



## 2021 Request for Leadership Institute Proposals

**ISSUANCE DATE:** Tuesday, September 15, 2020

**APPLICATION DEADLINE:** Friday, October 30, 2020

**PERFORMANCE PERIOD:** January 15, 2021 to September 15, 2021

### 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 2021. 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 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 the themes of Business, Civic Engagement, and Public Management. The six-week Institutes, held on college and university campuses, support the development of Fellows' leadership skills through academic study, workshops, mentoring, networking with U.S. leaders, and collaboration with Americans. Each Institute also offers insights into American society through site visits and cultural exchange. The Institutes strengthen connections between the United States and Africa and establish enduring partnerships between Fellows, local communities, and private businesses.

The Fellows, who are between the ages of 25 and 35, have established records of promoting innovation and positive change in their organizations, institutions, and communities, and are recruited from all 49 countries in Sub-Saharan Africa. Due to the current global pandemic, and with the safety and well-being of Fellows and Partners as the highest priority, the U.S. Department of State postponed the 2020 Fellowship until summer 2021. Therefore, applicants for the 2020 Fellowship who were selected as Finalists and Alternates have been notified that they are eligible to defer their participation until summer 2021. The U.S. Department of State will not open a general application for the 2021 Fellowship this fall and may choose to increase the total number of selected Fellows in comparison to previous years based on Institute capacity.

Once finalized, the full cohort of 2021 Fellows will have the opportunity to hone their skills through a six-week Leadership Institute and a Summit in Washington, D.C., and some will engage in subsequent professional placements across the country. Upon returning home, Fellows continue to build on the skills and connections developed during their time in the United States through access to ongoing professional development, networking, and collaboration opportunities with support from the U.S. Department of State and affiliated partners. Mandela Washington Fellowship Alumni form a vibrant network of young African leaders with the skills and motivation to spur growth and prosperity, strengthen democratic governance, and enhance peace and security across Africa.



As the flagship program of the [Young African Leaders Initiative \(YALI\)](#), which represents the U.S. Government's signature effort to invest in the next generation of African leaders, the Mandela Washington Fellowship Leadership Institutes support the [Administration's Africa Strategy](#) to strengthen U.S.-Africa relations and ensure effective investment of U.S. taxpayer dollars. To advance these objectives, the Bureau of Educational and Cultural Affairs (ECA) at the U.S. Department of State, which provides funding and visionary oversight for the Mandela Washington Fellowship, has identified the following priorities and expectations for the 2021 Leadership Institutes:

- **Programming incorporates key U.S.-Africa strategic policies and topics**
- **Programming reflects diverse viewpoints and ensures political balance**
- **Programming prioritizes leadership development**
- **Programming is inclusive for Fellows of all abilities**
- **Fellow health and safety is prioritized**
- **Communications reflect [U.S. Department of State brand equities](#)**

*Further information about each of these priorities can be found under "Institute Overview & Guidelines" (Section IV) and in the designated sections below.*

IREX, in collaboration with ECA, is seeking a limited number of partners to complement an existing cohort of U.S. colleges, universities, and organizations ("Institute Partners") who 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. Due to the ongoing COVID-19 pandemic and the postponement of the 2020 Fellowship to summer 2021, selected U.S. institutional partners will be relied upon to remain as flexible and responsive as possible in adjusting planning and programming to meet the needs of the Fellowship and individual Fellows.

Institute Partners previously selected to host in 2020 may propose to host an additional Institute in 2021. Institutions proposing to host two Institutes in 2021 must demonstrate separate and 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 Civic Engagement cohorts).

Non-governmental organizations are eligible to apply as a subaward recipient; however, Leadership Institutes must 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 2021 should carefully review the information enclosed detailing proposal requirements and submit the [online application](#) and required documents no later than Friday, October 30, 2020. Applications received after this date may not be considered.



Prospective applicants are encouraged to register their interest with Senior Program Officer Alison Boland-Reeves ([abolandreeves@irex.org](mailto:abolandreeves@irex.org)) in order to receive updates on this competition. Questions regarding the RFP may also be directed to Ms. Boland-Reeves.

