Request for Quotes (RFQ)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: RFQ for Scholar Prospect Academic Database Search Tool

RFQ Issue Date: Wednesday, July 5, 2023
Questions Due From Offerors: Friday, July 14, 2023 at 5 PM Eastern Daylight Time
Response to Questions Posted: Friday, July 21, 2023
RFQ Closing Date: Monday, July 31, 2023 at 5 PM Eastern Daylight Time
Semi-Finalists May Be Invited to Present Product Demonstration (if recommended by the Selection Panel): Approximately the week of August 14 – 18, 2023
Performance Period: Five year contract

The Institute of International Education (IIE) is seeking licenses to a searchable academic database to enhance IIE’s research capabilities and increase our ability to identify US Scholars by several criteria. IIE invites qualified firms and organizations (“Offerors”) to submit best-value Quotes for the requested goods and services. The agreement resulting from this award will be a Contract serving the Fulbright Scholar Program.

Offerors are encouraged to read this RFQ 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 IIE to award a contract, nor will IIE pay for any costs incurred in the preparation and submission of a quote. The agreement resulting from this RFQ 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 RFQ.

The required goods and services are listed in the Attachment A “Statement of Work.” IIE encourages your organization to indicate its interest in this RFQ by submitting a quote according to the instructions in “Quote Preparation Instructions”. Quotes will be evaluated based on the “Evaluation Criteria”.

All quotes are due by the dates and times stated above. Any quote received after the required time and date specified for receipt shall be considered late and non-responsive. Late quotes will not be evaluated.

Questions: Any questions are to be submitted in writing via email to the email address listed below by the date specified 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 RFQ will be published on or about the date listed above on IIE’s website under Subawards and Procurement (https://www.iie.org/Work-With-Us/Subawards-Procurements).
Quote Submission: Quotes, including any attachments (limited to 6MB), should be sent electronically in PDF format to: jassarian@iie.org. Be sure to include in the subject line: RFQ for Scholar Prospect Academic Database Search Tool. IIE will not accept quotes received by fax.

Table of Contents

SECTION 1: BACKGROUND AND PURPOSE ......................................................................................... 3
SECTION 2: RFQ CONDITIONS ........................................................................................................... 3
SECTION 3: QUOTE PREPARATION INSTRUCTIONS ....................................................................... 4
SECTION 4: TERMS OF PAYMENT ..................................................................................................... 5
SECTION 5: EVALUATION OF QUOTES .............................................................................................. 5
ATTACHMENT A: STATEMENT OF WORK ......................................................................................... 6
ATTACHMENT B: COST STRUCTURE ................................................................................................. 8
ATTACHMENT C - ADDITIONAL REQUIREMENTS ............................................................................ 9
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 and in other countries.

Purpose of Request for Quote
The purpose of this Request for Quotations ("RFQ") is to invite qualified organizations to submit quotes for the goods and services listed in Attachment A.

SECTION 2: RFQ CONDITIONS
IIE reserves the right to:
- Reject any or all offers and discontinue this RFQ 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 RFQ 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 RFQ or have any liability for any representations (express or implied) contained in, or omissions from, this RFQ. This RFQ and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Quote. Each Offeror shall keep the RFQ and its contents confidential and shall return the RFQ (without keeping copies) to IIE if the Offeror elects not to submit a Quote, or upon being requested to do so by IIE.

Any information or materials submitted in response to this RFQ and/or as a Quote (whether successful or unsuccessful) shall become the property of IIE and will not be returned.

In submitting a Quote, you must agree that your offer shall remain firm for a period of no less than 120 days from the RFQ closing date.

Failure to follow the specifications and requirements provided in this RFQ may result in disqualification.
SECTION 3: QUOTE PREPARATION INSTRUCTIONS

Quotes 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 RFQ, all Offerors are requested to provide the following information, and format their Quote as follows:

- **Basic information, one page**
  - Legal name, registered address, and “Remit to” mailing address, if different from registered address
  - Name of authorized representative for this RFQ, with telephone number(s), and e-mail address
  - General information about your organization and the services it offers

- **Professional References and Past Relevant Experience**
  - Include two (2) letters of reference of current customers.
  - 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>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Technical Specifications, 5 pages maximum**
  - Please include a full description of the technical capabilities of your database and database search tool, including options for different types of services and tiers of services.
  - Please include a description of your customer service including proposed response times.

- **Proposed Pricing – see ATTACHMENT B: PRICING for more information**
  - Please include a comprehensive description of pricing options and tiers of service for 5 years
  - Please include prices for any training services
  - Offerors may propose volume or other types of discounts, including, if applicable, discounts for not-for-profit organizations (IIE is a 501(c)(3)).

- **Security Questionnaire**
  - Offerors may be required to complete the IT security questionnaire (please see the attached)
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 RFQ. No advance payments will be provided.

SECTION 5: EVALUATION OF QUOTES

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Offeror’s responsiveness and compliance with the RFQ requirements and conditions.</td>
<td>25 Points</td>
</tr>
<tr>
<td>The Offeror’s ability, capacity, and skill to fully and satisfactorily provide the services and/or items required in this RFQ, including: Reasonableness/competitiveness of proposed fee and/or benefits to the IIE.</td>
<td>25 Points</td>
</tr>
<tr>
<td>The quality of Offeror’s performance in comparable and/or similar projects.</td>
<td>25 Points</td>
</tr>
<tr>
<td>Assessment of the overall cost. IIE’s review of the cost and 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 quotation.</td>
<td>25 Points</td>
</tr>
</tbody>
</table>

Total 100 Points
ATTACHMENT A: STATEMENT OF WORK

Required technical capabilities:

IIE is seeking licenses for a comprehensive online tool to assist with the recruitment of potential applicants to the Fulbright US Scholar program. IIE is seeking an existing, off-the-shelf solution. IIE will not consider quotes that involve building a database.

