



## 2019 Request for Leadership Institute Proposals

**ISSUANCE DATE:** September 5, 2018

**APPLICATION DEADLINE:** October 23, 2018

**PERFORMANCE PERIOD:** January 15, 2019 to August 15, 2019

### INTRODUCTION

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The [Mandela Washington Fellowship for Young African Leaders](#), a groundbreaking initiative begun in 2014, is seeking U.S.-based colleges, universities, and organizations to implement six-week Leadership Institutes in the summer of 2019. The Mandela Washington Fellowship is sponsored by the U.S. Department of State with funding provided by the U.S. Government and administered by IREX.

The Fellows, who are between the ages of 25 and 35, have established records of accomplishment in promoting innovation and positive change in their organizations, institutions, and communities, and come from all 49 countries in Sub-Saharan Africa. Each of the Fellows selected for the 2019 Fellowship will have the opportunity to hone their skills through a six-week Leadership Institute at an accredited U.S. university, a Summit in Washington, D.C., and some will engage in professional placements across the country. The Fellowship also provides Fellows with support for professional development after they return home.

IREX, in collaboration with the Department of State's Bureau of Educational and Cultural Affairs, pending availability of funds, will select up to 28 U.S. colleges, universities or organizations ("Institute Partners") to receive subawards of up to \$200,000 to host 25 young African leaders for a non-credit, non-degree, six-week intensive executive-style leadership and professional development program. Grant guidelines mandate that selected hosts must contribute a minimum of \$50,000 in cost-share. Each Institute should center on a customized theme: Leadership in Business, Leadership in Civic Engagement, or Leadership in Public Management. The intensive Institute model includes linkages between academic sessions, site visits, professional networking opportunities, leadership training, community service, and organized cultural activities to maximize learning and cultural exchange.

Each Institute Partner may propose to host up to two cohorts. Institutions that propose to host two Institutes must demonstrate separate distinct programming for each cohort in different thematic areas. No institution may host two cohorts of the same theme (i.e. No institution will have two Leadership in Civic Engagement cohorts). Non-governmental organizations are eligible to apply as a subaward recipient; however, the Leadership Institutes should take place on a U.S. college or university campus. Colleges and universities can partner with other entities to implement Institute programming but may only designate one official entity as the lead administrator on the subaward. Institutions receiving a subaward from IREX for the Mandela Washington Fellowship will be subject to the Office of Management and Budget's Circular 2 CFR Parts [200](#) and [600](#), and the applicable cost principles.



Qualified U.S.-based colleges, universities, and organizations who would like to be considered to host a Leadership Institute in 2019 should carefully review the information enclosed detailing proposal requirements and submit the [online application](#) and required documents no later than **Tuesday, October 23, 2018**. Applications received after this date may not be considered.

Prospective applicants are encouraged to register their interest with Katrin DeWindt, Senior Program Officer, ([kdewindt@irex.org](mailto:kdewindt@irex.org)) in order to receive updates on this competition. Questions regarding the RFP may also be directed to Ms. DeWindt. An FAQ document will be posted to [IREX's website](#) on September 25, 2018 with responses to questions received relevant to the RFP.

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## SECTION I: 2019 ANTICIPATED INSTITUTE DATES

<b>RFP Issuance Date</b>	September 5, 2018
<b>Public Posting of FAQs</b>	September 25, 2018
<b>Submission Deadline</b>	October 23, 2018
<b>Anticipated Institute Partner Selection Notifications</b>	December 5, 2018
<b>Anticipated Institute Partner Subaward Start</b>	January 15, 2019
<b>Anticipated Institute Partner Planning Retreat</b>	Early February
<b>Official Announcement of Institute Partners</b>	Early February
<b>Institute Program Development</b>	January 15 to June 18, 2019
<b>Anticipated Commencement of Leadership Institutes</b>	June 19, 2019
<b>Anticipated Conclusion of Leadership Institutes</b>	July 27, 2019
<b>Fellows and Institute Staff Travel to Summit</b>	July 28, 2019
<b>Mandela Washington Fellowship Summit</b>	July 29 to July 31, 2019
<b>Institute Partner Debrief</b>	August 1, 2019
<b>Anticipated Subaward End Date</b>	August 15, 2019

## SECTION II: APPLICATION REQUIREMENTS

A complete application will include the following documents. Failure to follow the specifications, requirements, and provided templates may result in disqualification. Proposals will be reviewed based on the "Evaluation Criteria" included below in Section IX.



- ✓ **Online Application Form**
- ✓ **Resumes or Curricula Vitae for the proposed Academic and Administrative Directors**
- ✓ **Letter of Support from University/Organization Senior Leadership**
- ✓ **Institute Narrative** (see guidance for this narrative in Section VI, page 16)
- ✓ **Budget Worksheet** (required template)
- ✓ **Budget Narrative** (see guidance for the required format in Section VII, page 18)
  - *Note: If indirect costs are included in the budget, also attach a copy of the institution's current Negotiated Indirect Cost Rate Agreement (NICRA) from a cognizant agency or comparable approved documentation.*

### SECTION III: SUMMARY OF ROLES AND RESPONSIBILITIES

#### **Institute Partner roles and responsibilities will include, but are not limited to:**

- In consultation with IREX and the Bureau of Educational and Cultural Affairs (ECA), designing Institute programming that meets identified criteria and secure adequate and appropriate staffing. These criteria include time for the Common Leadership Curriculum and Innovation Challenge.
- Creating a program agenda and an At-A-Glance overview calendar using Fellowship templates.
- Creating a logistics guide, welcome letter, and Institute overview using Fellowship templates.
- Identifying all logistics, including local transportation and pickup from nearest international airport.
- Securing appropriate lodging and meals with dietary considerations.
- Serving as primary contact with Fellows placed at Institute.
- Confirming emergency healthcare providers which accept the U.S. Department of State's Accident and Sickness Health Benefits Program (ASPE) and identifying staff to support Fellow health issues that may arise.
- Reinforcing Fellowship policies and expectations to participants through orientation and program communications, including applying the Fellowship's conduct and travel policies.
- Collecting and returning to IREX Fellow information post-arrival including but not limited to tax paperwork, assigned phone numbers, and required immigration documents.
- Arranging accommodations for Fellows with disabilities in accordance with U.S. law and supporting their full participation in the Institute.
- Promoting the Fellowship brand through social media strategy and following set branding guidelines.
- Providing Fellows with a certificate of Institute completion at the end of the program, signed by university or organizational leadership and stamped with a university seal.
- Completing weekly online reports during the Institute as well as the post-program survey.
- Submitting final program report and final invoice using Fellowship provided templates.

Institute Partners are expected to submit deliverables to IREX by stated deadlines, participate fully in webinars and Institute planning calls, and coordinate communication with Fellows placed at their Institute. In addition, a representative from each Institute as well as the designated leadership facilitator will be required to participate in the annual Institute Partner Retreat in Washington, D.C. held in February



for Institute Partners. One Institute staff member is also funded by IREX to provide support to Fellows during their travel to the Summit and to participate in the Institute Partner Debrief.

