



Request for Proposals (RFP)

To : Offerors
From : Institute of International Education, Inc. (IIE)
Subject : Fulbright 75th Anniversary Project - Strategic Communications and Web Development

RFP Issue Date : October 2, 2020
RFP Closing Date : October 19, 2020
RFP Closing Time : 5:00 PM EST
Performance Period : November 1, 2020 – December 31, 2021

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-Funded Subcontractor Agreement** serving the Fulbright 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 **5:00 PM EST on October 12, 2020**. 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 **October 14, 2020** 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: thallen@iie.org. IIE will not accept proposals received by fax.

Proposal Timetable

Event	Date
RFP Issued	October 2, 2020
Questions from Offerors	October 12, 2020
Responses to Questions Posted	October 14, 2020
Submission for Deadline for Proposals	October 19, 2020
Semi-finalists receive notification and interview requests	October 21, 2020
Offerors Notified of Decision	October 30, 2020
Anticipated Work Start Date	November 2, 2020

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SECTION 1: BACKGROUND AND PURPOSE

Background: Institute of International Education

The Institute of International Education (“IIE” or the “Institute”) is a New York not-for-profit corporation that is among the world’s largest and most experienced international education and training organizations. Founded in 1919, IIE promotes educational exchange around the world through a wealth of programs and services including Fellowship and Scholarship Management, Higher Education Institutional Development, Emergency Student and Scholar Assistance, and Leadership Development.

For more than 100 years, IIE has promoted educational exchange around the world. The Institute currently implements more than 200 programs benefiting 40,000 participants from 183 countries. Foremost among these programs is the world-renowned Fulbright Program, which IIE has had the honor to administer on behalf of the U.S. Department of State since the program’s inception in 1946. In addition to the U.S. Department of State, program sponsors include: the U.S. Agency for International Development (USAID); World Bank; major philanthropic foundations; private and public corporations; foreign governments; and individuals.

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

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 strategic communications and publicity services as outlined in **Attachment A** in conjunction with the project to celebrate the 75th anniversary of the Fulbright Program - *Fulbright@75: Inspiring the Future of Educational Exchange*.

Project Goals and Objectives

In 2021, the Fulbright Program will celebrate its 75th anniversary and over the course of the calendar year, this project will highlight the legacy and impact of Fulbright in the U.S. and around the world. The project seeks to engage Fulbright networks of alumni and institutions; to highlight the Fulbright program’s innovations over time; and to spotlight the program’s mission of diversity and inclusion. The Fulbright Program will encourage stakeholders in the U.S. and around the world to develop and carry out activities and events relevant to these goals and to utilize 75th anniversary theme and brand guidance.

Summary of Strategic Communications and Publicity Services

The Fulbright Program and the Fulbright@75 campaign is directed by the U.S. Department of State’s Bureau of Educational and Cultural Affairs (ECA), and the selected individual/company will collaborate with ECA and other program stakeholders, including the Fulbright Foreign Scholarship Board (FFSB) under IIE’s direction but in consultation with ECA. The selected company/individual will produce a public relations strategy and an associated implementation plan for all stakeholders to celebrate the Fulbright Program’s legacy and its future impact. IIE will oversee the selected individual/company’s implementation plan. All associated deliverables will be reviewed, approved and cleared by ECA. This implementation plan will follow the communications framework of the Fulbright brand identity (launched in 2019) to develop strategic messaging that will include text, video, multimedia, and marketing collateral.

Strategic Vision for the Fulbright@75 Project

1. The strategy for the Fulbright Program’s 75th Anniversary is a bold approach that cements Fulbright’s position as the global leader in international exchange. It includes a website, which will serve as a hub for the celebratory year; an ambitious communications and social media campaign; virtual and, if/when possible, in-person educational and cultural events. The 75th anniversary campaign will target existing and new audiences in the U.S. and globally, including future applicants, and will aim to positively impact global public opinion of the United States.