The Fulbright US Scholar Program enables hundreds of US Scholar to go abroad each year. As the cooperating agency of the program sponsor, the US Department of State, Bureau of Educational and Cultural Affairs (ECA) IIE is responsible for recruiting potential US Scholar applicants to apply for grant opportunities. In addition, IIE assists Fulbright Commissions that are actively seeking US Scholars for Commission funded grant opportunities.

The primary purpose of IIE procuring an academic database is to enhance our research capabilities and increase our ability to identify US-based scholars’ specific areas of work, as well as their career stage, discover their networks and collaborators, and distinguish any past fellowship or grant the scholar has held. The database should allow for access by users both at IIE and outside of IIE in Fulbright Commissions around the world. The database vendor should also include training for all users and a plan for service and technical support throughout the contract period.

The database will need to address the following main points:

- Ability to identify scholars’:
  - by field of study and specialization within discipline
  - by first and last name
  - by career stage, i.e. when PhD or terminal degree was conferred
  - by current institutional affiliation
  - by institution type and institutional attributes, i.e. Carnegie classification, land-grant university, public/private, etc.

- Ability to view scholars’:
  - published research activities
  - networks and collaborators
  - past awards, fellowships and grants
  - research productivity including articles, book chapters, books, conference records

- Ability to identify research trends of a specific research area

- Ability to export results to Excel

The database vendor will provide the following:

- User access to individuals at IIE and individuals at 49 Fulbright Commissions around the world
- Virtual training to all users (both live and recorded), as well as an option for in person training
- Technical support to users throughout the contract period

IIE estimates that need for approximately 15 licenses for IIE users and 100 – 150 sub-licenses at Fulbright Commissions. For sub-licenses, IIE is willing to consider a sub-license agreement.

Not required for this RFQ

Institute of International Education • iie.org
One World Trade Center, 36th Floor • New York, NY 10007 USA • 212.984.5425
- IIE will not consider any quotes that propose the development of a database.
- The proposed solution will not be required to integrate with any third party or homegrown systems.

### Self-service Platform

<table>
<thead>
<tr>
<th>Feature</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supports multiple IIE admin users</td>
<td>Must Have</td>
</tr>
<tr>
<td>Supports intuitive and use-friendly admin UI</td>
<td>Must Have</td>
</tr>
<tr>
<td>Supports customization of UI and/or dashboard</td>
<td>Must Have</td>
</tr>
<tr>
<td>Supports fully self-service portal with minimal to no vendor interaction needed</td>
<td>Must Have</td>
</tr>
<tr>
<td>Streamlined onboarding process</td>
<td>Must Have</td>
</tr>
</tbody>
</table>

### Monitoring and Reporting

<table>
<thead>
<tr>
<th>Feature</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robust searching by key words and phrases</td>
<td>Must Have</td>
</tr>
<tr>
<td>Ability to logically group searches (e.g., projects, programs etc)</td>
<td>Must Have</td>
</tr>
<tr>
<td>Monitoring of at least 3 Social media platforms</td>
<td>Must Have</td>
</tr>
<tr>
<td>Collect and track Mentions</td>
<td>Must Have</td>
</tr>
<tr>
<td>Collect and track Sentiment</td>
<td>Must Have</td>
</tr>
<tr>
<td>Collect and track earned media across platforms</td>
<td>Must Have</td>
</tr>
<tr>
<td>Analytics and visualizations</td>
<td>Must Have</td>
</tr>
<tr>
<td>Trend analysis</td>
<td>Must Have</td>
</tr>
<tr>
<td>World region mapping of mentions &amp; sentiment</td>
<td>Must Have</td>
</tr>
<tr>
<td>Ability to cure negative sentiment or promote positive mentions</td>
<td>Must Have</td>
</tr>
<tr>
<td>Competitor and Sector analysis</td>
<td>Nice to Have</td>
</tr>
</tbody>
</table>

### System Integration

<table>
<thead>
<tr>
<th>Feature</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to perform manual extracts of data</td>
<td>Must Have</td>
</tr>
<tr>
<td>API accessibility to platform</td>
<td>Nice to Have</td>
</tr>
</tbody>
</table>

### Other

<table>
<thead>
<tr>
<th>Feature</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearly articulated product vision</td>
<td>Must Have</td>
</tr>
<tr>
<td>9am-5am support across any of the U.S. time zones</td>
<td>Must Have</td>
</tr>
<tr>
<td>Ability to quickly adapt to emerging social media platforms (e.g., TikTok)</td>
<td>Must Have</td>
</tr>
<tr>
<td>Posting to social media platforms</td>
<td>Nice to Have</td>
</tr>
<tr>
<td>Tracking mentions and sentiment on Podcasts</td>
<td>Nice to Have</td>
</tr>
<tr>
<td>Pushing proprietary data into the platform</td>
<td>Nice to Have</td>
</tr>
</tbody>
</table>

**Offerors may include additional applicable capabilities that would provide additional value to IIE.**
ATTACHMENT B: COST STRUCTURE

Please see Section 3: Quote Preparation Instructions
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.

Offerors who have recently undergone this process may not be required to do so at this time.

- 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.