**Research Studies–Proposal Requests**

**Title**

**BACKGROUND and PURPOSE**

[Enter background and purpose here].

**RESEARCH OBJECTIVE**

The [sponsoring entity] is seeking researchers to [objective of research]. The following are examples of proposed topics that may be addressed:

* [list topics here]

Note that the above list is not meant to be exhaustive but merely examples of proposed topics that may be researched.

[Additional information here]

**PROPOSAL**

To facilitate the evaluation of proposals, the following information should be submitted:

1. Resumes of the researcher(s), including any graduate student(s) expected to participate, indicating how their background, education and experience bear on their qualifications to undertake the research. If more than one researcher is involved, a single individual should be designated as the lead researcher and primary contact. The person submitting the proposal must be authorized to speak on behalf of all the researchers as well as for the firm or institution on whose behalf the proposal is submitted.
2. An outline of the approach to be used (e.g. literature search, model, etc.), emphasizing issues that require special consideration. Details should be given regarding the techniques to be used, collateral material to be consulted, and possible limitations of the analysis.
3. A description of the expected deliverables and any supporting data, tools or other resources.
4. Cost estimates for the research, including computer time, salaries, report preparation, material costs, etc. Such estimates can be in the form of hourly rates, but in such cases, time estimates should also be included. Any guarantees as to total cost should be given and will be considered in the evaluation of the proposal. While cost will be a factor in the evaluation of the proposal, it will not necessarily be the decisive factor.
5. A schedule for completion of the research, identifying key dates or time frames for research completion and report submissions. The [sponsoring entity] is interested in completing this project in a timely manner. Suggestions in the proposal for ensuring timely deliver, such as fee adjustments, are encouraged.
6. Other related factors that give evidence of a proposer's capabilities to perform in a superior fashion should be detailed.

**SELECTION PROCESS**

The [sponsoring entity] will appoint a Project Oversight Group (POG) to oversee the project. The [sponsoring entity/POG] is responsible for recommending the proposal to be funded. Input from other knowledgeable individuals also may be sought, but the [sponsoring entity/POG] will make the final recommendation, subject to SOA leadership approval. The SOA's Research Actuary will provide staff actuarial support.

**Questions**

Any questions regarding this RFP should be directed to [Steven Siegel/Ronora Stryker], SOA Research Actuary (phone: 847-706-3578/3614; email: [ssiegel@soa.org](mailto:ssiegel@soa.org) / [rstryker@soa.org](mailto:rstryker@soa.org).

**NOTIFICATION OF INTENT TO SUBMIT PROPOSAL**

If you intend to submit a proposal, please e-mail written notification by XXX XX, 201X to [[Barbara Scott](mailto:bscott@soa.org) / [Jan Schuh](mailto:jschuh@soa.org)].

**SUBMISSION OF PROPOSAL**

Please e-mail a copy of the proposal to [[Barbara Scott](mailto:bscott@soa.org) / [Jan Schuh](mailto:jschuh@soa.org)].

Proposals must be received no later than XXX XX, 201X. It is anticipated that all proposers will be informed of the status of their proposal by the end of XXX 201X.

**Note: Proposals are considered confidential and proprietary.**

**CONDITIONS**

The selection of a proposal is conditioned upon and not considered final until a Letter of Agreement is executed by both the Society of Actuaries and the researcher.

The [Society of Actuaries/sponsoring entity] reserves the right to not award a contract for this research. Reasons for not awarding a contract could include, but are not limited to, a lack of acceptable proposals or a finding that insufficient funds are available. The [Society of Actuaries/sponsoring entity] also reserves the right to redirect the project as is deemed advisable.

The [Society of Actuaries/sponsoring entity] plans to hold the copyright to the research and to publish the results with appropriate credit given to the researcher(s).

The [Society of Actuaries/sponsoring organizations] may choose to seek public exposure or media attention for the research. By submitting a proposal, you agree to cooperate with the [Society of Actuaries/sponsoring entity] in publicizing or promoting the research and responding to media requests.

The [Society of Actuaries/sponsoring entity] may also choose to market and promote the research to members, candidates and other interested parties. You agree to perform promotional communication requested by the [Society of Actuaries/sponsoring entity], which may include, but is not limited to, leading a webcast on the research, presenting the research at an SOA meeting, and/or writing an article on the research for an SOA newsletter.