

## Request for Proposals (RFP)

**To** : Offerors  
**From** : Institute of International Education, Inc. (IIE)  
**Subject** : Fulbright Visiting Scholar Enrichment Seminars

**RFP Issue Date** : July 18, 2016  
**RFP Closing Date** : August 15, 2016  
**RFP Closing Time** : 17:00 hours U.S. Eastern Time.  
**Performance Period** : July 18, 2016 to July 18, 2017

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-price proposal for the requested services.

Offerors are encouraged to read this RFP in its entirety (including any and all attachments), paying specific attention to the instructions and requirements included herein. Issuance of this solicitation does not, in any way, obligate the Institute of International Education (IIE) to award a contract, nor will IIE pay for any costs incurred in the preparation and submission of a proposal. The agreement resulting from this RFP will be provided to the most responsive Offeror(s) whose Offer will be the most advantageous to IIE in terms of cost, functionality, and other factors as specified in this RFP.

### Content of RFP:

Section 1: Background and Purpose  
Section 2: RFP Condition  
Section 3: Proposal Preparation Instructions  
Section 4: Terms of Payment  
Section 5: Evaluation of Proposals

Attachment A: Statement of Work  
Attachment B: Cost Proposal Template

The required services are described in the “**Statement of Work**” in **Attachment A**. IIE encourages your organization to indicate its interest in this RFP by submitting a proposal according to the instructions in “**Proposal Preparation Instruction**”. Proposals will be evaluated based on the “**Evaluation Criteria**”.

All proposals are due by the dates and times stated above. Any proposal received after the required time and date specified for receipt shall be considered late and non-responsive. Late proposals will not be evaluated.

**Questions:** Any questions are to be submitted **in writing** via email to the email address listed below no later than **{Wednesday, July 27, 2016}**. No questions will be entertained if they are received by means other than the specified email address. No oral answers will be provided. Answers to questions IIE deems relevant to this RFP will be published on **{Monday, August 1<sup>st</sup>, 2016, 5:00 PM EST}** on IIE’s website under Subawards and Procurement (<http://www.iie.org/en/What-We-Do/Our-Procurements>).

**Devon Sponheimer**, Senior Manager, Events and Enrichment  
Institute of International Education  
809 United Nations Plaza  
New York, NY 10017  
Email: [Enrichment@iie.org](mailto:Enrichment@iie.org)

IIE will hold a webinar at 1 PM EDT, Friday, July 22, 2016 for all interested Offerors. This webinar will be recorded and posted on our website as a resource for Offerors. Answers to all questions will be published in writing and supplied to all interested Offerors. Please go to the following address to register for the webinar:

<https://attendee.gotowebinar.com/register/5356814428884182018>

**Proposal Submission:** Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: [Enrichment@iie.org](mailto:Enrichment@iie.org). Be sure to include in the subject line: {Fulbright Visiting Scholar Enrichment Seminars}. IIE will not accept proposals received by fax.

#### **RFP SCHEDULE**

<b>Event</b>	<b>Date</b>
RFP Distribution to Offerors	Monday, July 18, 2016
Information Webinar	Friday July 22, 2016, 1:00 PM EST
Recording of the Webinar posted on our website	Monday, July 25, 2016
Inquiries to IIE due	Wednesday, July 27, 2016
Responses to Offerors inquiries due	Monday, August 1, 2016
Proposal Due Date	Monday, August 15, 2016, 5:00 PM EST
Anticipated decision and selection of Offerors	Tuesday, August 30, 2016
Anticipated commencement of work	Two months prior to selected seminar dates

## **Section 1: Background and Purpose**

### **Background: Institute of International Education**

The Institute of International Education (“IIE” or the “Institute”) is a New York not-for-profit corporation that is among the world’s largest and most experienced international education and training organizations. Founded in 1919, IIE promotes educational exchange around the world through a wealth of programs and services including Fellowship and Scholarship Management, Higher Education Institutional Development, Emergency Student and Scholar Assistance, and Leadership Development.

For more than 90 years, IIE has promoted educational exchange around the world. The Institute currently implements more than 250 programs benefiting 25,000 men and women from 175 nations. Foremost among these programs is the world-renowned Fulbright Program, which IIE has had the honor to administer on behalf of the U.S. Department of State since the program’s inception in 1946. In addition to the U.S. Department of State, program sponsors include: the U.S. Agency for International Development (USAID); World Bank; major philanthropic foundations; private and public corporations; foreign governments; and individuals.