**IREX roles and responsibilities will include, but are not limited to:**

- Serving as liaison with the Bureau of Educational and Cultural Affairs (ECA), U.S. Department of State.
- Providing comprehensive guidance documents and planning resources to Institute Partners to support program development and implementation.
- Reviewing Institute documents and providing input from IREX and the U.S. Department of State regarding proposed Institute designs, daily schedule, and logistics.
- Arranging and paying for Fellow flights to and from the United States as well as transportation to the Summit.
- Collecting and sharing Fellow information with Institute Partners including but not limited to dietary information, contact details, flight itineraries, and biographical summaries.
- Covering the cost and sharing Fellow results of the StrengthsFinder leadership assessment. This support will also be provided for the identified Institute leadership staff member.
- Providing leadership session facilitators for weeks two through four as well as the post-program evaluation.
- Monitoring and evaluating the program through site visits, calls, document reviews, and surveys, including but not limited to a Fellow baseline survey, post-program surveys, alumni survey, and Summit survey.
- Administering Student and Exchange Visitor Information System (SEVIS) related documentation for the issuance of visas to Fellows on behalf of the U.S. Department of State and maintaining accurate SEVIS records.
- Supporting Fellow health and conduct issues that arise during the Fellowship.
- Working with Institutes to identify any barriers in programming or access in order to plan for the provision of accommodations for Fellows with disabilities. *Direct program costs associated with disability accommodations will be paid directly by IREX and are not expected to be included in subaward budgets.*

IREX will work with Institute Partners to review required program agendas and At-A-Glance overview calendars to ensure inclusion of all required program components and to confirm that scheduled sessions and activities are appropriate for the respective Institute theme. IREX will communicate the program timeline, provide feedback on and approval of all Institute documents as well as share administrative and logistical information to Institute Partners throughout the planning process. Information will be communicated via email, during individual Institute calls, and targeted webinars addressing topics such as disability accommodations and Summit preparation.

#### SECTION IV: INSTITUTE OVERVIEW & GUIDELINES

The Mandela Washington Fellowship Leadership Institutes are comprehensive executive-style programs designed to build skills and empower Fellows to lead in their respective sectors and communities through thematic leadership foci in Business, in Civic Engagement, and in Public Management. The academic content, designed using adult learning principles, is delivered by both host institution faculty and local practitioners. The intensive six-week Institute model uses leadership development as the framework to



create links between academic sessions, the strengths-based Common Leadership Curriculum, site visits, community service, and cultural activities to maximize learning and retention of new concepts and ideas. Fellows in all three themes gain theoretical knowledge and practical skills that can be applied in or adapted to African contexts.

The Fellowship programming is robust, but host institutions should leave sufficient free time during evenings and weekends for Fellows to pursue individual interests and socialize with fellow participants and Americans. The agenda should also include adequate time for reading and preparation of class assignments.

The program model for the Fellowship includes identification by each Institute of an academic director and an administrative director. The academic director will plan, implement, and oversee the academic content and monitor Fellow participation in all program activities. The academic director will be present throughout the entirety of the Institute to ensure the coherence of all aspects of the academic program as well as the integration of the Common Leadership Curriculum. The administrative director will oversee all Fellow support services, including budgetary and logistical elements of the Institute, required reporting to IREX, and Fellows' personal well-being throughout the Institute. It is expected that either the academic or administrative director will be actively engaged in the majority of program activities, in particular the academic sessions. Both directors should plan to be present and available as resources for the Fellows throughout the six weeks of the Institute. Other staff should be designated to support key areas, for example the coordination of organized networking activities and the management of Fellow health/medical needs. Institutes are encouraged to have additional staff available to help Fellows acclimate to the campus and local communities and to assist with any emergencies that may arise.

All Institutes must include the following elements:

### **Orientation**

All proposed Institutes must include an orientation that will provide Fellows with a concise overview of the program, including principal objectives and major themes, and important logistical information. As a complementary resource to a Pre-Departure Orientation and the Fellow Handbook, IREX will provide Institute Partners with an Institute Orientation PowerPoint presentation, a key resource that all Partners are required to use to ensure consistency of messaging on key Fellowship topics across all Institutes. Institutes may use the resource as a stand-alone presentation or can incorporate the slides into the Institute planned orientation sessions. Successful orientations include both academic and administrative components. The academic orientation should introduce Fellows to the overall themes that will be covered, the practical academic sessions during the Institute, and how the sessions relate to the Institute's greater themes. It should be stressed that some academic content may not be directly applicable to all Fellows, but Fellows should make connections between the content and their experiences in their home countries. The academic orientation should also address other program components including the Leadership Common Curriculum, site visits, community service activities, peer collaborators, networking, and any other experiences the Fellows will participate in and how they relate to the Institute's themes.

The administrative orientation should introduce Fellows to Institute staff and to the resources available on campus and in the surrounding community. The orientation must include information on safety and security, respect for diversity, health and well-being, and sexual harassment. Institute staff should clearly outline their expectations of the Fellows including active and timely participation in all aspects of the Institute, adherence to Fellowship and Institute terms and conditions, responsibility to build their own



networks, and the importance of keeping an open mind to learn from each session, whether or not it directly relates to each Fellow's present work. The administrative orientation should establish group norms to ensure Fellows have the tools to debate constructively, in addition to other ground rules to promote effective discourse throughout the program.

From early communications, Institutes should be clear with Fellows on what they can expect from Institute programming in terms of academic rigor and the types of experiential and skills-building activities the Institute will offer. These communications should also provide information on pre-arrival Institute contacts, housing accommodations, and other Institute specific details to support appropriate planning and expectation setting.

Some orientation best practices include:

- Program management takes time during orientation to work with Fellows to develop a collaboratively agreed upon code of behavior and sets expectations for group conduct during the program.
- Program management reviews the university's sexual harassment policy with Fellows, providing culturally relevant examples of the types of activities that constitute sexual harassment.
- Scavenger hunts to help familiarize Fellows with the campus and surrounding community as well as bond with each other and/or get to know Americans.

### ***Practical Academic Sessions***

An ideal Institute will consist of an integrated series of highly interactive learning experiences including seminars, group discussions, skills-building exercises, experiential activities, and assignments. Individual sessions should allow ample time for the exchange of views among Fellows and presenters. When constructing the Institute program agenda and while discussants/facilitators/speakers are crafting their sessions, it is important to keep in mind that the Fellowship is an executive-style program, the **Fellows are not students**, and they come from a diverse set of countries and backgrounds. To ensure the success of each session, Institutes are encouraged to identify session leaders who are interested in learning about African experiences from the Fellows in addition to sharing their expertise on the American experience. Presenters that have some experience in Africa are often well received by the Fellows. The Institute should expose Fellows to a variety of presenters with diverse backgrounds, viewpoints, and occupations. The Institutes must be designed specifically for the Mandela Washington Fellows and may not replicate an existing course. Sessions should cover overall guiding principles and skills specific to the Institute track and be applicable to a wide-range of professional and educational backgrounds.