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## SECTION I: 2021 ANTICIPATED INSTITUTE DATES

RFP Issuance Date	September 15, 2020
Submission Deadline	October 30, 2020
Anticipated Institute Partner Selection Notifications	December 8, 2020
Anticipated Institute Partner Subaward Start	January 15, 2021
Anticipated Virtual Institute Partner Planning Retreat	January 27 to 29, 2021
Official Announcement of Institute Partners	January 27, 2021
Institute Program Development	January 15 to June 22, 2021
Anticipated Commencement of Leadership Institutes	June 23, 2021
Anticipated Conclusion of Leadership Institutes	July 31, 2021
Fellows and Institute Staff Travel to Summit	August 1, 2021
Mandela Washington Fellowship Summit	August 2 to August 4, 2021
Institute Partner Debrief	August 5, 2021
Anticipated Subaward End Date	September 15, 2021

## SECTION II: APPLICATION REQUIREMENTS

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

- ✓ [Online Application Form](#)
- ✓ **Resumes or Curricula Vitae for proposed Academic and Administrative Directors and Leadership Manager**
- ✓ **Letter of Support from University/Organization Senior Leadership**
- ✓ **Institute Narrative** (see guidance for this narrative in Section IX)
- ✓ **Budget Worksheet** (required template available at [mwfellows.info/2021InstituteRFP](http://mwfellows.info/2021InstituteRFP))



- ✓ **Budget Narrative** (see guidance for the required format in Section X)
  - *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 & 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 priorities and securing adequate and appropriate staffing. This includes ensuring diverse viewpoints across programming, implementing the Common Leadership Curriculum, selecting Ignite Talk speakers, and retaining the required feedback session in the final week for Fellows to complete the post-Institute survey.
- Designing a plan and securing appropriate staff to ensure successful implementation of the Institute. This includes, but is not limited to, the Academic Director, the Administrative Director, and a designated Leadership Manager (see pages 13-14 for more detail on staff roles).
- Creating a program agenda and an At-A-Glance overview calendar using Fellowship-provided templates.
- Creating required Fellow welcome and introductory Institute materials using Fellowship-provided templates.
- Submitting deliverables to IREX by stated deadlines, ensuring full participation in webinars and Institute planning calls, and coordinating communication with Fellows placed at the Institute according to stated timelines.
- Identifying and arranging all logistics, including local transportation and pickup from nearest international or other IREX-identified airport.
- Securing appropriate lodging and meals with dietary considerations.
- Serving as primary contact for Fellows during the Institute.
- Confirming emergency healthcare providers that accept the U.S. Department of State's Accident and Sickness Health Benefits Program (ASPE) and identifying staff to support Fellow health issues.
- Ensuring that one Institute representative (either the Administrative or Academic Director) and the Leadership Manager participate in the virtual Institute Partner Planning Retreat in January 2021.
- Developing an orientation schedule that utilizes the Fellowship's Arrival Orientation PowerPoint and provides Fellows with a concise overview of the program, including principal objectives, major themes, and important logistical information.
- Reinforcing Fellowship policies and expectations to participants through orientation and program communications and activities, including applying the Fellowship's conduct and travel policies and using Fellowship-provided templates.
- Collecting and returning to IREX requested Fellow information to be gathered upon 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 U.S. Department of State brand equities through social media strategy and adherence to set branding requirements.
- Sending all articles or press releases to IREX for clearance prior to publication.
- Providing Fellows with a certificate of Institute completion at the end of the program, signed by the program director, university, or organizational leadership and stamped with a university seal.
- Distributing the U.S. Department of State's certificate of completion for the Mandela Washington Fellowship.
- Completing weekly online reports during the Institute as well as the post-program survey.
- Identifying one Institute representative to support Fellow travel to the Summit and to participate in the Institute Partner Debrief on August 5, 2021.
- Submitting a final program report and final invoice using Fellowship-provided templates according to stated deadlines.

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

- Serving as liaison with the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA).
- Providing guidance documents and planning resources to Institute Partners to support program development and implementation.
- Reviewing Institute documents to ensure inclusion of required program components and reflection of U.S. Department of State priorities.
- Communicating the program timeline, providing feedback on and approval of all Institute documents, and sharing administrative and logistical information to Institute Partners throughout the planning process.
- Arranging and paying for Fellow flights to and from the United States as well as transportation to the Summit.
- Collecting information from Fellows and sharing relevant details with Institute Partners including but not limited to dietary information, contact details, medical history, flight itineraries, and biographical summaries.
- Developing the Common Leadership Curriculum (CLC) and associated resources, implementing trainings, and supporting facilitator identification/selection as needed.
- Financing and sharing results of Fellows' CliftonStrengths® assessments with Institute Partners.
- Monitoring and evaluating the program through site visits, calls, document reviews, and surveys, including but not limited to Fellow baseline, post-program, Alumni, and Summit surveys.
- 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 may arise during the Fellowship.
- Filing 2021 tax returns on behalf of all Fellows and collecting written consent to do so.
- Working with Institutes to identify any barriers in programming or access and plan for necessary accommodations for Fellows with disabilities. Direct program costs associated with disability accommodations will be paid directly by IREX.