2. The Fulbright@75 campaign is forward looking, positive, and highlights Fulbright's achievements and its alumni. Due to the COVID-19 pandemic and associated health concerns, the Fulbright program, an in-person global exchange program, was paused. Following this unprecedented event, and as global exchanges begin to return in late 2020 and 2021, the 75th Anniversary offers a unique opportunity to transform this uncertain, disruptive time into a powerful, inspiring narrative. The 75th Anniversary campaign will capitalize on the benefits of this distinguished program to the world by highlighting Fulbright who fuel innovation, counter mis-understandings, address our most serious global challenges, and tackle the most vexing and intractable problems in every field.
3. Fulbright is the most prestigious global exchange program because of the strength of its global network of stakeholders and alumni. It has maintained its preeminence in the field of exchanges for 75 years because of the support of the U.S. Government and the draw of American higher educational institutions, which both produce and attract the top students and scholars from around the globe. By supporting the education of the world's leading minds, Fulbright is making an investment in the future of American foreign policy. Through their time in the U.S., foreign Fulbright alumni better understand American values and ideals, and successive U.S. administrations are better able to accomplish their key national security goals because of the impact of this experience in the U.S. on the world's leaders. Fulbright alumni possess and share a wealth of cultural understanding and knowledge with their communities about the people, cultures, and traditions of others, and bonds of friendship, commerce, scientific and artistic collaboration, and diplomacy are formed. The program enables U.S. grantees to gain an understanding and appreciation of their host country and culture as well as an informed global perspective, returning to share their experience and appreciation for cross-cultural understanding and global engagement with their home communities.
4. The anniversary provides the opportunity to highlight these Fulbright program strengths. The goal of the celebration is for the Fulbright brand to emerge even stronger, and even more well-positioned to continue offering life-changing intercultural and educational exchange opportunities. The messages for a U.S. and the global audience will emphasize 75 years of bringing people and nations closer together, one connection at a time, toward a more peaceful and prosperous world.
5. The campaign will demonstrate how the Fulbright program advances knowledge and improves lives around the globe. It will show how Fulbright shapes a positive vision for communities and our world. And it will demonstrate that Fulbrighters forge connections and find solutions to global challenges.

In advance of the 75th anniversary and throughout 2021, the selected company/individual will support the organization and coordination of existing deliverables from U.S. and global Fulbright stakeholders, as well as support the creation of new ones. This expectation will be achieved through the creation, coordination, and use of meaningful and compelling social media content, activities, and educational opportunities that will have broad or targeted appeal and which will be focused on varied, diverse audiences. The selected company/individual will cooperate with program collaborators, partners, and stakeholders, including the Fulbright Foreign Scholarship Board (FFSB), U.S. Embassies, Fulbright Commissions, U.S. universities, Fulbright alumni associations, cooperating organizations, and our strategic partners, such as the University of Arkansas, Smithsonian, and National Geographic.

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 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 individual experience/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
- Capacity and resources to undertake work in the field of web design and micro-site creation
- Capacity and resources to undertake strategic communication projects aimed at raising an organizational or program profile during a commemorative year (anniversary, celebration of a milestone, etc.)

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.

#	(a) Name of Organization	(b) Activity Title	(c) Locations of activity	(d) Synopsis of the activity and relevance to this RFP	(e) Performance period (date and duration)	(f) Cost for the activity	(g) Name & Contact Info (E-mail <u>and</u> phone)
1							
2							
3							

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
- Quality control plan including:
 - A description of internal review procedures that facilitate high-quality standards
 - How quality control will be managed when completing multiple projects for multiple clients
- Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted

6. Cost Proposal

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

SECTION 4: TERMS OF PAYMENT

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

SECTION 5: EVALUATION OF PROPOSALS

Item	Requirement	Maximum Length	Points Available
1) Methodology	<p>Considering the Statement of Work in Attachment A, please describe in detail the following:</p> <p>a) The steps, in chronological order, that you will take to implement the work. Make sure to describe any innovative approaches or technology you plan to use.</p> <p>b) Why you chose the methodology: make sure to mention similar projects you implemented in the past and lessons you learned from them.</p>	5 pages	55 points

3) Staffing	<p>Please provide the following, in order:</p> <p>a) A description of your staffing plan for this activity and a general overview of the expertise of the individuals included.</p> <p>b) A list of your proposed staff in the following format: <i>Name:</i> <i>Proposed position on your team:</i> <i>Summary of relevant expertise and experience:</i></p> <p>c) Please include the CVs of each proposed staff member. Each CV must be no longer than one page in length.</p> <p>Greater points will be awarded for presentation of staff with greater qualifications and experience in managing works similar that stated in this RFP.</p>	2 pages (a and b) and 1 page per CV	25 points
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.		20 points
Total		7 pages	100 points

ATTACHMENT A. STATEMENT OF WORK

Scope of Work

The selected company/individual will utilize key themes for Fulbright@75 to design and implement a multichannel communications and marketing plan in collaboration with IIE, ECA, and other program stakeholders. The communications and marketing plan should highlight the following:

- The Impact of Fulbrighters
 - Prominent alumni who are successful leaders or have significant accomplishments
 - Alumni positive impact stories, cultural or professional
 - Fulbrighters providing value: addressing challenges and providing solutions
- Fulbright's impact on participants' home and host communities, employers, etc.
- Fulbright's Commitment to Diversity & Inclusion
 - Fulbrighters who are from diverse backgrounds and who have worked, on their grants or in their subsequent careers, to support diversity and inclusion
- Fulbright's Global Network
 - Alumni create lasting personal connections and lifelong professional collaborations
- Youth: Alumni initiative to inform middle/high-schoolers about the program, and opportunities for youth to engage them with Fulbright

Deliverables:

1. Meetings:

- Kick-off meeting and project briefings with Fulbright project committee

IIE will convene a virtual meeting with a small group of key staff from IIE and ECA to provide the selected individual/company with pertinent background information related to the Fulbright Program, the overall goals of the project, and any information relevant to the project, including the Fulbright Brand Manual. IIE, ECA, and the individual/company will discuss and confirm the deliverables and timetable. Following the meeting, the individual/company will provide confirmation, in writing to IIE via email, of the final agreed upon deliverables and timing.

- Regular project update meetings

2. Strategy and campaign development

Develop an overarching campaign that builds from the Fulbright@75 vision and incorporates input from key stakeholders. Fulbright implementing partners and other strategic partners are planning a range of activities which need to be coordinated into a comprehensive campaign strategy. This includes a campaign calendar/timeline, as well as, ideas and templates for how to feature alumni profiles, stories and voices. Develop narrative frameworks and draft messaging for priority audiences including potential applicants, alumni, partners and government stakeholders, the general public, and other constituencies. Special attention should be given to reaching new and underserved audiences targeted in the brand guide. The individual/company should assist ECA in developing foundational documents necessary for Fulbright@75 which may include prominent alumni lists, quotes, press kits, talking points, etc.

3. Publicity campaign collateral and vehicles

Create new marketing collateral that effectively communicates the Fulbright@75 vision. The chief among these deliverables is the support to a website production company for the **Fulbright@75 website** or micro-site to serve as a digital home for all Fulbright anniversary information. Website content should include:

- An interactive program historical timeline with key milestones
- A global event and activity calendar (some content created and organized by individual/company, most content to be provided by partners and edited/curated by individual/company)
- Alumni and participant impact stories
- Notable alumni profiles
- Videos

The selected organizations / individual will be expected to help build out the site and offer editorial and design input. A separate website production company will be responsible for the technical work

Social media posts. Create unique content for Fulbright social media accounts and to contribute to a global social media toolkit for use by the global network of Fulbright stakeholders. Target stakeholder and target new potential partners for collaboration on social media.

Video and multimedia. Produce a range of short feature videos highlighting notable alumni; key themes such as impact, diversity, and lasting connections; and other topics, as prioritized by the program sponsor. Engage with development of short user generated videos, professionally edited, highlighting the impact of Fulbright across a variety of fields/mediums. Coordinate video and multimedia products associated with the campaign, from all stakeholders, to ensure compliance with campaign branding and goals.

Press. Draft press releases and engage media to publicize key events and milestones during the anniversary year. Develop plans and pitch ideas for articles to traditional press and media related to Fulbright, highlighting the anniversary year.

Events promotion. Create a plan to promote events (virtual and in-person) which are organized in conjunction with the 75th anniversary. These events would be organized by program partners or by the individual/company, and will include a number of pre-existing events such as virtual activities and enrichment events hosted by stakeholders, celebratory events on university campuses, events organized by Fulbright stakeholders, etc. The company/individual will ensure that all activities will have a strong virtual component and follow 75th communications guidance, and are advertised effectively and highlighted on the website and/or amplified through social media and other means. Potential events for promotion purposes could include:

- U.S. Events: implementing partners, U.S. colleges and universities, conferences and professional organizations, community and youth engagement, etc.
- Global Events: stand alone activities (or joint commemorations) may be held by Fulbright Commissions, U.S. Embassies, Foreign Embassies in the U.S., partner governments, etc.
- Kennedy Center – Gala in late 2021: alumni performances, virtual component, visual display, additional arts virtual educational activities associated with this event or, possibly, throughout the year (with the REACH and in partnership with Kennedy Center’s online arts educational programming).

Advertisements. Develop both print and electronic ads for a range of print and online publications and social media.

Infographics. Create infographics that highlight program milestones, statistics, program trends, etc. for dissemination through social media – using data from across Fulbright cooperating agencies and partners.

Potential offerors should be familiar with the State Department Bureau of Educational and Cultural Affairs Communications Guidance which is applicable to this scope of work. The Communications Guidance can be found at this link -

https://eca.state.gov/files/bureau/communications_guidance_for_eca_recipient_organizations.pdf. IIE will be responsible for obtaining any necessary approvals from the Department of State.

