Request for Proposals (RFP)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: Fulbright Scholar-in-Residence Virtual Pre-Departure Orientation

RFP Issue Date: October 19, 2023
Offerors Questions Submission Deadline: November 13, 2023
Responses to Offeror’s Questions: November 15, 2023
RFP Closing Date and Time: November 22, 2023, 11:59 PM EST
Performance Period: February 1, 2024 - August 16, 2024

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-value proposal for the requested services. The Contract resulting from this award will be a USG Contractor Agreement serving the below mentioned program.

Offerors are encouraged to read this RFP in its entirety (including any and all attachments), paying specific attention to the instructions and requirements included herein. Issuance of this solicitation does not, in any way, obligate the Institute of International Education (IIE) to award a contract, nor will IIE pay for any costs incurred in the preparation and submission of a proposal. The agreement resulting from this RFP will be provided to the most responsive Offeror(s) whose Offer will be the most advantageous to IIE in terms of cost, functionality, and other factors as specified in this RFP.

The required services are described in the “Statement of Work” in Attachment A. IIE encourages your organization to indicate its interest in this RFP by submitting a proposal according to the instructions in “Proposal Preparation Instruction”. Proposals will be evaluated based on the “Evaluation Criteria”.

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

Questions: Any questions are to be submitted in writing via email to the email address listed below no later than 5pm ET, November 13, 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 or about, November 15, 2023, on IIE’s website under Subawards and Procurement (https://www.iie.org/Work-With-Us/Subawards-Procurements).

Julia Brunner, Project Manager
Institute of International Education, Inc.
Email: jbrunner@iie.org

Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: jbrunner@iie.org. Be sure to include in the subject line: Scholar-in-Residence Pre-Departure Orientation. IIE will not accept proposals received by fax.
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SECTION 1: BACKGROUND AND PURPOSE
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. IIE administers the Fulbright Scholar-in-Residence (S-I-R) Program, among many others.

The Fulbright Scholar-in-Residence (S-I-R) Program is a unique Fulbright Scholar Program initiative that is specifically driven by the goals of U.S. institutions of higher education to enhance internationalization efforts on their campuses. Through the S-I-R Program, institutions host a scholar from outside of the United States for a semester or full academic year to teach courses, assist in curriculum development, guest lecture, develop study abroad/exchange partnerships and engage with the campus and the local community.

Purpose of Request for Proposal
The purpose of this Request for Proposal (“RFP”) is to invite qualified individuals and organizations to submit a proposal for the Fulbright Scholar-in-Residence Virtual Pre-Departure Orientation (PDO). The PDO will serve the Fulbright Scholars-in-Residence Program participants (S-I-Rs) who will teach in a diverse set of U.S. institutions of higher education. While they may have lecturing and research experience in their home countries, these international scholars may require additional context for teaching in the U.S. higher education environment. Please see Attachment A for further details.

An estimated cost range for delivering this program is $15,000-$30,000. In determining the cost for this PDO, Offerors should provide accurate estimates based on the scope of work and their costs.

SECTION 2: RFP CONDITIONS
IIE reserves the right to:
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Offeror or other party.
- Accept other than the lowest price offered.
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
- Award more than one contract.

Nothing in this RFP is, or should be, relied on by Offeror as a promise or representation by IIE. IIE does not make any representation or warranty as to the completeness of this RFP or have any liability for any representations (express or implied) contained in, or omissions from, this RFP. This RFP and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Proposal. Each Offeror shall keep the RFP and its contents confidential and shall return the RFP (without keeping copies) to IIE if the Offeror elects not to submit a proposal, or upon being requested to do so by IIE.

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

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

Failure to follow the specifications and requirements provided in this RFP may result in disqualification.

The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the successful Offeror, at

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IIE’s discretion. State Universities and Agencies should not expect or ask IIE to modify its Terms and Conditions to incorporate any State Regulations or Statutes.

**SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS**

Proposals are expected to be comprehensive and include the information set forth below. Offerors are also invited to send any additional information or supplemental material they believe will aid IIE in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought.

