



## Request for Proposals (RFP)

**To** : Offerors  
**From** : Institute of International Education, Inc. (IIE)  
**Subject** : 2022 Fulbright Visiting Scholar In-Person Enrichment Seminar: Diversity, Equity, and Inclusion in Higher Education

**RFP Issue Date** : December 3, 2021  
**RFP Closing Date** : January 10, 2022  
**RFP Closing Time** : 5:00 PM Eastern Standard Time  
**Performance Period** : January 14, 2022 to June 30, 2022

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-value proposal for the requested services. The Contract resulting from this award will be a **DOS-Subcontractor Agreement** serving the below mentioned program.

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.

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 **5:00 PM Eastern Standard Time on Monday, December 20, 2021**. 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 **Wednesday, December 22, 2021 at 5:00 PM Eastern Standard Time**, on IIE’s website under Subawards and Procurement (<https://www.iie.org/Work-With-Us/Subawards-Procurements>)

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**Proposal Submission:** Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: [msaenzsoto@iie.org](mailto:msaenzsoto@iie.org) /CC: [enrichment@iie.org](mailto:enrichment@iie.org) Be sure to include in the subject line: **Proposal – 2022 Fulbright VS Seminar on DEI in Higher Education**. IIE will not accept proposals received by fax.

## Table of Contents

SECTION 1: BACKGROUND AND PURPOSE ..... 3

SECTION 2: RFP CONDITIONS..... 4

SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS..... 4

SECTION 4: TERMS OF PAYMENT ..... 6

SECTION 5: EVALUATION OF PROPOSALS ..... 6

SECTION 6: ANNUAL RENEWAL: ..... 7

ATTACHMENT A: STATEMENT OF WORK ..... 8

ATTACHMENT B: COST PROPOSAL INSTRUCTIONS ..... 17

ATTACHMENT C: ADDITIONAL REQUIREMENTS ..... 19

## 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 100 years, IIE has promoted educational exchange around the world. The Institute currently implements more than 200 programs benefiting 40,000 participants from 183 countries. 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.

### The Fulbright Visiting Scholar Program

The Fulbright Program, the flagship international educational exchange program sponsored by the U.S. Department of State’s Bureau of Educational and Cultural Affairs (ECA), is designed to increase mutual understanding between the people of the United States and the people of other countries. The U.S. Congress established the Fulbright Program in 1946, following legislation introduced by the late Senator J. William Fulbright to fund the “promotion of international good will through the exchange of students in the fields of education, culture and science.”

The Fulbright Visiting Scholar Program provides grants to approximately 850 faculty and professionals from over 100 countries who receive Fulbright grants for advanced research and university lecturing in the United States. Grants range in length from three to twelve months.

### Purpose of Request for Proposal

IIE is seeking proposals from organizations to design and host a Fulbright Visiting Scholar Enrichment Seminar on the topic of *Diversity, Equity, and Inclusion in Higher Education* during the Spring of 2022 for up to 90 Fulbright Visiting Scholars (“Participants”). Enrichment seminars enhance the Fulbright experience of current Fulbright 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 also expose Fulbright Participants to areas where they may not travel on their own and help expand the reach of the Fulbright program to different places across the United States. As such, we encourage a diverse pool of applicant organizations from various locations in the United States. Organizations in locations that do not have large populations of Fulbright Visiting Scholars are especially encouraged to apply to this opportunity (see *Section 5: Evaluation of Proposals* and *Attachment A: Statement of Work* for additional details)

This seminar should provide an opportunity for Participants to examine the systemic issues that affect students in institutions of higher education in the U.S. and cause disparities in educational outcomes, and what the impact of the COVID-19 pandemic has been on diversity, equity and inclusion (DEI) efforts. Participants will explore the seminar topic in depth over the course of four days through a range of discussions, panels, site visits, and other activities (see *Attachment A* for further details on content and seminar objectives).

The seminar should have appropriate COVID-19 protocols in place to maintain the health and safety of all attendees. Please carefully review the logistical implementation and COVID-19 safety requirements included in Attachment A.

