



## Request for Proposals (RFP)

**To:** Offerors  
**From:** Institute of International Education® (IIE®)  
**Subject:** U.S. Future Leaders Topical Seminars\*

\*IIE anticipates awarding three contracts to institutions across different geographic locations.

**RFP Issue Date:** January 14, 2019  
**RFP Closing Date:** February 25, 2019  
**RFP Closing Time:** 5 p.m. EST  
**Performance Period:** May 1, 2019 – September 30, 2019 (seminar will occur between these dates)

Enclosed is a Request for Proposals (RFP). At the direction of the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA), IIE invites qualified institutions of higher education ("Offerors") to submit a best-value proposal for the requested services. The Contract resulting from this award will be a U.S. government-funded Subcontractor 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**." Final selection will be by the U.S. Department of State.

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. The award ceiling is **\$63,000 per seminar**.

**Questions:** Any questions are to be submitted **in writing** to the email address listed below no later than 5 p.m. EST on February 1, 2019. 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 February 8, 2019 on IIE's website under Subawards and Procurement (<https://www.iie.org/Work-With-Us/Subawards-Procurements>).

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 RE: U.S. Future Leaders Topical Seminars  
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**Proposal Submission:** Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: [gilmanevents@iie.org](mailto:gilmanevents@iie.org). Be sure to include in the subject line: **Proposal — U.S. Future Leaders Topical Seminars**. IIE will not accept proposals received by fax.

#### RFP SCHEDULE

Event	Date
RFP issue date	January 14, 2019
Offerors' question submission deadline	February 1, 2019
Responses to Offerors' questions	February 8, 2019
Proposal submission	February 25, 2019
Anticipated decision and selection of Offeror	March 13, 2019

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## SECTION 1: BACKGROUND AND PURPOSE

### U.S. Future Leaders Topical Seminars

Under the direction of the U.S. Department of State’s Bureau of Educational and Cultural Affairs (ECA), the U.S. Future Leaders Topical Seminars will benefit alumni from two programs offered through ECA’s USA Study Abroad branch. Each seminar will host approximately 75 American alumni from across the two programs. USA Study Abroad is offering these seminars for the first time in 2019 as part of its continued efforts to promote career readiness and leadership among its American program alumni.

### 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 90 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).

### **Benjamin A. Gilman International Scholarship Program**

The U.S. Department of State's Benjamin A. Gilman International Scholarship Program enables students of limited financial means to study or intern abroad, thereby gaining skills critical to our national security and economic prosperity. The merit-based Gilman Program broadens the student population that studies and interns abroad by supporting undergraduates who might not otherwise participate due to financial constraints. The Gilman Program aims to encourage students to study and intern in a diverse array of countries and world regions. The Gilman Program also encourages students to study languages, especially critical need languages (those deemed important to national security and diplomacy), and provides limited additional funding through a supplemental Critical Need Language Award. By supporting undergraduate students who have high financial need, the program has been successful in supporting students who have been historically underrepresented in education abroad, including but not limited to first-generation college students, veterans, students in a wide array of fields, ethnic minority students, students with disabilities, students attending HBCUs or other minority-serving institutions, students attending community colleges, and students coming from U.S. states with less study abroad participation. The Gilman Program seeks to assist students from a diverse range of public and private institutions from all 50 states, Washington, D.C., and all U.S. territories. The Gilman Program is a program of the U.S. Department of State with funding provided by the U.S. government and supported in its implementation by IIE.

### **Critical Language Scholarship Program**

The U.S. Department of State's Critical Language Scholarship (CLS) Program is an intensive overseas language and cultural immersion program for American undergraduate and graduate students enrolled at U.S. colleges and universities. The program includes intensive language instruction and structured cultural enrichment experiences designed to promote rapid language gains in 15 critical languages: Arabic, Azerbaijani, Bangla, Chinese (Mandarin), Hindi, Indonesian, Japanese, Korean, Persian, Portuguese, Punjabi, Russian, Swahili, Turkish, and Urdu. CLS offers approximately 550 awards per year for eight- to ten-week summer overseas language immersion programs. CLS is part of a wider government initiative to expand the number of Americans studying and mastering foreign languages that are critical to national security and economic prosperity. The Critical Language Scholarship Program is a program of the U.S. Department of State with funding provided by the U.S. government and supported in its implementation by American Councils for International Education.