Include only your own work and no text copied from sources outside of your organization, unless those sources are adequately cited and credited. In order to be qualified for this RFP, all Offerors are requested to provide the following information, and format their proposal as follows:

1. **Letter of transmittal, one page**

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

3. **Qualifications and Capabilities**
   - Brief description of the organization/entity and experience in the field that illustrates overall services and capabilities to meet the terms of the RFP
   - Years of relevant experience
   - Any plans to outsource/subcontract the services or any part thereof

4. **Past Performance and Experience**

   Document and summarize your proven track record of successfully implementing similar activities. Using the table format provided below, please list only the relevant projects you implemented within the past 3 years, a brief description of how each is relevant to the scope of the RFP, and the contact details for each previous client 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>
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</tr>
</tbody>
</table>

5. **Implementation of the Statement of Work**
   - Detailed description of the services being offered and any information relevant to meeting the technical specifications stated in Attachment A
   - Methodology, and reasoning behind the methodology chosen
   - Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted
   - Implementation of the program should address diversity through session content and speaker selection.
6. Staffing Plan
   - The CVs (including name, contact information, education, experience, and expertise) and a brief biography of the content facilitator(s) and the primary logistical contact.
   - A description of your staffing plan for this activity and a general overview of the expertise of the individuals included. Include a list of your proposed staff in the following format:
     
     **Name:**
     
     **Proposed position on your team:**
     
     **Summary of relevant expertise and experience:**

7. Cost Proposal
   - Submit a detailed cost proposal, in U.S. dollars, in the recommended format shown in Attachment B
   - Include any additional cost items that the Offeror wishes to propose
   - Total cost proposed

**SECTION 4: TERMS OF PAYMENT**

Payment terms for the award shall be approximately net thirty (30) days after satisfactory completion of each deliverable or milestone agreed upon and established in the resulting agreement. Payment shall be made by the Institute of International Education ("IIE") via check or electronic funds transfer/bank wire. The final payment terms in the contract will control, not this RFP. No advance payments will be provided.

**SECTION 5: EVALUATION OF PROPOSALS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
<th>Points Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Program Content</td>
<td>Proposal indicates a practical understanding of implementing a pre-departure orientation for an international audience and employs innovative but realistic ways of delivering session content.</td>
<td>10 points</td>
</tr>
<tr>
<td>Experience and Past Performance</td>
<td>Demonstrated experience implementing a similar scope of work for international visitors or academics.</td>
<td>10 points</td>
</tr>
<tr>
<td></td>
<td>Consideration will be made on the past programs listed in the Past Performance and Experience section.</td>
<td></td>
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<tr>
<td>Staffing</td>
<td>Assessment of staffing plan.</td>
<td>5 points</td>
</tr>
<tr>
<td>Support for Diversity</td>
<td>Proposals must show commitment to promoting awareness and understanding of diversity. This should be evidenced in the content of the required sessions, as well as in the suggested speakers to be engaged during the orientation.</td>
<td>5 points</td>
</tr>
<tr>
<td>Cost Proposal</td>
<td>IIE’s review of the cost proposal shall determine if the overall costs proposed are realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror’s technical proposal.</td>
<td>5 points</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td>35 points</td>
</tr>
</tbody>
</table>
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.
A.1 Program Guidelines
The Subcontractor will perform the following Work:

Overview

1. Host a Virtual Pre-Departure Orientation (PDO) for newly awarded Fulbright Scholar-In-Residence participants. The targeted dates for the PDO are June 4-6, 2024.
2. Convene the orientation via IIE’s Learning Management System (LMS), based on IIE guidance. The Subcontractor will be provided access to the LMS through IIE. Subcontractor agrees to follow all applicable requirements for accessing and using the LMS, including, but not limited to, any terms of service.
3. All sessions are to be presented at a level commensurate with the audience role, university faculty or post-graduate researchers, rather than students.

Audience

S-I-Rs work across departments and curricula in a variety of ways to widely enhance or expand an existing international program, develop new world area studies programs, add an international dimension to existing coursework or provide an opportunity for U.S. students to learn about a particular world region or country. They may be unaccustomed to the U.S. perspective on student/teacher interaction and may have expectations for students that are misaligned with those of the higher education community in the U.S. S-I-Rs will benefit from an orientation that provides context for the U.S. academic environment, from a practical, theoretical and structural perspective. The PDO should provide skills and strategies for managing classes in the U.S. setting. In addition, they may not be familiar with teaching and working at a U. S. minority-serving institution, community college, etc., with their unique educational setting and diverse student populations.

Diversity

1. Design orientation sessions and activities that maintain a non-political character, are balanced to represent multiple perspectives, and are representative of the diversity of political, social, and cultural life of the U.S. and the countries from which the grantees are departing. “Diversity” should be interpreted in the broadest sense and encompass differences including, but not limited to, ethnicity, race, gender, religion, geographic location, socioeconomic status, sexual orientation, and disability.
2. Comply with Uniform Guidance at 2 CFR 200 as applicable.
3. Design and deliver virtual content that will accommodate participants with disabilities according to applicable laws and regulations regarding disabilities.