As much as possible, content should be U.S.-focused but provide clearly transferable lessons that Fellows could consider incorporating into their situations in Africa. In other words, **Institutes should not attempt to teach African leaders about African problems or U.S. solutions to African problems**. Rather, Institutes should present U.S. content and allow ample time for Fellows to share and discuss their own experiences. Allowing Fellows to talk about their work in their home countries and share ideas with each other and the presenters is integral to the success of the Institute. The academic director should be available to assist Fellows in their efforts to connect the U.S. lessons to their home countries. While this can be done in many ways, typically it is most successful when Fellows debrief regularly with the academic director. Throughout the academic program, Fellows should be reminded that most of the case studies presented will be focused on the U.S. context as the Fellows are expected to bring their home country expertise and perspective to these discussions.



Best practices for practical academic sessions include:

- Academic content should be designed for the adult learner using adult learning principles and experiential/practical training techniques.
- Academic learning is balanced with cultural enrichment and down time.
- Sufficient reflection time is allocated for Fellows to process new learning and experiences during their program. Program design incorporates structured reflection facilitated by an expert to synthesize the disparate program elements through activities such as journal writing, small group work, or group sharing.
- Academic content emphasizes innovative uses of technology and scientific and data-driven approaches to decision-making.
- Program design includes linkages between academic sessions, site visits, community service and cultural/civic activities to maximize learning and retention of new concepts.
- Workshops are sequential, emphasize practical applications, and provide opportunities for Fellows to develop and practice new skills.
- Team building and communications sessions are facilitated through leadership activities to develop group cohesion.

### **Site Visits**

The Institute should also include site visits to relevant businesses, organizations, and government agencies and discussions in the field with local professionals and experts. The site visits should be substantive in nature and not solely a tour of a facility. The most successful site visits include an orientation to the organization (including what need the organization exists to address, how it is structured to address that need, and what other ways Americans are tackling this need), a tour of the facility or opportunity to meet with beneficiaries, and an opportunity for a discussion with a senior leader of the organization. When selecting site visits, it is helpful to prioritize organizations that have either an organizational or staff level interest in establishing relationships with the Fellows so that the Fellows can utilize site visits as additional networking opportunities. Site visits should relate to the academic content and the week's theme.

While most site visits may be organized for the full cohort of 25 Fellows, time should also be set aside for tailored/specialized site visits for individual Fellows or small groups that can be organized by sub-themes.

### **Leadership Training**

Leadership training is the framework on which all Institute programming is built and each Institute will include two required components to develop Fellows' skills: the strengths-based Common Leadership Curriculum (CLC) and the Leadership Development and Action Plan (LDAP). The Leadership Common Curriculum is based on key concepts and theories about leadership, including a focus on individuals' strengths rather than weaknesses, essential soft-skills that contribute to future success for professionals, ethical leadership, the value of ubuntu, and the use of reflective practice. Fellowship alumni have confirmed that these are the skills and approaches that they use most often in their home contexts.

The curriculum will consist of a suite of complementary tools, including the StrengthsFinder assessment and a 360 Feedback tool, to ensure that all Fellows achieve common learning goals. Institutes will dedicate three hours of programming each week to the Leadership Common Curriculum. Institutes will identify a faculty/staff member to lead sessions in weeks one and five of the curriculum, while sessions two through four will be facilitated by external leadership coaches provided by IREX. Institute staff will receive training on how to implement the Common Leadership Curriculum during the 2019 Institute Partner Planning



Retreat. IREX will pay directly for StrengthsFinder assessments for all Fellows and for all coaches who facilitate the required sessions.

The Leadership Development and Action Plan is part of the Leadership Common Curriculum and is required of all Fellows. The LDAP will complement the work done during dedicated leadership sessions and will also link leadership concepts with non-academic aspects of programming. It will guide Fellows to set concrete short-term goals and to develop a practical strategy to implement their vision. Fellows will share their LDAP at the Summit and will receive feedback from alumni and other Fellows, as well as have the opportunity to identify technical or other resources from which they can draw or to which they can contribute. Fellows will use unscheduled free time to work on their LDAP and apply leadership learnings to their personal contexts.

In addition to the leadership components listed above, it is expected that Institutes should identify team building activities and innovative approaches for incorporating complimentary leadership skills building sessions and topics across all aspects of programming.

### **Community Service**

All Institutes should include a minimum of 15 hours of community service opportunities throughout the six weeks in which the Fellows experience firsthand the key role of not-for-profit organizations and volunteerism in America. Community service should connect with the Institute theme whenever possible. Ideally these activities will expose Fellows to a diverse group of organizations and include interaction with service recipients. As with site visits, before the community service activities, Fellows should be briefed on the community need the organization fills and be given an overview of how the organization operates. Community service should be hands-on and include activities that broaden Fellow interaction with Americans, such as serving meals at a homeless shelter, visiting with long-term patients at a local nursing home, sharing their favorite games with disadvantaged children, participating in a community park clean-up, or mentoring/tutoring teens in summer school.

Some best practices for community service activities include:

- Service activities are linked to the themes and topics being explored in the Institute, and Fellows are provided with an overview of the organization they will be visiting/working with prior to the activity. Including the organization's website (if applicable) can be helpful to Fellows.
- Community service activities are preceded and followed by debrief sessions, allowing Fellows to process their experience, ask questions, and make connections to their home communities.
- Activities are scheduled for a long enough block of time that allows Fellows to have a substantive engagement.
- Activities tangibly support community needs. Examples of activities include fighting food insecurity by working with a local foodbank to provide meals to residents of the local community or volunteering with Special Olympics chapters to support activities for athletes with disabilities.

### **Cultural Exchange**

The Bureau of Educational and Cultural Affairs' (ECA) mission is to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange that assist in the development of peaceful relations. Thus, Institutes should include robust opportunities for Fellows to interact with their U.S. peers, to meet Americans from a variety of backgrounds, and to speak to appropriate student and civic groups about their experiences and life in their home communities. Many Fellows will appreciate gaining insight into the lives of "everyday"





Americans and to the extent possible, host institutions should facilitate this. Activities should also allow Fellows to present their country's history and culture to Americans as well as to each other. Institutes should include at least one formal opportunity for Fellows to share their cultures with the local community through a cultural fair, community dinner, panel discussion, or other cultural activity.

Institutes are encouraged to facilitate optional cultural and weekend activities (such as group nights at the theater, concerts, sporting events, and city tours) that offer Fellows opportunities to experience the diversity of the United States while fostering group cohesion.

Some best practices in cultural activities include:

- Institutes incorporate events that allow the Fellows to share their cultures with each other and the local community.
- Institutes design and host cultural activities that showcase local culture and/or seasonal U.S. holidays (e.g. July 4<sup>th</sup> parades and fireworks).
- Institutes organize a variety of optional cultural/social activities during the week and weekends.
- Institutes regularly share (via email, wikis, etc.) information on the broad mix of campus and community activities open to Fellows (such as sporting, theater, and art events, and guest speakers).
- Institutes arrange for Fellows to spend an evening(s) with an American host family.

### ***Organized Networking Opportunities***

Networking is an important component of the Fellowship and the support and time set aside by Institutes for networking is a distinct element of the program. Successful Institutes coordinate various types of networking opportunities throughout the six weeks in which Fellows can create and cultivate one-on-one collaborative relationships with peers and mentorship relationships with seasoned professionals. Institutes should incorporate networking events and receptions where Fellows can meet with organizations that might be interested in developing professional connections with them.