This seminar 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 Institute of International Education (IIE). The seminar provider is therefore required to comply with the Uniform Guidance at 2 CFR 200 as applicable.

## 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.

The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: <https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services>. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the successful Offeror, at IIE's discretion. State Universities and Agencies should not expect or ask IIE to modify its Terms and Conditions to incorporate any State Regulations or Statutes.

## 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 Offeror'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

### 3. Qualifications and Capabilities, one page

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- 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

#### 4. Past Performance and Experience, one page

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.

#	(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							

#### 5. Narrative Proposal, ten pages maximum

Detailed description of the services being offered and any information relevant to meeting the technical specifications stated in **Attachment A: Statement of Work**. Narrative proposals are expected to be comprehensive and must respond to each of the elements set forth in **Attachment A**, in a Word Document format. Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted.

##### A. Program Design

- The proposal should describe the program design in detail, including the objectives and approach of each session, thereby presenting the intended learning narrative and outlining how the various sessions contribute to the Participants' understanding of the subject matter.
- A proposed project timeline and milestones, in chronological order, should be included in the proposal. Make sure to describe any innovative approaches or technology planned for the seminar.

##### B. Implementation and Logistics

- Proposals should detail the logistical arrangements for the seminar, including housing arrangements, COVID-19 -related protocols, plans for meal delivery, and transportation strategy for both airport transfers to and from the local airport, as well as for any local transportation during the seminar.
- Applicant organizations are not requested to arrange air travel for Participants; IIE will make all travel arrangements from their host institutions to the seminar city.
- Proposals should have a 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.

#### 6. Draft Agenda

In addition to the narrative proposal, a seminar agenda must be submitted as a supplemental document. The agenda must outline all required content components as well as proposed cultural and elective activities. It must also include proposed presenter names, titles, affiliations, and brief biographies. Each session should include a clear description of the subject matter that will be addressed and how the session will be delivered. The agenda will be reviewed based on the following criteria:

- Clear description of content sessions that build upon one another to achieve stated objectives in **Attachment A**;

- Relevance of sessions and activities to Participants’ experience;
- Manageable pace of the program; and
- Varied session format that contributes to participant learning.

The agenda submitted with the proposal is a key document in determining effective program design.

#### 7. Staffing Plan

Please provide the following, in order:

- A description of your key staff involved in content development and planning for the performance period.
- A list of your proposed staff in the following format:
  - Name
  - Proposed position on your team
  - Summary of relevant expertise and experience:
- Please include the CVs for key staff (no longer than one page in length for each key staff member).

#### 8. Cost Proposal

- Submit a detailed cost proposal, in U.S. dollars, in the format indicated in **Attachment B**, including any additional cost items you wish to propose.
- In addition to submitting a budget proposal (must be according to the provided Excel template), a Budget Narrative and NICRA (if indirect costs are proposed) should be included.
- 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
<b>Proposal Program Content</b>	<p>Considering the requirements in Attachment A, higher scores will be awarded to proposals that exhibit these characteristics:</p> <ul style="list-style-type: none"> <li>– A program narrative that demonstrates how the location of the seminar relates to the topic.</li> <li>– A clear conceptualization of proposed sessions and speakers, and how they relate and build on the seminar topic.</li> <li>– Various and differing but balanced perspectives on the topic included within the program.</li> <li>– Proposed schedule contains all the sessions outlined in the Required Content Components in <b>Attachment A</b>. These proposed sessions will be evaluated by how well they showcase the seminar topic.</li> <li>– Proposal indicates a greater practical understanding of implementing a large seminar and employs innovative but realistic ways of connecting the theme to the sessions and activities and to the host city/community.</li> </ul>	35 points
<b>Experience and Past Performance</b>	Demonstrated experience implementing a similar scope of work for international visitors or academics.	20 points

