RFP Issuance Due Date: July 28, 2020

Notification of Intent and Signing of NDA: August 5, 2020

Questions Due Date: August 7, 2020

Questions Answered Date: August 12, 2020

Initial Proposal Submission Due Date: September 1, 2020

Preliminary Review of Offers: September 11, 2020

Offeror Demonstration: September 25, 2020

Best and Final Offer: September 30, 2020

Anticipated Start Date: November 2, 2020

SUBJECT: Request for Proposals (RFP) – MS Dynamics 365 Implementation and Advisory Services (E-CRM)

IIE is seeking proposals from qualified organizations interested in providing the services described in the attached Request for Proposals (RFP).

The purpose of this Request for Proposal (“RFP”) is to invite qualified organizations to submit a proposal to deliver IIE Enterprise Microsoft Dynamics 365 Implementation and Advisory Services outlined more fully in Sections III and IV.

IIE intends to issue a fixed-price subcontract to suitable vendors who demonstrate that they have the capacity to deliver quality technical assistance and are the most responsive to the requirements of the RFP.

The remainder of this RFP provides additional information that will allow an offeror to understand the scope of the effort and develop a proposal in the format desired by IIE.

Issuance of this Request for Proposal (RFP) does not constitute an award commitment on the part of the IIE. IIE reserves the right to reject any offer received in response to this request. IIE shall not be liable for any costs incurred by Offeror in the preparation and submission of proposal.

The information presented in this RFP is furnished solely for the purpose of assisting the offeror in making its own evaluation of the Scope of Work and does not purport to be all-inclusive or to contain all the information you may require. This RFP is not an offer by IIE to contract, but rather an attempt to establish a common framework for IIE to evaluate potential suppliers. The offeror should make its own
investigations, projections and conclusions to verify independently the information contained in this RFP, and to obtain any additional information that it may require, prior to submitting a proposal.

All questions, comments, requests for clarifications must be sent in writing to DGheorghiu-Zmeu@iie.org no later than the date and time indicated above. Questions will not be entertained after this date.

If substantive questions are received which affect the response to the solicitation or if changes are made to the closing date and time as well as other aspects of the RFP, this solicitation will be amended. Any amendments to this solicitation will be issued and posted on the IIE’s procurement opportunities website. The worldwide web address is https://www.iie.org/en/Work-With-Us/Subawards-Procurements. Offerors are encouraged to check this website periodically.

Thank you for your interest and we look forward to your participation.

Sincerely,

Pete Young

SVP, Chief Technology Officer

Institute of International Education
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Statement of Work (SOW)

I. Background

The current CRM at IIE functioned as a central repository of critical participant information. The information includes program operation data and participant personal information of about 20,000 active participants in about 200 programs. CRM also leverages a third-party portal technology to exchange data and communicate with external users and partners.

The Enterprise Customer Relationship Management (E-CRM) project is undertaken to provide IIE with a state-of-the-art, consolidated, integrated and scalable CRM platform – in order to benefit from economies of scale, reusability/repeatability and learning curve.

The project is a timely replacement of the existing Oracle CRM OnDemand implementation, which is reaching its end-of-life limitations.

The project is well-positioned on the IIE Technology Roadmap – enabling IIE to fully benefit from Microsoft (MS) all-encompassing business application offerings.

II. Objectives

IIE seeks a qualified system integrator (SI) to provide Microsoft Dynamics 365 implementation expertise and business advisory services after the implementation of the E-CRM project at the Institute of International Education.

The Enterprise CRM Replacement project is undertaken for the following purposes and objectives:

1. Modernize the CRM platform/applications currently deployed:
   a. Replace obsolete and outdated 20+ year-old technology;
   b. Address structural security vulnerabilities;
   c. Improve connectivity and integration across systems.

2. Realign IIE technology to changing IIE business models:
   a. Build a platform that is scalable for the next 10+ years;
   b. Set the foundation for and align with a strategically-defined enterprise architecture.

3. Enable new solutions that are only possible on the new CRM platform:
   a. Deploy new/additional features, functions and configurations -- that are in-demand from the IIE user community, but not met by the exiting CRM implementations;
   b. Allow new/additional user groups/programs to utilize and onboard the CRM platform – whose needs have not been fulfilled by the exiting CRM implementations.

4. Rethink and transform outdated business and technology processes and models, to gain efficiency and effectiveness:
   a. Innovate and speed-up the requirement-design-delivery cycle;
b. Define and apply a new financial costing model, capable to enable and incentivize additional CRM usage;
c. Increase business and technology agility and allow for continuous improvement.

