Request for Proposals (RFP)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: Lead Scholars for round four of the Fulbright Arctic Initiative

RFP Issue Date: June 2, 2023
Questions Due from Offerors: June 9, 2023 by 17:00 Eastern Time
Responses to Questions Posted: June 16, 2023
RFP Closing Date: June 30, 2023
RFP Closing Time: 17:00 US Eastern Time
Semi-finalists invited for virtual interview: Anticipated late July or early August
Anticipated Performance Period: September 1, 2023-April 30, 2026

Enclosed is a Request for Proposals (RFP). IIE invites qualified individuals and organizations ("Offerors") to submit a best-value proposal for the requested services. The Contract resulting from this award 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 the date and time 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 on the date listed above on IIE’s website under Subawards and Procurement (https://www.iie.org/Work-With-Us/Subawards-Procurements).

Susan Muendl
Assistant Director, Fulbright Multi-Regional Programs
Institute of International Education (IIE)
One World Trade Center, 36th Floor
New York, NY 10007
Email: arctic@iie.org

Lead Scholars for round four of the Fulbright Arctic Initiative
Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: arctic@iie.org. Be sure to include in the subject line: Lead Scholar(s) for round four of the Fulbright Arctic Initiative. 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); 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, Kazakhstan, Mexico, Russia, Thailand, Ukraine, and Vietnam).

About the Fulbright Arctic Initiative

Launched in 2015, the Fulbright Arctic Initiative supports international scientific cooperation on Arctic issues and increases mutual understanding between the people of the United States and the people of other countries. As Arctic nations continue to take concrete steps to work together and address public-policy research questions relevant to their shared challenges and opportunities, the Fulbright Arctic Initiative offers a collaborative model for scholarly exchange.

The Fulbright Arctic Initiative is part of the Fulbright Program, the U.S. government’s flagship international educational exchange program, which is funded through an annual appropriation made by the U.S. Congress to the U.S. Department of State’s Bureau of Educational and Cultural Affairs. Participating governments and host institutions, corporations, and foundations around the world also provide direct and indirect support to the Program. Since 1946, the Fulbright Program has provided more than 400,000 participants from more than 160 countries with the opportunity to study, teach and conduct research, exchange ideas and contribute to finding solutions to shared international concerns. The Fulbright Arctic Initiative forges lasting connections among the Arctic scholars and their nations as they work together toward common goals.

The Fulbright Program and the Fulbright Arctic Initiative are programs of the U.S. Department of State, with funding provided by the U.S. government and partner governments, including the governments of Canada, the Kingdom of Denmark, and Iceland.

Purpose of Request for Proposal

The Fulbright Arctic Initiative will provide grants to both established experts and early career specialists from Arctic Council member nations to carry out collaborative research that will study and analyze the Arctic from a multi-disciplinary perspective. The selected group of scholars will investigate how Arctic nations, citizens, and institutions can collectively respond to the changing Arctic environment and exercise responsible stewardship, making decisions based on the best available information and with the involvement of the Arctic’s indigenous communities, with the aim of promoting a healthy, sustainable, and resilient Arctic. Research areas could include resource management, public health, education, energy, the environment and economic development, among others.

The purpose of this Request for Proposal (“RFP”) is to invite qualified individuals to submit a proposal for one or two Lead Scholar(s) to provide intellectual guidance and overall facilitation of the fourth Fulbright Arctic Initiative.
**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](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.

**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 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, if applicable

3. **Qualifications and Capabilities (two pages, excluding CV’s)**
   - CV demonstrating a record of scholarship, expertise, and engagement on Arctic issues.

**Lead Scholars for round four of the Fulbright Arctic Initiative**
• Brief description of the organization/entity and experience in the field that illustrates overall services and capabilities to meet the terms of the RFP. Individual applicants should describe their relevant experience and capabilities to meet the terms of the RFP.
• Years of relevant experience
• Staffing plan, if applicable, for this activity and a general overview of the expertise of the individuals included. This may include support regarding outreach or logistics, role division in the case of joint Co-Lead Scholar proposals, and other such scenarios. Please include the following: name, position on your team, summary of relevant expertise and experience for personnel to be assigned to the project.

4. Past Performance and Experience

Document and summarize your proven track record of successfully implementing similar activities. In particular, describe any experience relevant to:
• interdisciplinary scholarship and team-based research.
• effectively engaging and leading others to achieve a common goal.
• consensus-building and negotiation among diverse views.
• working to connect scholarship with regional, national, or international policy.

Describe relevant projects you implemented within the past three years demonstrating expertise on Arctic issues. This may include, but is not limited to, international and environmental law, water and oceans policy, resource governance, sustainable development and community resilience, rights of indigenous peoples, food security and fishing and hunting rights, language and cultural vitality, human security and geosecurity, and environmental conservation, among others.