### **Purpose of Request for Proposal**

The purpose of this Request for Proposal (RFP) is to invite accredited U.S. higher education institutions to submit a proposal to host a two-day topical seminar for alumni from the Benjamin A. Gilman International Scholarship Program (the Gilman Program) and the Critical Language Scholarship Program (the CLS Program). The RFP is open to higher education institutions across the United States. The responsibilities and expectations of hosting the seminar are outlined in **Attachment A**.

The topical seminars are conceptualized and sponsored by the U.S. Department of State's Bureau of Educational and Cultural Affairs, as part of the Gilman Program, implemented by IIE, and the CLS Program, implemented by American Councils for International Education. The recipient institution is therefore required to comply with the Uniform Guidance at 2 CFR 200 as applicable.

The U.S. Future Leaders Topical Seminar is to take place on mutually-agreed-upon days in May, June, July, August, or September of 2019, and will be held on a Thursday and Friday. Participants will arrive Wednesday night and depart Saturday morning. The seminar will host approximately 75 Gilman and CLS alumni in addition to approximately three total staff members representing ECA, IIE, and American Councils.

The scope and content of the proposed topical seminar should be centered on one of the three topics identified below. Offerors may bid on more than one topic but should provide unique seminar content for each topic of interest and should submit two or three separate proposals.

- Cyber Issues (Cybersecurity, Artificial Intelligence, Technology)
- Energy and Natural Resources
- Entrepreneurship and Innovation

All proposed seminars must also integrate the following subthemes into the seminar content, and Offerors are encouraged to detail the creative and innovative ways in which they will demonstrate and integrate these subthemes into the seminar's content. These subthemes can be woven in throughout the seminar's content or touched upon in specific breakout sessions.

- Closing the skills gap
- Leadership development
- Women's empowerment

The objectives of the U.S. Future Leaders Topical Seminars are to:

- Advance alumni understanding of the identified topics and the domestic importance of the topics;
- Educate alumni about the ways they can contribute to solving challenges that are associated with the identified topics;
- Position alumni to engage in careers and opportunities that address the identified topics in both broad and specific ways;
- Strengthen alumni leadership skills and provide specific, lifelong tools for their success;
- Provide practical guidance on how alumni can gain employment or strengthen their existing career and professional trajectory in areas related to the identified topics;
- Strengthen the identity of the alumni community as future leaders in these topical areas by connecting Gilman and CLS alumni to current public- and private-sector professionals in substantive ways; and
- Increase alumni exposure to other educational and career opportunities available to them.

## **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 the 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/en/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)**

This letter will summarize, in a brief and concise manner, the Offeror's understanding of the scope of services and make a positive commitment to perform the work in a timely manner. The letter should name all persons authorized to represent the institution, including telephone number(s) and email addresses.

The Letter of Transmittal shall be signed by a representative who is authorized to contractually bind the institution and shall include the agent's title or authority. The letter should not exceed one page in length.

## 2. Past Performance and Experience (one page)

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 three 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 recommendations/appreciation letters and certificates.

	(a) Activity title	(b) Location of activity	(c) Synopsis of the activity and relevance to the specified topic of the proposal	(d) Performance period (date and duration)	(f) Cost for the activity	(g) Name and contact info (email and phone) of the client or donor
1						
2						
3						

## 3. Narrative Proposal (up to eight pages)

Narrative proposals are expected to be comprehensive and must respond to each of the elements set forth in **Attachment A: "Statement of Work,"** in a Word document format. The Narrative Proposal should include responses to the following:

- A. Why is your institution interested in hosting the seminar?
- B. Brief description of personnel hosting and facilitating the U.S. Future Leaders Topical Seminar, including a general overview of the expertise of the individual(s). Indicate each individual's name, current role, relevant past roles, and explanation of their qualifications as they relate to the seminar.
- C. Brief description of the unique strengths, experiences, best practices, and/or resources that the institution and the facilitator will bring that are relevant to the seminar's specified topic (Cyber Issues, Entrepreneurship and Innovation, or Energy and Resources). Please provide a detailed description of the services being offered and any information relevant to meeting the technical specifications stated in **Attachment A**. Competitive applications will demonstrate expertise in both the topic itself and in providing support to students pursuing careers in industries related to the topic.