### **Peer Collaborators and Mentors**

Institutes should plan to introduce Fellows to peers, mentors, or professionals of the same track/industry. These connections should be individuals from the community who share similar professional interests and are leaders in their area of specialization. They should be interested in sharing experiences and building relationships internationally.

While there are many possible Peer Collaborator and Mentor models, best practices include:

- **Speed Networking:** Institutes bring Fellows and potential Peer Collaborators and Mentors together for an event in which they facilitate structured, short introductory conversations. Fellows have the opportunity to meet multiple individuals and privately identify who they would like to continue to connect with. The event organizer provides contact details for the matches following the event and encourages initial contacts.
- **Hub Leaders:** Fellows at each Institute will generally be placed in smaller communities of practice of 4-5 individuals who are working in the same field. Institute staff identify an American professional in each interest area from the local community as a hub leader. The hub leader meets with their group of Fellows in the first week and helps to connect Fellows to potential peer collaborators or mentors. Hub leaders generally meet each



week with their Fellows to check in on the connections and to help identify other professionals in the Fellows fields of expertise.

- **Peer Collaborator Bios:** A virtual version of speed networking. Institute staff collect 150-word professional bios from a pool of potential Peer Collaborators and Mentors. Staff share these bios with the Fellows who then rank their top three choices of Peer Collaborators or Mentors. They do the same with Fellow bios for the Peer Collaborators and Mentors. Institute staff assign a Peer Collaborator or Mentor to each Fellow based on their rankings, interest areas, and work experience.
- **One to One Matching:** Institute staff utilize information from each Fellow's application materials and bios, as well as communications with the Fellow on their networking goals and professional interests, to match them directly with a professional working in the Fellow's field. Since model of matching is more complex, it has proven most successful when a member of the Institute team is assigned to oversee this component as their primary responsibility.

### **Networking Events and Receptions**

Institutes will organize events and receptions where Fellows can meet with organizations in the community that might be interested in developing professional connections with them. These events may also feature organizations that Institutes draw Peer Collaborators and potential mentors from. Peer collaborators and mentors are designed to provide an in-depth professional relationship with Americans, while general networking opportunities allow Fellows to further expand the breadth of their professional networks.

### ***Unstructured Time for Individual Networking***

In order for Fellows to build as broad a network as possible, Institutes should dedicate a full morning or afternoon each week for unstructured time for Fellows to pursue their individual interests during regular business hours. During this time Fellows should be encouraged to arrange their own meetings with American experts and leaders in your local community, allowing them to further customize their Fellowship experience. This is an opportunity for Fellows to focus on more technically specific areas of interest and grow their professional networks. Institutes are asked to help connect Fellows with relevant contacts through their networks and encourage them to take initiative and make good use of this time. While Institutes should plan to connect Fellows to networking opportunities, they should also set the expectation that Fellows should be building connections on their own during unscheduled time. As Fellows will become more comfortable at their host institutions and build larger networks as the Institutes progress, program agendas should include more unscheduled time in later weeks.

### ***Innovation Challenge***

Three innovation challenges will be introduced to Fellows during week one to advance the exchange of ideas and collaboration on critical issues. Challenge areas will be confirmed after Institute selection, but may include issues like youth unemployment, maternal health and mortality, and increasing inclusion for people with disabilities. Institutes will include at least one hour each week for Fellows to work together in small groups to develop a solution to their chosen challenge, and each Institute will submit a proposed solution or strategy. A winning strategy for each challenge, chosen by the U.S. Department of State and IREX, will be showcased at the Summit.



### **Summit Preparation**

One 90-minute session should be set aside in week six for group discussions and preparation for Summit activities. The Summit provides an exciting opportunity for Fellows to network with U.S. Government officials and leaders in the public and private sectors, and other Fellows. It will include a variety of events, such as panel presentations and small group discussions. Institute Partners will receive guidance from IREX on Summit activities to share with Fellows.

### **Fellow Feedback**

Institutes should include weekly debrief sessions for Fellows to reflect and to provide academic or administrative feedback so that issues of concern can be addressed. Fellows take part in a three-hour Post-Institute Reflection at the end of the last week of their Institute. Facilitators will conduct focus groups using Appreciative Inquiry and Most Significant Change techniques to serve as guided reflections for the Fellows. IREX will implement baseline and post-Institute surveys to Fellows and will share these results with Institute Partners.

### **Institute Inclusion & Diversity**

As a program of the U.S. Department of State's Bureau of Educational and Cultural Affairs, the Mandela Washington Fellowship works to ensure that its efforts reflect the diversity of U.S. society and societies abroad and seeks and encourages the involvement of people from traditionally underrepresented audiences. The Fellowship defines diversity as the multiplicities and differences between people, particularly in terms of race, color, national origin, sex, age, religion, geographic location, socioeconomic status, ability, sexual orientation or gender identity.

#### **Incorporation of Diversity and Inclusion Practices Across all Institute Activities**

The Fellowship strives towards the active, intentional, and ongoing inclusion of diverse groups of people, such that they are engaged as valued decision-makers, leaders, and drivers of change. Institutes should incorporate diversity and inclusion practices into all aspects of programming and logistics. Leadership Institutes should foster the U.S. Department of State's Bureau of Educational and Cultural Affairs' mission to promote mutual understanding between citizens of other countries and citizens of the United States. When designing programming, Institutes should work to provide Fellows with opportunities to engage with Americans representing diversity in gender, age, race, nationality, language, disability, sexual orientation, religion, and socioeconomic differences.

#### **Support for Fellows with Disabilities**

The Mandela Washington Fellowship strongly promotes the inclusion of Fellows with disabilities and seeks partner organizations that are committed to ensuring a high quality, inclusive program for all Fellows. All Institutes should be prepared to provide accommodations for Fellows with various types of disabilities at their Institute. Direct program costs associated with disability accommodations will be paid directly by IREX and are not expected to be included in subaward budgets, although cost-share is allowable and strongly encouraged. IREX will coordinate and pay directly for any accommodations needs during the Summit.

### **Institute Staffing**

In order to effectively manage a Mandela Washington Fellowship Institute, it is important to ensure that the major programmatic components below are overseen by a team of program staff.



- **Administration:** including but not limited to the management of program logistics, housing, local transportation, arrival/departures travel coordination, budget and finance, university relationships, event planning, Institute weekly and post program surveys, Fellow health and wellness, accessibility accommodations, and 24/7 support available during the Institute.
- **Academics:** including but not limited to overseeing the Institute agenda and program quality and continuity, designing curriculum, securing and preparing faculty and guest speakers, designing Institute assignments and deliverables, and integrating site visits, cultural outings, and community service into the curriculum. Ideally the Academic director should be present with Fellows at all sessions and should highlight and provide connections on how various components integrate into broader Institute themes and goals of the Fellowship.
- **Community Engagement:** including but not limited to managing relationships with external and university organizations involved in the Fellowship through community service, site visits, and cultural outings, organizing networking opportunities, helping Fellows navigate the local organizational landscape, and assisting Fellows in making connections with appropriate industry contacts or mentors.
- **Leadership Development:** including but not limited to overseeing classroom and experiential leadership activities, ensuring that leadership development is woven across all Institute activities, facilitating the two Institute-led leadership sessions in addition to the sessions facilitated by external leadership coaches provided by IREX, participating in the Institute Partner Planning Retreat leadership training, and incorporating topics from the Leadership Development and Action Plan (LDAP) and facilitated Common Leadership Curriculum into program sessions.

