Request for Proposals (RFP)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: Selection of IIE Preferred Vendors for Communications Services
RFP Issue Date: April 28, 2023
Questions Due from Offerors: May 8, 2023
Responses to Questions Posted: May 12, 2023
RFP Closing Date: May 22, 2023
RFP Closing Time: 5 PM Eastern Daylight Time

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-value proposal for the requested services. Offerors may submit a proposal for any or all of the services listed within this RFP, and do not have to address all of the services listed within their proposals. The Contract resulting from this award will be a Master Services Agreement. IIE preferred vendors may be utilized by all IIE programs or by IIE for its own needs. Please note that this includes programs sponsored by the US Government. IIE preferred vendors will work on individual projects with separate Statement of Work contracts.

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 the date listed above. 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 per the timeline above on IIE’s website under Subawards and Procurement (https://www.iie.org/Work-With-Us/Subawards-Procurements).

Hannah Galatoire, Project Coordinator
Institute of International Education, Inc.
Email: communications@iie.org

Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: communications@iie.org. Be sure to include in the subject line: IIE Preferred Vendors for Communications Services. 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 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); 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, Houston and San Francisco) and staff in other countries (China, Egypt, Ethiopia, India, Indonesia, Mexico, Russia, Thailand and Ukraine).

Purpose of Request for Proposal
IIE is seeking preferred vendors for the following communications related services:

Video Services:
- Full-Service video production
- Video Editing
- Short form video for social media
- Filming/shooting

Motiongraphic Services
- Photo and video animation
- Typographic animation/dynamic captioning
- Explainer videos
- Animated photo slideshows

Graphic Design Services:
- Report Design and Publication Design
- Branding and Collateral Design
- Infographics
- Data Visualization / Tableau

Printing Services:
- Publications, invitation packages, signage, mailing services
- Offset printing for large print run orders
- Digital printing/photocopying for small print run orders and quick turnaround
- Mailing and fulfillment services

Editorial and Writing Services
- Copywriting for print, web, social
- Copyediting
- Proofreading
- Speech writing and remarks
- Video scripts
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

Please indicate in your submission, which services you are submitting bids for by checking off the appropriate boxes:

1. Video Services:
   - □ Full Service Video Production
   - □ Video Editing
   - □ Motion Graphics / Animation videos
   - □ Short form video for social media
   - □ Filming/shooting

2. Motiongraphic Services
   - □ Photo and video animation
   - □ Typographic animation/dynamic captioning
3. Graphic Design Services:
- Full Graphic Design Services
- Report and Publication Design
- Branding and Collateral design
- Infographics
- Data Visualization / Tableau
- MS Word Template Development

4. Printing Services:
Publications, invitation packages, posters, signage, mailing services. For detailed breakdown of printing service requirements, please refer to Attachment A for detailed capability requirements
- Offset printing for large run orders
- Digital printing/photocopying for small run and quick turnaround

5. Editorial and Writing Services
- Copywriting for print, web, social
- Copyediting
- Proofreading
- Speech writing and remarks
- Video scripts

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 noted below. In addition, other requirements for Offerors who are offering specific services are listed further below.

ALL OFFERORS MUST SUBMIT THE FOLLOWING:
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, 2 pages maximum

- 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
- Past experience working with IIE if applicable (not required)
- For Offerors submitting proposals for video and graphic design, submit a bio or CV of the principal of the firm

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. You may also include recommendation/appreciation letters and certificates. Include 3 – 5 examples.

For past performance, include web links to past projects or attached a PDF for each example.

<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) Total Vendor fees (inclusive of equipment rental for video) for the activity</th>
<th>(g) Name &amp; Contact Info (E-mail and phone)</th>
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- Please note that IIE reserves the right to request references from offerors following the submission of proposals. *

5. Fees and Rates

All proposals should include rate sheet and/or hourly rates for services:
Please include any proposed discounts, including discounts for working with not-for profit organizations (IIE is a 501 (c)(3)).

