



The ARF Online Research Quality Council

**Request for Proposal
(RFP)**

Solutions to Identify Duplicate Respondents

Date Issued: *June 10, 2008*

Project Lead/RFP Contacts:

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I. Introduction

A. Statement of Purpose

The Steering Committee and Client Advisory Board for the ARF's Online Research Quality Council are seeking support for an industry-wide research-on-research project. With this request for proposal ("RFP") we are seeking a proposal for the portion(s) of the research-on-research project described herein (the "Project"):

Technology or statistical solutions to identify duplicate respondents (same respondent recurring) within and across separate sample sources.

B. Background Information

The key goals of the proposed US industry-wide research-on-research are to:

- Measure the degree to which duplication occurs in samples when multiple sample sources are used in both a national sample and for a smaller geographic area
- Compare survey results across online sample providers and across modes for consistency
- Compare the wave-over-wave consistency of survey results for independent samples from the same provider
- Measure self-reported multi-panel membership
- Measure respondent motivations and attentiveness
- Use the data collected to conduct statistical analyses to identify the correlations between self-reported multi-panel membership, observed duplication, and respondent motivations and attentiveness

C. Scope of Work

All vendors rendering services under this Project shall enter into the non-disclosure agreement (the "NDA") attached hereto as Exhibit 1 to ensure the utmost confidentiality and security of the data. Vendors shall assume responsibility for protection of PII (Personally Identifiable Information) in accordance with applicable federal and state laws, rules and regulations, and are expected to demonstrate that they have the capabilities and commitment to protect PII. Multiple vendors using different methodologies may be selected to participate in this Project to provide a comparison of the efficacy and accuracy of each approach. Sample supplier identity must be kept "blind" and confidential.

Deduping can include the following checks, as well as additional processes:

- Real world validation, match to physical address or ID
- One real world ID with multiple panel IDs
- One digital fingerprint with multiple panel IDs
- IP address inconsistent with stated geography

The vendor(s) selected will have a proven track record of handling records from multiple panels and providing user reports that identify results of a deduping process.

D. Deliverables

1. A data file that identifies the respondents found to be in more than one of the samples being checked. The number of duplications found will be added to all records linked to a particular respondent. For each of two waves, it is anticipated that a range of between 10-30 separate sample sources will be part of the research study with each providing approximately 2,000 completed interviews. For purposes of this RFP, you will be working with approximately 30,000 to 60,000 individual records that will make up the data file for each of two waves.

2. Reports that communicate the outcome of the deduping process employed by vendor.

E. Contractual Terms and Conditions

The NDA set forth in Exhibit 1 attached hereto must be signed by vendor and returned to the ARF on or before the Final Proposal Due Date as a condition precedent to be considered for this Project.

F. Proposal Requirements

The following Proposal requirements are included in the WORD file attached hereto:

1. Description of current methodology and process for deduping and its advantages and limitations
2. Research-on-research (white papers, articles, etc) conducted by vendor or third parties to validate results of methodology
3. Timeline, schedule of when deduping information can be made available to clients for their use and analysis
4. Requirements (e.g., type of data, access to PII and special application) for vendor's deduping process to operate
5. Time in use and approximate records deduped by vendor over last 12 months
6. Current number of vendor's client/users of method, including 3 client references
7. Examples and description of data of all relevant reports/databases that are available from this process
8. Technical and research qualifications of the vendor
9. Privacy implications of vendor's method (from a North American perspective)-if none, a discussion of why. Provide a supporting legal assessment if available

10. Commercial pricing - Typical price of service to vendor's client

11. Pricing detail for services rendered to support this research study and factors influencing the price. **It is the express wish of the ARF that vendor will provide their services on this research-on-research project on a pro bono basis.** That may not be possible, in which case please provide an explanation.

12. Name, title and contact information for the Chief Privacy Officer, or individual charged with respondent privacy issues in vendor's company

13. Corporate overview, and name, title, contact information and brief biography for vendor's key workers on project

II. Evaluation and Award Process

A. Award Process

The evaluation committee will award the project to the vendor(s) considered most qualified to: implement the deduping process on this study, adhere to the protection of PII and sample provider identity, and act in accordance with the points articulated under Section V (the "Evaluation Criteria"). The committee's decisions are final and binding in all respects.