While each Institute staffing structure is unique and may differ from other Institutes, please be aware that these components will require significant staff time and it is important to organize the staffing structure accordingly.

#### ***Overall Institute Best Practices (Logistical Considerations)***

- Housing is an easy walk or public transit ride to campus in a facility dedicated to mature adults (i.e. not undergraduates) with no more than two persons of the same gender assigned to each room. Housing offers wireless internet access.
- Several meal options are offered for Fellows, which may include a combination of cash and meals. Housing should have the option for Fellows to cook meals and include basic cookware and utensils.
- Transportation to and from all organized site visits, community service activities, and cultural activities is provided. Transportation is also provided to and from the airport at the beginning and end of the Institute.
- Institutes provide Fellows with information on places of worship and prayer on campus during orientation and campus tours.
- Fellows have access to Institute Partner's resources to support independent learning such as the writing center, library, computer lab, etc.
- Institute staff prepares and shares a toolkit of social and cross-cultural university and community resources to support Fellow needs during the program.
- Program implements a clear communications plan to notify Fellows of events, activities, and program changes (e.g. Moodle, Canvas, Facebook, wikis, Google groups, listservs, etc.).



- Team-building and positive group dynamics are supported and nurtured throughout the program and facilitated by a cross-cultural expert who is outside of the regular program management team.
- Medical care facilities are available and easily accessible to Fellows as needed over the course of the Leadership Institute from providers accepting the international Accident and Sickness Health Benefits Program (ASPE) provided by the U.S. Department of State.

## SECTION V: INSTITUTE TRACK GUIDANCE

Since Mandela Washington Fellows are mid-career professionals, basic survey courses on business, civic engagement, or public management are not appropriate for the Institutes. Institutes are most effective when they have a unifying umbrella and weekly themes that ties the academic, leadership, and other activities together. We expect that you will consider key challenges facing Africa, your institution's unique expertise, and the resources available within your community as you develop Institute themes and topics. However, to ensure a common experience for the Fellows, we ask that academic sessions include the **subthemes** mentioned below for each track. While theoretical sessions can provide a helpful common understanding of a subject, Institutes should emphasize practical academic sessions with opportunities to relate the experiential content to Fellows' work at home.

In the long term, Mandela Washington Fellows will be problem solvers who can address local, national, and international challenges. With this goal in mind, Institutes should encourage and develop problem solving on issues relevant to current challenges in Sub-Saharan Africa. Examples of **current sub-Saharan African challenges** are listed below for each track. Your Institute may delve into these issues or pose other challenges and opportunities for discussion. However, Institutes should not attempt to teach Fellows about problems in their home countries. Instead, Institutes should highlight how the United States has developed or tried to develop solutions to similar issues and allow time for Fellows to draw upon their own experiences to relate the lessons or best practices to their home countries. Fellows appreciate speaking with individuals who are knowledgeable about or have experience in Africa, and these experts should focus on engaging in conversation with the Fellows about their experiences and how U.S. examples may or may not be applicable in their home countries. Also listed below are **U.S. examples** that can be explored for each track.

### **Leadership in Business**

Leadership in Business Institutes should provide Fellows with an overview of U.S. entrepreneurial strategies including those that are employed to address social issues. The Institutes should focus on developing Fellows' skills in business and entrepreneurship, while examining the development, history, challenges, and successes of U.S. enterprises and social enterprises, in the United States and globally, with specific relevance to the African continent. The Institutes should encourage Fellows to elaborate innovative and practical plans to expand their engagement in business and/or entrepreneurship in their communities and to engage with others in this area.

#### **Business Fellow Profile**

Business Fellows are innovators who have responded to a need in their community, created new products, processes, or strategies at their companies, or pioneered new trends in their fields. In 2018, almost 85% of Fellows in the business track owned a business, of which 62% made a profit in the prior year. Nearly 70% of these Fellow business owners were full time employees of their businesses and on average employed 13 individuals. Just over 40% of Fellow businesses operated or had clients



outside their home country. Business Fellows are experienced young innovators who are critically positioned to start-up or expand their business.

### **Subthemes**

- Innovation and technology that will capitalize on emerging markets and impact the youth population in Africa
- Business plan development and tools (topics may include customer discovery, ideation, prototyping, pitch workshops, scaling, outcome-based evaluations, etc.)
- Financial management (topics may include identifying appropriate sources of funding, grant writing, entrepreneurial finance, transparency, accountability, etc.)
- Business ethics (topics may include corporate social responsibility, whistleblower protections, etc.)
- Intersection of business with civil society and government and the role of private/public partnerships

### **Current Sub-Saharan African Challenges**

- Infrastructure and energy deficiencies
- Excessive government regulations and other institutional barriers to operating legal business
- Limited access to quality market research
- Shortage of professionals with appropriate skills for emerging industries
- Low internet penetration and limited access to information and communication tools

### **U.S. Examples**

- Strategies for business plan development and innovation can be highlighted through a visit to a local innovation or start-up hub.
- Infrastructure deficiencies may be highlighted by a site visit to the local sanitation facility to discuss funding and implementation of capital improvement projects.
- Internet access issues could be highlighted in a visit to an internet service provider to discuss how they are expanding their broadband capabilities in local libraries.

### ***Leadership in Civic Engagement***

Leadership in Civic Engagement Institutes should provide Fellows with an overview of how citizens, both as individuals and groups, have shaped U.S. history, government, and society, including discussion of similarities and contrasts with experiences and opportunities on the African continent. The academic program should define civic engagement, examine its development in the United States, and build skills in topics such as citizenship, community building, economic development, grass-roots activism, political organizing and leadership, volunteerism, and the use of information and communications technology in advancing civic causes. The Institutes should encourage Fellows to develop innovative and practical plans to expand their engagement as citizens in their own communities and to work with others in this area.

### **Civic Engagement Fellow Profile**

Civic Engagement Fellows are young leaders who are serving the public through NGOs, community-based organizations, and volunteerism. In 2018, nearly 60% of Fellows in the civic track led a non-profit organization and 44% had experience fundraising from public or private funders for personal projects. Just over a quarter of civic Fellows owned a business which employed an average of 23 employees. More than half of civic Fellows reported encountering corruption in their workplace or



among partners, and of these Fellows, approximately 60% directly work to fight this corruption. Civic Engagement Fellows are influencers who have a proven record of experience, leadership, and accomplishment in civic society spaces.