	<p>Consideration will be made of the past programs listed in the Past Performance and Experience section.</p> <p>Proposals should illustrate the organization's capacity to carry out the proposed plan.</p>	
<b>Staffing</b>	<p>Assessment of staffing plan.</p> <p>Higher scores will be awarded to proposals that include staff with more relevant qualifications and experience in managing works similar to those stated in this RFP.</p>	10 points
<b>Support of Diversity</b>	<p>Proposals should show commitment to promoting awareness and understanding of diversity. This should be evidenced in the content of proposed activities, as well as in the suggested speakers/local organizations to be engaged during the seminar.</p> <p>Higher scores will be given to proposals that demonstrate an effort to feature speakers who are representative of the student populations that are the focus of DEI initiatives.</p>	10 points
<b>Cost Proposal</b>	<p>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.</p> <p>Assessment of the overall cost of the proposal.</p>	20 points
<b>Seminar Location</b>	<p>Proposed seminar location is in an area that does not have a large concentration of Fulbright Visiting Scholars (see scholar distribution in Attachment A).</p>	5 points
<b>Total</b>		<b>100 points</b>

### SECTION 6: ANNUAL RENEWAL:

Annual Renewal: Selection(s) may be renewed annually, at IIE's sole discretion, for up to five years before re-competition. The topic of future seminars may be different from the theme of this year's seminar. IIE would inform the selected organization of the theme in the renewal letter. IIE reserves the right to exercise any one of the following options:

- Accept the updated proposal if changes are reasonable and within the scope of the original selection;
- Negotiate any updates/changes; or,
- Decide not to renew.

## **ATTACHMENT A: STATEMENT OF WORK**

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The selected organization will host a four-day Fulbright Visiting Scholar Enrichment Seminar on the topic of *Diversity, Equity, and Inclusion in Higher Education* for up to 90 Fulbright Visiting Scholars. The seminar is scheduled to take place during the Spring of 2022, between March 1 and April 30, with Wednesday as the arrival day and Saturday as the departure day. Programming can begin Wednesday afternoon/evening, continue through the next two full days, and conclude by noon on the final day. Participants will depart after the last session on Saturday morning. The blackout dates are April 13 - 16, 2022.

### **Audience**

The seminar is designed to benefit up to 90 Fulbright Visiting Scholars who are faculty and professionals from around the world, conducting advanced research and/or lecturing at universities in the United States in a variety of fields. Presenters should be prepared for a diverse and sophisticated audience with a range of expertise on the seminar topic. As such, we strongly encourage a diverse group of presenters who will be able to represent varying points of view as well as provide a holistic perspective to the topic and related sub-topics. Extra effort should be made to engage speakers from traditionally underrepresented populations.

### **Program Design**

Leveraging institutional expertise, the selected organization will develop a seminar under the umbrella topic of *Diversity, Equity, and Inclusion in Higher Education*. As part of the Fulbright Enrichment Program, this seminar will serve as an opportunity to introduce Participants to a topic that is currently relevant in the United States and will allow them to learn about a host community from a contextualized perspective. Through a combination of plenary sessions, panel discussions, facilitated breakout sessions, and site visits, this seminar will explore the systemic issues that affect students in institutions of higher education in the U.S. and cause disparities in educational opportunities and outcomes, and what challenges and opportunities have been created by the COVID-19 pandemic as related to DEI efforts in institutions of higher education. The seminar should also explore what different local stakeholders are doing to address DEI issues and what proactive measures they are taking to address these challenges. Special effort should be made to engage speakers who reflect the student populations that are typically the focus of DEI initiatives (minorities, first-generation college students, students with disabilities, students of color, students of lower socioeconomic status, etc.)

The seminar should also provide a platform for Fulbright Visiting Scholars to expand their personal and professional network while promoting the Fulbright brand. As such, sessions should be designed to be interactive, maximizing discussion among the Participants and thereby facilitating networking opportunities. Pursuant to ECA's authorizing legislation, Fulbright enrichment programs must maintain a non-political character and should be balanced and representative of the diversity of the U.S. political, social, and cultural life. Sessions should be balanced to represent multiple perspectives and bi-partisan views, if engaging elected officials.

