



**Humphrey  
Fellowship**  
A Fulbright Exchange Program



## Request for Proposals (RFP)

**To:** Interested Organizations  
**From:** Institute of International Education, Inc. (IIE)  
**Subject:** 2023 Request for Proposal to Host Humphrey Fellows in the Field of Educational Administration, Planning and Policy

**RFP Issue Date:** August 4, 2023  
**RFP Closing Date:** October 6, 2023  
**RFP Closing Time:** Midnight EDT

**RFP Informational Webinar:** August 14, 2023, 3:00-4:00 pm ET  
Zoom link:  
<https://iie-org.zoom.us/j/99562066325?pwd=Y2Y5bkcybWRSYjZxUi9hTUo5OXdkdz09>  
Meeting ID: 995 6206 6325/Passcode: 091467

**Performance Period:** March 2024 – June 2025

Enclosed is a Request for Proposal (RFP). The U.S. Department of State has asked IIE to invite qualified universities to submit a proposal to host Humphrey Fellows in the field of Educational Administration, Planning and Policy. The Contract resulting from this award will be a **Cost Reimbursable Subrecipient Agreement** that serves the Humphrey Fellowship Program.

**Educational Administration, Planning and Policy** - The program will allow Fellows to share knowledge in the field of educational administration, planning and policy. Fellows will develop best practices related to, education policy development and implementation, and short and long term strategies to improve education at regional and/or national levels. Topics such as primary, secondary, and tertiary education curriculum development, vocational/technical program design, teacher training and certification, systemic approaches to teaching of English as a foreign language and the use of technology in education, among others will be included. See Attachment A for a list of possible fields of expertise for suitable candidates for this program.

Offerors are encouraged to read this RFP in its entirety (including all attachments), paying specific attention to the instructions and requirements included herein. 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 organization whose offer most comprehensively addresses the cost, functionality, and other factors as specified in this RFP.

The required services are described in the **“Program Description” 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 Instructions.”** Proposals will be evaluated based on the evaluation criteria described in Section 5: **“Evaluation of Proposals.”**

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 August 24, 2023. 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 August 31, 2023 on IIE’s website under Subawards and Procurement (<https://www.iie.org/work-with-us/subawards-procurements>).

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**Proposal Submission:** Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: [anemith@iie.org](mailto:anemith@iie.org). Please send proposals as one complete PDF file (including budget documents). IIE will not accept proposals received by fax.

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## SECTION 1: BACKGROUND AND PURPOSE

### Background: Hubert H. Humphrey Fellowship Program

The **Hubert H. Humphrey Fellowship Program** is sponsored by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) and administered by the Institute of International Education, Inc. ("IIE").

The Hubert H. Humphrey Fellowship Program, a Fulbright exchange, enhances leadership among international professionals who collaborate to address local and global challenges and foster change for the collective good. Through academic study and professional development with U.S. counterparts, this growing global network shares best practices and builds expertise in fields of critical importance to advance societal and institutional capacity, promote human rights and freedoms, ensure sustainable environments, and develop thriving communities. More than 6,500 individuals have participated in the Humphrey Fellowship Program since the program began in 1978. Approximately 150 Fellowships are awarded annually.

### Purpose of Request for Proposal

The purpose of this Request for Proposal ("RFP") is to invite qualified Universities to submit a proposal to host a group of Humphrey Fellows in the field of Educational Administration, Planning and Policy. Please see more details in Attachment A of this proposal.

Universities selected to host a group of Humphrey Fellows for the 2024-2025 program year will be subrecipients of IIE's Humphrey Fellowship Program Award and will sign a cost-reimbursable Subrecipient Agreement with IIE. A new agreement may be issued annually based on successful performance, host campus need (which is dependent on the applicant pool from year to year), availability of funding and at IIE's sole discretion. The competitive subrecipient selection for this field of study will be held again in 2028.

Offerors will be notified in writing by February 15, 2024 of the results of the review process.

### 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 in other countries (China, Egypt, Ethiopia, Hungary, India, Indonesia, Mexico, Russia, Thailand and Ukraine).

## 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 organization 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 interested organizations, 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 interested organizations solely for the purposes of the organization preparing and submitting a Proposal. Each interested organization shall keep the RFP and its contents confidential and shall return the RFP (without keeping copies) to IIE if the organization 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 organization will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: <https://www.iie.org/en/Work-With-Us/Subawards-Procurements/Solicitations-for-Subaward-Opportunities>. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the successful Offeror, at IIE's discretion. State Universities and Agencies should not expect or ask IIE to modify its Terms and Conditions to incorporate any State Regulations or Statutes.

### SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS

Proposals are expected to be comprehensive and include the information set forth below. Organizations are also invited to send any additional information or supplemental material they believe will aid reviewers 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. A *cover sheet* with the name of the institution and participating academic departments or schools, name of dean and proposed program coordinator, address, e-mail address(es) and telephone number(s), and academic field(s) of proposal.
2. A *narrative* not to exceed 15 double-spaced pages. Your narrative should address the following points:
  - a) Description of institution;
  - b) Participating academic departments or schools, including any that could serve the needs of Humphrey Fellows with inter-disciplinary interests or from related fields;
  - c) Plan for implementation of Fellows' goals through academic work;
  - d) Name and qualifications of the proposed designated coordinator, with a plan for appointing a successor coordinator in the event that the proposed coordinator becomes unavailable during the course of the agreement period;
  - e) Evidence of the university's international commitment and programmatic expertise in meeting the needs of Humphrey Fellows;
  - f) Plan for Fellows to complement and enrich the institution's and local community's international focus;
  - g) Plan for professional development and professional affiliation activities for Fellows within the university or community at large, i.e., professional and community resources the university can offer to Humphrey Fellows for professional enhancement, networking, and practical work experience with their American counterparts;
  - h) Outline of the proposed year-long Humphrey Seminar. The seminar should cover such topics as:
    - American culture/society/institutions;
    - Policies and issues in the fields in which you propose to host Fellows;
    - Professional skill building (e.g. grant proposal writing), public speaking, conflict resolution, computer skill training (as relevant)
    - Leadership development.
  - i) Plan to incorporate an Associate Campus Partnership, particularly with community colleges or minority-serving institutions (MSIs) (as described in Attachment A below) into the program.
3. *Appendices* must include:
  - a) A letter of endorsement and financial approval from the relevant dean or university official whose division proposes to host this group of Humphrey Fellows;
  - b) Biographical sketches (not to exceed two pages for each individual) of key personnel in the program (e.g. coordinator, assistant coordinator), indicating scholarly and non-scholarly activities relevant to the Humphrey Fellowship Program. Please provide background information on selected academic advisers, including their familiarity with Humphrey participating countries;
  - c) An annotated list of related international programs at the institution;
  - d) Excerpts from university catalog(s) and publications, including course descriptions that are directly relevant to Humphrey Fellows' interests (please do not send entire course catalogs);

e) Examples of possible local and national professional affiliation sites for Fellows.

4. *Budget submission* in the provided template and budget narrative.

#### 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 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

Proposals will be evaluated on a hundred-point scale based on their responsiveness to the following criteria:

Item	Requirement	Maximum Length in Pages/Points Available
I. Methodology	<p>a) Describe the university's capacity, academic expertise, and commitment to internationalization (including global networks, partnerships, study abroad and exchanges). Please also describe university faculty whose exchange experience, research and publications are in the field of educational administration, planning and policy. The selected university should also demonstrate their ability to meet the academic and professional needs of outstanding mid-career professionals from selected developing and emerging countries. [5 points]</p> <p>b) Describe in detail the steps you will take to design and implement a comprehensive program for international Fellows. This should include:</p> <ul style="list-style-type: none"> <li>- a detailed agenda/syllabus for a year-long Humphrey Seminar reflecting program's objectives, Fellows' interests, and the host institution expertise</li> <li>- evidence of university's ability to develop initial orientations and retreats which take advantage of university and community resources</li> <li>- plan for the development and implementation of the Associate Campus Partnership that highlights the host institution's existing partnerships with other institutions of higher learning and the potential to establish new partnerships; and</li> <li>- a plan for assisting Fellows in securing professional affiliations that demonstrates existing relationships with government agencies, non-profit organizations, and/or private sector companies and the potential to establish new relationships. [10 points]</li> </ul> <p>c) Describe evidence of University's international commitment and programmatic expertise, including academic resources available to participants, including availability of relevant graduate courses, faculty ability to develop new courses or workshops, e.g., Humphrey Fellowship Program Seminar, workshops in leadership, management, negotiation, computer training, etc. that relate to mid-career professionals and Humphrey Fellows' fields. [5 points]</p> <p>d) Describe any lessons learned from similar projects in the past, and any previous work with this program [5 points]</p>	7 pages/25 points
II. Logistics and U.S. Integration	<p>a) Provide a plan for housing (on- or off-campus), shared workspace, computer access, telephones, transportation, and administrative assistance. [10 points]</p> <p>b) Describe availability of and outreach plan with local cultural, professional, and social organizations, and a host/friendship family program in which Fellows could participate [5 points]</p> <p>c) Describe a plan for Fellows to become resources at the university, in the community to promote increased international</p>	6 pages/25 points