### **Subthemes**

- Advocacy (topics may include coalition building, development-friendly policies, creating community-based campaigns, political organizing, minority and marginalized populations, etc.)
- Strategic Planning (topics may include mission development, good governance, grant writing/fundraising, etc.)
- Organizational Development (topics may include human resource development, ethics, project management, marketing and communications, monitoring and evaluation, etc.)
- Intersection of civil society with business and government

### **Current Sub-Saharan African Challenges**

- Restrictive regulation of civil society organizations
- Political and governance structures that are not transparent or accountable to everyday citizens
- Low internet penetration and limited access to information and communication tools
- High demand for basic services but extremely limited resources
- Human rights challenges for minority populations
- Social change advocates' personal safety issues/fear of retribution

### **U.S. Examples**

- A discussion on encouraging accountability in government structures could be highlighted by a visit with a local elected official who has recently implemented a new transparency initiative for public spending in her office.
- Fear of retribution could be highlighted by a visit with leaders from a civil rights movement who were able to overcome fear and hate in their quest for social change.
- Practical approaches to managing limited resources could be examined during a visit to a community-based organization that provides a continuum of social services for local residents.

### ***Leadership in Public Management***

Leadership in Public Management Institutes should provide Fellows with an overview of public management and leadership, including: regional economic and workforce development; financial management in public and non-profit organizations; planning and the global knowledge economy; and domestic and foreign development policies. Within the broader frame of the public policy process, Fellows should be exposed to specific public management questions on topics such as public finance, rule of law, education, public health, environment, public sector transparency and accountability, and foreign policy. The Institutes should encourage Fellows to create innovative and practical plans to expand their engagement in public management in their communities, and to work with others in this area.

### **Public Management Fellow Profile**

Public Management Fellows are young leaders who are promoting reform to make their institutions more efficient and transparent. In 2018, over half of all Public Management Fellows worked in government positions (43% of Fellows held national government positions, and an additional 10% worked in local or regional governments). Ten percent of these Fellows had been elected to public



office, most often at the national level. Additionally, 30% of the 2018 cohort was comprised of medical and public health professionals who serve their communities as medical doctors, maternal health specialists, health access advocates, mental health providers, and supporters of marginalized local populations. Public Management Fellows are innovators who advocate for new approaches to policy or practice within the public sector to positively impact their communities.

### Subthemes

- Citizen engagement (topics may include community outreach and policy dialogue, transparency, principles of justice, legal rights, and government accountability)
- Resource management (topics may include combatting corruption, ethics, intellectual property protection, workforce development, information technology, and accountability)
- Financial management systems (topics may include public revenue models, civic works, transparent procurement processes, and accountability for proper stewardship of funds)
- Intersection of government with business and civil society

### Current Sub-Saharan African Challenges

- Strained infrastructure, food security concerns, and energy deficiencies
- Rapid human migration both within country borders (urbanization, Internally Displaced Persons) and to/from outside (brain drain, human trafficking, gender-based violence, migrant laborers, refugees)
- Need for improvement in health outcomes for both rural and urban populations especially in the areas of maternal health and individuals with disabilities.
- High demand for basic services but extremely limited resources
- Limited access to information, communication tools, and integrated systems
- Centralized decision making and bureaucratic structures that do not support or reward innovation

### U.S. Examples

- Citizen engagement on infrastructure deficiencies may be highlighted by a visit to a city council hearing on a new transportation project and a follow-on conversation with the local transportation official who works to integrate community feedback into local transportation plans.
- The intersection of government with business and civil society could be highlighted through a visit to a local Business Improvement District (BID) office, or a conservancy or “Friends of the Park”-type organization.

## SECTION VI: INSTITUTE NARRATIVE

The Institute Narrative should provide IREX and the U.S. Department of State with a clear concept of the structure and content for the proposed Mandela Washington Fellowship Institute. Refer to the “Institute Overview and Guidelines” (Section IV) and “Institute Track Guidance” (Section V) for information on program components and the overall themes and ideas to be developed and implemented over the course of the proposed Institute. The Institute Narrative should walk readers through a Fellow’s experience in the program and clearly outline the propose approach for key program components and learning objectives. Institute Narrative may not exceed 10 pages single spaced.





**Note:** *If applying to host more than one Institute, a separate Institute Narrative must be created for each proposed Institute.*

**The following information must be included in the Institute Narrative:**

- Institute Overview
- Institute Objectives and Goals
- Weekly or Thematic Unit Overview: including the topics covered and their relevance to the Institute’s theme or sub-theme, as well as the thematic learning objectives or goals
- Summaries of activities and approach for the following program components:
  - **Orientation:** Provides Fellows with a concise overview of the program, including principal objectives and major themes, and important logistical information. Describe how the Institute will orient Fellows both at the beginning of the program and at the start of each week. This description should address both the academic and administrative elements of these orientations.
  - **Practical Academic Sessions:** Provides an opportunity to explore relevant Institute topics in-depth. Sessions should expose Fellows to a variety of presenters with diverse backgrounds, viewpoints, and occupations and facilitate opportunities for Fellows to create connections between American examples and their experiences in their home countries. Discuss how the Institute will integrate a series of highly interactive learning experiences including seminars, case studies, group discussions, skills building exercises, experiential activities, and assignments.
  - **Site Visits:** Provides an important form of experiential learning and are most successful when they complement the thematic structure and/or are preceded by an academic session to provide background and context. These visits offer Fellows critical insight on how Americans deal with challenges, both successfully and unsuccessfully. They also serve as introductions to a broad network of Americans whose work might have applicability in the Fellows’ home countries. Provide an overview of Institute site visits and how they will compliment and build on the Institute themes.
  - **Leadership Training:** The Common Leadership Curriculum and Leadership Development and Action Plan will provide a central framework for all Leadership Institutes. In addition to dedicating three hours of programming each week to the Leadership Common Curriculum, Institutes will ensure leadership topics and skills-building activities are incorporated throughout the Institute. Describe how the Institute will weave supplemental leadership programming throughout the six-weeks.
  - **Community Service:** Exposes Fellows to America’s service culture while at the same time providing another touch point for how Americans address challenges. These activities also allow Fellows to work with Americans from a variety of backgrounds toward a common goal. Provide an overview of the proposed hands-on community service activities during the Institute, and how they will relate to the overall program themes and objectives. Include descriptions of proposed partners and how activities will be structured.
  - **Cultural Exchange:** Promotes a primary goal of the Mandela Washington Fellowship which is to increase mutual understanding between the countries of Sub-Saharan Africa and the United States. While practical academic and leadership activities form the basis of the program, scheduled cultural, civic, and social interactions with Americans play an important role in ensuring strong understanding between Fellows and Americans. Describe your plan for community engagement, including networking and cultural



- activities planned to introduce Fellows to Americans both professionally and personally in your community.
- **Networking Opportunities:** Create additional linkages for Fellows to interact with and network with American professionals. This important component of the Fellowship should be incorporated throughout the six weeks through group networking events and receptions hosted by the Institute as well as securing invitations to preexisting networking opportunities in the local community. Weekly unstructured time should be provided to allow Fellows to pursue personal interests independently. Please provide an overview of networking opportunities, including how the Institute will engage and connect Fellows to local community leaders and professional mentors.
  - **Fellow Feedback Activities:** Provide opportunities for Fellows to provide feedback during the Institute to ensure that any academic, administrative, or personal issues of concern can be addressed in a timely manner. Institutes will be hosting a group of leaders who will provide feedback on things that are working for them and things that are not working. Detail how the Institute will gather and incorporate feedback from Fellows throughout the program.