Required Components and Logistics

1. Design virtual S-I-R PDO sessions according to objectives and list of sessions outlined in Section A.2 (TABLE1). Sessions must:
   a. Prepare participants for a successful experience in the U.S.;
   b. Be delivered in both asynchronous and synchronous formats;
   c. Be interactive and elicit grantee participation in a virtual setting;
   d. Incorporate event management features to help participants build sustainable networks with one another;
2. Select a content facilitator to assist with planning and preparing virtual sessions. The content facilitator will:
   a. Serve as an advisor to orientation speakers and assist with developing a cohesive course;
   b. Provide perspective on how orientation sessions contribute to the overall PDO objectives;
   c. Review synchronous and asynchronous session outlines before submitting to IIE.
   d. Attend synchronous session rehearsals in order to provide feedback to session presenters (the content facilitator’s attendance is not required at final synchronous sessions).

3. Identify and confirm appropriate presenters and facilitators for sessions, in consultation with IIE, according to the Deliverables Timeline. One facilitator may deliver an entire course or various subject matter experts may be sourced to deliver specific sessions. The Subcontractor will:

4. Share program guidelines with presenters and contributors;

5. Communicate with presenters and contributors about the participant profile, exchange experience, and the Fulbright Program;

6. Provide content for the website to IIE, who will then create the website for both asynchronous and synchronous sessions;

7. Communicate with session presenters about monitoring discussion boards/forums and replying to participant inquiries regarding session content; and

8. Submit all proposed speakers to IIE for approval prior to implementation.

9. Plan and deliver asynchronous SIR PDO sessions and materials according to the Deliverables Timeline and the Scope of Work.
   a. Prior to recording and submitting asynchronous session content, the Subcontractor will provide a detailed session outline to IIE for review according to the “Session Outline” template provided by IIE.
   b. After incorporating IIE feedback, the Subcontractor will record, edit, and finalize the production of all asynchronous content.
   c. The Subcontractor will submit final asynchronous session recordings and supplemental materials to IIE for upload to LMS.

10. Plan and facilitate synchronous PDO sessions and materials according to the Deliverables Timeline and the Scope of Work.
    a. Prior to hosting synchronous sessions, the Subcontractor will provide a detailed session outline as well as potential discussion prompts to IIE for review according to the “Session Outline” template provided by IIE.
    b. Presenters will participate in a session rehearsal with alumni panelists and incorporate IIE, ECA, and content facilitator feedback.
    c. The Subcontractor and session presenters will consult with IIE to determine schedule for the delivery of synchronous sessions.
    d. IIE will coordinate the logistical delivery of synchronous sessions and share video conference details with participants and the Subcontractor.

11. Ensure that all virtual content is accessible for participants with disabilities by reviewing the “Checklist for Accessibility of eLearning Content” provided by IIE.

Materials and Correspondence

1. Prepare and submit the following required virtual orientation materials to IIE:
   a. Speaker and staff bios;
   b. Multiple choice assessments to accompany asynchronous sessions (as needed);
c. Discussion board prompt or forum for participants to submit questions to panelists prior to all synchronous sessions (as needed); and

d. Supplemental materials that support session content, such as additional readings on or references on topics being addressed and example classroom activities.

2. Incorporate the following recommended supplementary materials into both asynchronous and synchronous sessions, including, but not limited to, digital handouts and resources, supplemental reading, polling, post-session written reflections, and other materials as needed.

3. Prepare all orientation materials in accordance with the following guidelines:
   a. IIE will provide specific templates and branding guidelines for session materials, including templates for PowerPoint presentations and logos.
   b. IIE shall approve all final orientation materials, including any digital materials bearing the name of IIE, the Fulbright Program, and the U.S. Department of State.
   c. Subcontractor will direct all requests for the use of Fulbright logo to IIE. All orientation materials, including print and digital media, must adhere to the Fulbright Program branding and style guidelines. Materials must also clearly indicate that the Fulbright Program and the orientation are programs of the U.S. Department of State, with funding from the U.S. government, supported in their implementation by IIE and the Subcontractor.
   d. The Subcontractor will credit U.S. Department of State and IIE in all orientation program reports and materials, above the name of the Subcontractor. All electronic materials related to the PDO must reference the U.S. Department of State and IIE as shown below under “Required Language,” which must precede any mention of the Subcontractor.
   e. Required Language: “Fulbright is a program of the U.S. Department of State, Bureau of Educational and Cultural Affairs, with funding provided by the U.S. Government. IIE implements components of the Fulbright Program. This activity is supported by [Subcontractor’s Institution Name].”