	<p>understanding by Americans. Plans for department or university-wide exposure of Fellows via public seminars or public speaking opportunities. [5 points]</p> <p>d) Describe a plan for sustained contact to promote continued collaboration among Fellows, interaction with their U.S. counterparts and with the university as a whole during and after their Humphrey year. [5 points]</p> <p>Greater points will be awarded to materials that are professionally developed and provide greater detail.</p>	
III. Staffing	<p>a) Provide a description of your staffing plan for Coordinator and Academic Advisors including accessibility and time commitment (percentage of FTE) of proposed coordinator; relevance of proposed coordinator's experience/credentials (minimum Masters' degree required, Ph.D. or other related terminal degree preferred) to suit program needs; plan for appointing an interim coordinator, in the event that the proposed coordinator becomes unavailable during the course of the grant period. [10 points]</p> <p>b) Describe a plan for matching each Fellow with a suitable academic advisor/mentor. [10 points]</p> <p>c) Include a list of your proposed staff and include the CVs of each proposed staff member. Each CV must be no longer than two pages in length. The CVs should be included in the Appendices. [5 points]</p> <p>Higher points will be awarded for presentation of staff with stronger qualifications and experience in managing work similar to what is stated in this RFP.</p>	2 pages (for points a and b) and two pages maximum per CV (should be included in the Appendices)/25 points
IV. Cost Proposal	IIE's review of the cost proposal shall determine if the overall costs proposed are realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror's technical proposal.	25 points

Please Note: IIE reserves the right not to evaluate a non-responsive proposal. The issuance of this solicitation does not in any way obligate IIE to award a contract. Organizations are responsible for all costs incurred for the preparation and submission of their proposals. IIE reserves the right to reject any and all offers.

#### REVIEW OF PROPOSALS BY INCUMBENT UNIVERSITIES

Proposals submitted by universities that are currently serving as host campuses for the Humphrey Fellowship Program will be evaluated based on the review criteria listed above as well as past performance as a host for Humphrey Fellows.

In addition, incumbent universities are required to address the following two points:

1. Please discuss the most critical lessons you have learned in implementing the Humphrey Fellowship Program on your campus;
2. Please propose an external entity (professional membership organization; not-for profit or privately held company; other) that could serve as a close partner in providing opportunities for joint engagement with Humphrey Fellows.

An additional two pages may be added to the narrative to discuss these points, if needed.

#### SECTION 6: ANNUAL RENEWAL

Annual Renewal: Selection(s) may be renewed annually, at IIE's sole discretion, for up to five years before re-competition. IIE reserves the right to exercise any one of the following options:

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

## **ATTACHMENT A: PROGRAM DESCRIPTION**

### **Hubert H. Humphrey Fellowship Program**

The Hubert H. Humphrey Fellowship Program, a Fulbright exchange, enhances leadership among international professionals who collaborate to address local and global challenges and foster change for the collective good. Through academic study and professional development with U.S. counterparts, this growing global network shares best practices and builds expertise in fields of critical importance to advance societal and institutional capacity, promote human rights and freedoms, ensure sustainable environments, and develop thriving communities. Nominated by U.S. Embassies or Fulbright Commissions, Humphrey Fellows are selected through competitive review based on their potential for leadership, commitment to public service and professional expertise.

The ten-month, non-degree program provides an excellent opportunity to enhance the international orientation of your campus. Humphrey Fellows are placed in cohorts of approximately 12 Fellows representing different countries and regions of the world. Over the course of an academic year, they bring a wealth of experience and perspective to share with faculty, students, and the university community at large. Moreover, the relationship between your university and Humphrey Fellows continues long after the program ends. Each host campus is encouraged to maintain ties with its annual cohort of Humphrey Fellows, as well as make use of the overall Humphrey alumni group now numbering more than 6,500 professionals. Overall program design may change following the initial year, based on programmatic and policy needs, and in consultation with ECA.

The program also offers pre-academic English language training (varying from two to four months in length) to incoming Fellows who are otherwise strong Humphrey candidates but need improved English language skills to benefit fully from the Humphrey experience. These programs are hosted by institutions selected through a separate competition. The availability of English training as a program component extends the reach of recruitment for the Humphrey Fellowship to non-traditional, non-elite candidates who may not have had the benefit of previous substantial English language study. Upon successful completion of the English language training program, the Fellows travel directly to their academic-year host universities.

### **Who is a Humphrey Fellow?**

Humphrey Fellows are exceptional ambassadors from their countries who have demonstrated leadership, and strong potential for greater leadership, as well as a commitment to public service, whether in the public, private, or non-profit sector. Selected each year from a pool of over 5,000 initial online applicants from more than 130 countries throughout the world, Fellows have undergone two competitive review processes before arriving on the host campus. The first review is conducted at the U.S. Embassy level in their home country and the second one in Washington, D.C. by independent reviewers who are experts in the program's fields of study. Humphrey Fellows have at least five years of professional work experience in addition to a bachelor's degree (or equivalent) or higher-level degree.

In addition to what Humphrey Fellows will gain from their year at the host university, they have much to offer to the academic and wider communities. They are eager to impart their diverse experiences to their American counterparts and to build and sustain friendships and working relationships, both personal and professional. Fellows participate in volunteer activities to "give back" to their American host communities, such as giving presentations about their home countries or professional fields to students and community groups, starting scholarships at local schools, helping build houses with Habitat for Humanity, and other similar activities.

Additionally, long-term evaluation of the program has shown that 61% of program alumni return home and work in government in some capacity; 46% have developed national policies, created national programs, served as national trainers, and advised government officials on legislation in their home countries; and more than 80% have introduced new best practices and innovative management methods into their organizations back home.