## SECTION VII: BUDGET GUIDELINES

Applicants are required to submit an Institute Partner Budget using the required provided worksheet as well as a detailed budget narrative using the template provided below. Each line item must include a detailed description of the activities supported and explanation of how the cost was derived. If a line item includes both Bureau of Educational and Cultural Affairs (ECA) requested funds and cost share funds, be sure the amounts for each funding category (ECA/Cost Share) are separately noted in the narrative.

*Institutions receiving a subaward from IREX for the Mandela Washington Fellowship will be subject to the Office of Management and Budget's Circular 2 CFR Parts [200](#) and [600](#), and the applicable cost principles.*

### General Budget Information

**Subaward Amount:** Budget for the subaward cannot exceed \$200,000 total in requested funds. All costs incurred in implementing the Institute over \$200,000 must be cost-shared by the host university. Requested funds should be included in Column G on the budget sheet named "ECA Requested Funds."

**Cost-Share Amount:** A minimum of \$50,000 cost share is required. Cost-Share can include, but is not limited to, university fees, indirect costs, housing, transportation, and personnel costs. Cost-Share funds should be included in Column H on the budget sheet named "University Cost-Share."

### Budget Line Items Overview – Administrative Costs

**Staff Costs:** These expenses should include all key Institute personnel salary and benefits costs. The anticipated subaward period is January 15, 2019 to August 15, 2019 and all budgeted personnel costs should fall within this seven-month period of performance. The calculations/formula used to determine staff costs must be clearly visible on the budget worksheet.

The budget narrative must clearly list each key staff member, including both the administrative and academic directors, and detail how costs were derived. Several examples have been included below.



**If using Percentage of Effort:** Ms. Jones has a base salary of \$52,000, and will devote 40% of her effort from January 15 – August 15, 2019 to Institute planning and implementation.  $\$52,000 / 12\text{months} = \$4,333 \times 7 \text{ months} \times 40\% = \$12,132$ .

**If using Daily Rate of Pay:** Dr. Smith is on a nine-month appointment at a salary of \$75,000. Dr. Smith will devote 30 days to Institute planning and implementation.  $\$75,000 / 168 \text{ (# of duty days in an academic year)} = \$446 \text{ daily salary} \times 30 \text{ days devoted to the program} = \$13,380$ .

**If using Hourly Rate of Pay:** Two graduate students will provide additional support during the implementation of the Institute. They will be scheduled for 30 hours per week for 6 weeks at an hourly rate of \$18.00.  $\$18 \times 30 \text{ hours} \times 6 \text{ weeks} \times 2 \text{ graduate students} = \$6,480$ .

**Benefits:** These are set according to university policy. In the budget narrative, be sure to state the appropriate fringe rate for each personnel listed as these rates often differ depending on the individual's status (i.e. full-time, part-time, consultant, graduate student, etc.). If applicable, be sure these rates reflect the rates confirmed in the university's Negotiated Indirect Cost Rate Agreement (NICRA).

**Other Direct Expenses:** These expenses include items directly attributable to the project **and** not accounted for in Indirect Costs (i.e. phone, fax, postage, copying, printing, office supplies, etc.)

**Indirect Costs:** If indirect costs apply, please explain how these costs are derived in the budget narrative. If indirect costs are included in the budget, the proposal **must** include a copy of the Negotiated Indirect Cost Rate Agreement (NICRA) or similar document from a cognizant agency. Indirect costs can be included as cost-share. The calculations/formula used to determine indirect costs must be clearly visible on the budget worksheet.

### **Budget Line Items Overview – Program Costs**

**Institute Accommodations and Per Diem:** Fellow lodging and per diem support should take into consideration, but may not exceed, established U.S. Government per diem rates for each location. U.S. Government per diem rates may be found online at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem)

**Accommodations:** The budgeted cost for 39 nights of lodging should include linens, towels, basic bathroom supplies (toilet paper/cleaning products), and access to basic cooking and utensils supplies (if relevant). Given Fellows are mid-career professionals, single rooming arrangements (private or within a suite) are preferred by Fellows; however, double rooms or suite arrangements are also acceptable provided each Fellow has their own bed. Accommodations should include access to internet.

**Meals and Incidentals:** Depending on the university context, meals are typically provided through a combination and variety of means including campus meal cards, group meals, and monies provided directly to support the purchase of groceries for cooking at Fellow housing or eating in local restaurants. The monies budgeted on this line should encompass the full amount of monies budgeted to provide meals to Fellows for 40 days during the Institute. The only exceptions are funds for group meals and the opening and closing meals which should be included on the relevant budget lines titled "Group Meals" and "Welcome/Farewell Events" described below.

**Institute Textbooks and Materials:** Institutes should cover all costs of materials related to and required for the Institute; for parity - laptops, etc. should not be purchased for each Fellow; however, they may be



rented. The program will supply cell phones to the Fellows and should not be budgeted for in Institute budgets. Education costs which are not per participant costs should be included below under “Education Materials” line item.

**Book and Cultural Allowance:** Institute budgets must include a \$200 book and cultural allowance to allow Fellows to purchase U.S. study books and materials in their area of interest. These funds can also be used to cover admissions to cultural events of personal interest; however, these funds cannot be used to cover mandatory program activities or materials. It is intended that these funds be distributed directly to Fellows to use at their discretion.

**Incidentals Stipend Allowance:** Institute budgets must include a \$450 incidentals stipend allowance to allow Fellows to cover any incidental expenses that they personally incur over the course of the Institute (budgeted at \$75 per week). Fellows often use these funds to purchase additional toiletries, snacks, phone cards, or to cover medical co-pays. This stipend is meant for Fellows’ personal use only and must be distributed directly to Fellows to use at their discretion.

**Participant Admissions:** These expenses include per participant admissions for cultural, academic, and other mandatory activities planned for the group as part of the Institute program.

**Tax Withholding:** Institutes are solely responsible for determining and withholding taxes on funds provided to participants as per their institution’s guidelines. Include any tax withholding on the line provided in budget spreadsheet and detail how these costs were derived in the budget narrative. All amounts listed on other budget line items should be the totals not including any applicable taxes that have been withheld and should not reduce the Incidental or Book and Cultural stipend amounts to be provided to Fellows as noted above. IREX is not permitted to give tax advice, but it is highly recommended that applicants consult with tax professionals on campus regarding any new or existing relevant tax laws when creating the budget.

**Guest Speaker Honoraria:** Honoraria for speakers who are not being compensated by the subaward on a salaried basis cannot exceed \$250 per day for preparation and delivery. Costs above the \$250 per date rate may be cost-shared.

**Guest Speaker Per Diem:** Lodging and per diem for guest speakers must not exceed established U.S. Government per diem rates and may be found online at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem). Costs above the federal per diem rate may be cost-shared.

