicable.

- (4) The applicant(s) must have an established record of non-partisanship and must be prepared to commit to continue operating VIP for non-commercial, non-partisan educational, research, and charitable purposes, and to make VIP publically available.

(B) **Expressions of interest:** Any entity interested in submitting an application in response to this RFA must submit an expression of interest (EOI) by 5:00PM ET on July 11, 2017 by email to Jasen Andersen (jandersen@pewtrusts.org). Pew will only distribute additional 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 an entity to submit an application. Any expression of interest must include, at a minimum:

- Entity's legal name; and
- Point of contact details, including name, title, phone number, and email address.

(C) **Questions:** Questions or requests for clarification regarding the technical and/or administrative requirements of this RFA must be submitted no later than 5:00PM ET on July 11, 2017 by email to Jasen Andersen (jandersen@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 applicants will be circulated to all RFA recipients who also have submitted an EOI. Pew will aggregate and anonymize the questions and issue a document containing answers to questions submitted by potential applicants.

Only the written answers issued by Pew will be considered official and carry weight in the RFA 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 RFA.

(D) **Informational Conference:** In order to provide interested parties with an opportunity to learn more about VIP and Pew's approach to the transfer of VIP to a new home, Pew will host an "informational conference" at 10:00AM ET on July 18, 2017 at Pew's offices in Washington DC; participation remotely via WebEx will also be available. Applicants interested in responding to this RFA are strongly encouraged to participate in this informational conference, but participation is not mandatory in order to submit an application in response to this RFA. Participation in the informational conference is the responsibility of the applicants; Pew will not reimburse any costs associated with participation in the informational conference.

If interested in participating in the informational conference, please RSVP no later than 5:00PM ET on July 11, 2017 by email to Jasen Andersen (jandersen@pewtrusts.org). Any RSVP must include, at a minimum:

- Entity's legal name; and
- Point of contact details, including name, title, phone number, and email address.

Instructions for how to participate in the informational conference will be emailed to those entities that have submitted an RSVP and an EOI.

(E) **Application Submission**: All applications must be submitted electronically (either in PDF or Microsoft Word document format) to Jasen Andersen (jandersen@pewtrusts.org). **Applications must be received by 5:00PM ET on August 21, 2017.** Please reference the RFA number in any response to this RFA. Applicants will be notified that their application has been received. Applicants who do not receive confirmation of receipt of their application before the deadline should not assume the application has been received and should resubmit. Applications received after the specified time and date will be considered late and will be considered only at the discretion of Pew.

By submitting an application, each applicant 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 applicant guarantees that (1) it has full and complete rights to all information and materials included in the application 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 applicant agrees to defend, indemnify and hold harmless Pew with respect to any claims or losses arising from the aforementioned guarantees. Each applicant 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 applicant's pre-existing intellectual property rights contained in such submission), and Pew is not required to return any submitted materials to any applicant.

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

|  |                        |
|--|------------------------|
| Issuance of RFA  | June 15, 2017          |
| Deadline for notification of intent to submit an application           | July 11, 2017          |
| Deadline for questions regarding this RFA                              | July 11, 2017          |
| Deadline for RSVP of participation in informational conference         | July 11, 2017          |
| Informational conference   | July 18, 2017          |
| Anticipated release of Pew's answers to questions raised               | August 1, 2017         |
| <b>Deadline for submission of applications in response to this RFA</b> | <b>August 21, 2017</b> |
| Anticipated date of Pew's determination of finalist(s) for award       | October 31, 2017       |
| Anticipated execution of award(s) and initiation of transfer of VIP    | April 1, 2018          |

(G) **Application Validity**: All applications submitted in response to this RFA must be valid for at least one hundred and eighty (180) days following the RFA deadline for submission of applications.

## 5. Application Submission Requirements

(A) **Format Requirements**: Applications in response to this RFA must be submitted in PDF or Microsoft Office format, using 8.5" x 11" sized layouts. Applications may not exceed twenty five (25) pages maximum (excluding the following attachments: cover letter, CVs, organizational chart, partners' letters of commitment / memoranda of understanding). There are no additional requirements regarding format (margins, font size, etc.)

