

## Request for Proposals (RFP)

To: Interested Organizations  
From: Institute of International Education, Inc. (IIE)

### Request for Proposals to Host 2023-2024 Humphrey Fellowship Program Enhancement Workshop

RFP Issue Date: September 14, 2023  
RFP Closing Date: November 10, 2023  
RFP Closing Time: Midnight, Eastern (Washington, DC) Time  
Performance Period: February 2024 – July 2024

Enclosed is a Request for Proposal (RFP). The U.S. Department of State has asked IIE to invite qualified U.S. organizations, including academic and professional institutions, to submit a proposal to host a **2023-2024 Humphrey Fellowship Program Enhancement Workshop**. The award will result in a **Cost-Reimbursable Contract Agreement** that serves the Humphrey Fellowship Program.

Organizations 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 organization whose offer most comprehensively addresses the cost, functionality, and other factors as specified in this RFP.

The required services are described in **“Section 1: Background and Purpose.”** 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.”**

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 **Friday, October 20, 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 **Friday, November 3, 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: [eamato@iie.org](mailto:eamato@iie.org). Please send proposals as one complete PDF file. IIE will not accept proposals received by fax.

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## SECTION 1: BACKGROUND AND PURPOSE

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

The Hubert H. Humphrey Fellowship Program 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 men and women representing 163 countries 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 organizations, including academic and professional institutions, to submit a proposal ***to design and facilitate a short-term Enhancement Workshop for the 2023-2024 cohort of Humphrey Fellows.***

Enhancement Workshops offer Humphrey Fellows opportunities to:

- Discuss major challenges facing the developing world and their home contexts
- Gain practical professional skills and leadership development
- Enhance knowledge of the diversity of the U.S. and global society
- Expand professional networking with American peers and policymakers
- Interact with Fellows in other professional fields and from other campuses

IIE encourages proposals from institutions and organizations that introduce Humphrey Fellows to the full range of American diversity, including institutions and organizations working with underserved, rural and minority populations.

The Enhancement Workshop must be able to accommodate approximately 30-40 Fellows and should be held between February and late March 2023.

Please see additional details in Attachment A.

IIE intends to fund **three to four Enhancement Workshops of up to \$30,000 each** to take place in late February, March, or early April 2023.

### **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.

IIE has offices around the world, including offices in the United States (New York City global headquarters, Washington D.C., Chicago, Denver, Houston and San Francisco) and in other countries (China, Egypt, Ethiopia, Hungary, India, Indonesia, Mexico, Russia, Thailand, Ukraine, and Vietnam).

## **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 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 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/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services>. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the selected organization.

## **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, with 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 your organization, including any participating departments, offices, or partner organizations in the case of joint proposals; address; e-mail address(es) and telephone number(s); and the name of proposed program coordinator. If a non-profit, for-profit, state or local government or independent consultancy, include department/division name(s), name of department Executive(s) that will be involved, and field of proposal. If an institution of higher education, include names of any academic departments or schools that will be involved, name of Dean(s), and academic field(s) of proposal.
2. A *narrative* not to exceed 5 double-spaced pages. Your narrative should provide a plan to implement the program as described in Attachment A including the following points:
  - a) Description of organization;
  - b) Participating departments, offices, schools, and/or external organizations. In the case of joint proposals, include description of partner organization and delineate how responsibilities will be shared;
  - c) Name and qualifications of the proposed administrative planning and support team;
  - d) Evidence of the organization's previous experience implementing similar programs;
  - e) Outline of the proposed workshop agenda with session topics and potential speakers included.
3. A *budget submission* using the provided template and budget narrative
4. *Appendices* may include:
  - a) A letter of endorsement and financial approval from an authorized official within the organization. For colleges and universities, dean or other university official whose division proposes to host a 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

## 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

Criteria	Requirement	Maximum Length	Points Available
1) Qualifications and Capabilities	Demonstration of qualifications, expertise, and capacity to complete the scope of work.  Staffing plan for the activity and a general overview of the expertise of the individuals included.	1 page	30 points
2) Experience and References	Demonstrated past experience implementing a similar scope of work.	1 page	15 points

3) Implementation of the Scope of Work	Proposed approach to completing the scope of work, including project timeline, relevance of proposed topic for Humphrey Fellows, and proposed workshop components.	3 pages	30 points
4) Cost Proposal & Budget	Budget and narrative should include appropriate, reasonable and allowable costs in order for the work to be performed, reflect a correct understanding of the project requirements, and be consistent with the Offeror's technical proposal.	1 page	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. Offerors are responsible for all costs incurred for the preparation and submission of their proposals. IIE reserves the right to reject any and all offers.

## **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**

### **Overview of the Hubert H. Humphrey Fellowship Program**

The Hubert H. Humphrey Program, a Fulbright exchange, supports approximately 150 international professionals who spend an academic year in thematic cohorts on 13 U.S. campuses, participating in graduate-level study and professional experiences with U.S. counterparts. These cohorts share best practices and build 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.

During the ten-month, non-degree program, 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 a host 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.

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

Humphrey Fellows are exceptional ambassadors from their countries who have demonstrated leadership and strong potential for further excellence, 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 gain from their year at the host university, they have much to offer 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. Through professional collaborations with U.S. host organizations, Fellows have developed and coordinated training programs; conducted impact and market assessments; and contributed to joint research in their fields of expertise, among other professional collaborations. Fellows also 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.

