Request for Proposals (RFP)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: Grantee Virtual Productivity Improvement Project in Ethiopia and Rwanda

RFP Issue Date: May 7, 2020
RFP Closing Date: May 20, 2020
RFP Closing Time: 5:00pm (PDT)
Performance Period: May – November 2020 (approximately six months)

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 issuance of any contract under this RFP is subject to the receipt of funds by IIE from the David and Lucile Packard Foundation. The Agreement will be a Non-USG-Consultant 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 5:00pm (PDT) May 11, 2020. 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 5pm May 13, 2020 on IIE’s website under Subawards and Procurement (https://www.iie.org/en/Work-With-Us/Subawards-Procurements/Solicitations-for-Consultants).

Joannah Bell
Program Development Lead
Institute of International Education
809 United Nations Plaza • New York, NY 10017
Email: jbell@iie.org

Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: jbell@iie.org. Be sure to include in the subject line: Grantee Virtual Connectivity Improvement Project. IIE will not accept proposals received by fax.

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RFP SCHEDULE

<table>
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<tr>
<th>EVENT</th>
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<tr>
<td>RFP ISSUE DATE</td>
<td>MAY 7, 2020</td>
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<td>OFFERORS QUESTIONS SUBMISSION DEADLINE</td>
<td>MAY 11, 2020</td>
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<td>RESPONSES TO OFFEROR’S QUESTIONS</td>
<td>MAY 13, 2020</td>
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<td>PROPOSAL SUBMISSION</td>
<td>MAY 20, 2020</td>
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<td>ANTICIPATED DECISION AND SELECTION OF OFFEROR</td>
<td>MAY 22, 2020</td>
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<td>ANTICIPATED COMMENCEMENT DATE OF WORK</td>
<td>MAY 26, 2020</td>
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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 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.

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
The purpose of this Request for Proposal ("RFP") is to invite qualified individuals and organizations to submit a proposal to carry out a virtual productivity improvement project for up to 12 grantee organizations of the David and Lucile Packard Foundation in Ethiopia and Rwanda outlined more fully in Attachment A.

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-Consultants. The IIE 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.

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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**
   
   - 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
   - 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.

<table>
<thead>
<tr>
<th></th>
<th>(a) Name of Organization</th>
<th>(b) Activity Title</th>
<th>(c) Locations of activity</th>
<th>(d) Synopsis of the activity and relevance to this RFP</th>
<th>(e) Performance period (date and duration)</th>
<th>(f) Cost for the activity</th>
<th>(g) Name &amp; Contact Info (E-mail and phone)</th>
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5. **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](#)
   - Methodology, and reasoning behind the methodology chosen
   - 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
### 6. Cost Proposal
- Submit a detailed cost proposal, in U.S. dollars, in the recommended format shown in Attachment B
- Include any additional cost items that the Offeror wishes to propose
- 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

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<th>Item</th>
<th>Requirement</th>
<th>Points Available</th>
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| Qualifications and Capabilities     | Assessment of the Offeror’s qualifications and capacity to complete the scope of work. Higher scores will be awarded to methodologies that indicate a greater practical understanding of implementing the work, and more innovative but realistic ways of carrying out the work. Factors to be considered include, but are not limited to:  
  - The ability to provide customized 1-1 coaching as well as group trainings  
  - A strong customer service orientation | 20               |
| Implementation of the Scope of Work | Assessment of proposed approach to completing the scope of work, including project timeline and proposed platform capabilities. Higher scores will be awarded to materials that are more detailed, more accessible, and/or professionally developed. | 20               |
| Organizational Capacity and Past Performance and Experience | Demonstrated past experience implementing a similar scope of work. Factors to be considered include, but are not limited to:  
  - A demonstrated track record providing training and IT support to private Foundations and/or non-profits, since the needs and cultures of the non/profits are quite different from the corporate sector  
  - Direct knowledge of and/or prior contact with Foundation grantees (if possible)  
  Staffing plan for this activity and a general overview of the expertise of the individuals should be included. | 20               |
| Cost 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. Assessment of the overall cost of the proposal. | 40               |
| **Total**                           |                                                                             | 100 points       |
IIE requests proposals from qualified firms and organizations in Ethiopia interested and able to carry out a virtual productivity improvement project for up to 12 grantee organizations of the David and Lucile Packard Foundation in Ethiopia and Rwanda. This would be subject to funding availability/grant approval from the Packard Foundation.

GRANTEE VIRTUAL PRODUCTIVITY IMPROVEMENT PROJECT

Goal and Objectives

Goal: Strengthen the capacity of a set of Packard Foundation grantees (primarily in Ethiopia) to work and collaborate virtually -- both internally and with key external stakeholders -- in an efficient, cost-effective, and reliable manner both during and after the state of emergency instituted in response to the COVID-19 pandemic.

Objectives:
1. Rapidly expand grantee access to and effective use of key (or one key) virtual platform(s), to reliably support internal operations and external communication and collaboration as a near-term response to the impacts of COVID-19 on work life.
2. Strengthen capacity of key staff in the grantee organization in Ethiopia and Rwanda in the use and management of virtual platforms and key collaboration tools to lay the foundation towards sustaining these tools and methods in the future.