With IIE’s global headquarters in New York City, IIE has offices around the world, including offices in the United States (Washington D.C., Chicago, Denver, Houston and San Francisco) and in other countries (China, Egypt, Ethiopia, Hungary, India, Indonesia, Mexico, Russia, Thailand, Ukraine and Vietnam).

### **Purpose of Request for Proposal**

IIE is seeking to implement up to five Fulbright Visiting Scholar Enrichment Seminars during the 2016-17 academic year pending availability of funds. Offerors may only submit an offer for one seminar.

The purpose of this Request for Proposal (“RFP”) is to invite Offerors to submit a proposal to design, and assist in the development and execution of an enrichment seminar for up to 90 Fulbright Visiting Scholars during the 2016-

17 academic year, with dedicated funding for selected organizations of up to \$20,000. Enrichment seminars enhance the Fulbright experience of current Visiting Scholars and further the overall mission of the Fulbright Program, which is to increase mutual understanding between the people of the United States and the people of other countries. Seminars should provide opportunities to explore a proposed seminar topic in depth over the course of four days through a range of speakers, discussions, site visits, and other activities.

## Section 2: RFP Conditions

IIE reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Offeror or other party.
- Accept other than the lowest price offered.
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
- Award more than one contract.

Nothing in this RFP is, or should be relied on by Offeror as a promise or representation by IIE. IIE does not make any representation or warranty as to the completeness of this RFP or have any liability for any representations (express or implied) contained in, or omissions from, this RFP. This RFP and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Proposal. Each Offeror shall keep the RFP and its contents confidential and shall return the RFP (without keeping copies) to IIE if the Offeror elects not to submit a proposal, or upon being requested to do so by IIE.

Any information or materials submitted in response to this RFP and/or as a proposal (whether successful or unsuccessful) shall become the property of IIE and will not be returned.

In submitting a proposal, you must agree that your offer shall remain firm for a period of no less than **120** days from the RFP closing date.

Failure to follow the specifications and requirements provided in this RFP may result in disqualification.

## Section 3: Proposal Preparation instructions

Proposals are expected to be comprehensive and include the information set forth below. Offerors are also invited to send any additional information or supplemental material they believe will aid IIE in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought.

Include only your own work and no text copied from sources outside of your organization, unless those sources are adequately cited and credited. In order to be qualified for this RFP, all Offerors are requested to provide the following information, and format their proposal as follows:

### 1. Letter of transmittal, one page

This letter will summarize in a brief and concise manner, the Proposer's understanding of the scope of services and make a positive commitment to perform the work in a timely manner. The letter should name all of the persons authorized to make representations for the company. The Letter of Transmittal shall be signed by a representative who is authorized to contractually bind the company and include the agent's title or authority. The letter should not exceed one page in length.

### 2. Basic information, one page

- Legal name, registered address, and "Remit to" mailing address, if different from registered address
- Name of authorized representative for this RFP, with telephone number(s), and e-mail address
- General information about your organization and the services it offers
- Description of relevant partnerships and business relationships

**3. Qualifications and Capabilities**

- Brief description of the organization/entity and experience in the field that illustrates overall services and capabilities to meet the terms of the RFP
- Years of relevant experience
- Description of resources (personnel) supporting the development of the seminar and relevant qualifications
- Staffing plan for this seminar and a general overview of the expertise of the individuals included. Please include the following: name, position on your team, summary of relevant expertise and experience.
- Any plans to outsource/subcontract the services or any part thereof

**4. Past Performance and Experience**

Document and summarize your proven track record of successfully implementing similar activities. Using the table format provided below, please list only the relevant projects you implemented within the past 3 years, a brief description of how each is relevant to the scope of the RFP, and the contact details for each previous client or donor. You may also include recommendation/appreciation letters and certificates as attachments.

5.

#	(a) Name of Organization	(b) Activity Title	(c) Locations of activity	(d) Synopsis of the activity and relevance to this RFP	(e) Performance period (date and duration)	(f) Cost for the activity	(g) Name & Contact Info (E-mail <u>and</u> phone)
1							
2							
3							

**6. Implementation of the Statement of Work**

- Detailed description of the services being offered and any information relevant to meeting the technical specifications stated in **Attachment A**
- Detailed description of services offered to address the specifications stated in the Scope of Work
- Proposed project timeline and milestones
- Please provide information about your writing capabilities and sample pieces of promotional materials that were written by your writers. Your proposal should reflect the level of effort you can provide for helping to write materials, to help us determine the writing needs for our internal team
- Quality control plan including:
  - A description of internal review procedures that facilitate high-quality standards
  - How quality control will be managed when completing multiple projects for multiple clients
- Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted

**7. Cost Proposal**

- Submit a detailed cost proposal, in U.S. dollars, in the recommended format shown in **Attachment B**
- Breakout of estimated costs by phases stated in Attachment B, as referred to in Scope of Work
- Include any additional cost items that the Offeror wishes to propose
- Hourly rate for services (where possible, please indicate estimated number of hours needed for each component or feature of the platform)
- Total cost proposed

**Section 4: Terms of Payment**

Payment terms for the award shall be approximately net thirty (30) days after satisfactory completion of each deliverable or milestone agreed upon and established in the resulting agreement. Payment shall be made by the

Institute of International Education (“IIE”) via check or electronic funds transfer/bank wire. The final payment terms in the contract will control, not this RFP. **No advance payments will be provided.**

## Section 5: Evaluation of Proposals

Item	Requirement	Points Available
<p><b>Proposal Program Content</b></p>	<p>Considering the requirements in <b>Attachment A</b>, please include the following components into the proposed program:</p> <ul style="list-style-type: none"> <li>• A program narrative that demonstrates how the location of the proposed seminar relates to the topic chosen.</li> <li>• A clear conceptualization of proposed sessions and how they relate and build on the chosen seminar topic.</li> <li>• Various and differing perspectives on the topic included within the program.</li> <li>• Proposed schedule contains all the sessions outlined in Seminar Sessions and Activities in <b>Attachment A</b>. These proposed sessions will be evaluated by how well they showcase the seminar topic.</li> <li>• Proposed schedule includes the local Fulbright Associations and/or local community members in the proposed activities.</li> <li>• The steps, in chronological order, that will be taken to implement the program. Make sure to describe any innovative approaches or technology planned for use.</li> </ul> <p>Higher scores will be awarded to proposals that indicate a greater practical understanding of implementing a large seminar, that propose strong sessions related to the topic and employ innovative but realistic ways of connecting the theme to the sessions and activities.</p>	<p>50</p>
<p><b>Experience and References</b></p>	<p>Demonstrate in a narrative format the past experience implementing a similar scope of work.</p> <p>Consideration will be made of the past programs listed in Section 3.</p>	<p>20</p>
<p><b>Staffing</b></p>	<p>Please provide the following, in order:</p> <ul style="list-style-type: none"> <li>• Identification of key staff who will work on the proposed Seminar, including information on the designated representative, and description of any relevant past experience or specialization (It is recommended to include CVs/Resumes of key staff in the Supporting Documentation section of the Proposal).</li> <li>• A Staffing plan for the division of labor.</li> <li>• A list of your proposed staff in the following format: <ul style="list-style-type: none"> <li>Name:</li> <li>Summary of relevant expertise and experience:</li> <li>Proposed position on your team:</li> </ul> </li> </ul> <p>Higher scores will be awarded for presentation of staff with</p>	<p>10</p>

	more relevant qualifications and experience in managing projects similar that stated in this RFP.	
<b>Cost Proposal</b>	IIE's review of the cost proposal shall determine if the overall costs proposed are realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror's technical proposal.  Assessment of the overall cost of the proposal.	20
<b>Total</b>		<b>100 points</b>

## **Attachment "A"**

### **Statement of Work**

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The selected organizations will be responsible for designing a seminar for up to 90 visiting scholars, preparing a seminar agenda and schedule related items such as speakers, panelists, professional visits, and community service as detailed in the RFP. The organizations will provide weekly status updates to IIE, outlining the status of invited speakers, panelists, and facilitators and will develop and implement a media outreach strategy in conjunction with IIE. Organizations will also be responsible for providing recommendations to IIE regarding the seminar logistics including facilitating introductions to appropriate service providers for local ground transportation, housing, conference meeting space, AV equipment rentals, and other services outlined in the proposed agenda. IIE will be responsible for arranging all seminar logistics and funding all program expenses. The organizations will provide onsite support during all schedule program activities, providing staff and volunteers to assist IIE in the implementation of the seminar throughout the selected dates. The organizations will also prepare a final program report, which will outline outcomes and lessons learned, and a final budget, which must account for any increase to the estimated cost.