### **Objectives**

The seminar should provide a forum in which Participants can:

- Discuss the impact of the COVID-19 pandemic on DEI efforts in institutions of higher education in the U.S.;
- Examine the historically rooted systemic issues that affect U.S. college students and cause inequitable educational opportunities and outcomes;
- Learn about current initiatives that can be used as concrete examples of proactive measures to address DEI challenges;



- Engage with knowledgeable professionals who have experience in the topic and are able to share their expertise and useful resources for Fulbright Visiting Scholars;
- Build sustainable networks with Participants in the same discipline, with the Participants at large, with professionals, and with the host community;
- Appreciate the global nature of the Fulbright program and promote the Fulbright brand.

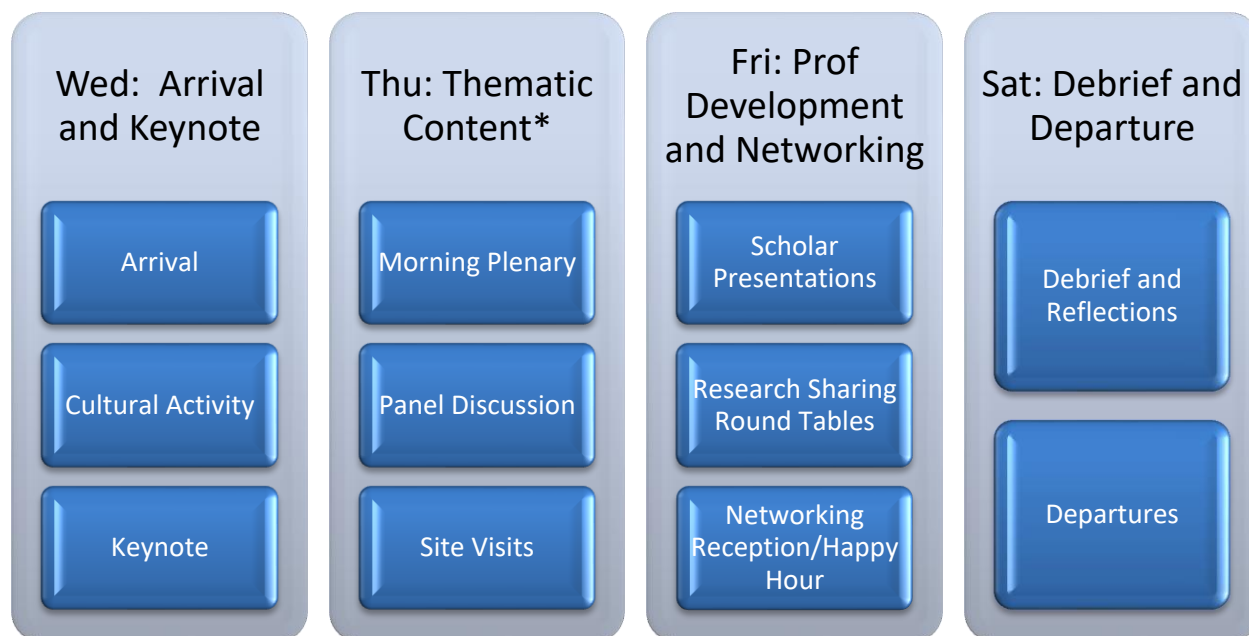
### Required Content Components

ECA and IIE will work with the selected organization on the seminar’s development. All seminar activities and speakers **must** be approved by ECA prior to implementation. Seminar sessions should be interactive and the seminar content should challenge and engage the audience.

The selected organization should identify a local content area expert to engage the scholars in a brief, daily “specialized” conversation at the beginning of each day regarding seminar reflections and context.

The selected organization should engage Participants with the local community. The proposal should highlight how the proposed content/activities will achieve this.

### Seminar Schedule



\*Order of sessions may vary.