### **The Goals of the Humphrey Fellowship Program:**

- Establish and enhance long-lasting productive partnerships and relationships between U.S. citizens and individuals from other parts of the world;
- Develop leaders whose knowledge and skills have been informed by exposure to American values, models and ideas – leaders who will have a multiplier effect on their society;
- Expand and improve the range of international exchange and training programs; and
- Increase U.S. citizens' knowledge and understanding of international issues and of other cultures and societies.

### **Humphrey Fellows in the Field of Educational Administration, Planning and Policy**

Universities responding to this RFP for Educational Administration, Planning and Policy must have the capacity to host Fellows in these fields, which may be interpreted very broadly.

Appropriate candidates include individuals who contribute to national or regional education policy and hold administrative positions at institutions of higher education, non-profit organizations, or government ministries. Candidate profiles could comprise technical areas of education such as: curriculum development, instruction and learning assessment techniques, higher education and academic affairs, program design, adult learning, teacher training, and vocational/technical education programs. These individuals may also be teacher trainers and master teachers in the field of Teaching English as a Foreign Language if they also have additional responsibilities in the areas above. University professors with an exclusively academic focus are not suitable; however, university professors in administrative or policy-making positions are eligible.

To help Offerors envision a representative cohort of Humphrey Fellows, we have compiled the following sample cohorts with biographies modeled after recent Humphrey Fellows. Please keep this range of professional experience in mind and use these typical Fellows as examples in outlining/writing your proposal narrative. For example, what would the Humphrey Seminar look like if these Fellows were the participants?

**Niger** - Fellow A is Head of the Girls' Education Department in the Ministry of Secondary and Higher Education. Her program areas and interests include K-12 education, gender, equity and access to education issues as well as community participation.

**Saudi Arabia** - Fellow B is an information technology and e-learning specialist in the Ministry of Educational Supervision. His program areas and interests include the use of technology in education and e-learning.

**Turkey** - Fellow C is the Deputy Director of the Metin Sabanci Rehabilitation Center. Her program areas and interests include educational psychology, early intervention, infant disabilities and early childhood learning activities.

**Pakistan** - Fellow E is principal of an all-girls' high school located in Lahore. Her program areas and interests include girls' education, competitiveness, staff development, standards, assessment and accountability and cultural diversity.

**Moldova** - Fellow F is an associate professor at Tiraspol State University. His program areas and interests include higher education policy, research and development policy and project management.

**Mexico** - Fellow G is senior education officer, Ministry of Education. Her program areas and interests include tertiary education, teacher training and identifying training needs.

**Vietnam** - Fellow H is vice director of student services at Vietnam National University. Her program areas and interests include student affairs, higher education management and community education.

### **University Placements**

The university serves as the Fellows' academic and professional base. The Humphrey Fellowship Program is hosted by an academic unit of the university based in the predominant field, but Fellows should have access to a broad spectrum of resources across campus. Fellows are assigned in geographically-diverse groups of approximately 12 individuals to the most appropriate host institution based on field and specific area of interest. The university designates a campus coordinator, usually a member of the faculty or administration, to oversee the Humphrey Fellowship Program at each university.

U.S. host universities are selected through a competitive bidding process. Selection is based on the institution's ability to offer specialized non-degree programs for a diverse and increasingly interdisciplinary group of Fellows in one or more of the designated professional fields.

### **Non-degree Nature of the Program**

The Humphrey Fellowship Program is a non-degree program focused on professional development. Fellows should be strongly encouraged to audit or limit the number of credit courses they enroll in, in order to leave adequate time for the Humphrey Fellowship Program components below, as well as other professional development and cultural enrichment activities.

### **Humphrey Fellowship Program Components**

**1. Individual Program Plan:** Fellows prepare their individual program plans shortly after arrival at their host campus. They are assisted by the campus coordinator or advisor. The plan details Fellows' goals and objectives for the year, including courses, seminars, special projects, professional development, and community activities.

**2. Humphrey Seminar:** As a core part of the Fellowship, Humphrey Fellows are required to attend a special, weekly, year-long Humphrey Seminar organized by the coordinator and university faculty. The seminar serves as an introduction to many aspects of U.S. society and culture and includes topics related to the Fellows' professional fields. The seminar provides an opportunity to develop leadership skills and to share ideas and approaches to problems encountered by Fellows in their home countries.

### **3. Humphrey Fellowship Program Workshops and Seminars, organized by IIE:**

- **The Global Leadership Forum:** Takes place in the fall in Washington, D.C. and provides an introduction to U.S. institutions, federal agencies, and international organizations. Fellows meet with representatives of key organizations, participate in sessions on leadership and professional development, and make professional contacts. They also meet Fellows from all other host campuses and make plans for continued interaction with them during and after their Fellowship year. All Fellows are required to attend the five-day Global Leadership Forum. Costs associated with the Fellows' participation are paid by IIE.
- **Enhancement/Professional Workshops:** Lasting four or five days, they are offered late winter through early spring. Although not mandatory, these workshops provide opportunities to visit professional sites, meet and interact with professionals in the field, and develop professional contacts. Fellows are required to pay travel, room and board, and a nominal registration fee. Note: 2024 Enhancement Workshops may also be made available on a virtual basis.