- D. Description of relevant partnerships and relationships and how they may be involved in the scope or content of the seminar, if applicable.
- E. Brief statement on the preferred months and dates for the proposed seminar. Please also note any months and/or dates that would not work for your institution.
- F. Program Design:
- Overall approach to the seminar content and delivery.
  - Institution's expertise on the topic of Cyber Issues (Cybersecurity, Artificial Intelligence, Technology), Entrepreneurship and Innovation, or Energy and Natural Resources.
  - Institution's expertise in guiding students pursuing careers in industries related to the topic.
  - Description of the unique strengths, experiences, best practices, and resources that the institution and the facilitator(s) will bring to the seminar.
  - Description of at least two industry site visits and their contributions to the seminar objectives, and the seminar location's relevance as a knowledge hub for the topic proposed.
  - Description of an opening dinner and networking opportunity arranged for participants on Thursday night. Speakers, staff from site visit locations, and other local industry leaders should be invited as appropriate.
  - Description of a dinner and cultural activity planned for participants on Friday night. This more informal event should encourage further relationship building among participants.
  - Description of ideas and innovative approaches to content delivery and/or suggestions for interactive activities or breakaway sessions not outlined in the RFP are welcomed, but must be expressly noted in the form of a draft outline or agenda.

In addition to the narrative proposal, the following supplemental documentation, outlined below in sections 4–7, must be submitted: CV of key staff and seminar facilitator(s), proposed agenda and session descriptions, proposed venue space, and cost proposal. Please note that venue space and speakers do not have to be retained at this time and can be confirmed if and when the award is granted. The institution's host facilitator and point of contact for IIE must be confirmed at the time of proposal submission.

#### **4. Resume or Curriculum Vitae of Proposal of Facilitators**

- The proposed facilitators and speakers who will be presenting and moderating seminar sessions as outlined in Attachment A must also be appropriately qualified. Please provide a brief paragraph, including the current role of the proposed individuals, the individuals' relevant past roles, and an explanation of their qualifications as they relate to the related sessions.
- Pursuant to the U.S. Department of State's Bureau of Educational and Cultural Affairs' authorizing legislation, the seminars must maintain a non-political character and should be balanced and representative of the diversity of American political, social, and cultural life. Proposed facilitator(s) should understand and agree to presenting in a non-political manner and should also highlight diversity. "Diversity" should be interpreted in the broadest sense and encompass differences including, but not limited to, ethnicity, race, gender, religion, socio-economic status, and disabilities.



## 5. Implementation and Logistics

- Proposals should outline the logistical arrangements for the seminars, including proposed venue and meeting space options, plans for meals, parking availability, and ground transportation during the seminar for site visits to local venues.
- Proposals should include a description of the physical spaces to be used.
- Applicant organizations are not requested to arrange air travel for participants but are asked to describe ease of access to and from airports/trains for participants.
- The host institution must provide services to people with disabilities in the spirit of and with the intent of the Americans with Disabilities Act of 1992 (ADA). All meeting spaces and venues must be ADA-compliant. Applicant organizations are strongly encouraged to adhere to the advancement of this principle in the implementation of all seminar elements.

## 6. A proposed agenda with session descriptions and proposed speakers should be included as an attachment. Each session description should address the following:

- Relevance to the overall topic and any of the three subthemes (closing the skills gap, leadership development, and women's empowerment).
- How the session will be tailored to the participants as American alumni of the Gilman and CLS programs and contribute to their understanding of the specified topic and/or careers in industries related to the topic.
- Anticipated learning outcomes.
- Description of how each session will be interactive and engage participants.

