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 USG-Funded 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.

Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: bshackelford@iie.org. Be sure to include in the subject line: Fulbright LMS. IIE will not accept proposals received by fax.
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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 for a Learning Management System, or Systems 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 substantively 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
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

<table>
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<tr>
<th>Item</th>
<th>Requirement</th>
<th>Maximum Length</th>
<th>Points Available</th>
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<tr>
<td>1) Features</td>
<td>a) Features offered, including required and/or requested. Additional features as proposed.</td>
<td>5 pages</td>
<td>20 points</td>
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| 2) User Interface         | a) Proposed solutions should not require specialized knowledge to implement.  
                              b) Administration and authoring should be reasonable understandable.  
                              c) Learners should have an easy to understand interface that does not require specialized technical knowledge, devices, or device capabilities. | 2 pages or digital demos/videos | 20 points       |
| 3) Support                | a) Offerors should clearly outline the level of support available to all users (learners, authors, or administrators). | 2 pages or digital resources | 20 points       |
| 4) 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. | 1 page          | 30 points       |
| 5) Experience and Reference | Demonstrated past experience implementing a similar scope of work. Assessment of reference responses | 1 page          | 10 points       |
|                           | Total                                                                        | 10 pages        | 100 points      |

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. 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

IIE seeks to contract a Learning Management System (LMS) provider to host courses and learning modules for the benefit of IIE’s educational exchange program participants. Below is a chart of the LMS features sought by IIE. IIE plans to make courses available for the following annual user groups.

- Fulbright U.S. Students and Scholars – approximately 800
- Fulbright Foreign Students - approximately 650
- Fulbright Foreign Language Teaching Assistants – approximately 400

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
<th>Required</th>
<th>Requested</th>
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<tbody>
<tr>
<td>Video/Audio</td>
<td>Ability to add personalized video/audio to courses</td>
<td></td>
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<td>Privacy</td>
<td>GDPR compliance is required.</td>
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<td>Assessment</td>
<td>Trainers can assess learning, using tests and quizzes.</td>
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<td>Assignments</td>
<td>Learners can upload assignments, including videos.</td>
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<td>Document Sharing</td>
<td>Ability to add documents into modules that learners can download.</td>
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<td>Syllabus</td>
<td>Ability to display a course syllabus with links to assignments, modules, files, and other course content.</td>
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<tr>
<td>API/Web Services</td>
<td>Allow for the seamless integration of the LMS with other applications and systems.</td>
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<td>Learner Categories</td>
<td>It is easy to identify and categorize learners based on predefined criteria, to be used when allocating costs. Ability to limit visibility of courses based on user group.</td>
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<td>Blended Learning</td>
<td>Host live sessions via the LMS platform, or with a combination of another platform, such as GoToMeeting, Zoom, BigBlueButton (others as proposed).</td>
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<td>Observers</td>
<td>Allows course observers in addition to learners and instructors/trainers.</td>
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<td>Mentoring/TA</td>
<td>Mentors, or teaching assistants can be assigned to monitor and contribute to the learner experience.</td>
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<td>Cloud Based</td>
<td>IIE prefers a cloud-based platform that does not require installation on our servers.</td>
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<td>Authoring/Content Creation</td>
<td>The LMS allows trainers to easily author their own courses. Ability to create and publish content through one system.</td>
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<td>Interactive Learning</td>
<td>Learners can interact with other learners in the same course. A “virtual classroom” environment exists. Such as discussion boards, chats, or ability to create profiles.</td>
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<td>Accessibility</td>
<td>Meets federal 508 compliance regulations (i.e. videos have closed captioning). Meet the needs of audiences that access information from mobile devices.</td>
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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 cost proposal should clearly outline pricing methodology. Including price per learner (or quantity of learners), price per author, as well as any setup or usage fees.

The following is a format 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.

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit (hours/days)</th>
<th>Unit Price (USD)</th>
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ATTACHMENT C GENERAL SYSTEM REQUIREMENTS AND PREFERENCES

The information in this section is intended to provide vendors responding to this RFP with a general sense of the system requirements. The chosen vendor should be able to provide a software solution to meet IIE’s desired objectives outlined in the RFP. In situations where a specific capability is not available, comment on what alternative solutions are available or how this can be easily/simply replicated.

Overall system security and technical requirements include:
- Stable and secure environment with an uptime guarantee and with sufficient system redundancies to accommodate unlimited applications per annum
- Sufficient bandwidth to accommodate peak periods of activity along with low bandwidth areas
- Routine (e.g., weekly, biweekly, etc.) backups at an offsite secure data center
- Vendor provided backup files to be shared with IIE, as needed
- Customizable data fields and elements
- Unrestricted number of user accounts
- User audit trails to identify when key activities have occurred or when key fields have been updated
- Standard ability to generate automated emails from within the system
- Web responsiveness (consumable on mobile devices from mobile phones to laptops)
- Compatibility with current and recent versions of standard web browsers, including:
  - Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
  - Safari
- System must be in compliance with Department of Defense Instruction 8582.01 Security of Unclassified DoD Information on Non-DoD Information Systems
- Compliance with Section 508 of the Rehabilitation Act
- Availability of a development/test environment, and a change control protocol for technical, functional and integration change management and regression testing