**4. Short-term Professional Development Activities:** During the Humphrey Fellowship year, Fellows are expected to devote considerable time to short-term professional development activities off campus. Should local health and safety guidelines permit, such activities may include, making site visits to organizations of professional interest, attending conferences, and meeting with U.S. experts and professionals in their field. IIE provides Fellows with additional funds for professional activities.

**5. Six-Week Professional Affiliation:** Fellows are expected to spend at least six weeks (30 working days or 210 working hours) working with a U.S.- based organization in their professional field. Fellows identify the organizations most relevant to their interests and most likely to be receptive to their inquiries in consultation with the university coordinator or faculty advisor. The professional affiliation may take place at any time during the Humphrey Year. It may also follow a flexible schedule, for example, one or two days per week throughout the year; three weeks in January and three in May; six weeks in May-June at the same organization/institution. Fellows are provided with additional funds to be used towards this and other professional activities.

**6. Involvement in Community Activities:** An important goal of the Humphrey Fellowship Program is contributing to mutual understanding with citizens of the United States by participating in community and professional activities. Campuses introduce Fellows to an American host/friendship family who might help Fellows settle in and provide hospitality on such occasions as Thanksgiving and Christmas, and/or invite the Fellow to accompany them to a local event, a Rotary or school meeting, a football game, a concert, or on a weekend outing. Fellows are also encouraged to make presentations about their countries and their work to the university and other communities.

**Program Timeline (based on a traditional year – timeline may be adjusted if prevailing circumstances warrant)**

April – June	Fellows report to IIE-sponsored English training, if necessary
August	Fellows arrive at universities
September – October	Fellows prepare individual program plans, receive campus visits by IIE staff
Late October	Global Leadership Forum in Washington, D.C.
Mid-March	Deadline for finalizing professional affiliations
Late April or early May	Year-end programming takes place on campus
Mid-June	Humphrey Fellowship Program ends
Throughout the Fellowship year	<p>Fellows take courses at the host campus</p> <p>Fellows participate in the year-long weekly Humphrey seminar</p> <p>Fellows identify and participate in professional development activities</p> <p>Fellows work for at least six weeks with a U.S.-based organization at their professional affiliation</p>

## Responsibilities of the University Coordinator

The selected university appoints a Humphrey coordinator who administers the Humphrey Fellowship Program on campus and serves as the bridge between Fellows, the university community, professional colleagues, IIE and the U.S. Department of State. The coordinator, generally a highly respected faculty member or university administrator, guides, counsels, and assists the Fellows and has overall responsibility for the Fellows at his/her institution. Any change in coordinators must be approved by IIE and the Department of State.

A coordinator is typically a seasoned university faculty member or administrator with international experience and interests. Many Humphrey coordinators have spent time living and working abroad. Serving as a Humphrey coordinator is a way to continue that international work, but in the United States. The rewards are numerous, including establishing long-lasting ties with Humphrey Fellows from many countries and every region of the world.

The coordinator's specific responsibilities include:

**Individual Leadership/Professional Development Plan:** Assisting Humphrey Fellows in developing individually tailored ten-month programs of academic and professional experiences directly related to the needs of each Fellow.

**Fellows as Resources:** Promoting Fellows as local resources: a) to increase international understanding among Americans; b) to provide professional expertise at the institution and in the community; and c) to participate in community activities. Coordinators should facilitate volunteer activities in the community for individuals or groups of Fellows.

**Academic Adviser/Mentor:** Appointing an academic adviser/mentor for each Fellow, assuring a good match between the skills and background of the Fellow and the specific interests of the faculty member.

**Integrated Program Components:** Organizing a year-long, weekly, Humphrey Seminar which includes topics related to the program's goals, the Fellows' professional fields, and the development of Fellows' leadership skills. Developing and improving the Associate Campus Partnership.

**Special Training:** Arranging professional skills training for Fellows, as necessary, and organizing workshops on relevant topics, such as management, negotiation skills, research methodology, introduction to statistical analysis, etc. These special workshop topics may also be integrated into the Humphrey Fellowship Program Seminar (see above). Coordinators should anticipate the potential need for Fellows' access to English language resources in some cases.

**Professional Activities:** Assisting Fellows to make contact throughout the academic year with other faculty and professionals from appropriate organizations at the local and national levels. Recommending and arranging professional activities such as conferences, site visits, and meetings with specialists and experts. Encouraging Fellows to develop joint projects with faculty, advanced graduate students, or professionals in the community that could continue after the Fellow returns home.

**Professional Affiliations:** Helping each Fellow arrange a professional affiliation of at least six week's duration with an appropriate and relevant U.S.-based organization. (IIE provides Fellows with stipend support; no cost is incurred by the affiliation host.)