**Educational Materials/Trainings/Networking Activities:** These expenses include group access to educational portals, leadership modules, and other curricular resources for the Institute. This line also includes expenses related to planned networking activities.

**Airport Transportation:** These expenses include transportation for airport transfers to the Institute from the nearest International airport and return to the airport for departure to the Summit. Locations within driving distance of Washington, D.C. will travel to the Summit via coach, paid for directly by IREX.

**Ground Transportation:** This line item should include bus/van/taxi rentals for all site visits, community service, cultural excursions, networking, grocery store shopping, etc. In the budget narrative, provide a



detailed description for how the costs on this line item were derived. *Please note if internal university rentals are utilized, they should be procured at cost or competitively procured externally.*

**Group Meals:** Costs for group meals may not exceed established U.S. Government per diem rates for each attendee and location. U.S. Government per diem rates may be found online at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem).

**Welcome/Farewell Events:** A welcome and farewell event is required. Costs for welcome and farewell events cannot exceed \$45 per person with maximum ratio of 2 guests per 1 Fellow (50 guests + 25 Fellows = 75); unless additional expenses are cost-shared. Fellows should be provided with a certificate of Institute completion at the end of the program, signed by the program director and stamped with a university seal.

### **Budget Line Items Overview – Additional Institute Staff Travel Costs**

IREX will cover the cost of one staff member per Institute to attend the Planning Retreat in early February as well the Summit in July. Additionally, IREX will cover the cost of the designated leadership facilitator to participate in the leadership training at the Planning Retreat. The costs for the IREX supported staff members should not be included on this budget.

Institutes may choose to send up to two additional staff to one or both of these events. Any additional university staff would need to be cost-shared or included on the relevant subaward line items. Total per diem rate (lodging, meals and incidentals) for these individuals may not exceed established U.S. Government per diem rates. U.S. Government per diem rates may be found online at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem).

### **SECTION VIII: SUBAWARD RENEWAL**

Participation to host an Institute may be renewed annually based on prior performance, the availability of funding, and at the U.S. Department of State and IREX's sole discretion, for up to two years. IREX reserves the right to request updated budget or program documents, negotiate changes to programming or support, and decide not to renew for future years.

### **SECTION IX: EVALUATION CRITERIA**

Through an open, nationwide competition the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) and IREX seek to recruit and partner with a diverse array of organizations and accredited U.S. institutions of higher education, including public, private, urban, rural, minority serving institutions, and community colleges.

Eligible U.S.-based colleges, universities, and organizations who would like to be considered to host a Leadership Institute in 2019 should submit the online application and required documents no later than **Tuesday, October 23, 2018**. Applications received after this date may not be considered.



Proposals will be evaluated on criteria, including but not limited to the following:

Evaluation Criteria	Evaluation Guidance
<p><b>Academic and Leadership Programming</b></p>	<ul style="list-style-type: none"> <li>• Academic content is designed for and targeted towards adult learners using adult learning principles and experiential training techniques.</li> <li>• Institute Narrative demonstrates a good balance of theoretical knowledge and practical skills; clear linkages between academic sessions including leadership training, site visits, community service and other activities; and structured leadership skills-building sessions are designed to develop and enhance Fellows’ leadership and collective problem-solving skills.</li> <li>• Topics and subthemes are appropriately tied to the sector track yet varied enough to interest a diverse set of Fellows.</li> <li>• Faculty and guest speakers are drawn from a diverse set of departments and fields, including industry leaders and public sector officials, exposing Fellows to a variety of topics and approaches.</li> <li>• Programming approach is innovative and supports the development of creative and interactive sessions that develop and enhance Fellows’ leadership and collective problem-solving skills.</li> <li>• A diverse set of organized networking events and receptions are incorporated throughout the six weeks.</li> <li>• Networking opportunities allow Fellows to create and cultivate one-on-one collaborative relationships with mentors, peers, and professionals.</li> <li>• Leadership programming incorporates timing set aside for the weekly three-hour sessions for the strengths-based Leadership Common Curriculum and the Leadership Development and Action Plan (LDAP). Sessions two through four will be facilitated by external leadership coaches provided by IREX.</li> <li>• Institute has identified a faculty/staff member to lead sessions one and five of the Leadership Common Curriculum and participate in the Institute Partner Retreat. Sessions two through four will be facilitated by external leadership coaches provided by IREX.</li> <li>• Opportunities for Fellow feedback are incorporated throughout the Institute.</li> </ul>
<p><b>Mutual Understanding</b></p>	<ul style="list-style-type: none"> <li>• Application demonstrates an understanding and appreciation of the Fellowship’s benefits to the campus and community.</li> <li>• Facilitated cultural and weekend activities (concerts, sporting events, city tours) offer Fellows opportunities to experience the diversity of the United States and interact with Americans from a variety of backgrounds.</li> <li>• Opportunities are provided for Fellows to share their country’s history and culture to Americans as well as to each other.</li> <li>• Community service activities are designed to allow Fellows to have a substantive engagement and ensures that Fellows can make meaningful and lasting connections with Americans.</li> <li>• Organized community service activities represent a diverse set of service opportunities.</li> </ul>



	<ul style="list-style-type: none"> <li>• A minimum of 15 hours of community service opportunities are included throughout the Institute.</li> </ul>
<p><b>University Support &amp; Past Performance</b></p>	<ul style="list-style-type: none"> <li>• Faculty, senior administration across the institution, and community partners provide broad university support for hosting an Institute.</li> <li>• Academic Director has knowledge and experience in the selected sector track.</li> <li>• Administrative Director has experience working with international visitors and strong knowledge of university and community resources.</li> <li>• Institution has past experience designing and successfully implementing short-term customized academic exchange programs.</li> </ul>
<p><b>Logistics</b></p>	<ul style="list-style-type: none"> <li>• Orientation provides a strong introduction to the community and covers key topics such as safety and sexual harassment, program expectations and norms, and introductions to campus resources.</li> <li>• Housing facility is appropriate for mature adults and offers wireless internet access.</li> <li>• Several meal options are offered for Fellows, which may include a combination of cash, campus meal plans, in-residence cooking, and group meals.</li> <li>• A clear plan for transportation is provided.</li> <li>• The proposed housing is an easy walk to campus or transportation is easily available and/or provided to Fellows.</li> <li>• Local grocery or Big-box stores are either within walking distance or there are other transportation arrangements to allow Fellows to purchase toiletries and groceries.</li> <li>• Medical facilities and a staffing plan have been identified to support Fellow care needs that may arise.</li> <li>• Institution has the capacity and willingness to provide accommodations for Fellows with disabilities.</li> </ul>
<p><b>Budget</b></p>	<ul style="list-style-type: none"> <li>• Overall budget costs are reasonable, allowable, cost-effective, and realistic for the programming proposed.</li> <li>• The budget includes the required minimum cost-share of \$50,000 and does not exceed \$200,000 in requested funding.</li> <li>• Adequate staff and staff time are budgeted to successfully implement programming.</li> <li>• Reasonable lodging and meal costs are included for 25 participants for 39 nights and 40 days.</li> <li>• The budget narrative clearly details how the costs for each line item are derived.</li> </ul>