Required seminar sessions and activities include the following:

- i. **Welcome Session and Keynote:** The welcome session should include notable guests and local Fulbright alumni, when possible. The selected organization’s leadership should deliver welcome remarks, providing a brief overview of the host organization, host city, and the relevance of the topic to the community. A knowledgeable speaker should address the Participants and introduce the key concepts of the seminar topic and set the tone for an event of academic, professional, and personal discussions on the topic.

- ii. **Agenda Overview/Orientation Session:** A brief overview of the seminar agenda to provide context for the different sessions must be given. Any special instructions or off-site activities should be noted. An overview of COVID-19-related protocols must be provided during this session.
- iii. **Plenary Session:** A plenary session with one or more knowledgeable speakers should continue discussions of the key concepts of the seminar topic.
- iv. **Panel Discussion:** Session should feature locally based U.S. subject experts who can highlight various aspects of the seminar theme and its impact on the local community. In designing the seminar, care should be taken to develop a program in which content knowledge builds upon previous sessions as the seminar progresses.
- v. **Scholar Presentations:** IIE will launch a call for abstracts from Fulbright Visiting Scholars so they can present their research related to the topic during the seminar. The selected organization will identify selection criteria, review abstracts, and recommend which submissions should be included in the session. The selected organization will coach presenters prior to their presentations. IIE will work with the selected organization on the session format based on the available resources, space considerations, and the number of qualified applicants.
- vi. **Research Sharing Round Tables:** During this session, scholars will be grouped based on fields of study and will share their research in an informal setting. The selected organization will review the final participant list and suggest scholar groupings to facilitate connections among Participants in similar disciplines.
- vii. **Networking Session:** The third seminar day should wrap-up with a networking activity. The session should aim to maximize networking opportunities for all Participants.
- viii. **Thematic Site Visits:** The agenda should include activities that introduce participants to local organizations or institutions that can provide additional context for the themes discussed during the seminar. The visits must include a facilitated tour or discussion that presents the relevance of the site and Participants should have the opportunity to ask questions.
- ix. **Tours/Cultural Activities:** The program should incorporate architectural, historical, or other cultural activities that emphasize the diversity of the host city/town/community and its history. Outdoor activities and walking tours are highly encouraged.
- x. **Final Debrief Session:** The seminar should end with a final debrief session on the last day that gives Participants an opportunity to reflect on and discuss the seminar theme amongst each other.

### **Implementation Requirements**

#### **Diversity**

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 U.S. political, social, and cultural life. Sessions should be balanced to represent multiple perspectives and bi-partisan views, if engaging elected officials. "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. Proposals 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.

The U.S. Department of State's Bureau of Educational and Cultural Affairs funds this seminar as part of its flagship Fulbright Program. The selected organization is therefore required to comply with the Uniform Guidance at 2 CFR 200 as applicable and must also provide services to people with disabilities as required by law.

Applicant organizations are strongly encouraged to adhere to the advancement of the principle of diversity both in program administration and in program content. Extra effort should be made to engage diverse speakers, especially those from traditionally underrepresented populations. Opportunities for Fulbright Visiting Scholars to interact with U.S. minority audiences are highly encouraged.

### **Media Strategy**

The selected 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, social media posts, and arranging interviews with speakers, participants, and administrators. Media outreach materials must be approved by IIE and ECA at least two weeks before intended distribution. Special care should be taken to ensure the privacy of participants who do not wish to have their names or pictures used by media outlets. 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.

### **Logistics**

IIE will provide the selected organization with participant names, field of study, country of origin, gender, contact information, dietary restrictions, disabilities, and religious observances that require special accommodations. IIE will also provide travel itineraries to the selected organization.

The selected organization is encouraged to consider a manageable pace when planning seminar activities.

The following minimum logistical arrangements must be provided to all seminar Participants:

#### **1. Local Transportation**

The selected organization will not be responsible for arranging air travel to and from the seminar airport, IIE will arrange it. The organization is required to arrange transportation to and from the local airport and/or train station, if applicable, as well as all local transportation for any off-site activities during the seminar. The organization staff will facilitate Participants' arrivals and departures at the airport. Whenever possible, the use of ground transportation should be limited and/or provide options for social distancing.