This project is envisaged as a short-term, focused effort to support a set of Packard Foundation grantees in Ethiopia and Rwanda to begin to adapt to a new virtual way of working and collaborating. The project should complement and build from the grantees' existing systems, structures, and capacity and help to lay a foundation for longer-term improvements. This project is not intended to be an intensive or long-term investment in specific grantee IT infrastructure/capacity; nor is it a substitute for in-house IT support. It may help jump start needed improvements to set the stage for future work and capacity-strengthening. In close collaboration with the David and Lucile Packard Foundation and IIE team in the U.S. and Ethiopia, an in-country IT consulting firm or organization ("service provider") will provide the following service and activities to the Foundations’ grantees in Ethiopia and Rwanda.

Project Design and Proposed Approach

Design Principles

- The project would be demand driven - grantees would opt in.
- In close collaboration with IIE, the service provider will decide which grantee organizations are selected to participate.
- While grantees would be required to invest a certain amount of time and effort, the intent is to make this support easy to access. It aims to quickly improve virtual operating and collaboration capacity among interested grantees and ensure grantee ownership of the improvements.
- The service provider will provide varying levels of engagement and support upon requests from the selected grantees. Some may wish to avail of only basic improvements to virtual platform/capacity and minimal coaching on security or legal checks needed to secure these improvements. Others may need or want more 1-1 coaching support on how to use, maintain these capabilities.
- The service provider, with oversight from IIE, would be empowered to determine priority within the project framework and resources and decide when it needs to consult with the Foundation on priorities.
For efficiency, IIE and the service provider will work with a point person in each organization supported by a small team. The grantee would coordinate with the service provider to receive coaching and be responsible for sharing what is learned inside their organization.

To serve the maximum number of grantees, the service provider would be encouraged to propose to the Foundation and IIE needed adjustments to the project design and/or budget categories within the overall budget that would enable the project to provide further benefit to the greatest number of grantee partners.

**Proposed Approach**

- In collaboration with IIE, the service provider develops an application process and selection criteria for participation in the project.

- Packard Foundation nominates a group of grantees and shares instructions for how to apply.

- Interested organizations reach out to IIE and its selected service provider in Ethiopia to undergo an initial intake assessment interview and discussion of grantee needs and interests.

- IIE and its local service provider decide quickly, according to agreed-to criteria, whether the grantee’s needs fit the project and if so, the specific support they will get. The service provider and IIE may need to prioritize based on types of needs and may consult with the Foundation on needed adjustments to project design.

- The service provider provides a list of product(s) and descriptions to be purchased by the project holder. The provider helps to assess pro/cons and facilitate the purchase (for example, Zoom Pro and/or Zoom Business as platforms for virtual connectivity). Licenses will need to be held in the name of the grantee organization.

- The local service provider delivers individualized support and coaching (4-8 hours) up to 12 grantee organizations selected into the program. Services may include advising grantee on maintaining security and legality of virtual platform improvements, improvements to internet capacity, etc. This coaching may include assessing the need for and connecting grantees to other free or inexpensive apps/software that are easy to adopt and use and could improve team and organizational capacity in virtual operations and on-line collaboration (e.g. Google applications). Provide supportive coaching as needed.

- The local service provider may organize a few (2-4) targeted small group trainings*. The decision to organize these would be based on grantee demand and would be determined during the 1-1 coaching and upgrading of virtual platform. Any training would be tailored to the needs of participants and focused to their high-priority topics.
  - Certain topics may lend themselves to group trainings (i.e. cybersecurity/phishing; current government IT policies).

- The local service provider provides suggestions to grantees on how to integrate new capacities into ongoing operations and systems and advise them on inclusion in future budgets.

- IIE, informed by the local service provider, shares periodic updates to the Foundation team in the U.S. and Ethiopia.

*The preferred and main modality of providing capacity-strengthening support will be via 1-1 coaching to the key staff in each grantee organization.
**Timeline:** The project is expected to have a six-month timeline with two phases.

1. **The first phase (approximately 3.5 months) would involve the more intensive level of effort including:**
   - intake, screening and assessment of grantees (led by service provider, with oversight from IIE)
   - facilitation and purchase of licenses and installation support (led by service provider, with oversight from IIE)
   - introduction and assistance with accessing and using free/inexpensive on-line collaboration tools; conducting necessary security precautions and advice on aligning to relevant government regulations; and provision of 1-1 coaching and problem-solving with selected grantees. Potentially, depending on time and resources, a few small group, targeted trainings. (led by service provider, with oversight from IIE)

2. **The second phase (approximately 2.5 months) would include the service provider being available for a limited amount of follow-up questions or problem-solving; and if possible, providing follow-up trainings on key issues or areas that emerge as grantees use their new platforms and tools. A final debrief meeting (1-1.5 hours) with IIE, service provider, and relevant Foundation staff members in the U.S. and Ethiopia to share feedback and learnings from the project would be included.**

**Beneficiaries**

IIE and service provider will select 12 participants. The final number to be selected may change based on grantee demand and readiness; the level of support requested; and the ability of the service provider to respond within project framework. IIE and service provider would have full discretion to select the final group of beneficiaries.
ATTACHMENT B COST PROPOSAL TEMPLATE

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.

The following is a format that may be used as a guide to assist you in the preparation of the cost proposal. You may submit the cost proposal using this form or in the format of your choice (plain sheets, your own form, or a variation of this form). The Offeror may list any cost line items, but it is recommended that the Offeror follow the major categories listed below, breaking down all “lump sum” items as much as reasonably possible.

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<th>Unit Price (USD)</th>
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