## 7. Cost Proposal

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

## 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	Points Available
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<b>Organizational Capacity and Past Performance and Experience</b>	Assessment of the Offeror’s demonstrated experience implementing a similar scope of work.  Assessment of the Offeror’s staffing plan for this activity and the expertise of the individuals included.	15
<b>Program Design</b>	Assessment of the Offeror’s capacity to complete the scope of work.  Assessment of proposed approach to completing the scope of work, including learning objectives, proposed session topics, proposed agenda, seminar activities, site visits, and opportunities for networking.	35
<b>Implementation and Logistics</b>	Assessment of logical program development, as evidenced in the agenda, with realistic pace and varied session format and use of available resources.  Assessment of transportation, meal, and housing plans.  Assessment of proposed venue space, A/V, catering, and parking.	25
<b>Cost Proposal</b>	Assessment of the overall cost of the proposal, including cost-share and/or in-kind contributions to the Gilman Program. 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.  Higher scores will be awarded to the most cost-effective budgets and those with cost-share and/or in-kind contributions.	25
<b>Total</b>		<b>100 points</b>

The U.S. Department of State’s Bureau of Educational and Cultural Affairs will determine the final selection of workshop hosts.

#### **ATTACHMENT A: STATEMENT OF WORK**

The U.S. Future Leaders Topical Seminars are a benefit made available to alumni of the Benjamin A. Gilman International Scholarship Program and the Critical Language Scholarship Program, programs of the U.S. Department of State, Bureau of Educational and Cultural Affairs (ECA).

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The recipient institution will host approximately 75 Gilman and CLS Alumni for a two-day seminar to take place on a Thursday and Friday in May, June, July, August, or September of 2019. Offerors should include dates in which they are available to host a seminar. Each seminar day should be approximately eight hours in length, commencing at 9 a.m. and concluding at 5 p.m., followed by more informal networking and cultural activities in the evenings. Participants will arrive on Wednesday night and depart Saturday morning. The seminar should include two site visits designed to provide an in-depth and practical understanding of the seminar topic. For example, for Offerors applying for the topic of “Cyber Issues,” a visit to a leading company in the technology field would be an appropriate site visit. This component of the program should not simply be a tour, but must deepen participants’ understanding of the topic and potential related careers and have defined learning outcomes.

Within 30 days of the seminars, digital copies of workshop resources, such as PowerPoints, handouts, interactive materials, or reading materials, must be compiled to be shared with seminar participants and the wider Gilman and CLS alumni communities. Applicant organizations are highly encouraged to include a plan for recording key sections of the seminar as a means of promoting on-demand and virtual learning for a larger audience. Program staff will distribute digital resources to Gilman and CLS Program Alumni via approved channels. Session facilitators should be informed that their materials will be shared more broadly unless they specifically request otherwise.

### **Audience & Objectives**

The U.S. Department of State’s USA Study Abroad branch ensures that America’s future leaders gain the critical skills they need to advance U.S. national security and economic prosperity by providing scholarships for more than 3,500 American college and university students to study and/or intern abroad each year. The Department’s Benjamin A. Gilman International Scholarship Program provides 3,000 economically-disadvantaged American undergraduate students the ability to gain career-enhancing skills through study or internships abroad each year. The Department’s Critical Language Scholarship (CLS) Program places approximately 550 U.S. undergraduate and graduate students in fully-funded intensive summer language institutes overseas, covering 15 critical languages. Through these programs, high-achieving students gain the knowledge, experience, and abilities that are critical to American economic prosperity and national security, while also building people-to-people relationships and providing positive examples of U.S. culture and values in more than 140 countries in every world region.

Through the creation of the U.S. Future Leaders Topical Seminars, approximately 225 Gilman and CLS alumni will be invited to take part in one of a series of three seminars on issues of domestic importance:

- Cyber Issues (Cybersecurity, Artificial Intelligence, Technology)
- Energy and Natural Resources
- Entrepreneurship and Innovation

These seminars should better position our alumni as future American leaders across public and private sectors, empower women and underrepresented groups to pursue fields of utmost national importance, and help bridge the skills gap so college graduates may contribute to U.S. economic prosperity and national security. It should also better connect the value of the Gilman and CLS programs, as well as the Americans they support, to the private and nonprofit sectors and to the wider U.S. government.

These seminars will be held in select U.S. locations with accessibility to industry hubs of expertise. Alumni will engage with U.S. leaders in the public and private sectors, building on their international experiences from a sectoral perspective and developing and expanding their networks.