#### **2. Housing and Meeting Space Arrangements**

Housing must be provided to all seminar participants. All scholars must be placed in single occupancy rooms. Acceptable housing arrangements may include dormitories or hotels. All housing costs, per person, must be within allowable federal per diem rates. An effort should be made to identify vendors that have COVID-19 vaccination requirements.

Appropriate meeting space for all sessions must be secured. Directional signs to facilitate social distancing should be placed throughout the meeting space.

#### **3. Meals**

Breakfast, lunch and dinner must be provided to all participants for all core program days of the seminar. Breakfast must be provided for all core days (Thursday – Saturday). Lunch must be provided for all days except the arrival and departure days. Participant dietary restrictions must be accommodated at all meals. Please ensure ample options for vegan and vegetarian participants or others with special dietary needs.

All meals should be provided through one of these acceptable options:

- Individual with per-diem stipend (provided by IIE). When using this option, Participants should have enough time to get food off-premises and attend subsequent seminar sessions.
- Individual boxed meals.
- Plated meals for outdoor settings.

*\*Self-service buffets are not allowed.*

No eating and drinking will be allowed during seminar sessions. During breaks, only individually packaged food items are permitted. The selected organization should consider increasing the number of self-service coffee/tea stations to reduce attendee groupings or, alternatively, provide bottled/canned refreshments in lieu of self-service beverage stations.

Physical guides and markers should be used to guide attendees when collecting their food. The selected organization should work with the food and beverage vendor to ensure proper cleaning and disinfecting of meal areas.

#### **4. Onsite Management**

The organization will be in charge of onsite management during all scheduled program activities, ensuring an appropriate number of staff and volunteers is enlisted to successfully execute the seminar. This includes staffing the registration desk; coordinating event logistics, such as checking AV, room setup and meal arrangements prior to sessions; accompanying Participants to all activities to provide contextual information regarding the academic or cultural purpose of each; among others.

#### **5. Emergency Information**

The selected organization must identify local healthcare options where participants can go in case of emergency.

#### **6. Disability Accommodations**

The selected organization will provide special accommodations to participants as required by law.

#### **Additional COVID-19 Mitigation Measures**

The seminar must have appropriate COVID-19 protocols in place to maintain the health and safety of all attendees.

#### COVID-19 Vaccination requirement:

- All Participants will be required to have full vaccination status against COVID-19. If a Participant has a non-World Health Organization vaccine, they will be required to show proof of a negative COVID-19 test taken within 72 hours prior to the start of the seminar. IIE will manage the verification process.
- All seminar staff and speakers must be fully vaccinated against COVID-19 with a WHO-approved vaccine in order to participate in the seminar.

Masks: Masks are required indoors for all individuals, regardless of COVID-19 vaccination status, except for active eating and drinking.

Additional COVID-19 protocols may be implemented depending on updated guidance from the CDC, host city/town, venue, and/or ECA.

While ECA and IIE expect the seminar to be in-person, in the unlikely event that circumstances prevent an in-person gathering, IIE will consult with the selected offeror to determine whether the seminar can take place virtually.

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## Materials and Correspondence

### 1. Required Language

The U.S. Department of State and IIE should be mentioned in all seminar program reports and materials, above the name of the selected organization. All enrichment programming must use the approved Fulbright logo and be identified as associated with the Fulbright Program. Please refer to the [U.S. Department of State communication guidance](#) for general guidance related to ECA programs and [Fulbright Program Guidelines-Brand Identity](#). All print and electronic materials related to the seminar should reference the U.S. Department of State and IIE as shown below under “Required Language.” This language should appear prominently on all print and electronic materials and precede any mention of the selected organization.

Required Language:

“This Fulbright Enrichment activity is sponsored by the U.S. Department of State with funding provided by the U.S. Government and supported in its implementation by the Institute of International Education (IIE), and [*name of selected organization*].”