III. Activities and Tasks

<table>
<thead>
<tr>
<th>Project Phases</th>
<th>Vendor Expertise and Business Advisory Services and Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Project Planning</td>
<td>: Discovery, Fit-Gap Analysis, Solution Design, Process Reengineering and Implementation Plan</td>
</tr>
<tr>
<td>II. Project Implementation</td>
<td>: Dynamics 365 Implementation in agile approach</td>
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<td></td>
<td>- Planned core releases, rebuilt existing integrations and Master Data Management, including existing data migration and normalization efforts</td>
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<td>- Additional planned regular/wave releases</td>
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<td>- Implementation Activities; including</td>
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<td>o Application Development</td>
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<td>o Application Configurations</td>
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<td>o Process Improvement in MS Dynamics</td>
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<td>o Conduct Application Unit Testing &amp; Bug Fixing</td>
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<td></td>
<td>o Conduct coordinated (with IIE) User Acceptance Testing &amp; Bug Fixing</td>
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<td></td>
<td>- Organization Change Management Support</td>
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<td>- Training Support</td>
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<td></td>
<td>- Documentation and Knowledge transfer to internal IIE Business Systems and Information Technology staff</td>
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<tr>
<td>III. Post Implementation</td>
<td>: Operations and Maintenance Activities</td>
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<td></td>
<td>- Operations and Maintenance during transformation</td>
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<td>- Post transformation ongoing support and updates/upgrades</td>
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<td></td>
<td>Work Performance, including Service Level Agreement (SLA) commitment.</td>
</tr>
</tbody>
</table>

Identified Business Requirements
Business Requirements below are subjected to revision and validation during the project planning phase of the project, including editing acceptance criteria for Business Requirements.

Refer to Annex I - Detail E-CRM User Stories

<table>
<thead>
<tr>
<th>Functional Areas</th>
<th>No. of User Stories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Management</td>
<td>13</td>
</tr>
<tr>
<td>Campaign Management</td>
<td>5</td>
</tr>
<tr>
<td>Contact Management</td>
<td>13</td>
</tr>
<tr>
<td>Data/File Storage</td>
<td>10</td>
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<tr>
<td>Document Generation</td>
<td>2</td>
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<tr>
<td>Email Client Generation</td>
<td>2</td>
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<tr>
<td>Email Marketing Integration</td>
<td>3</td>
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<tr>
<td>Implementation</td>
<td>3</td>
</tr>
<tr>
<td>Integrations</td>
<td>22</td>
</tr>
<tr>
<td>Lead Management</td>
<td>3</td>
</tr>
<tr>
<td>Participant Financial Management</td>
<td>8</td>
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<tr>
<td>Participant Management</td>
<td>7</td>
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<tr>
<td>Participant Portal</td>
<td>8</td>
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<tr>
<td>Partner Portal</td>
<td>4</td>
</tr>
<tr>
<td>Reporting</td>
<td>14</td>
</tr>
<tr>
<td>Security &amp; Permissions</td>
<td>7</td>
</tr>
<tr>
<td>Task Management</td>
<td>21</td>
</tr>
<tr>
<td>User Interface/User Experience</td>
<td>13</td>
</tr>
</tbody>
</table>

**Use Cases – IIE Business Processes Demonstration**
The current CRM at IIE functioned as a central repository of critical participant information. The information includes program operation data and participant personal information of about 20,000 active participants in about 200 programs. CRM also leverages a third-party portal technology to exchange data and communicate with external users and partners.

IIE has prepared six use cases designed to showcase how IIE intends to use the functions in CRM to accomplish its business processes. **Selected offerors are required to present these use cases by leveraging functionality in MS Dynamics 365 and more details will be provided once the Notification of Intent and Non-Disclosure Agreement are executed with IIE.**

**Case 1: Agreements/Terms Documents**

Many IIE programs require functionality to produce contractual documents that include data from CRM or another system and then to receive the signed document and review it for the necessary signature and date.

**Case 2: Document Review**

IIE reviews high volumes of documents that are submitted. A new CRM needs to be capable of receiving, reviewing, approving and tracking documents efficiently by multiple teams and with appropriate workflows. Automation of document review and extracting data from PDF/word documents would be added value.

**Case 3: Email Marketing**

IIE engages in general email marketing campaigns with partners and participants.

**Partners** – Once a partner is approved, they will need to receive communications via email marketing about the program. All Alliance members will receive communications but there may be some specific emails based on the type of partner.

**Participants** – In addition to general email marketing campaigns, there are also times when emergencies require organized and clear responses. The ability to identify affected individuals, contact them quickly, and engage in any individual follow up is essential.