### **Facilitators & Seminar Design**

U.S. Future Leaders Topical Seminar sessions will be facilitated by speakers as proposed by the recipient institution and approved by IIE. The recipient institution should design a program that flows logically where all sessions contribute to the overarching objectives outlined in the Purpose of Request for Proposal section and are relevant to the proposed topic of the seminar. Sessions should be interactive and dynamic to encourage participation and engagement of alumni. IIE recommends that facilitators outline breakout sessions led by professionals with specialties in an area within the overarching topic. The breakout sessions should accommodate smaller audiences, depending on participant interest. With a more intimate audience size, these sessions should be particularly hands-on and interactive. For all sessions, facilitators and presenters should keep in mind the range of experience of participants when developing and facilitating the sessions. The host institution should also propose other sessions that may be of interest to alumni. Ideas for creative sessions like simulations or pitch competitions are encouraged but not required. Each seminar must include visits to two relevant sites, such as local businesses and organizations, allowing industry leaders to interact directly with highly skilled and diverse alumni of the Gilman and CLS Programs. Competitive applications will also integrate local experts and industry leaders into the wider agenda and seminar sessions beyond the site visits.

### **Logistical Requirements**

#### *Seminar Event Space*

- Secure a reserved ADA-accessible plenary room with capacity to host approximately 80 participants (75 alumni and other staff members) at round tables to facilitate discussion and interaction.
- Secure two reserved ADA-accessible breakout rooms with capacity to host approximately 20 participants at round tables to facilitate discussion and interaction.
- Ensure capacity to set up catering buffet in plenary room space or in another location if needed.
- Ensure A/V capabilities, including a projector and microphones in all reserved spaces, as needed.
- Provide a designated registration table and two chairs set up outside of plenary room.
- The schedule of events should be approximately eight hours in length, commencing at 9 a.m. and concluding at 5 p.m., followed by a networking dinner on Thursday night and a group cultural activity on Friday night.

#### *Lodging*

- Identify local hotel rooms to accommodate up to 75 participants in double-occupancy rooms, and three staff members in single-occupancy rooms, for Wednesday, Thursday, and Friday nights. The recipient institution will need to reserve all rooms, but only rooms for 50 participants will be paid for out of this award. Rooms for the remaining 25 participants and program staff will be paid for separately.

### *Catering*

- Secure catering company for each day and order an appropriate menu selection that accommodates participants of each seminar and staff in attendance, including:
  - Breakfast, lunch, and dinner on Thursday and Friday for up to 75 participants, session facilitators, three program staff, and any other invited guests. Thursday's opening dinner should include invited session presenters, site visit staff, and local industry leaders. Friday's dinner can be less formal, with a group cultural activity afterward.
  - Coffee/tea break for up to 75 participants, session facilitators, three program staff, and any other invited guests.
  - The provided meals should provide a range of options that take into account possible dietary restrictions.

### *Parking*

- Secure parking in close vicinity to the seminar location.
- Provide parking vouchers in the event there is a cost associated with parking.

### **Benefits of Hosting the Seminars**

- The program is cost-reimbursable, including facilities costs and labor.
- Opportunity to demonstrate the institution's leadership in a topical area of utmost national importance.
- Opportunity to provide professional development on topics of national interest to outstanding alumni of two U.S. Department of State programs.
- Opportunity to be engaged with the U.S. Department of State, Bureau of Educational and Cultural Affairs, USA Study Abroad Branch, in addition to IIE and American Councils for International Education.
- Recognition as host in Gilman and CLS Program promotional materials, press releases, website, and social media.

### **Summary of Responsibilities**

#### *Responsibilities of Recipient institution:*

- Secure seminar spaces on campus per the guidelines outlined in the logistical requirements above.
- Order and ensure proper setup of A/V.
- Conduct on-site management, including event setup, registration, catering, tear-down, and overall event management.
- Secure parking near the seminar location for participants and program staff.
- Identify a local hotel able to accommodate up to 75 participants in double occupancy rooms and three program staff in single occupancy rooms. The recipient institution will need to reserve all rooms, but only rooms for 50 participants will be paid for out of this award. Rooms for the remaining 25 participants and program staff will be paid for separately.
- Order catering, accommodating possible dietary restrictions of registrants and staff.
- Plan opening dinner to include local industry leaders on Thursday night.
- Book and arrange group cultural activity on Friday night.
- Print all handouts and materials needed by seminar session presenters and participants.