## 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, Civic Engagement, and 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 (CLC), site visits, community service, and cultural activities to maximize learning and retention of new concepts and ideas. Fellows across all three themes gain theoretical knowledge and practical skills that can be applied in or adapted to African contexts.

In support of broader U.S.-Africa policy efforts, all Institutes must ensure the following identified priorities are addressed throughout their proposed programming:

### **Programming Incorporates Key U.S.-Africa Strategic Policies and Topics**

Institute activities and topics must include opportunities for Fellows to learn about and discuss U.S. policies and initiatives that impact U.S.-Africa relations. Examples include (but are not limited to) efforts to increase trade and investments with the United States, such as Prosper Africa and Access Africa, as well as the African Growth and Opportunity Act, Power Africa, and the recently created U.S. International Development Finance Corporation. All Institutes must include at least three sessions that draw from the following priority topics: accountable governance, anti-corruption, combatting HIV/AIDS, countering violent extremism, debt diplomacy, energy production/distribution, ethical leadership, food security, gender parity, human trafficking, infrastructure/service delivery, international/regional trade, maternal health, peace and security, and youth employability and engagement.

### **Programming Reflects Diverse Viewpoints and Ensures Political Balance**

Institute programming must incorporate a diverse range of U.S. perspectives on target issues and policy responses. This diversity must be reflected across session content as well as guest representation for panels, forums, closing ceremonies, and other events where multiple speakers are engaged. All programming must include a balance of speakers and perspectives throughout the program schedule, including diverse demographic, political, and geographic U.S. viewpoints.

### **Programming Prioritizes Leadership Development**

The Common Leadership Curriculum (CLC) will provide foundational leadership content for Fellows across all Institutes. Institutes must implement the CLC as designed through three-hour sessions scheduled in weeks two through six of programming. Additionally, Institutes must incorporate supplemental leadership approaches, tools, and activities throughout their individual programs to build on and reinforce the Fellowship's focus on broad-based leadership development.

In pursuit of these priorities, 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, 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 Arrival Orientation PowerPoint presentation, a resource that all Partners are required to use to ensure consistency of messaging on key Fellowship topics across all Institutes. Institutes may either use the resource as a stand-alone presentation or incorporate the slides into the Institute-planned orientation sessions. Successful orientations will include both an academic and administrative focus. The academic orientation will introduce Fellows to the Institute's overall themes and practical academic sessions and explain how the sessions relate to Institute objectives. It should stress that while some academic content may not be directly applicable to every Fellow, all Fellows should look for connections between the content and their experiences in their home countries. The academic orientation must also address other program components including the CLC, site visits, community service activities, networking, and any other experiences the Fellows will participate in and how they relate to the Institute's themes.

The administrative orientation will introduce Fellows to Institute staff and the resources available on campus and in the surrounding community. This orientation must include information on safety and security, respect for diversity, health and well-being, and sexual harassment. Institute staff must 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 and associated disciplinary processes, responsibility for building 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 will 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 their first communications with Fellows, Institutes should be clear on what Fellows can expect from Institute programming in terms of academic rigor, pace and daily scheduling, and the types of experiential and skill-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.
- 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.
- Program incorporates a presentation by the university's Title IX office and/or invites the campus Title IX coordinator to present relevant Arrival Orientation slides and the university's policies on sexual harassment.

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

Institutes will consist of an integrated series of highly interactive learning activities including seminars, group discussions, skill-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 **Fellows are not students**; the Fellowship is an executive-style program comprised of experienced individuals 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 from the Fellows in addition to sharing their own expertise on the American experience. Presenters that have some experience in Africa are often well received by the Fellows; however, as noted below, it is expected that Fellows will be the key contributors of expertise, perspectives, and experiences from across Sub-Saharan Africa during academic programming. It is important that Institutes 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 be applicable to a wide range of professional and educational backgrounds. As described above, all Institutes must include at least three academic sessions that draw from the following priority topics: accountable governance, anti-corruption, combatting HIV/AIDS, countering violent extremism, debt diplomacy, energy production/distribution, ethical leadership, food security, gender parity, human trafficking, infrastructure/service delivery, international/regional trade, maternal health, peace and security, and youth employability and engagement.