**Community Resources:** Providing a "host/friendship" family for each Fellow and introducing Fellows to local organizations and individuals that may provide professional networking opportunities.

**Logistics:** Arranging an orientation to the Humphrey Fellowship Program, campus and community, and providing complete logistical support throughout the year (e.g., arrival assistance at local airport, assistance in registration, securing adequate housing); providing on-campus work resources for the Fellows: office space, computer facilities, individual email accounts, telephone, photocopy machine, fax, etc.

**Program Support Staff:** Appointing and working with an assistant coordinator who helps the coordinator secure the resources the Fellows need for a successful Fellowship year. The assistant coordinator often serves as the "frontline" for daily program-related procedures and provides logistical support for program activities on campus.

**Campus Liaison:** Serving as liaison within your campus community to facilitate Fellows' access to campus resources and services. Ensuring Fellows understand the university's code of conduct and their responsibility to adhere to university policies.

**Liaison with IIE and Incident/Emergency Response:** Maintaining regular contact with IIE, consulting on key issues as needed and contacting IIE within 24 hours concerning any situation that presents possible serious legal, medical, or media issues for a Fellow or the program. Monitoring the overall health, safety, well-being, and program activities of each Fellow throughout the year, assisting Fellows in the event of an emergency, and overseeing any adjustments or changes to the program that may be needed to ensure the well-being of the Fellows and maintain the continuity of program and progress toward program objectives. Ensuring all Fellows know who to contact and what to do in the event of an emergency. Facilitating any changes to the program needed to respond to campus, local, national, or global events that may impact the ability to conduct program activities.

**Health Insurance:** All Humphrey Fellows have health benefits coverage through the U.S. Department of State-administered Accident and Sickness Program for Exchanges (ASPE). Please ensure that the ASPE coverage will meet your university's minimum requirements for international students. If not, the cost of purchasing the university Student Health Insurance Plan for each Fellow can be covered by the grant when required by the university. Please provide assistance as needed with any health or insurance issues and submission of claims.

**Humphrey Brochure/Website:** Publishing an annual website section that introduces the Fellows and the campus Humphrey Fellowship Program and acknowledges U.S. government sponsorship through the U.S. Department of State. Any print, web, and social media publications related to the Humphrey Fellowship Program must also adhere to ECA's [branding guidelines](#).

**Reports:** Submitting two narrative reports to IIE, one at mid-year, one at the end of the year, assessing the progress of each Fellow in meeting his/her program objectives and in participating in program activities. The reports also describe activities undertaken by the institution in response to program goals (e.g. orientation, special workshops, trips, etc.).

**Publicity:** Promoting the Humphrey Fellowship Program on the university campus among faculty, administrators and students, both undergraduate and graduate, and to relevant individuals and groups in the community.

**Dependents:** When warranted, assisting Fellows with required paperwork to bring their dependents to campus.

**Year-End Ceremony:** Arranging a year-end ceremony on campus in late spring that marks the conclusion of program activities.

**Coordinators' Workshop:** Attending the annual workshop, organized by IIE for all university Humphrey coordinators, in May. Expenses are covered by IIE for the coordinator and associate coordinator to attend.

(Note: A *Coordinators' Manual* describing these responsibilities in detail is provided by IIE.)

### **Guidelines for the Organization and Structure of the Humphrey Seminar**

The Humphrey Seminar should be a major component of the Humphrey Fellowship Program on your campus. While the specific content may vary on each campus depending on the professional field(s) of your cohort, please keep in mind the following guidelines as you organize the seminar for your Fellows:

1. The seminar should meet at least once per week. Many campuses have found it advantageous to include in the time slot a half hour at the beginning or the end for "housekeeping" matters (announcements, distribution of paperwork, etc.).
2. The seminar should meet for the entire year and Fellows are required to attend all sessions.
3. The seminar agenda should include topics related to the program's goals, which are stated below:
  - Establish and enhance long-lasting productive partnerships and relationships between U.S. citizens and individuals from other parts of the world;
  - Develop leaders whose knowledge and skills have been informed by exposure to American values, models and ideas – leaders who will have a multiplier effect on their societies;
  - Expand and improve the range of international exchange and training programs; and
  - Increase U.S. citizens' knowledge and understanding of international issues and of other cultures and societies.

4. Allow each Fellow the opportunity to make a presentation to the group throughout the course of the year. The presentation may be on his or her country or profession, in response to a speaker or on a topic of his/her choice. Or a Fellow may identify and bring in a relevant speaker. However, each Fellow should make an active contribution to the content of the seminar at some point.
5. Many campuses have also found it useful to intersperse site visits and outings throughout the course of the year-long seminar in order to model networking skills for Fellows and to introduce them to professionals in the community who may broaden their perspectives on their Fellowship year.
6. Consider developing different approaches and themes for the fall and spring semesters of the seminar. Many coordinators have found that the development of the Fellows personally and professionally differs the first semester from the second and they have structured the seminar accordingly.
7. Seminars must maintain a non-political character and should be balanced and representative of the diversity of political, social, and cultural life in the United States and abroad. 'Diversity' should be interpreted in the broadest sense and encompass differences including race, color, national origin, sex, age, religion, geographic location, socio-economic status, disability, sexual orientation and gender identity. Seminars should demonstrate how diversity will enhance the program's goals and objectives and the participants' exchange experience.

