



Institute of International Education (IIE)

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Response to Bidders' Inquiries

Online Application System Request for Proposal

Q: Do you envision that a new applicant's first step would be creating an account? Or should they pass through an eligibility verification step first? (A. Application Requirements; i. Application Design and Features; pg. 7).

A: Applicants for some scenarios will need to first pass initial eligibility verification prior to creating an application; other scenarios may not require initial eligibility verification. Each program will have unique eligibility requirements.

Q: Do you anticipate repeat applicants?

A: Yes, applicants may reapply to the same program multiple times and/or apply to multiple programs using the online application system.

Q: Do you require proposal text pasted, file upload or will you allow them the choice? (A. Application Requirements; i. Application Design and Features; pg. 8).

Q: Proposed project/program information (e.g. degree, field, proposal/project abstract, etc.). In this Point, will Proposal/Project Abstract be only simple text area or a separate form with multiple details? Please elaborate.

A: Each application will have separate program proposal requirements. We require the flexibility for all three scenarios (i.e. uploaded as an attachment, copied and pasted into a textbox, or both).

Q: Should the applicant be able to return to the application and add additional referees? Check on status of referees' response? (A. Application Requirements; iv. Letters of Recommendation; pg. 9).

A: Yes, the applicant should always have the ability to return to the application, check on references and add/remove references, even after submitting.

Q: Do you require the referee to use a form provided to them? (A. Application Requirements; iv. Letters of Recommendation; pg. 9).

Q: Letters of Recommendation. Would you please elaborate on what are the total fields should be there in Letter of Recommendation? Or would you provide us some reference for "Letters of Recommendation"?

A: Referee requirements will vary based on program scenario and referee type. Certain program scenarios require a form in addition to a letter that is uploaded; others require just a letter. Some program scenarios maintain both: a form for one referee type (e.g. language evaluation) and then a letter/form for the standard reference type.

Q: For programs that require multiple "recommendation" types is the total number still 3-4? Or, do these programs require more? (A. Application Requirements; iv. Letters of Recommendation; pg. 9).

A: The total number of all "recommendation" types may reach five (5).

Q: By "in-system" do you mean that the content of a message is only viewable by logging into the portal? Or, is it acceptable for message contents to be delivered via email? (B. Application Management and Review Requirements; i. Application Manager Design and Features; pg. 10).

A: The message will be delivered by email to applicants, but will be created in the system by administrators or application managers.

Q: How do downloaded files need to be manipulated? What does "manipulated" mean? (B. Application Management and Review Requirements; i. Application Manager Design and Features; pg. 10).

A: Files should have the ability to be downloaded in common files formats versus system proprietary file type. For example, downloading a personal narrative in PDF that can be easily opened offline in Adobe Reader. Further, we require the ability to download applications and select application components. For instance, bulk downloading letters of invitation or transcripts only as individual files.

Q: Does “missing documents” refer to the documents an applicant has not yet provided or something else? (B. Application Management and Review Requirements; i. Application Manager Design and Features; pg. 10).

A: Missing documents refer to required documents an applicant has not provided.

Q: Does an applicant also have access to previous applications from formant competitions via the portal? (B. Application Management and Review Requirements; i. Application Manager Design and Features; pg. 10)

A: Yes, the applicant should have access to submitted versions of previous years' competitions in a read-only format.

Q: By “versions of submitted applications” do you mean different layouts for the applications based on the viewer's role? (B. Application Management and Review Requirements; ii. Application Reviewer; pg. 10).

A: Yes, data fields and elements will be viewable by reviewers based on their level of access. For example, sensitive applicant data would only be viewable by the administrator or application manager, but not a reviewer.

Q: Can you provide more detail on what is meant by “higher-level applicant review and broad country/program comments?” (B. Application Management and Review Requirements; ii. Application Reviewer; pg. 10).

A: We require a solution that allows for approval of entire country panels en masse and perform bulk updates. These reviews do not require the same level of detail as the individual application review. These reviewers will generally only need to see a certain set of defined fields, an at a glance view, of each application.

Q: In the Application Manager section of the Bidder Response, line 43- can you clarify desired functionality and give an example?

A: We need the ability to assign program specific user defined fields to each application to add in our review and processing of application, for example, assigning the value of “complete” to multiple applications to move them to the next stage of the process.

Q: What are your requirements for historical data migration? (C. General Online Application System Requirements and Preferences; pg. 12).

Q: Is data migration a consideration for this project?

A: We do not have any requirements for historical data migration.

Q: Do you have an estimate on the total amount of file data received in a year's cycle? (C. General Online Application System Requirements and Preferences; pg. 12).

A: We receive approximately 35,000 applications per year. Each application requires on average 7 upload pages at roughly 2MB each. In addition, each application will have three reference letters uploaded again at roughly 2 MB each.

Q: On designated text boxes, perform spell check, restrict and display character count and restrict special characters. If possible, it would be helpful to know if there are specific character restrictions that IIE has in mind with this requirement.

A: Some fields should not accept characters with diacritics (e.g. accents, breves, cedillas, dieresis/umlauts, etc.).

Q: Access to applications from dormant competitions. I would like to confirm that they simply want application records to persist in conjunction with contact records from year to year.

Q: Would you please elaborate on “Access to applications from dormant competitions”

A: We need access to the entire application and application data online in the system, and download entire applications to save for offline use from year to year.

Q: File-size compression of attachments. If they can provide a specific use case of what this business requirement is referencing, that would be helpful.