As much as possible, content must 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 formal policy measures and allow ample time for Fellows to share and discuss their own experiences and thoughts on various initiatives. 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 both the Institute and the Fellowship's broader objectives of strengthening U.S.-Africa relations. The Academic Director should be available to assist Fellows in their efforts to connect 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 U.S. context, as they themselves are expected to bring their home country expertise and perspective to these discussions.

Best practices for practical academic sessions include:

- Academic content is designed for the adult learner using adult learning principles and experiential/practical training techniques.
- Academic learning is balanced with cultural enrichment and downtime.
- Sufficient reflection time is allocated for Fellows to process new learning and experiences. 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, Common Leadership Curriculum, 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. 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 Fellows so that the Fellows can utilize site visits as additional networking opportunities. Site visits should relate to the week's academic content and theme and must highlight diverse viewpoints and a balance of political perspectives.

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. Each Institute will include three required components to develop Fellows' skills in this area: the Fellowship's strengths-based [Common Leadership Curriculum](#) (CLC), the complementary [Leadership Development and Action Plan](#) (LDAP), and Institute-identified leadership activities.

#### **Common Leadership Curriculum**

The Common Leadership Curriculum (CLC) provides a common leadership experience so that all Fellows have a shared language and a foundational knowledge to build upon as they return to their home countries. The CLC is guided by the perspective that leadership is not related to an individual's professional level, but rather to their behavior and actions in whatever position they hold. It incorporates both a strengths-based approach—including use of the CliftonStrengths® assessment which focuses on an individual's natural talents in work and life—and the concept of Ubuntu. The curriculum uses active learning methods to give Fellows practical tools they can apply regardless of their sector interest or level of professional experience. Fellows will return home with an initial action plan and strategies for leveraging their talents to effectively lead and contribute to their local communities.

Institutes will dedicate one three-hour session each week, scheduled in weeks two through six, for the CLC. Institutes will identify a staff member/facilitator to lead Sessions 1, 4, and 5 of the curriculum, as well as a Strengths-trained facilitator to lead Sessions 2 and 3, which are Strengths-focused. A single facilitator may lead all five sessions if they have completed Gallup's current [Successful Strengths Coaching](#) course or its equivalent under previous Gallup training models. For the Strengths-focused sessions, Institutes are encouraged to seek qualified candidates from institutional or community partner staff to ensure continuity with other programming and an understanding of Fellow profiles. Alternatively, IREX can identify a Strengths-trained facilitator to lead Sessions 2 and 3 or provide Institutes with search resources and recommended facilitator selection criteria. IREX will provide Institutes with needed materials to implement the CLC and Institute staff will receive training on how to implement the curriculum during the 2021 Virtual Institute Partner Planning Retreat.



IREX will pay directly for CliftonStrengths® assessments for all Fellows. Facilitator compensation for Sessions 1, 4, and 5 should be included in budgeted Institute staff costs, either as ECA-requested funds or as cost share. For Strengths-based Sessions 2 and 3, IREX will provide a set compensation rate to external or non-salaried Institute staff facilitators. In cases where salaried Institute staff are delivering CLC Sessions 2 and 3, additional compensation will not be provided.

### **Leadership Development and Action Plan**

The [LDAP](#) will complement the work done during dedicated CLC leadership sessions, link leadership concepts with non-academic aspects of programming, and guide Fellows in setting concrete short-term goals and developing practical strategies to implement their visions. Fellows will use unscheduled free time throughout the Institute to work on their LDAPs and apply leadership learnings to their personal contexts.

### **Institute-Identified Leadership Activities**

While the [CLC](#) will provide foundational leadership content for Fellows, Institutes must also incorporate supplemental leadership approaches, tools, and activities throughout their individual programs to build on and reinforce the Fellowship's focus on broad-based leadership development.

### **Community Service**

All Institutes will include a minimum of 10 hours (15 hours are preferred) of community service opportunities throughout the six weeks for Fellows to 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, Fellows should be briefed on the community need the organization fills and be given an overview of how the organization operates prior to the service activity. 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, 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 in advance (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 enough time to allow substantive engagement.
- Activities tangibly support community needs. Examples of activities include fighting food insecurity by working with a local foodbank to provide meals to community residents or volunteering with Special Olympics chapters to support activities for athletes with disabilities.