**The seminar agenda should also include topics related to the following:**

**Fellows' professional fields:** Consider surveying your Fellows at the beginning of the year and again mid-way through on topics they would like to learn more about. The common results of this survey can form the basis for a significant portion of the sessions. Many campuses have also asked Fellows to identify and recruit speakers for specific seminar sessions. (This is most often done in the latter part of the year after Fellows have had the chance to make some contacts in the community.)

**American culture and society:** Fellows should have the opportunity to learn more about the culture in which they will be spending the next ten months. A portion of the seminar should be devoted to discussing relevant aspects of American history, U.S. current events, and U.S. values and cultural practices. The seminar should also provide a forum in which Fellows feel comfortable asking general questions related to their stay in the United States.

**Community service:** Fellows should be introduced to the concept of community service and the notion of giving back to their community. This may be an unfamiliar concept for many Fellows but one that holds value in the United States. One to two group community service activities should be organized per semester, at minimum, with additional information given to Fellows about how they can volunteer on their own, if they wish.

**Development of leadership skills:** Fellows are emerging leaders in their countries; therefore, particular importance should be placed on engaging Fellows in activities that help develop their capacity to lead. This can be done by bringing in outside speakers to discuss an aspect of leadership and by asking individual Fellows to take the lead on planning an activity for the group. Another approach is to plan a series of skills-building sessions on leadership for the group, such as on conflict resolution, networking, managing organizational change, project management, communication, creative leadership, or any other topics that would be compatible with their fields of study.

### **Associate Campus Partnership Component**

The Associate Campus Partnership aims to establish long-term alliances between Humphrey host campuses and other colleges, particularly underrepresented and underserved universities, community colleges or minority-serving institutions (MSIs). The associate campus should serve students who may not have opportunities to work with international visitors like Humphrey Fellows. These alliances benefit both institutions, as well as offer Humphrey Fellows opportunities to engage with diverse faculty, students, and Americans beyond those of their host campuses.

Your proposal must include a plan for incorporating an associate campus into your program. The plan should contain the following:

- A statement outlining the purpose of the partnership and how it supports the goals of both institutions.
- A description and tentative schedule of activities the Fellows will engage in with students and faculty, including one or two collaborative projects undertaken by both institutions to strengthen institutional linkages.

- An overview of volunteer activities in the associate campus community.
- An estimate of funds needed to support the partnership (included in the proposal budget).

Sample Timeline of Activities for Associate Campus Partnership between X University and Y State Community College:

*September*

**Introduction to Community Colleges** - The Fellows will engage in a presentation and discussion regarding the role of community of community colleges in America and the opportunities they provide.

*October-November*

**Panel Discussions** -

- At the community college, the Fellows will participate in a panel discussion centered on their own professional roles and native cultures. The panel discussion will include administrators, educators, and students from the college community.
- **Branch Campus Visit** - A site visit to the branch campus furthers the exposure of the Fellows to education in rural America and allows for professional exchange with rurally-located education practitioners. The Fellows will participate in a panel discussion centered on their own professional roles and native cultures. The panel discussion will include administrators, educators, and students from the college community.

*January-February*

**Classroom Exchange** - The classroom exchange aspect of the associate campus allows for Fellows to actively participate in courses at the college. In the classroom, they will be provided with the both the professional interactions with educators and the personal interactions with students.

**Presentations in the Field of Expertise** - The Fellows will present on their functions as practitioners to members of the relevant department at the college.

*March-April*

**Community Exchange** - At the college, the Fellows have the opportunity to engage in dialogue with the various associated community organizations. The Fellows will engage in discussions regarding international cultural exchange with Rotary Clubs and local organizations.

**Consortium Exchange** - Fellows present and interact with students and faculty from area and regional community colleges in the system.

## **ATTACHMENT B: COST PROPOSAL/BUDGET TEMPLATE**

### **Guidelines for the Budget and Budget Narrative**

**The maximum total request for the proposal should not exceed \$235,000 for 10 Fellows.**

**IMPORTANT NOTE: This budget represents how much it would cost your university to host a group of 10 Humphrey Fellows for a program year.** IIE provides Fellows with a monthly maintenance stipend intended to cover housing, transportation, meals and other daily costs. They also receive allowances for professional activities, books and supplies, and settling-in expenses. These costs **should not** be included in the university's budget.

Please submit a detailed budget in the subaward budget template provided by IIE. The budget submission must be in Excel. Guidelines on how to allocate costs in each budget category are below. Additional guidance is also included in the subaward budget template.

A detailed Budget Narrative that explains how costs (including cost share) were calculated for each line item is also required.