4. Consent to all presentations and session materials being digitally available to participants for at least one year. All synchronous sessions will be recorded for future use by IIE and the Fulbright program.

Reporting and Evaluation

1. Prepare and submit the following reports:
   a. A certified financial report and invoice, due within 60 days of completion of the orientation and submitted to Julia Brunner, jbrunner@iie.org. Payment of the final invoice is dependent upon the submission and acceptance of the final certified financial report. Failure to submit a timely financial report may result in forfeiture of payment; and
   b. A narrative program report, due within 60 days of completion of the orientation and submitted to Julia Brunner, jbrunner@iie.org.

2. Prepare and submit additional reports upon request.
## A.2 Fulbright SIR PDO Sessions and Course Structure – TABLE1

<table>
<thead>
<tr>
<th>Module</th>
<th>Session</th>
<th>Session Type / Presenter</th>
<th>Participants Will</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>S-I-R Program Introduction</td>
<td>Welcome</td>
<td>Conducted by IIE and the U.S. Department of State</td>
<td>Hear from the U.S. Department of State and IIE program contacts.</td>
<td>SIRs and Hosts</td>
</tr>
<tr>
<td></td>
<td>Networking</td>
<td>Subcontractor</td>
<td>SIRs connect with each other and their Host institutions using creative grouping and activities. SIRs and Hosts will be given prompts to guide their discussions in breakout rooms and assigned a moderator who is either a Host Alum Mentor or IIE staff member.</td>
<td>SIRs and Hosts</td>
</tr>
<tr>
<td></td>
<td>Grant Benefits and Responsibilities</td>
<td>Conducted by IIE</td>
<td>Understand responsibilities of the J-1 Visa, Fulbright program benefits, and remaining responsibilities for securing the J-1 Visa.</td>
<td>SIRs and Hosts</td>
</tr>
<tr>
<td></td>
<td>Office Hours with IIE Staff</td>
<td>Conducted by IIE</td>
<td>IIE Program staff will hold an open office hour where SIRs and Hosts have the chance to ask administrative and logistical questions about their upcoming grant.</td>
<td>SIRs and Hosts</td>
</tr>
<tr>
<td>Introduction to U.S. Higher Education System and Community</td>
<td>U.S. Education System</td>
<td>Subcontractor</td>
<td>Understand the scope of U.S. higher education in the U.S., including the institutional and student profiles of various institution types, such as minority-serving institution, community colleges, etc. SIRs will lecture at diverse institutions, including: Asian-American and Native American/Pacific Islander-Serving Institutions (AANAPISIs) Historically Black Colleges and Universities (HBCUs) Hispanic-Serving Institutions (HSIs) Native American-Serving, Nontribal Institutions (NASNTIs) Predominantly Black Institutions (PBIs) Tribal Colleges and Universities (TCUs) Community Colleges Small Liberal Arts Colleges Rural colleges and universities</td>
<td>SIRs</td>
</tr>
<tr>
<td></td>
<td>Cross-Cultural Communication</td>
<td>Subcontractor</td>
<td>Understand different communication styles, including classroom communication expectations in the U.S. They will understand the differences between direct/low context communication and indirect/high context communication, and how they may experience these in the classroom and host community. They will gain skills to navigate the new environment.</td>
<td>SIRs</td>
</tr>
<tr>
<td></td>
<td>Diversity in the Classroom</td>
<td>Subcontractor</td>
<td>Appreciate the diversity represented in the U.S. classroom, highlighting first generation college students, in addition to race, gender expression, ethnicity and sexual orientation.</td>
<td>SIRs</td>
</tr>
<tr>
<td>Preparing for Success in Teaching</td>
<td>Technology in the Classroom</td>
<td>Subcontractor</td>
<td>Understand common classroom technology and learn techniques for using technology to enhance instruction.</td>
<td>SIRs</td>
</tr>
<tr>
<td><strong>Maximizing the SIR Experience</strong></td>
<td><strong>Classroom Management</strong>&lt;br&gt;Synchronous - 45 min</td>
<td><strong>Subcontractor</strong></td>
<td><strong>SIRs</strong>&lt;br&gt;Learn about U.S. classroom culture and how it may differ from classroom culture in their home countries, building on cross-cultural communications sessions. Learn strategies for managing a U.S. classroom.</td>
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<tr>
<td><strong>Campus and Community Engagement</strong>&lt;br&gt;Synchronous - 45 min</td>
<td><strong>Subcontractor</strong></td>
<td><strong>SIRs and Hosts</strong>&lt;br&gt;Learn strategies for engagement within the University and in the wider community. IIE will identify SIR and Host Alumni who will speak on a panel about best practices and lessons learned. The subcontractor will identify a moderator for the session. At the conclusion of the session, SIRs and Hosts will walk away with action items to prepare them to effectively engage on campus and in the wider community.</td>
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</table>
| **Telling Your Fulbright Story**<br>Synchronous – 60 min | **Conducted by IIE/Fulbright Communications**<br>This workshop will equip SIRs and Hosts with tools to tell their Fulbright stories through ethical storytelling. | **SIRs and Hosts**<br>SIRs and Hosts<br>Telling Your Fulbright Story<br>Synchronous – 60 min | **SIRs and Hosts**<br>Best Practices, Roles and Responsibilities for Hosts<br>Synchronous – 60 min | **Conducted by IIE**<br>Host representatives will learn from IIE Program Management and Alumni Host Mentors on best practices, roles, and responsibilities for SIR host institutions. | **Hosts**