#### **1. Roles and Responsibilities Summary**

The recipient organization will:

- i.** Design a multi-day seminar for Fulbright Visiting Scholars thematically designed around one of the required topics as listed below;
- ii.** Identify appropriate presenters for the core program components;
- iii.** Identify cultural events that highlight specific aspects of U.S. or regional culture or history;
- iv.** Identify potential community service activities;
- v.** Provide IIE staff with information, such as articles or reports relevant to the subject of the seminar for dissemination to the scholars three weeks prior to the start of the program.
- vi.** Arrange activities and events that facilitate contact with Americans, including, but not limited to, home hospitality dinners;
- vii.** Identify potential hotel accommodations, local transportation options, seminar reception venues, and seminar session and site visit venues to be selected by IIE;
- viii.** Complete a walkthrough and supply photos of venue spaces to IIE.
- ix.** In coordination with IIE, create an overarching staff timeline outlining tasks to be completed during the seminar and identifying appropriate staff and/or volunteers to carry out each task;
- x.** Assist in the development of a media strategy;
- xi.** Assist IIE in the implementation of the seminar, including, but not limited to:
  - a) Facilitating scholar arrivals and departures at the airport;
  - b) Staffing the registration desk;
  - c) Accompanying the scholars during all scheduled sessions and site visits;
  - d) Assisting with event logistics, such as checking AV, room setups, and meals prior to sessions and assisting with room setup and breakdown;
  - e) Facilitating/monitoring sessions, site visits, and events; and
  - f) Collaborate on the creation of a central run of show document with IIE staff
- xii.** Submit narrative report within 14 days of the program's completion and financial reports within 30 days of the program's completion.

IIE will:

- i.** Serve as the liaison with the Bureau of Educational and Cultural Affairs, U.S. Department of State;
- ii.** Serve as primary contact for scholars
- iii.** Collaborate with recipient organization in program development and agenda design;
- iv.** Print final program, associated materials and provide folders for scholars;

- v. Arrange and pay for airfare, meals, housing, cultural activities and local transport for all program participants;
- vi. Create the registration webpage page for scholars
- vii. Serve as event manager during the seminar to manage the onsite logistics;
- viii. Manage participant issues during the seminar;
- ix. Design and disseminate seminar evaluation; and
- x. Manage payments to vendors

**a) Communications/Reporting Guidelines**

Selected organizations agree to scheduled weekly conference calls with IIE and ECA to provide staffing and agenda updates and discuss next steps. Selected organizations are required to submit a preliminary seminar program schedule to IIE no later than eight weeks before the seminar start date and a preliminary run of show to IIE no later than four weeks prior to the start date of the seminar. The run of show should reflect the organizations staffing contributions during the seminar dates and a chronological list of program management tasks. A template for the run of show will be provided by IIE. All program activities and speakers must be approved by IIE. IIE will make final determination of all seminar logistics and work directly with all service providers. A final draft of the seminar program, including all finalized sessions and speakers, must be submitted for IIE review three weeks before the seminar start date. In addition, IIE will approve any formal communications between the recipient organization and the scholars.

IIE will provide an electronic post-program evaluation for scholars to complete; results will be shared with the seminar organizers. No later than 14 days after the conclusion of the seminar, the organizations will submit a final narrative report that includes a brief narrative of the event and the work the organization conducted in facilitating the event, summarizing progress of major activities and detail results and lessons learned. A debrief call following the conclusion of the seminar will take place no later than 15 days after the conclusion of the seminar. Organizations will also submit a reconciliation of all administrative expenses, along with documentation for any cost share attributed to the seminar no later than 30 days after the conclusion of the seminar.

**b) Media Strategy**

The recipient organization will work closely with IIE and ECA on the development of a media engagement strategy for the Fulbright enrichment seminar. This should include, but is not limited to, drafting a press release, contacting local media outlets to pitch coverage of the seminar, social media posts, and arranging interviews with speakers, participants and administrators. Special care should be taken to ensure the privacy of participants who do not wish to have their names or pictures used by reporters attending seminar events. Immediately following any media interviews the recipient organization must share the details of the coverage with IIE, including the likely publication date and/or air date.

**2. Seminar Theme and Dates**

The proposed seminar must focus on one of the themes below:

- i. U.S. Elections and the Political Process;
- ii. Environmental/Climate Change, Plight of the Oceans;
- iii. Democracy and Human Rights;
- iv. Lab to Market (The Lab to Market theme relates to technological advances in scientific disciplines and how they support various fields such as public health, environmental sciences and clean energy. More information can be found here: <https://eca.state.gov/fulbright/fulbright-experience/enrichment-activities/lab-market-seminars>)
- v. American History (the New West, the New South, for example);
- vi. Women's Issues;
- vii. Diversity;
- viii. Food Security;

- ix. Public Health;
- x. Entrepreneurship, including Social Entrepreneurship
- xi. Sports Diplomacy; or
- xii. Lab to Government (A concept envisioned and tested in a scientific setting that resulted in the formation and implementation of public policy)

Seminar topics may cover more than one focus if necessary.