### **Notes on Specific Items of Cost**

IIE must calculate tax withholding for all eligible participant support costs. As a result, costs that are specifically attributable to Fellows must be separated from general programmatic costs. In the submitted budget, costs for Fellows must be included in the "Humphrey Fellows" column and general program costs must be included in the "General Program" column.

**Salaries** – Identify staffing requirements by name and title. A concise description of each person's duties must be included in the narrative. In accordance with 2 CFR 200.430(h)(2), please also include the percentage of FTE that will be spent on the Program. It will also be useful to explain the FTE in the budget narrative. Compensation for graduate students should also be included in this category. These costs should be listed in the General Program Costs column.

**Fringe Benefits** – Fringe benefits must be listed separately from salaries. Please specify the rate being used for each employee. Fringe benefit application must be consistent with the university's most recent fully executed Negotiated Indirect Cost Rate Agreement. These costs should be listed in the General Program Costs column. Please also include a link to where the budgeted NICRA rates are listed on your university's website.

**Travel and Transportation** – All ground transportation, lodging, and meals (related to travel) must be included in this category. Please specify to which activity the travel costs apply in the budget. Costs for Fellows should be included in the Humphrey Fellows column and costs for all other travelers should be included in the General Program Costs column. Group meals that are not related to travel for a specific trip should be included in the Other Direct Costs section.

For example:

**Associate Campus Partnership** – ground transportation  
**Meetings and Professional Development Site Visits** – ground transportation  
**New York Trip** – lodging  
**New York Trip** – ground transportation  
**Year End Workshop** – ground transportation

**Supplies** – Supplies for university staff/faculty or for general programmatic use, including the printing of the program brochures, should be listed in the General Program Costs column. Supplies that are purchased specifically for the Fellows' use, and that will not be used again in future years, should be included in the Humphrey Fellows column.

**Business Cards** – Business Cards should be included in the Supplies category in the Humphrey Fellows column.

**Other Direct Costs** – Most expenses will be included in this category. Please see guidelines for specific items of cost below.

- **Tuition** - Tuition must be described in terms of the per-credit cost and the total number of credits allowed per Fellow.



Please also specify whether or not these are out-of-state, in-state, or otherwise reduced tuition rates. Please also include a link to where the budgeted tuition rates are listed on your university's website. These costs should be included in the Humphrey Fellows column.

- **University Fees** - University fees, such as computer and recreation fees, must be listed individually in the budget. Please also include a link to where the budgeted fees are listed on your university's website. These costs should be included in the Humphrey Fellows column.
- **Speakers'/Presenters' Fees** – Please specify any fees or honoraria that you plan to provide to guest speakers in this line item. Compensation for university faculty should only be included in the Salaries category. These costs should be included in the General Program Costs column.
- **Group Meals and Refreshments** – Meals and refreshments for all programmatic activities should be included in this line item. You should provide specific amounts for each activity, including Orientation, Humphrey Seminar, Graduation/Certificate Ceremony, Associate Campus Partnership, Year End Workshop, etc. Please also specify your estimated headcount for each event and allocate accordingly in the General Program Costs (for all non-Fellow attendees) and Humphrey Fellows columns.
- **Cultural Activities** – Cultural activities that will not take place during orientation, a mid-year retreat, or the year-end workshop/retreat should be clearly noted in the budget narrative and will require approval from IIE. You will need to include a rationale for the programmatic purpose of these activities in the narrative. In general, Fellows should use their stipend to cover the costs of cultural activities throughout the year. Please note that “entertainment” costs, as defined in 2 CFR 200, are an unallowable expense. As there can sometimes be confusion between what is considered entertainment and what is considered a cultural activity, please consult with your university's Office of Sponsored Projects to seek clarification on the university's policy for cultural activities. The Fellows' portion of these costs should be included in the Humphrey Fellows column. Costs for non-Fellows to participate should be included in the General Program Costs column.
- **Facility and Equipment Rentals** – This line should include A/V and other rental costs associated with using outside facilities. You should provide specific amounts for each activity either in the budget or in the budget narrative. These costs belong in the General Program Costs column.

**Indirect Costs** – Please specify the base and the rate being used. Indirect cost application must be consistent with the university's most recent fully executed Negotiated Indirect Cost Rate Agreement (NICRA). These costs should be listed in the General Program Costs column. Please also include a link to where the budgeted NICRA rates are listed on your university's website.

#### **Cost Share and In-Kind**

IIE encourages cost sharing, and the amount of identified cost share must be reasonable, allowable, and allocable to the program and in accordance with 2 CFR 200.306. For auditing purposes, the amount must be tracked and supporting documentation must be available upon request. A detailed explanation of cost share must be included in the budget narrative. Any tuition, fees, and indirect costs that are cost shared must be verifiable; please provide a copy of your university's NICRA as well as a link in the budget narrative to where your university lists its tuition and fee rates.

Please note that, while encouraged, cost share is not mandatory. Cost share will be taken into consideration as a part of “cost proposal” evaluation listed under “Evaluation of Proposals” criteria in Section 5 above.