**Case 4: Document Reminders**

IIE has program cycles and participants are required to provide documents at each stage in the cycle. The ability to schedule the document requests and track completion of each stage would be useful to support the business processes developed.

**Case 5: Tracking Program Payments/Approvals**

IIE programs need to manage programmatic costs associated to individual participants. CRM system must allow users to approve and track workflows for participant costs that are issued via a separate financial system.

**Case 6: Administrator Editing Security Roles/User Rights**

IIE will have system administrators that manage access and user roles. CRM system must allow administrative users to change rights, roles and permissions to objects/records/files/etc. Some
IV. Deliverables

Phase 1 – Project Planning

- Completion of the activities outlined and IIE’s acceptance of the following deliverable from the vendor
  - Dynamics 365 Solution Architecture
  - Functional Design Document;
  - Project Delivery plans, incl.:
    - Release Train timeline;
    - Documentation plan (User & Tech);
    - Training plan;
    - Knowledge Transfer plan;
    - Change Management plan;

Phase 2 – Project implementation

- Successful configurations/developments of all Release and its user stories
- Successful provisioning of all the D365 environments (Dev, UAT and Production)
- Obtain sign off of UAT in accordance with the user acceptance criteria
- Obtain IIE’s acceptance of all documentations and knowledge transfer activities

Phase 3 – Post implementation

- All deliverables govern by the SLA

V. Duration and Location

Duration: The estimated time of completion for the MS Dynamics 365 implementation is expected to take at least 12 months starting from November 2, 2020.
Location: Most of the work can be performed remote and online but some onsite presence in IIE’s Washington DC and New York office will be required.
Submission Information

VI. Submission Information

This section contains general and specific requirements for submitting the technical and cost proposals. Please ensure completed forms, along with a copy of your legal registration, are included with the technical proposal otherwise your proposal will be rejected.

1. This RFP is issued as a public notice to ensure that all interested, qualified and eligible organizations legally registered for business in United States have a fair opportunity to submit proposals. Qualified international firms should have local and/or international experts available to provide these services.

2. The Offeror is requested to submit a proposal directly responsive to the terms, conditions and clauses of this RFP. The overall proposal shall consist of two (2) physically separated parts: Technical Proposal and Cost Proposal. Alternative proposals will not be considered. Proposals not conforming to this solicitation may be categorized as unacceptable and eliminated from further consideration.

Offerors are allowed to submit one proposal. If an Offeror participates in more than one proposal, all proposals involving the Offeror will be rejected.

3. Proposals shall be written in English. Cost proposals shall be presented in USD.

4. Proposals must remain valid for a minimum of 120 (one hundred twenty) days. The Offeror may submit its proposal by the following means:

   Electronically – Internet email with attachments compatible with MS WORD, Excel and Adobe Acrobat in a MS Windows environment to: DGeorghiou-Zmeu@iie.org. Be sure to include in the subject line: IIE E-CRM RFP Response.

5. The person signing the Offeror’s proposal must have the authority to commit the Offeror to all the provisions of the Offeror’s proposal.

6. The Offeror should submit its best proposal initially as IIE intends to evaluate proposals and make an award without discussions. However, IIE reserves the right to conduct discussions should IIE deem it necessary.

7. Proposals must be clearly and concisely written and must describe and define the Offeror’s understanding and compliance with the requirements contained in the STATEMENT OF WORK. All pages must be sequentially numbered and identified with the name of the Offeror and the RFP number.

PART A: TECHNICAL PROPOSAL
The technical proposal shall be straightforward and concise, outlining in sequence, how the Offeror intends to carry out the technical requirements under each main activity. No contractual price information is to be included in the Offeror’s implementation work plan in order that it will be evaluated strictly on its technical merit.

The implementation work plan shall be limited to **(20) twenty pages in total.** *Pages in excess of 20 pages will not be read or evaluated.*

Detailed information should be presented only when required by specific RFP instructions. Items such as graphs, charts and tables may be used as appropriate but will be considered part of the page limitation. Key personnel resumes, bio-data sheets, references and dividers are not included in the page limitation. No material may be incorporated in the proposal by reference, attachment, appendix, etc. to circumvent the page limitation.

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. IIE may contact the previous clients as part of the reference checking activities of the RFP.

<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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</table>
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 **the Statement of Work** section.
• Methodology, and reasoning behind the methodology chosen
• Quality control plan including:
  o A description of internal review procedures that facilitate high-quality standards
  o 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. Third Party IT Security Assessment
• Complete IIE’s Third Party IT Security Assessment attached to the RFP as Annex II

PART B: COST PROPOSAL

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.