Offerors may be required to handle Personally Identifiable Information (PII) and other confidential information. Offerors should demonstrate the capacity to manage PII and confidential information in accordance with applicable laws such as GDPR and other laws.

4. Implementation Strategy

The implementation strategy should: 1) provide a written roll-out plan with a timeline and required action items; 2) define specific objectives for target audiences; 3) recommend effective communications channels; 4) set meaningful milestones; and 5) and specify evaluation metrics to ensure the strategy remains effective.

5. Reporting and coordination

The company/individual will deliver a weekly status report in writing to IIE, and/or hold a weekly meeting with IIE. A regular meeting in which the individual/company would brief ECA and identified stakeholders would be set up on a regular basis, as determined by ECA. A calendar and implementation plan for events and activities will be organized and reported on by the individual/company. Upon request by IIE, the firm will provide written reports and/or in-person presentations for key stakeholders. All written reports should be submitted electronically. At the end of the contract, the firm will fully cooperate with any project successors. The firm will transfer to IIE, as directed in writing, all materials and deliverables related to this contract.

Target Project Schedule and Dates of Note:

- Fall 2020
 - Kick off meeting
 - Strategy, organization, and calendar of events and deliverables
 - Website development consultation
- Fall/Winter 2020, coordination of strategy, development of:
 - Website launch
 - Implementation plan
- January 2021:
 - January 1 – website launch
 - FFSB Board Meeting: University of Arkansas
- January/February/March: Virtual Global Kick-off activities
- February: activities around the AIEA Conference in Washington – Top Producer Recognition
- May/June: Graduation Ceremonies on U.S. campuses
 - New Fulbrighters are announced at many ceremonies and thorough campus announcements
- May 30-June 4: NAFSA Conference, Orlando, FL
- July 4th: Opportunity to celebrate at U.S. Embassies
- August
 - August 1, 1946, program signed into law (Hill Announcement)
 - University of Arkansas Archives digitized assets go live
- October: Fulbright Association conference - Achievement Awards
- October/November/December: Potential Date for Kennedy Center Event
- November
 - November 15-19, 2021: International Education Week
 - Open Doors report release
 - HBCU Institutional Leaders Event
- December: End of year virtual closing event

ATTACHMENT B COST PROPOSAL TEMPLATE

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

The following is a format may be used as a guide to assist you in the preparation of the cost proposal. You may submit the cost proposal using this form or in the format of your choice (plain sheets, your own form, or a variation of this form). The Offeror may list any cost line items, but it is recommended that the Offeror follow the major categories listed below, breaking down all "lump sum" items as much as reasonably possible.

Item No.	Description	Quantity	Unit (hours/days)	Unit Price (USD)	Total Price
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

ATTACHMENT C ADDITIONAL REQUIREMENTS

General Information Security questions:

- 1.1 Does your organization have documented information security policies?
1. List applicable polices (e.g., Acceptable use, Incident response, etc.)
 2. How often are the policies reviewed and updated?
 3. How often are these policies distributed?
- 1.2 Does your staff have information security training? If so, how often?
- a) Describe what is covered in the training
- 1.3 Is your staff (including temporaries, contractors, and your outsourced vendors) required to sign a confidentiality agreement?
- 1.4 Do your third-party contracts contain language describing responsibilities regarding information protection requirements?
- 1.5 Describe the screening process for all staff (employees, contractors, vendors, and third-parties)?
- 1.6 What are your procedures regarding staff terminations/separations?
- a) Detail how these procedures prevent unauthorized access to our data.
- 1.7 Please describe your Access Control Policy:
1. Do you maintain an inventory of our assets and are they clearly identified?
 2. What are your procedures with regards to the handling and storage of information assets?
 3. Describe the process by which your staff (including temporaries, contractors, and your outsourced vendors) would be granted access to our data.
 4. Describe the physical security mechanisms that prevent unauthorized access to our data?
- (i) What exterior security is provided (i.e. gates, security cameras, etc.)?
5. Describe how our data that is move to/removed from your premises authorized and controlled? (e.g., backup tapes, document storage boxes, etc.)
 6. Describe your account and password restrictions along with reset requirements for your systems that manage our information assets.
 7. Do you conduct periodic checks on users' accesses to ensure their access match their responsibilities?

1.8 What processes and standards do you follow for incident management (including possible breaches)?

a) Has a dedicated Information Security Response Team been established?

1.9 What processes and standards do you follow for change management?

1.10 How do you protect our data from environmental hazards such as fire, water, etc.?