### 2. Correspondence with Participants

IIE will manage the seminar invitations, the registration of participants, make travel arrangements to and from the seminar city, and obtain information about disabilities, dietary restrictions, religious observances, and any other special accommodations that may be required. IIE will advise the selected organization about the final participant list and all the relevant logistical information obtained in the registration survey.

IIE will serve as the primary contact for Fulbright Visiting Scholars prior to the seminar and will also serve as the liaison with ECA to secure final approval of the program development, agenda, and program book. Any formal communications between the selected organization and the Participants must be approved by IIE.

## Communications and Reporting Guidelines

**1. Weekly Calls:** The selected organization will have planning calls, which may be on a weekly basis, with IIE and ECA to provide staffing and agenda updates and discuss next steps.

**2. Relevant Readings:** Three weeks prior to the start of the program, the selected organization will provide IIE with articles or reports relevant to the seminar topic to be shared with the Participants.

**3. Draft Agendas and Run of Show:** The selected organization will be required to submit draft agendas to IIE according to the implementation plan no later than six weeks before the seminar start date and a preliminary run of show no later than three weeks prior to the start date of the seminar. The run of show should reflect the organization’s staffing plan during the seminar and a chronological list of program management tasks, which identifies appropriate staff and/or volunteers to carry out each of the tasks. A template for the run of show will be shared by IIE.

All program activities and speakers must be approved by IIE and ECA. 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. IIE will print the final program book to be distributed to Participants.

### 4. Participant Report

The selected organization must submit a participant list on the second core program day detailing the final number of participants and highlighting any participants who did not arrive.

**5. Participant Evaluation and Final Debrief:** IIE will provide an electronic post-program evaluation to Fulbright Visiting Scholars. The results of the evaluation survey will be shared with the selected organization and will be discussed further in the debrief call that will take place no later than 15 days after the conclusion of the seminar.

**6. Financial Report**

Within 60 days of completion of the seminar, a certified financial report and final invoice must be submitted outlining projected costs and actual costs. Failure to submit a timely financial report may result in forfeiture of payment.

**7. Program Report**

Within 30 days of completion of the seminar, a narrative program report must be submitted to IIE. The program report should include a brief narrative of the event and the work the organization conducted in facilitating the event, summarizing progress of major activities, and detailing results and lessons learned. The report should include an extensive evaluation of the seminar implementation based on staff experience.

**8. Other**

Other reports may be required upon request.

**Recommendation**

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.

**Current Visiting Scholar Distribution in the U.S.**

State	Number of Fulbright Visiting Scholars
Alaska	2
Alabama	4
Arkansas	4
Arizona	20
California	98
Colorado	11
Connecticut	17
Washington, D.C.	31
Florida	19
Georgia	10
Hawaii	3
Iowa	4
Idaho	1

Illinois	28
Indiana	9
Kansas	2
Kentucky	2
Louisiana	2
Massachusetts	70
Maryland	16
Maine	3
Michigan	16
Minnesota	11
Missouri	6
Mississippi	3
Montana	1
North Carolina	20
Nebraska	5
New Hampshire	3
New Jersey	18
New Mexico	4
Nevada	2
New York	64
Ohio	10
Oregon	3
Pennsylvania	40
Rhode Island	5
South Carolina	3
Tennessee	4
Texas	21

Utah	1
Virginia	14
Washington	17
Wisconsin	6
Wyoming	2



## ATTACHMENT B: COST PROPOSAL INSTRUCTIONS

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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.

A budget template is included as part of the application package. The Offeror may list any cost line items, but it is recommended that the Offeror follow the major categories listed in the template, breaking down all "lump sum" items as much as reasonably possible.

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### Preparing the Proposal Budget

This section describes how the budget should be prepared. After reading the guidelines below, enter your budget on the template provided. Add additional lines as necessary. Please also enter cost share items after reading the respective guidelines. Please make sure to carefully read the budget template notes included in the budget template.