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit (hours/days)</th>
<th>Unit Price (USD)</th>
<th>Total Price</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Phase I: Project Planning</td>
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<td></td>
<td>[Include expected deliverable]</td>
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<td>2</td>
<td>Phase II: Project Implementation</td>
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<td></td>
<td>[Include as many Releases and Sprints as applicable to cover the entire scope of the user stories]</td>
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<td></td>
<td>[Include expected deliverable by Release]</td>
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<td>3</td>
<td>Phase III: Post Implementation</td>
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<td></td>
<td>[Include Operations and Maintenance cost for transformation period]</td>
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<td></td>
<td>[Include post transformation monthly maintenance cost, targeted SLA and hours allotted for support and development hours]</td>
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</table>
VII. Evaluation Criteria

IIE will select the offeror whose proposal represents the best overall value to IIE in terms of the selection criteria specified below. Offerors who do not follow the instructions in this RFP may be disqualified from consideration.

Offers must first meet the mandatory requirements before their technical and cost proposals will be reviewed. Those bids not meeting the mandatory requirements will be automatically rejected.

The mandatory requirements are:

<table>
<thead>
<tr>
<th>MANDATORY ELIGIBILITY REQUIREMENTS</th>
<th>MEETS REQUIREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Legally registered to do business in United States— Offeror shall provide a copy of its registration document with the technical proposal.</td>
<td>YES/NO</td>
</tr>
<tr>
<td>3. Pass IIE’s Responsibility Determination. IIE will check to make sure that final offer is not listed under terrorism list of U.S. Treasury Department, United Nations and that it is not listed as an excluded party under the System for Award Management <a href="http://www.sam.gov">www.sam.gov</a></td>
<td>YES/NO</td>
</tr>
<tr>
<td>4. The detailed cost proposal follows the prescribed format.</td>
<td>YES/NO</td>
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</tbody>
</table>

The technical evaluation will be based on the following weighted categories:

<table>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
<th>Points Available</th>
</tr>
</thead>
</table>
| A – Company Information | Company’s Track Record – Experience & Expertise, incl.:  
  - Proven track record of success with:  
    ▪ Enterprise Dynamics implementation,  
    ▪ Oracle-to-Dynamics transition,  
    ▪ Education sector;  
  - Verifiable references (min. 3 references); Documented business strength and solid/sustainable market position. | 30 points         |
| B – Proposal Response | Proposal Content (excepting Cost) – Completeness & Adequacy, incl.:  
  - Alignment with SAFe/Agile/Scrum approach, incl.:  
    ▪ Inclusion of Stories pertaining to areas other than user requirements, such as: Knowledge Transfer, Tech & User Documentation, Org. Change Management, Training, Reports & Demos,  
    ▪ Story-point evaluation of initial Product Backlog,  
    ▪ Release Train proposal – themes and schedule milestones,  
    ▪ Participation in preparation for and delivery of Sprint-end ceremonies (estimated monthly): Sprint Review, Sprint Retrospective, Sprint Planning, | 30 points         |
• Delivery of reports for Project Management, such as: Sprint Burndown Chart (estimated weekly), Sprint potentially-shippable increments delivered in an IIE environment;
  • Proposed high-level Delivery plans, incl.:
    ▪ Release Train timeline;
    ▪ Documentation plan (User & Tech);
    ▪ Training plan;
    ▪ Knowledge Transfer plan;
    ▪ Change Management plan;
  • Staffing plan, incl.:
    ▪ Roles & Responsibilities,
    ▪ Named resources for the roles (incl.: Name, Position Title, Proposed Role, Summary of relevant Experience and Expertise),
    ▪ Resumes of resources proposed for Key Roles (who cannot be replaced after contract award without IIE written permission and acceptance of replacing resource),
    ▪ Proposed engagement schedule / calendar / % allocation.

<table>
<thead>
<tr>
<th>C – Cost Proposal</th>
<th>Proposed Cost – Justification &amp; Affordability (realistic, consistent with proposal work, meeting required scope), including:</th>
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<tbody>
<tr>
<td></td>
<td>• Competitive Project Planning stage cost;</td>
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<tr>
<td></td>
<td>• Competitive Project Execution stage cost (as total Implementation cost of set of separate costs per Release);</td>
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<td></td>
<td>• Competitive post-project Operation Support costs.</td>
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<tr>
<th>D – Functional Demonstration *</th>
<th>Demo Performance – Relevance &amp; Expertise, incl.:</th>
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<tbody>
<tr>
<td></td>
<td>• Relevant IIE-customized demonstration of each of the use cases documented in Attachment A;</td>
</tr>
<tr>
<td></td>
<td>• Demonstrated understanding of IIE needs;</td>
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<td></td>
<td>• Demonstrated expertise that brings value to the project;</td>
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</tbody>
</table>

| Total | 100 points |

• Only the shortlisted Offerors who would score the highest on A-C, will be invited to the Functional Demonstration phase.
VIII. General Terms and Conditions

1. Any proposal received in response to this solicitation will be reviewed strictly as submitted and in accordance with Section VII, Evaluation Criteria.