We download each application as part of our electronic grantee record system. To ease our storage burden, each downloaded application should be under 2 MB.

Q: An unrestricted number of user accounts is listed as a requirement. Please confirm that the user in this scenario is a person applying to the Fulbright program.

Q: Another requirement states “Ability for each application scenario to have upwards of 2,000 users”. Please confirm that 2000 users collectively means a person/people who is applying to the program.

A: The unlimited number of user accounts refers both to the number of applicants, and the number of reviewer and application managers. The 2,000 users referenced, in this instance, are reviewers and application managers.

Q: One requirement states, “Close and reopen application scenarios based on program-specific competition requirements”. Please define what a scenario is or could be.

Q: How many deadlines are there in total across all programs (that are included in the RFP)?

Q: How many unique competitions are there? Does each have a unique review process?

A: In a competition for a certain academic year, we may have multiple deadlines. For example, for one application scenario, we have February 1, April 1, August 1, November 1 and November 15 deadlines. For other programs, particularly for foreign (non-U.S.) applicants, competitions are kept open annually and we introduce a new version of the application during a seasonal lull. The Fulbright Program is active in more than 155 countries, each with country-specific deadlines. Each program scenario will have distinct review processes and requirements.

Q: Is there a budget that has been established for a new solution, and if so, can it be shared?

Q: Do you have an approximate annual budget for the system?

A: As outlined in 6. Criteria for Selection, pricing is one of the primary considerations for the bidder-proposed solution, following functional/technical capabilities.

Q: Is this an open or closed RFP? How many vendors are participating?

A: This is an open competition.

Q: What do you use as your current application process? Is there an incumbent?

A: We currently utilize several solutions to accommodate the Scope of Work outlined in the RFP.

Q: What is the total number of users broken out by applicants, references and reviewers in a typical year?

A: We have approximately 35,000 applications submitted each year. Each of those applications will have three (3) to five (5) references. These applications are reviewed by university contacts (upward of 1,000), external reviewers in the U.S. and in more than 155 countries, colleagues at the U.S. Department of State and the J. William Fulbright Foreign Scholarship Bureau (roughly 100).

Q: What is the average and peak number of concurrent users for your most active deadline period? If available, can you also supply bandwidth usage for that period?

Q: For your most active deadline period, what is the maximum number of submissions received in one day?

A: We do not maintain bandwidth usage, but concurrent applicants will be several thousand, not exceeding 12,000 per scenario.

Q: What are the current total storage requirements (MB) for all document uploads for a typical program year?

Q: What are the total multimedia storage requirements for a typical program year?

A: It varies between programs, but each application has roughly seven (7) upload pages, which are approximately three (3) MB each.

Q: What are the average and maximum file size estimates for multi-media files (AVI's, MPEGS, MP3s)?

A: On one application scenario, the maximum is 500 MB; on another, the maximum is five (5) GB.

Q: Administrators will require usage statistics and user reporting features. Would you please provide us with the list of Usage Statistics and Reports you require?

A: We monitor a range of information, including last log-in, e-mail address information, names, etc. We anticipate these requirements will be fleshed out during the design phase.

Q: Would you please list all external systems including a CRM, external review systems and enterprise database that you are currently using?

A: We currently utilize Oracle CRM On Demand and custom solutions built in-house with the Microsoft .NET Framework. The Oracle CRM On Demand environment is a hosted multi-tenant solution with web services integrations to other systems.

Q: What solution does IIE currently leverage for grants management?

A: We currently utilize several types, including most prominently, a CRM (Oracle CRM On Demand) and a custom-built grants management solution.

Q: We have a query in regards to the execution of the project if you are considering offshore vendors/contractors for this project.

A: Offshore vendors/contractors will be considered.

Q: What is the desired "Go-Live" date?

Q: Do you have a high level anticipated Go-Live date in mind?

Q: Can you share with us your projected implementation timeline for deploying new Fellowship software across these programs?

A: We will coordinate with the identified vendor to ensure a realistic timeline for a 2015 target date. As part of the Proposal Narrative, it is critical that the proposal include information on the company's approach to project planning and phased implementation.

Q: Is it fair to assume the following? Assumptions on Application Reviews: 1) Multiple Committees are created for the application review. 2) Multiple members are there for each committee. If not, please clarify?

A: Yes, this is correct. In one application scenario for U.S. applicants, we internally perform a technical review of each application. We then distribute applications to external discipline review committees comprised of multiple committee members. Comments from discipline review are then shared with region-based reviewers who review applications on a country/program/regional-level. Please refer to Page 11 for a better sense of the multi-staged application and review process.

Q: "Review capabilities must include options for program-specific evaluative metrics and/or substantial comments in prose." Are we setting the evaluative metrics based on each reviewer's status? Please confirm.

A: Each application scenario will utilize program-specific ratings, rankings and evaluation metrics for application review. Generally, it is fair to assume that reviewers of the same reviewer type will be provided with the same review requirements.

Q: "Review may be carried out simultaneously and/or in pre-defined program-specific workflows." Could you explain in detail, what kind of work process needs to be implemented?

Q: How the selection process occurs from Multiple Committee/Multiple Members. Is there a selection process? This is not outlined in the RFP.

A: The diagram on Page 11 outlines a high-level sample of review workflows for U.S. applicants and foreign applications. You will notice in the U.S. Student and Scholar Programs that following In-Country review, applications are released simultaneously for Binational Review and Sponsor Review. Flexibility with review and selection capabilities is critical to this project. Selection of applicants may be considered a component of the review process and workflow.