Using the table format provided below, please list only the relevant projects you implemented within the past three 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 (up to 5 pages maximum)

• 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. In particular, provide a plan to:
  o lead a multi-national and multi-disciplinary team of scholars during an 18-month program that fulfills Fulbright’s dual mission of supporting international scientific cooperation on Arctic issues and increasing mutual understanding between the people of the United States and the people of other countries.
  o engage a broad network of stakeholders, including Arctic communities, and promote collaboration across sectors.
  o ensure that program research findings are relevant and available to policymakers.

• 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

Lead Scholars for round four of the Fulbright Arctic Initiative
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>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
<th>Points Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualifications and Capabilities</td>
<td>Assessment of the Offeror’s qualifications and capacity to complete the scope of work, including evidence of ability to provide support to the Fulbright Arctic Scholars in meeting their professional goals.</td>
<td>35 points</td>
</tr>
<tr>
<td></td>
<td>Expertise of the individual applicant(s).</td>
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<tr>
<td>Implementation of the Scope of Work</td>
<td>Assessment of proposed approach to completing the scope of work, including project timeline and proposed platform capabilities.</td>
<td>25 points</td>
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<tr>
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<td>Higher scores will be awarded to proposals that indicate a greater practical understanding of implementing the work, and more innovative but realistic ways of carrying out the work.</td>
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<td>Higher scores will be awarded to materials that are more detailed, more accessible, and/or professionally developed.</td>
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<tr>
<td>Experience and References</td>
<td>Demonstrated past experience implementing a similar scope of work.</td>
<td>30 points</td>
</tr>
<tr>
<td></td>
<td>Assessment of reference responses (if submitted).</td>
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<tr>
<td>Cost Proposal</td>
<td>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.</td>
<td>10 points</td>
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<tr>
<td></td>
<td>Assessment of the overall cost of the proposal.</td>
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**Total** 100 points
ATTACHMENT A

STATEMENT OF WORK

To build on the success of the three previous Fulbright Arctic Initiative cohorts (2015-16, 2018-19, 2021-23), the U.S. State Department’s Bureau of Educational and Cultural Affairs (ECA) intends to sponsor a fourth cohort of Fulbright Arctic Scholars to support and promote research and cooperation on shared challenges in the Arctic among the eight member states of the Arctic Council.

The Arctic North is a region with enormous and growing geostrategic, economic, environmental, and security implications for the world. It is one of the most rapidly-changing regions on earth, presenting both opportunities and challenges. At a meeting of Science Ministers in September 2016, national representatives of the Arctic nations declared their commitment to “supporting science cooperation in the vast, diverse, and globally-relevant Arctic region” and their intention to “work together to enhance and deepen scientific knowledge and understanding of the Arctic.” The Fulbright Arctic Initiative is a key tool for Arctic nations to fulfill this commitment. Working in thematic teams, the Fulbright Arctic Scholars can explore public-policy research questions and engage governments, NGOs, the business sector, and Arctic communities.

The Fulbright Arctic Initiative will provide grants to both established experts and early career specialists to carry out collaborative research that will study and analyze the Arctic from a multi-disciplinary perspective. The initiative will provide research grants to up to 20 Fulbright Scholars from the Arctic Council countries, fund three multi-day group seminar meetings, and promote ongoing virtual collaborative research among the selected scholars. The initiative will begin in September 2024 and conclude in April 2026. The selected group of scholars will investigate how Arctic nations, citizens, and institutions can collectively respond to the changing Arctic environment and exercise responsible stewardship, making decisions based on the best available information and with the involvement of the Arctic’s indigenous communities, with the aim of promoting a healthy, sustainable, and resilient Arctic.

IIE is seeking a Distinguished Leader or team of two Leaders to provide intellectual guidance and overall facilitation of the Fulbright Arctic Initiative. The Distinguished Leader(s) will work closely with ECA and IIE beginning in the Fall of 2023 through to the conclusion of the program in the Spring of 2026.

Distinguished Leader Required Qualifications:

- Ph.D. with substantial research experience and a demonstrated ability to translate research into practice in a policy environment (e.g. public or private sector, NGOs, multilateral organizations).
- Expertise in Arctic issues, knowledge of regional scholarship and social/political/economic systems in the member states, and the ability to lead an international team of scholars in fields that may include environmental studies, international and environmental law and governance, environmental sustainability, energy, water, language and cultural preservation, security, conservation, social anthropology.
- Ability to engage a broad network of stakeholders and communities interested in the Arctic region and Arctic studies across a range of sectors (academe, private, public).