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ATTACHMENT B COST PROPOSAL TEMPLATE

Submit a detailed, budget for the services described in the technical proposal. IIE’s review of the cost proposal shall determine if the overall costs proposed are: realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror’s Technical Proposal.

A budget template is included as part of the application package. The Offeror may list any cost line items, but it is recommended that the Offeror follow the major categories listed in the template, breaking down all “lump sum” items as much as reasonably possible.

Budget Guidelines

- A line-item budget in Excel format, according to the template, that details all projected program and administrative costs (including estimated indirect costs), as well as a budget narrative, is required as part of the proposal.
- In-kind contributions is strongly encouraged, but not required, and must be allowable (see cost-sharing paragraph below for additional details).
- A budget narrative must be included explaining how the amounts were calculated in the budget summary. It can be submitted in either Excel or Word formats.
- An organization with an audited indirect cost rate (NICRA) negotiated with a cognizant federal government agency should include a copy of the cost-rate agreement as an addendum to the budget. The applicant organization must indicate in the proposal budget how the rate is applied.

In-kind contribution is defined as costs not paid for by Federal Funds and can include such costs as monetary contributions provided in support of the proposal, or in-kind contributions, which include items such as prorated staff time and speaker fees costs that are waived. In-kind contributions may be contributed by the selected organization or by other organizations or institutions. Volunteer hours contributed are also a form of in-kind contribution and a valuable resource. Please include an estimate of the number of volunteer hours that will be donated for the activity in the budget narrative. Selected organizations will be expected (to the best of their ability) to track volunteer hours and include them in their final report. The final report should also include a complete estimate of the In-kind contribution provided and any discounts received by the implementing organization.


The budget (in the Excel template provided) should include detailed information including, but not limited to:

- Technology Costs: Rental and/or production costs.
- Staff Requirements: Identify staffing requirements by each position title and, as necessary, brief description of duties. List annual salary of each position, percentage of time and number of months devoted to project (e.g., Program Coordinator: $30,000/year x 25% x 8.5 months; calculation: $30,000/12 = $2,500 x 25% x 8.5 months = $5,312).
- Administrative Costs: Provide specific information on salaries; postage; telephone; materials and supplies; indirect and overhead costs; other (as described).

Program funds cannot be used for:

- Alcohol, gifts, and the purchase of non-expendable items or equipment, such as computers, office furniture, etc. (must be donated or paid for with non-U.S. Government funds)
- International travel or extensive local travel
- Other unallowable costs per 2 CFR 200- Subpart E
ATTACHMENT C - ADDITIONAL REQUIREMENTS

Third-Party IT Risk Management Process (TPRM)

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

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

- Vendors who cannot furnish IIE with ISO 27001 Certification evidence will be asked to provide a SOC 2 Type 2 attestation and complete a security assessment that is mapped to the National Institute of Standards and Technology (NIST) Cyber Security Framework (CSF). NIST is a guidance, based on existing standards, guidelines, and practices for organizations to better manage and reduce cybersecurity risk. The NIST CSF consists of five concurrent and continuous Functions—Identify, Protect, Detect, Respond, Recover. When considered together, these Functions provide a high-level, strategic view of the lifecycle of an organization's cybersecurity risk management.

- If your organization does not wish to complete this request using the automated OneTrust platform, please visit the “Welcome” screen of the IT Security Questionnaire (using the emailed link from OneTrust) and click “Complete Offline Using Excel” to download the Excel version of the NIST CSF assessment. Please make sure to upload the completed file to OneTrust using the same path and Submit.

Prohibition on certain telecommunications and video surveillance services or equipment

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

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