B. RFP Schedule

The ARF anticipates the RFP process to follow the tentative schedule shown below; however, the ARF retains the right to modify the schedule in its sole discretion. . In the event that the ARF changes the schedule, all vendors from whom the ARF has received an Intent to Participate Acknowledgement will be notified. Notwithstanding the foregoing, the ARF will give vendors only the amount of time to meet vendor deliverables indicated in this schedule. Requests for extensions of the Response Due Date or any other deliverable date will NOT be granted. Vendors should add sufficient time to ensure timely delivery of any applicable vendor deliverables.

All vendors seeking to submit Proposals must first submit to the ARF an Intent to Participate Acknowledgment. Such acknowledgment must be received by the ARF by **6/17/08**.

Deliverable	Date
RFP Issued Date	6/10/08
Vendor Intent to Participate Acknowledgement	6/17/08
Questions are allowed to be asked through this date	6/23/08
Final Proposals Due Date	7/08/08
Business Award Date	8/05/08

C. Sample Providers

The exact number of sample providers is unknown at this time, but the resulting set will most likely consist of the major full-service research companies with online panels, third-party sample suppliers, “river” sample suppliers and database companies. The set will also include a set of offline samples (e.g., mail, phone and central location).

D. Geography

United States

III. Proposal Submission Guidelines

A. Vendor Representations and Warranties

Vendor, by submitting a response, represents and warrants that:

1. it possesses the capabilities, knowledge, equipment, and resources necessary to provide the services detailed in its response to this RFP within the timeframes presented herein;
2. the deliverables provided by vendor under this Project conform to the RFP specifications and are error free;
3. it has the right and authority to submit a Proposal to the RFP and enter into a contract with the ARF;
4. it has all rights and licenses necessary to provide the deliverables to the ARF;
5. the ARF will not be obligated to pay license fees to vendor or any third party based upon use of the deliverables;
6. it will comply with any and all applicable federal, state and local laws, rules and regulations; and
7. the services will be performed in a professional and workmanlike manner.

B. Non-Disclosure Agreement & Confidentiality

1. The NDA which each prospective vendor is required to sign and deliver to the ARF in accordance with Section I.E (Contractual Terms and Conditions) above will be understood by the parties to cover any and all materials and deliverables exchanged between the ARF and vendors pursuant to the Project. Vendors are obligated to treat all information concerning this RFP, the Project and the services as strictly confidential. The information contained in this RFP and subsequently provided to select vendors may only be used to fulfill the purposes of the RFP.

2. Should a vendor elect to engage the services of any third party (“Subcontractor”) to respond to the requirements of this RFP, an authorized representative of the Subcontractor must sign and return two originals of the attached

NDA to the ARF before the Subcontractor may review any documentation associated with this RFP.

3. All Subcontractors will be obligated to hold all information concerning this RFP in confidence. Vendor shall be responsible for ensuring a subcontractor's compliance with the terms of the NDA.

C. Vendor Data

All confidential vendor data, such as process, financial or management information, provided in a vendor's Proposal will be accorded the same protection by the ARF as the ARF accords its own confidential information. This protection will include the care given by team members and third party consultants retained by the ARF to assist in the Proposal evaluation. Confidential vendor data included in Proposals should be marked "Confidential".

All deliverables submitted to the ARF in response to this RFP become the exclusive property of the ARF and will not be returned.

D. Company Overview & Bios

Vendor is to provide a company overview, and the name, title, contact information and brief biography for each of vendor's key personnel on the Project. Suggested topics to be addressed in the overview include: 1) Brief history of firm; 2) Strengths / Accomplishments; 3) Size / Organization structure; and 4) Policies and Positions of Company's Stakeholders.

E. Communications

Vendor's contact with the ARF in connection with this RFP shall be restricted to the ARF contact(s) identified below and in accordance with the terms described herein. **Only those communications that are in writing from the ARF Contacts may be considered as a duly authorized expression on behalf of the ARF.**

Name / Title	Role	Contact Info
<i>Steve Schwartz</i>	Vendor contact for RFP Questions	425-706-1129 stevesch@Microsoft.com
<i>Efrain Ribeiro</i>		Efrain.Ribeiro@Ipsos-na.com
<i>Paul Shellenberg</i>		paulshellenberg@Bruzzone-Research.com

F. Vendor Questions

Vendors shall be given one opportunity prior to submitting their Proposals to ask questions related to the RFP. All questions should be clear and concise and must be consolidated into one submission per vendor. **Questions submitted after the due date will not be accepted or answered.** The text of select questions and answers of a substantive nature will be forwarded to all vendors being solicited. Multiple questions of a similar nature may be combined, in the ARF's sole discretion, into a common, single question to which the ARF will respond and disseminate a response.