### **Seminar Dates**

Proposals are being accepted for seminars in both the fall and spring semesters. Proposed seminars should take place over the course of four days between November 1, 2016 and April 30, 2017. Programming should begin the afternoon/evening of arrival, continue through the next two full days, and conclude by noon on the final day.

### **A. Seminar Sessions & Activities**

Required seminar sessions and activities include the following:

- i. An opening reception that includes important speakers, guests and local Fulbright alumni;
- ii. One or two keynote/plenary session(s) with one or more speakers who will address the Fulbright Visiting Scholars on a topic related to the seminar theme;
- iii. An overview/orientation session, detailing the seminar schedule and highlighting major events to take place during the course of the seminar;
- iv. Panel discussions with locally-based U.S. subject experts highlighting the seminar theme and its local impact;
- v. Facilitated breakout/small group sessions to discuss and reflect on plenary sessions, panel discussions and other activities;
- vi. Group volunteer activities for the Fulbright Visiting Scholars to participate in;
- vii. Home hospitality dinners at the homes of local community members/U.S. Fulbright alumni;
- viii. Tours/activities (e.g. architectural, historical, cultural) that emphasize the diversity of a city/town/community and its history;
- ix. A group photo; and
- x. A final debrief session on the last day that allows seminar participants an opportunity to reflect on and discuss the seminar theme amongst each other.

### **B. Diversity**

“Diversity” should be interpreted in the broadest sense and encompass differences including but not limited to race, color, national origin, sex, age, religion, geographic location, social-economic status, disability, sexual orientation or gender identity. Pursuant to the ECA’s authorizing legislation, Fulbright enrichment programs must maintain a non-political character and should be balanced and representative of the diversity of American political, social, and cultural life. Proposed seminars should also highlight and foster interaction with the diversity of local communities in order to demonstrate the contributions of these groups to the community and to the United States. Activities must maintain a non-political character and should be balanced to represent multiple perspectives and bi-partisan views if engaging elected officials. Applicant organizations are strongly encouraged to adhere to the advancement of this principle both in program administration and in program content. Opportunities for Fulbright Visiting Scholars to interact with U.S. minority audiences are encouraged.

### **C. Acknowledgement**

All enrichment programming must use the approved Fulbright logo and be identified as associated with the Fulbright Program. All program materials should note:

*“This activity is sponsored by the U.S. Department of State’s Bureau of Educational and Cultural Affairs as part of its flagship Fulbright Program, and is administered by the Council for International Exchange of Scholars (CIES), a division of the Institute of International Education (IIE).”*

This language should appear prominently on all print and electronic materials and above that of the role of the selected organization.

### **3. Recommendations**

#### **A. Alumni**

Coordination and joint initiatives with U.S. Fulbright alumni, primarily through the U.S. Fulbright Association and its network of chapters, are strongly encouraged. The goal is to link Fulbright Visiting Scholars with U.S. Fulbright alumni to strengthen long-term mutual understanding and to build professional and social networks that lead to long-term institutional and individual relationships.

#### **B. Cost Sharing / Program Contributions**

As funding for Enrichment programming is limited, offerors are strongly encouraged to submit proposals that are cost-effective and maximize opportunities for low-cost programming, administrative cost-sharing (as defined below), and/or include private sector support as well as institutional direct funding contributions. Offerors are encouraged to propose activities, venues, and other service providers that include price reductions or in-kind contributions. Such contributions may include, but are not limited to, reduced or waived speaker fees, reduced or waived conference space or AV rental fees, hosted meals, etc. Program contributions may be provided by the grant recipient or other organizations or institutions.

IIE’s internal cost estimate for completing this statement of work is \$20,000. Offerors are encouraged to submit budget requests lower than that amount where feasible. Proposals containing budgets in excess of the ceiling amount listed above may not be considered or evaluated for selection.

**Attachment "B"**  
**Cost Proposal Template**

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Submit a detailed budget for the services described in the technical proposal. IIE's review of the cost proposal shall determine if the overall costs proposed are: realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror's Technical Proposal.

Please see the separate attachments for the Budget Template and the Example Budget.