Distinguished Leader Desired Qualifications

- Demonstrated commitment to and experience with interdisciplinary scholarship and team-based research.
- Commitment to ensuring that project research findings are available to policy-makers and to actively promoting collaboration with the public, private, NGO and multi-lateral sectors to support follow-on activities and productive social and economic outcomes.
- Demonstrated ability to effectively engage and lead others to achieve a common goal; skill in consensus-building and negotiation among diverse views.

Lead Scholars for round four of the Fulbright Arctic Initiative
• Citizenship of one of the member states of the Arctic Council.
• For distinguished co-lead teams, one member should be from the U.S.

Specific responsibilities include the following:
• Advise ECA, IIE, and Fulbright Commissions in member states during the period of program design and launch.
• Establish, direct, provide intellectual leadership to the initiative’s overall research agenda and identify working group themes; provide guidance and support to the working groups; and lead the three group seminar meetings, in close collaboration with ECA, IIE, and Fulbright Commissions.
• Assist ECA, IIE, and Fulbright Commissions in the identification and recruitment of potential program participants in accordance with Fulbright Program policies, with a particular focus on recruiting a diverse cohort of scholars from the participating countries.
• Nominate peer reviewers and serve on a selection committee meeting to review and recommend grantee applications for the program.
• Assist working groups with setting group norms, research objectives and deadlines for outputs early in the program to provide a foundation for their work over the course of the program.
• Assist Scholars identify and connect with appropriate host institutions in support of individual research exchange component.
• Monitor and support Fulbright Scholar participation and progress; provide verbal and written feedback to the Fulbright Scholars and ECA on individual and working group projects throughout the course of the program; provide encouragement and ideas to stimulate discussion.
• Arrange, initiate and regularly monitor virtual communication; interact at least semimonthly with individual scholars and working groups (via a web-based collaboration platform, webinars, video chat, teleconferences, etc.).
• Conduct check-ins with the individual Fulbright Scholars throughout the cohort period.
• Consult regularly with IIE and Fulbright Arctic Initiative stakeholders regarding progress and outcomes for the program.
• In collaboration with IIE and ECA, plan and lead the working sessions of the program’s three in-person meetings (opening, mid-term, and final). Contribute to overall meeting agendas and coordinate meeting structure and content with cooperating Fulbright partner organizations responsible for hosting each meeting.
• Suggest and implement any trainings that might be beneficial to Fulbright Scholars to engage in interdisciplinary group work and to prepare scholars for program deliverables.
• Ensure broad impact and relevance of the findings of Fulbright Arctic Initiative to policymakers and communities.
• Travel required in support of key program events includes the scholar selection panel meeting, opening meeting (participating Arctic country – location TBD), mid-term meeting (participating Arctic country – location TBD), final meeting (Washington, DC, USA), and up to two work planning/debrief meetings (Washington, DC). Additional travel in support of program promotion and conference representation is optional.
• Submit narrative reports and financial reports. A narrative and certified financial report will be due within 30 days following the opening, mid-term, and final program meetings.

Each Distinguished Leader will be provided a total budget not to exceed $40,000 and Distinguished Leader team will be provided a consolidated total budget not to exceed $80,000 to be used for salary, administrative support, and program travel expenses.

Lead Scholars for round four of the Fulbright Arctic Initiative
**Selection Process Overview**

IIE and the program sponsor, ECA, intend to select the Distinguished Leader or team of Leaders for the Arctic Initiative based on the relevance of the applicants' background, experience, and achievements to the criteria for the position as listed in the Request for Proposal. Finalists may be invited to participate in a virtual interview.
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 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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<td>General Costs</td>
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<td>Direct Costs</td>
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<td>Salaries (for organizations)/Consulting Fees (for individual applicants)</td>
<td>Level of Effort</td>
<td>Annual Salary</td>
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<td>20%</td>
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<td>Assistant Coordinator</td>
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<td>Assistant Coordinator</td>
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<td>Graduate Assistant</td>
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<td>Subtotal - Fringe Benefits</td>
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Lead Scholars for round four of the Fulbright Arctic Initiative
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<th>Travel to Mid-Term Meeting</th>
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<td>Lodging in Washington, DC</td>
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<td><strong>Subtotal - Travel and Transportation</strong></td>
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| **Subtotal - Direct Costs (I + II + III)** | $0 | $0 | $0 |

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<th>$0</th>
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| Subtotal: Indirect Costs | $0 | $0 | $0 |

Organizational applicants who include indirect costs must include a current NICRA or use the 10% de minimis rate.

| TOTAL COSTS (Direct + Indirect) | $0 | $0 | $0 |
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.