### **Cultural Exchange**

The Bureau of Educational and Cultural Affairs (ECA)'s 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. As such, Institutes will include robust opportunities for Fellows to interact with their U.S. peers, meet Americans from a variety of



backgrounds, and 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 histories and cultures to Americans as well as each other. Institutes must 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 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 Facebook, Google groups, listservs, WhatsApp, wikis, etc.) information on the broad mix of campus and community activities open to Fellows (such as sporting/theater/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 distinctive element of the program. Institutes will organize events and receptions where Fellows can meet with organizations and contacts in the community that might be interested in developing a connection with them, allowing both Fellows and American professionals to further expand their professional networks.

Additionally, throughout the six weeks, Institutes are encouraged to provide opportunities for Fellows to create and cultivate one-on-one collaborative relationships with seasoned professionals. Institutes may plan to introduce Fellows to peers, mentors, or professionals within 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 models to facilitate these opportunities, best practices include:

- ***Speed Networking:*** Institutes bring Fellows and local professionals together to facilitate structured, short introductory conversations. Fellows have the opportunity to meet multiple individuals and privately identify who they would like to further connect with. The event organizer provides contact details for matches following the event and encourages outreach.
- ***Hub Leaders:*** Fellows at each Institute will generally be placed in smaller communities of practice of four or five 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, who will meet with Fellows in the first week and help connect them to professional contacts of interest. Hub leaders generally meet each week with their Fellows to check in on connections and help identify other professionals in the Fellows’ fields of expertise.



- **Peer Collaborator/Mentor Directory:** A virtual version of speed networking. Institute staff collect 150-word professional bios from a pool of potential Peer Collaborators and Mentors and share these bios with the Fellows. Fellows then rank their top three choices of Peer Collaborators or Mentors, while staff 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 Fellows' application materials, bios, and communications on networking goals and professional interests to match them directly with professionals working in their field. Given the complexity of this model, it has proven most successful when a member of the Institute team is assigned to oversee this component as their primary responsibility.

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

For Fellows to build as broad a network as possible, Institutes should dedicate a full morning or afternoon each week as unstructured time for Fellows to pursue their individual interests during regular business hours. During this time Fellows are encouraged to arrange their own meetings with American experts and leaders in the 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 Fellows to take initiative and make good use of this time. While Institutes will 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. Prior to arriving to their Institutes, Fellows will complete an online course and action plan on Networking in the United States so they are prepared to strategically leverage their networking and unscheduled time to engage with American professionals.

### ***Ignite Talks***

The 2021 Mandela Washington Fellowship Summit will include an opportunity for one Fellow from each Institute to present a three- to five-minute Ignite Talk discussing the work they are doing/plan to do in their home countries, an issue of importance to them, or something they have learned at the Institute that has impacted their work. Institutes may use different approaches to select their designated Ignite Talk speaker; however, all Fellows should be given the opportunity to develop and present a talk and the speaker should be selected by their Fellow peers. Institutes must ensure time is built into their calendars to select the speaker by July 14, 2021.

### ***Summit Preparation***

One 90-minute session must be set aside at the beginning of 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, as well as with other Fellows. The Summit program will include a variety of events, such as panel presentations, networking opportunities, and small group discussions. Institute Partners will receive guidance from IREX on Summit activities to share with Fellows.

### ***Fellow Feedback***

Institutes must include weekly or bi-weekly debrief sessions for Fellows to reflect and provide academic or administrative feedback to address any issues of concern. Additionally, IREX will disseminate baseline



and post-Institute surveys to Fellows and will share these results with Institute Partners. At the end of week six, Institutes must include a one-hour session for Fellows to complete the required online post-Institute survey.

### ***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, 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. The Academic Director should ideally be present with Fellows at all sessions and should highlight how various components support broader Institute themes and Fellowship goals.
- **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 leadership development is woven throughout all Institute activities; facilitating the Institute-led leadership sessions; supporting any sessions led by external facilitators; and linking concepts from the Common Leadership Curriculum (CLC) and the Leadership Development and Action Plan (LDAP) into complementary program sessions and activities. Where possible, Institutes should identify a single staff member to oversee all Institute leadership activities, including facilitation of the CLC.