During the Humphrey Fellowship Program year, Fellows may choose to participate in thematic or skill-building Enhancement Workshops. Thematic workshops have a broad focus on a critical global issue; these workshops expand not only the Fellows' expertise around the chosen topic, but help develop their leadership skills through content-rich exercises and discussions. Skill-building workshops equip Fellows with practical skills essential for success in the 21<sup>st</sup> century workplace, positioning them to influence decision-making and policy development within their professional fields in their countries.

## Purpose of this Solicitation

The purpose of this solicitation is to invite qualified organizations, including academic and professional institutions, to submit a proposal **to design and facilitate a short-term Enhancement Workshop for the 2023-2024 cohort of Humphrey Fellows**.

## Eligibility

The following organizations are eligible to apply for this opportunity:

- academic institutions, including two and four-year colleges and universities;
- non-profit organizations;
- for-profit organizations, including corporations and individual consultancies;
- state and local government institutions.

U.S. federal government entities are not eligible to apply.

Joint proposals between eligible organizations are permitted, particularly in cases where entities wish to leverage complementary resources. All joint proposals must designate **one** official entity as the lead administrator of the contract and must delineate how responsibilities will be shared. Academic institutions hosting the 2023-2024 academic year Humphrey Fellowship Program may not apply as sole Offerors nor serve as lead administrators on joint proposals.

## Roles and Responsibilities Overview

The recipient organization will design a **3 to 5 day in-person workshop** for approximately 30-40 Humphrey Fellows that is either *thematically-centered* on one critical global topic OR *focused on the development of specific professional skills*. Proposals must clearly state the thematic topic OR professional skillset the workshop will address.

## Enhancement Workshop Design Guidelines

### Content

The content of thematically-focused workshops should develop and strengthen the participants' understanding of the topical area. It should be accessible to a diverse group of participants. Proposals should build on the Offeror's own skills and expertise and need not deliver an overview of the entire topical area. Previous thematic workshop topics have addressed aspects of sustainable development and climate change, public health challenges, and particular facets of social justice and human rights. Potential thematic workshop topics might include:

- food security
- emergency management
- AI and emerging technology
- climate change, natural resources management and sustainability
- diversity, equity, inclusion and access in management and policymaking

Professional skill-based workshops should be designed to enhance participants' skillsets with the ultimate goal of effectiveness in pursuing policy and positive social change within their own professional fields and careers.

Potential skill-building workshop topics might include:

- data literacy
- grant writing
- digital transformation and ethical use
- people management/teambuilding



- ArcGIS practical training

## Workshop Sessions

Sessions should be designed with the following questions in mind:

- a. How will the workshop build upon and broaden the participants' existing knowledge of the topic area?
- b. How will the workshop connect participants with other professionals confronting similar challenges?
- c. What skills and approaches will Fellows learn to help them confront the issues explored in the workshop?

Offerors should identify appropriate and balanced speakers, in addition to the main facilitator, who will add specialized content to the course.

Sessions should include content relevant for the developing world, including the barriers to inclusion for underrepresented groups. Please include interactive presentations, case studies and activities that elicit discussions about both local and global concerns. This will enable Fellows to frequently engage with each other and the presenters.

## Workshop Implementation

In consultation with IIE, Offerors will be expected to:

- Create, publish, and print relevant workshop materials prior to the start of the event. All costs should be included in the proposed budget.
- Assist in the development of a social media strategy highlighting the workshop.
- Secure meeting spaces for all workshops. Offerors must be willing and able to shift workshops to a hybrid or fully virtual format if necessary.
- Arrange and secure all meals in accordance with participant dietary restrictions.
- Create and submit detailed pre/final draft program agendas to IIE no later than **three weeks** prior to the workshop start date.
- Publish and distribute all relevant workshop material (including final agenda and participant list) to participants prior to arrival or workshop opening session.
- Facilitate Fellow arrivals and departures from workshop venue, including sharing recommendations for transportation and lodging.
- Manage all event logistics, such as checking A/V, room setup, and meals prior to sessions and assisting with room breakdown.
- Arrange for a group photograph at an appropriate location and for candid photographs throughout the workshops.
- Facilitate and monitor all workshop sessions.
- Conduct a final evaluation of the workshop.
- Distribute certificates of participation to all workshop participants at the closing session.

- Submit final program report to IIE by June 28, 2024. At a minimum, the program report should include: the final workshop agenda, a list of speakers, and an overview of the workshop and evaluation results. The final invoice and certified financial report must be sent to IIE by July 31, 2024.

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

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

Offerors may propose budgets up to \$30,000.00 per workshop.

**IMPORTANT NOTE: This budget represents how much it would cost your organization to implement a workshop as described in Attachment A.** IIE provides Fellows with a regular maintenance stipend for living costs and a professional activities allowance to cover travel and hotel costs associated with attending an Enhancement Workshop. Those costs should **not** be included in your budget.

Please submit a detailed budget in the 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.

**Supplies** – Supplies for university staff/faculty or for general programmatic use 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.

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

**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. 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 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. Please note that “entertainment” costs, as defined in 2 CFR 200.438, 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. Whenever possible, Fellows should use their stipend to cover the costs of cultural activities. 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. 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 Contributions**

IIE encourages cost sharing, which may be in the form of allowable direct or indirect costs, as per 2 CFR 200, Subpart E – Cost Principles. The amount of identified in-kind and cost share contributions must be reasonable, allowable, and allocable to the program and in accordance with 2 CFR 200.306. For auditing purposes, the contribution amount must be tracked by the Contractor and supporting documentation must be available to IIE 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.