- Design and print seminar program book and/or agendas. Produce name tags and event signage. Department of State guidelines will be provided in a host packet upon acceptance of proposal.
- Have an on-site photographer present at various points throughout the seminar to capture images to share with program staff after the event. A photographer does not need to attend the whole seminar but should be present at major activities.

*Responsibilities of Seminar Facilitator(s) and Presenters:*

- Develop interactive seminar content according to the required seminar components below.
- Lead and facilitate seminar sessions and components.
- Coordinate with site visit locations, guest speakers, and other invited experts on logistics and content, ensuring different sessions build upon each other to comprehensively and cohesively address the seminar goals.

*Responsibilities of Program Staff:*

- Manage pre-arrival registration.
- Provide final list of participants to recipient institution.
- Work closely with facilitator(s) to finalize all aspects of the seminar and provide support wherever necessary.
- Work closely with the facilitator(s) to ensure alumni seminar sessions meet U.S. Department of State expectations.
- Attend all event sessions and provide hands-on support wherever necessary.
- Conduct online evaluation surveys for both alumni and host institution following the event.
- Distribute program materials following the event.
- Arrange follow-up meeting with event facilitators to discuss how the Gilman and CLS Programs may improve future events.
- Compose evaluation report on findings from the online evaluation survey to be shared with the host institution and the U.S. Department of State's Bureau of Educational and Cultural Affairs.

## **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 proposed budget should be submitted using the following format. 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.

### **Budget**

- Offerors should carefully review the following budget guidelines before submitting a proposal. The budget should include a total program cost and a per-participant cost based on an estimated 75 participants, plus facilitators and three program staff members. All efforts should

be made to keep costs as low as possible; cost sharing is encouraged. The estimated maximum amount for one U.S. Future Leaders Topical Seminar is \$63,000.

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

- Refreshments/Meals: Per-person cost x 75 participants plus facilitators, three program staff, and any other invited guests.
- Lodging: Cost per night for double-occupancy room x 3 nights x 50 participants. The recipient institution will not need to pay for hotels for the remaining 25 participants and 3 program staff members out of this award.
- Facility Fees: Rental, security, janitorial and other costs.
- Staff Requirements: Primary organizers will be provided with financial support. 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 3 months; calculation:  $\$30,000/12 = \$2,500 \times 25\% \times 3 \text{ months} = \$1,875$ ).
- Honoraria for presenters and facilitators not included in "Staff Requirements." Honoraria for single-session presenters should not exceed \$200 per speaker.
- Administrative Costs: Provide specific information on salaries, postage, telephone, materials and supplies, indirect and overhead costs, and any other related costs (as described).
  - o 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 Offeror must indicate in the proposal budget how the rate is applied.
- Cost sharing is strongly encouraged, but not required. Some common areas of cost sharing include any combination of waived staff salaries, waived honoraria, waived room rental fees, and parking.
  - o Cost sharing is defined as actual monetary contributions provided in support of the proposal, or in-kind contributions, which include items such as prorated staff time, discounted costs, speaker fees, and office and meeting space rental costs that are waived. Cost sharing may be contributed by the Offeror or by other organizations or institutions. Volunteer hours contributed are also a form of cost sharing 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. Recipient organizations will be expected (to the best of their ability) to track volunteer hours and include them in their final report.
  - o Please see 2 CFR 200.306 for guidance on determining the value of cost sharing and matching. (<http://www.gpo.gov/fdsys/granule/CFR-2014-title2-vol1/CFR-2014-title2-vol1-sec200-306>)

Please attach a budget narrative describing costs outlined in the budget, which should include:

- Per-person cost for meals, tickets, lodging, and other items;
- Sources for cost-sharing contributions;
- Estimated volunteer hours.

Program funds cannot be used for:

- Alcohol, gifts, and 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

Thank you for your interest in hosting this seminar. We value our partnerships with U.S. higher education institutions. Please feel free to reach out to us with any questions. (Questions should be directed to the email address provided, using the guidelines provided within this document.)