2. EXECUTIVE ORDER 13224 ON TERRORIST FINANCING

Offerors are informed that IIE complies with U.S. Sanctions and Embargo Laws and Regulations including Executive Order 13224 on Terrorist Financing, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any person or entity that participates in this bidding process, either as a prime or sub to the prime, must certify as part of the bid that he or it is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. IIE shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.

Firms or individuals that have an active exclusion on the System for Award Management (www.sam.gov) shall not be eligible for financing and shall not be used to provide any commodities or services contemplated by this RFP.

3. TERMS AND CONDITIONS

Offerors are responsible for review of the terms and conditions described.

4. CONTRACT MECHANISM

IIE is anticipated to award a fixed-price subcontract to the Offeror whose proposal will be evaluated based on the evaluation criteria described previously. Based on the merits of the offers received, IIE reserves the right to award more than one subcontract.

5. WITHDRAWALS OF PROPOSALS

Offerors may withdraw proposals by written notice via email received at any time before award. Proposals may be withdrawn in person by a vendor or his/her authorized representative if the representative’s identity is made known and if the representative signs a receipt for the proposal before award.

6. RIGHT TO SELECT/REJECT

IIE reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. IIE also reserves the right to reject any or all proposals received without explanation.

7. DUE DILIGENCE PROCESS

Any selected firm may be required to complete a Financial Pre-Award Risk Assessment in order for IIE to ascertain that the organization has the capacity to perform successfully under the terms and conditions of the proposed award. As part of the Pre-Award Risk Assessment process, the firm will also be
requested to submit a financial audit report from the previous fiscal year. In addition, payroll records
and other financial information may be requested to support budgeted costs.

8. CLIENT PRIOR APPROVAL

Based on the amount of the final award and the type of contractual mechanism, the selected Offeror
may be subject to funding agency approval before a subcontract can be awarded. Therefore,
organizations are reminded that there may be delays for this process to be completed. In addition,
should such approval not be given, this subcontract cannot be awarded.

9. DISCLAIMER

This RFP represents only a definition of requirements. It is merely an invitation for submission of
proposals and does not legally obligate IIE to accept any of the submitted proposals in whole or in part,
nor is IIE obligated to select the lowest priced proposal. IIE reserves the right to negotiate with any or all
firms, but with respect to price, costs and/or scope of services. IIE has no contractual obligations with
any firms based upon issuance of this RFP. It is not an offer to contact. Only the execution of a written
contract shall obligate IIE in accordance with the terms and conditions contained in such contract.

10. REQUEST FOR PROPOSAL FIRM GUARANTEE

All information submitted in connection with this RFP will be valid for 120 (one hundred twenty) days
from the RFP due date. This includes, but is not limited to, cost, pricing, terms and conditions, service
levels and all other information. If your firm is awarded the contract, all information in the RFP and
negotiation process is contractually binding.

11. OFFER VERIFICATION

IIE may contact Offerors to confirm contact person, address, bid amount and that the bid was submitted
for this solicitation.

12. FALSE STATEMENTS IN OFFER

Offerors must provide full, accurate and complete information as required by this solicitation and its
attachments.

13. CONFLICT OF INTEREST

Offerors must provide disclosure of any past, present or future relationships with any parties associated
with the issuance, review or management of this solicitation and anticipated award in or outside of the
country of performance.

Failure to provide full and open disclosure may result in IIE having to reevaluate selection of a potential
vendor.

14. RESERVED RIGHTS

All RFP responses become the property of IIE, and IIE reserves the right in its sole discretion to:

- Disqualify any offer based on Offeror failure to follow solicitation instructions.
• Waive any deviations by vendors from the requirements of this solicitation that in IIE’s opinion are considered not to be material defects requiring rejection or disqualification, or where such a waiver will promote increased competition.

• Extend the time for submission of all RFP responses after notification to all vendors.

• Terminate or modify the RFP process at any time and reissue the RFP to whomever IIE deems appropriate.

• Issue an award based on the initial evaluation of Offerors without discussion.

• Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

• Not compensate Offerors for preparation of their response to this RFP.

• Not guarantee that IIE will award a subcontract based upon the issuing of this RFP.

• Award a subcontract to more than one Offeror for specific parts of the activities in the RFP.

• 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 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.

• 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.

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