The Offeror must outline how the System is able to integrate with other systems and should describe or demonstrate:
- Included prebuilt APIs for transferring application form, management and selection data, including data and field translation
- Configurable settings to control the frequency and conditions to publish records through integration
- Specific external systems with which current clients integrate online registration data, including the frequency and volume of the integration
- The included tool set to design, build and change a web service integration of data or the middleware needed/supported to do so
- Administrative user access to configure, schedule and publish or send a data extract and to define the conditions of extract; conditions of extract should be able to be built upon any data element in the system.
ATTACHMENT D INFORMATION SECURITY QUESTIONNAIRE

I. General Information Security questions:

1.1 Does your organization have documented information security policies?
   a. List applicable policies (e.g., Acceptable use, Incident response, etc.)
   b. How often are the policies reviewed and updated?
   c. How often are these policies distributed?

1.2 Does your staff have information security training? If so, how often?
   a. Describe what is covered in the training

1.3 Is your staff (including temporaries, contractors and your outsourced vendors) required to sign a confidentiality agreement?

1.4 Do your third-party contracts contain language describing responsibilities regarding information protection requirements?

1.5 Describe the screening process for all staff (employees, contractors, vendors, and third-parties)?

1.6 What are your procedures regarding staff terminations/separations?
   a. Detail how these procedures prevent unauthorized access to our data.

1.7 Please describe your Access Control Policy:
   a. Do you maintain an inventory of our assets and are they clearly identified?
   b. What are your procedures with regards to the handling and storage of information assets?
   c. Describe the process by which your staff (including temporaries, contractors and your outsourced vendors) would be granted access to our data.
   d. Describe the physical security mechanisms that prevent unauthorized access to our data?
      (i) What exterior security is provided (i.e. gates, security cameras, etc.)?
   e. Describe how our data that is move to/removed from your premises authorized and controlled?
      (e.g., backup tapes, document storage boxes, etc.)
   f. Describe your account and password restrictions along with reset requirements for your systems that manage our information assets.
   g. Do you conduct periodic checks on users’ accesses to ensure their access match their responsibilities?

1.8 What processes and standards do you follow for incident management (including possible breaches)?
   a. Has a dedicated Information Security Response Team been established?

1.9 What processes and standards do you follow for change management?

1.10 How do you protect our data from environmental hazards such as fire, water, etc.?

II. Data Center Hosting questions:

2.1 What is your Hosting solution?
   a. Describe in detail your hosting recommendation – Public, Private, Hybrid, etc. (Example: multi-tenant cloud utilizing Amazon EC2 & S3 offerings)
b. Where is your hosting facility located?
c. Who owns and operates the hosting facility? (Is it your own or are you using a service?)
d. Where is your primary support location?
e. What are the hours of service?
f. What is the problem escalation procedure?
g. Who is responsible for support issues? (E.g., Will the Vendor be responsible for contacting the hosting facility for issues surrounding hosting?)
h. What has been the average uptime in production for the past 3 years?
i. Explain any unscheduled outages.

2.2 Does your data center have certifications such as:
   • SOC 1/SSAE 16/ISAE 3402 (formerly SAS 70)
   • SOC 2 | SOC 3
   • FISMA, DIACAP, and FedRAMP
   • DOD CSM Levels 1-5
   • PCI DSS Level 1
   • ISO 9001 / ISO 27001
   a. List all certifications that apply
   b. How often do you have audits to certify your compliance regarding the above certifications that you listed?
   c. Who performs the certifications/audits?

2.3 Describe your system’s ability to handle load balancing, redundancy and fault tolerance?

2.4 How will IIE be notified of an outage?

2.5 Disaster Recovery (DR) –Where is DR performed? Location and distance from primary
   a. Does your DR site follow the same policies and procedures as your primary site?
   b. Is your DR site as secure as your primary site?
   c. How are backups performed? (full, incremental, differential)
   d. Where are the backups stored?

2.6 Describe your RTO and RPO timeframes; In the event of a System outage; what are the standards of your Service Level Agreement? Specifically, in what timeframe can IIE expect issue resolution, full data restoration and 100% System functionality (to be able to perform all business functions associated with the System?)

III. Data Center Security questions:

Note: Access to electronic and physical repositories containing SSNs, ITINs and other personal identifiers must be controlled based upon reasonable and appropriate administrative, physical, technical, and organizational safeguards to those whose job functions require such access.

3.1 How is the Web server segregated from the database server?

3.2 Describe how data is protected from other users?

3.3 How will Personal Identifiable Information (PII) data be controlled and maintained?
   a. Who in the datacenter will have access to PII data?
   b. If the contract with IIE is terminated for any reason, how will the data be returned to IIE, and how will they (vendor and hosting facility) purge IIE data? – Including any backup data.
3.4 How do you ensure secure transmission of IIE’s and end-users’ data? (Example: Custom built into web application, utilizes SSL/TLS, utilizes APIs, SFTP, etc.)
   a. Explain security aspects involving custom built and utilization of APIs.
   b. Describe security aspects involving uploading of forms and documents?
   c. Describe security aspects involving any interfaces that might be involved.