**Video Services:**
Provide a detailed rate sheet that should include but not be limited to full day, half day and hourly rates for:
- videography
  - editing/post production
  - location staff fees (producer/director, director of photography, production assistant)
  - please include whether equipment rental fees are included or additional

**Motiongraphic Services:**
Please provide rates for full day, half day, hourly

**Graphic Design Services:**
Please provide hourly rate
Printing Services
Provide a detailed rate sheet that should include estimated pricing for:

- 4” x 6” postcard on 80lb dull/matte cover stock (4/4), full bleed – Quantities: 500, 1000, 2000
- 8.5” x 11” flyer on 80lb dull/matte cover stock (4/4), full bleed – Quantities: 500, 1000, 2000
- 4 page Brochure (11 x 17) Fold to 8.5 x 11 on dull/matte 80lb cover stock (4/4), full bleed, saddle stitch – Quantities: 100, 500, 1000
- 16 page Brochure (11 x 17) Fold to 8.5 x 11 on dull/matte 80lb cover stock (4/4), full bleed, saddle stitch – Quantities: 100, 500, 1000
- Business card: 3.5”x 2” on 100lb dull/matte cover stock, full bleed (2/1) – Quantities: 250, 500

Editorial and Writing Services:
Please provide hourly rates for:

- Copywriting for print, web, social
- Copyediting
- Proofreading
- Speech writing and remarks
- Video scripts

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>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
<th>Points Available</th>
</tr>
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<tbody>
<tr>
<td>Qualifications and Capabilities</td>
<td>Assessment of the bidder’s qualifications and capacity to complete the scope of work including review of website or portfolio highlighting examples of prior work in each corresponding category and printed samples for Printing Services proposals.</td>
<td>75</td>
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<tr>
<td>Cost and Rates</td>
<td>IIE’s review of the fees and rates based on past performance, hourly rates if applicable, and rate sheets if applicable 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.</td>
<td>25</td>
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<tr>
<td>Total</td>
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<td>100 points</td>
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Offset and Digital Printing Services:
IIE is seeking printing vendors for offset printing and fulfillment services with additional digital printing capabilities. This can include but is not limited to: direct mail, invitation packages, booklets, brochures, flyers, post cards, posters, reports, and manuals.

IIE is also seeking vendors who offer digital printing services only for small run projects and projects requiring quick turnarounds.

Vendor shall have a state-of-the-art printing and fulfillment facility and render printed materials that are of good quality, free from faults and defects, and performed by skilled and qualified workers with the capability to deliver within compressed timeframes.

Offset print vendor must have the capability to handle a variety of job requests, including large and complex color jobs, and large volume jobs, for example:
- Four color processed projects
- Four color processed computer to plate projects
- Oversize (larger than 11x17) projects
- Projects that need special bindery procedures including cutting, folding, collating, wafer-sealing, etc.
- Projects requiring special inks, paper, laminating, numbering, plastic printing, labels, imprinting, complex die-cuts, etc.
- Projects requiring PMS and branded color matching
- Metallic, specialty inks, coatings, etc
- Die-cutting and embossing capabilities
- A variety of binding capabilities including saddle stitch, perfect, wiro binding

In addition, Vendor must have the capability to print, assemble and mail direct mail campaigns, for example:
- Mailing consulting and piece analysis for best postage savings
- Data processing and manipulation services
- Addressing
- Finishing
- Mailing

Offset Vendor will be required to allow on-site press checks, deliver proofs or press check output to IIE office when requested by mail or messenger service and to deliver the printed material to designated distribution.
ATTACHMENT C - ADDITIONAL REQUIREMENTS

Third-Party IT Risk Management Process (TPRM)

An IT Security Questionnaire is required prior to signing a contract if the vendor will process IIE proprietary data or Personal Data according to GDPR’s definition on behalf of IIE or connect to IIE’s network.

- Vendors who can furnish evidence of an ISO 27001 Certification are asked to attach such documentation and to provide their up-to-date System and Organization Controls (SOC) 2 Type 2 Attestation.

- Vendors who cannot furnish IIE with ISO 27001 Certification evidence will be asked to provide a SOC 2 Type 2 attestation and complete a security assessment that is mapped to the National Institute of Standards and Technology (NIST) Cyber Security Framework (CSF). 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 your organization does not wish to complete this request using the automated OneTrust platform, please visit the “Welcome” screen of the IT Security Questionnaire (using the emailed link from OneTrust) and click “Complete Offline Using Excel” to download the Excel version of the NIST CSF assessment. Please make sure to upload the completed file to OneTrust using the same path and Submit.

Prohibition on certain telecommunications and video surveillance services or equipment

IIE cannot enter into a contract to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. As described in Public Law 115-232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).

Covered equipment and services must not be part of your offer to IIE.