(B) **Content Requirements**: Applications in response to this RFA must contain at least the following minimum information:

(1) **Organizational qualifications**: A description of the entity(ies) submitting the application, including full legal names, a brief business history, and a point of contact for all application-related correspondence. If you will rely on any other parties to manage VIP, please describe those entities here.

(2) **Proposed approach**: The application must describe the proposed approach to managing VIP, particularly with regard to the key principles described in Section 3 above. At a minimum, applicants must describe their proposed approach to the following:

➤ **Governance**: Describe how the applicant(s) will govern and manage VIP, including:

- How will the applicant structure VIP's daily operations?
- Who/what will be the decision-making entity?
- Who/what will be the legal "owner" of VIP's assets? What type of entity will this be, or does it already exist?
  - If the "owner" is an existing entity, please provide (i) copies of its governing documents (such as articles of incorporation, bylaws, operating agreement, partnership agreement, etc.), and (ii) if it is tax-exempt, a copy of its IRS determination letter or equivalent description of its tax-exempt status (e.g., under section 501(c)(3), 501(c)(4) or other provision of the tax code).
  - If the "owner" will be a newly-created entity, please describe the type of entity, its governance structure and, if applicable, its anticipated tax-exempt status.

➤ **Relationships with state and local election officials**: Describe how the applicant will interact with state and local election officials, including:

- How will the applicant ensure that VIP continues to work well with states and localities?
  - How will VIP recruit new participants?
  - How will VIP retain existing participants?
  - How will VIP ensure that participants continue to improve/update their feeds?
  - How will VIP deal with states that cannot make statewide data feeds available?

➤ **Key Relationships**: Describe how the applicant will engage and manage external relationships, including:

- How will VIP continue its longstanding project and technical relationship with Google?
- How will VIP continue and grow its relationships with other partners, such as:

- Other tech companies (e.g., Facebook, Twitter)?
  - Corporations and organizations sharing VIP data?
- **Financial information:** Describe financial-related considerations, including the following (if there are co-applicants, describe all of these factors for each co-applicant):
- What is the applicant’s current annual budget?
  - What sources of revenue does the applicant rely upon to execute its existing work?
  - What sources of revenue does the applicant anticipate using to execute VIP-related work?
  - What are the applicant’s estimated costs to operate VIP from April 2018 through March 2021? Please provide a total cost estimate with a breakdown by cost category (salaries, benefits, indirect costs, subcontractor costs, etc.) and a narrative explaining the cost build-up.
- (3) **Staffing Plan:** Applications must present a staffing plan that aligns with the proposed approach to managing VIP. The staffing plan, at a minimum, must include the following information:
- **Identification of key personnel:** The staffing plan must assign an adequate number of qualified key personnel for VIP—both management staff and technical staff—from the applicant(s) and provide position titles and individuals’ names for each position.
  - **Narrative staffing description:** The staffing plan must include a narrative description of the capabilities, qualifications, and experience of the proposed key personnel. If any new personnel will need to be hired by the applicant, the applicant must describe how these staffing decisions will be made. For any staffing provided by subcontractors, partners, affiliates, or subsidiaries, the applicant must describe how these staff members will be managed. Letters of commitment are required for any named key personnel that are not current full-time employees of the applicant(s).
  - **Resumes:** Applicants must submit resumes/CVs for up to five (5) identified key management and technical staff. Individual resumes may not exceed three (3) pages in length. Resumes may be for staff from subcontractors, partners, etc. Resumes/CVs do not count toward the overall application page limit.
  - **Organizational chart:** Applicants must include an organizational chart that includes all the proposed staffing positions along with lines of reporting and communication. The organization chart shall not exceed one (1) page, and does not count toward the overall application page limit.
- (4) **Case Scenarios:** Pew also seeks a greater understanding of applicants’ planned approach to VIP’s work. To that end, applicants must provide responses to each of the following scenarios:

- (a) VIP frequently receives [recommendations on improvements](#) to our specifications. Review the current proposals and highlight three of the recommendations that the applicant would prioritize for development. Describe the rationale in prioritizing these three.
  - (b) VIP's recent 5.1 specification is larger and more complex than its widely-adopted 3.0 predecessor. How would the applicant assess the technical and staffing changes necessary for states to complete the upgrade? What could VIP do to ease this burden on states?
  - (c) VIP has been working with a participating state for several years. Following an election, the incoming Secretary of State orders election staff to halt participation in VIP. How would the applicant address this issue?
  - (d) VIP has been trying for several years to work with another state that has yet to provide a statewide feed. The project is approached by several localities in the state who seek to bypass the state and provide their own local feeds. How would the applicant address this issue?
  - (e) A major national party invites you to join a planning meeting for their voter engagement efforts in 2018. How would the applicant respond?
  - (f) A participating state notifies VIP on Election Day that a widespread power outage has resulted in the relocation of several polling locations. How would the applicant address this issue and who should be involved?
- (5) **Cover letter and conditions of agreement**: Applicants must include and complete the cover letter found in Appendix A ("Cover Letter for Applications"). Please note that award of this RFA is contingent on Pew and the applicant(s) negotiating and signing a mutually acceptable agreement to transfer operation of VIP to applicant(s).

## 6. Evaluation of Applications

All applications submitted in response to this RFA will be assessed on their responsiveness and relevance to the objectives and requirements stated in this RFA. Applicants must ensure that their application clearly articulates the approach and directly responds to this RFA. Pew will review all applications 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 RFA, an application may be deemed "non-responsive" and thereby disqualified from consideration. Pew reserves the right to waive immaterial deficiencies at its discretion.

Applications in response to this RFA will be evaluated by Pew based on the following criteria:

- **Approach and methodology.** How detailed is the application? Does the applicant have the organizational and technical capacity to implement VIP? Does the applicant have the

technical acumen and experience to successfully implement VIP? Will the approach accurately and comprehensively meet the key principles as outlined by Pew? Have anticipated challenges (including illustrative events present in case scenarios) been sufficiently thought through and addressed? How will the applicant be funding the costs to operate VIP, and is that funding adequate to ensure VIP's continued success?

- **Staffing.** Does the proposed staffing structure meet the operational and technical requirements of managing VIP? Who are the individuals (both management staff and technical staff) dedicated to this project, and what are their qualifications? Do they have relevant subject matter expertise?
- **Risk:** What type of entity will own VIP? Are there any conflicts of interest? Does the applicant present any risk in terms of the operational and financial sustainability of VIP, in both the short and long term? Does the applicant present any risk in terms of ability to negotiate and comply with any resulting agreement with Pew?

Pew reserves the right to conduct negotiations with and/or request clarifications from any applicant prior to award. Applicants may be required to submit additional information during Pew's evaluation process. Following submission of applications, Pew may require presentations from applicants regarding their applications.

Upon completion of the review of all submissions—and a decision to proceed with the Selected Applicant(s)—Pew will contact each applicant to advise whether or not its submission has been accepted. All accepted submissions are subject to Pew and selected applicant negotiating and entering into a mutually acceptable agreement.

## 7. Award Process

**IMPORTANT:** Pew is not liable, financially or otherwise, for any costs associated with the preparation, submission, or presentation of any applications in response to this RFA. This RFA does not constitute a binding agreement between Pew and any applicant. Pew also retains the right to modify or cancel the RFA at any time at its sole discretion.

If an applicant's application is selected for award, that selected applicant ("Selected Applicant") will be required to negotiate in good faith with Pew and sign a mutually acceptable agreement(s) to transfer operation of VIP to Selected Applicant (Agreement). Until both Pew and the Selected Applicant have signed the Agreement, no express or implied commitment has been made by or on behalf of Pew. The Selected Applicant is not authorized to commence work until the Agreement is fully executed. If a Selected Applicant 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.

## **Appendix A: Cover Letter for Applications**

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

To:           The Pew Charitable Trusts  
                Attention: Jasen Andersen  
                901 E Street NW  
                Washington, DC 20004

Reference:   Request for Applications No. VIP-2017-03

To Whom It May Concern:

We, the undersigned, hereby provide the attached application to The Pew Charitable Trusts, in response to the above-referenced Request for Applications (RFA).

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

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

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

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

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

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

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

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

Full Entity Legal Name: \_\_\_\_\_