G. Amendments, Modification and Cancellation of RFP

Receipt of a Proposal and/or any and all discussions occurring during this RFP does not obligate the ARF to any vendor, in any way. The ARF reserves the right to accept or reject any and all Proposals in its sole discretion. The ARF further reserves the right to revise, amend, cancel, and/or reissue this RFP at any time for any reason, in which event such action shall be communicated in writing and provided to all vendors from whom the ARF has received an Intent to Participate Acknowledgement.

H. Use of Proposals

All Proposals and Alternative Proposals shall become the exclusive property of the ARF. Vendor hereby grants the ARF a worldwide, perpetual, unrestricted and royalty-free license to use all materials, methodologies, technologies and concepts included in any Proposal or Alternative Proposal for any purpose whatsoever. Selection or rejection of a Proposal shall not affect this right.

I. Gifts and Favors

Vendors shall not offer any gifts or favors of any kind to any employee or representative of the ARF, regardless of the value, during the RFP process through contract completion.

IV. Proposal Preparation and Delivery

A. Proposal Preparation and Response Format

The ARF's review of Proposals will be primarily focused on the information set forth in Section I.F and identified in the WORD file referenced below. To allow for an objective evaluation of all Proposals submitted, Vendors must conform to the response formats specified herein (and/or in the WORD file) and include all requested information. Failure to comply may result in the rejection of a vendor's Proposal.

Please find attached the RFP response WORD file – at minimum respond in this format. Feel free to include additional documentation (.ppt, .doc, etc.) for your proposal. (See COMPANY Proposal to ARF ORQC Deduplication RFP.doc.)

B. Most Favorable Terms

The ARF reserves the right to make an award without further discussion or negotiation of the Proposal submitted. Therefore, the Proposal should be submitted initially on the most favorable terms the vendor can propose. Contract negotiations may incorporate part or the vendor's Proposal. It is understood that vendor's Proposal will become a part of an official file on this matter.

C. Acceptance Period

Proposals should remain open and firm as an offer to contract through **09/01/08**.

D. Cost of Proposal Preparation and/or RFP Participation

Any and all costs incurred by the vendor associated with preparation of Proposals and/or participation in this RFP are entirely the responsibility of the vendor and shall not be chargeable in any manner to the ARF including, without limitation, any technical gap analysis activity required prior to award.

E. Alternative Proposals

In addition to submitting a Proposal addressing the specified requirements, vendors are encouraged to provide **additional** alternative proposals (each, an "Alternative Proposal") for services which vendor considers more cost effective than the processes/procedures described herein. Recommended alternatives are to be identified as such along with the applicable cost differential and program impact for each alternative proposed.

F. Delivery Instructions

Proposals and any Alternative Proposals shall be delivered no later than by the due date noted above, 5:00 PM Pacific Time via email to bill@theARF.org .

Late submissions will not be accepted unless otherwise agreed by the ARF, and the ARF accepts no liability for incomplete submissions, errors in transmission, late and/or misdirected transmissions.

V. The ARF Review Process

A. Evaluation Criteria

The ARF shall have the sole right and option to determine the evaluation and selection criteria it deems appropriate in selecting a vendor, and reserves the right to amend its selection criteria at any time, in its sole discretion. The foregoing notwithstanding, the following criteria will be strongly considered during such evaluation and selection:

(Note: Information is not necessarily provided in order of importance)

- Vendor's ability to meet the ARF's primary business objectives
- Vendor's ability to meet the requirements and service levels
- Vendor's overall business qualifications and industry knowledge
- Vendor's pricing proposal
- Vendor's agreement to the ARF's contract requirements

B. Bidder Presentations

If deemed necessary by the ARF, vendors may be requested to clarify their Proposal and/or present their proposal orally to the ARF. The ARF will notify vendors in the event such a presentation is necessary.