### Budget Guidelines

- A line-item budget in Excel format, according to the template, that details all projected program and administrative costs (including estimated indirect costs), as well as a budget narrative, is required with the proposal. The budget should include a total program cost and a per participant cost based on an estimated 90 participants. All efforts should be made to keep costs as low as possible; cost sharing is encouraged.
- Cost sharing is strongly encouraged, but not required, and must be allowable (see cost-sharing paragraph below for additional details).
- A budget narrative must be included explaining how the amounts were calculated in the budget summary. It can be submitted in either Excel or Word formats.
- An organization with an audited indirect cost rate (NICRA) negotiated with a cognizant federal government agency should include a copy of the cost-rate agreement as an addendum to the budget. The applicant organization must indicate in the proposal budget how the rate is applied.

Cost-sharing is defined as actual monetary contributions provided in support of the proposal, or in-kind contributions, which include items such as prorated staff time, discounted costs, speaker fees, and meeting space rental costs that are waived. Cost-sharing may be contributed by the grant recipient or by other organizations or institutions. Organizations must be able to document their cost-sharing contributions. Cost-sharing may not be declared toward any unallowable items. Cost-sharing must be reasonable, allowable, and allocable in accordance with the applicable cost principles.

Volunteer hours contributed are also a form of cost-sharing and a valuable resource. Please include an estimate of the number of volunteer hours that will be donated for the activity in the budget narrative. Recipient organizations will be expected (to the best of their ability) to track volunteer hours and include them in their final report.

Resources for determining the value of cash and in-kind contributions:

2 CFR 200.306 Cost sharing or matching

<http://www.gpo.gov/fdsys/granule/CFR-2014-title2-vol1/CFR-2014-title2-vol1-sec200-306>

### Seminar Expenses

The budget (in Excel) should include detailed information including, but not limited to:

- Travel/Transportation: Participant travel to and from the seminar will be arranged and paid for by IIE. Local travel should be budgeted as part of the seminar expenses, including transportation to and from the host city airport.
- Refreshments/Meals: Cost x # of Participants.
- Tickets/Admission Fees: Cost x # of Participants.

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- Lodging: Room rate per night x # of Participants x # of nights. Rooms must be single occupancy.
- Facility Fees: Rental and/or security, janitorial, other costs.
- Staff Requirements: Identify staffing requirements by each position title and, as necessary, brief description of duties. List annual salary of each position, percentage of time and number of months devoted to project (e.g., Program Coordinator: \$30,000/year x 25% x 8.5 months; calculation:  $\$30,000/12 = \$2,500 \times 25\% \times 8.5 \text{ months} = \$5,312$ ). Please indicate if you are requesting any supplemental compensation (per 2 CFR 200.430 Compensation – Personal Services)
- Administrative Costs: Provide specific information on salaries; postage; telephone; materials and supplies; indirect and overhead costs; other (as described).

**Budget Exclusions**

Program funds cannot be used for:

- Alcohol, gifts, and non-expendable items or equipment, such as computers, office furniture, etc. (must be donated or paid for with non-U.S. Government funds)
- International travel or extensive local travel
- Other unallowable costs per 2 CFR 200- Subpart E

## ATTACHMENT C: ADDITIONAL REQUIREMENTS

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### IT Security Evaluation

IIE's IT security assessment is based on The NIST (National Institute of Standards and Technology) Cybersecurity Framework v1.1 (CSF) and is carried out through an assessment conducted by OneTrust. NIST is a guidance, based on existing standards, guidelines, and practices for organizations to better manage and reduce cybersecurity risk. The NIST CSF consists of five concurrent and continuous Functions—Identify, Protect, Detect, Respond, Recover. When considered together, these Functions provide a high-level, strategic view of the lifecycle of an organization's cybersecurity risk management.

- If the vendor will send, store or receive Personal Data (any information that can identify a specific individual person, including name, address or email address) on behalf of IIE an **IT Security Evaluation is required prior to signing a contract**. Please note that this includes vendors that will provide a technology solution that sends, stores or receives Personal Data.
- The evaluation may include vendor completion of a security compliance assessment and delivery of security evidence to IIE.