The program model for the Fellowship includes identification by each Institute of an Academic Director, Administrative Director, and Leadership Manager. These key roles should be present and available as resources for the Fellows throughout the six weeks of the Institute and ***typically include the following types of engagement:***

- The **Academic Director** plans, implement, and oversees the academic content and monitors Fellow participation in all program activities. The Academic Director works closely with faculty, guest speakers, and community organizations to ensure the coherence of all aspects of academic and cultural programming.
- The **Administrative Director** oversees all Fellow support services, including budgetary and logistical elements of the Institute, required reporting to IREX, and Fellows' personal well-being throughout the Institute.
- The **Leadership Manager** works closely with the Academic Director to ensure that leadership programming is implemented as a foundational aspect of programming. The Leadership Manager facilitates CLC Sessions 1, 4, and 5; supports any sessions led by external facilitators; and participates in the Institute Partner Planning Retreat CLC leadership training.



While each Institute staffing structure is unique, be aware that some components will require significant staff time and the staffing structure must be organized accordingly. In addition to the roles outlined above, supplementary staff should be available to support acclimation to the campus and local community, organized networking activities, management of Fellow health/medical needs, and any emergencies that may arise.

#### **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 debit card funds and meals. Housing allows for Fellows to cook meals and includes basic cookware and utensils.
- Institutes provide Fellows with information on places of worship and prayer on campus and in the surrounding community during orientation and campus tours.
- Fellows have access to Institute Partner 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. Facebook, Google groups, listservs, WhatsApp, wikis, etc.).
- Team-building and positive group dynamics are supported and nurtured throughout the program and facilitated by a cross-cultural expert who is outside the regular program management team.
- Medical care facilities are available and easily accessible to Fellows as needed with providers who accept the international Accident and Sickness Health Benefits Program (ASPE) provided by the U.S. Department of State.
- Additional strong support staff are secured to provide critical assistance in matters such as logistical planning, finance and expenses, Fellow travel coordination, and 24/7 support during the Institute. Institutes should anticipate having 2-3 full or part-time support staff employed during the execution of the Institute (for a total of approximately 80-120 hours per week).

#### **SECTION V: INSTITUTE TRACK GUIDANCE**

As 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 tie the academic, leadership, and other activities together. Institutes will consider key challenges facing Africa, the institution's unique expertise, and the resources available within the local community as Institute themes and topics are developed. However, academic sessions should include the subthemes mentioned below for each track to ensure a common experience for all Fellows. 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 able to address local, national, and international challenges. With this goal in mind, Institutes should encourage and develop problem solving regarding issues relevant to current challenges in Sub-Saharan Africa. Examples of current sub-Saharan African



challenges are listed below for each track. Institutes 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 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. These experts should engage in conversation with the Fellows about their experiences and how U.S. examples may or may not be applicable in Fellows' home countries. U.S. examples that can be explored for each track have also been listed below.

### **Leadership in Business**

Leadership in Business Institutes should provide Fellows with an overview of U.S. entrepreneurial strategies, including those employed to address social issues. These Institutes should focus on developing Fellows' skills in business and entrepreneurship, while examining the development, history, challenges, and successes of U.S. enterprises and U.S./global social enterprises, with specific relevance to the African continent. 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.

#### **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
- Opportunities to leverage U.S.-Africa economic policy initiatives to expand businesses and create further international linkages
- Strengths-based leadership in entrepreneurship/management and building diverse teams
- Navigating a business in times of crisis through innovation, adaptation, and community partnerships

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

- Infrastructure and energy deficiencies
- Excessive government regulations and other institutional barriers to operating legal businesses
- 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 management 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 by a visit to an Internet service provider to discuss



how they are expanding 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, grassroots activism, political organizing and leadership, volunteerism, and the use of information and communications technology in advancing civic causes. 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.

#### **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.)
- Advancing inclusive communities and engaging marginalized groups in civic initiatives
- Intersection of civil society with business and government
- Strengths-based leadership in organizing and executing civic engagement initiatives
- Mobilizing communities and leveraging innovative partnerships to mitigate the effects of crises

#### **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**

- Reducing barriers to civic engagement for marginalized groups could be explored through a panel discussion featuring organizations that address issues related to disability rights.
- 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.
- 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 framework 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. 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.

### Subthemes

- Citizen engagement (topics may include community outreach and policy dialogue, transparency, principles of justice, legal rights, government accountability, etc.)
- Resource management (topics may include combatting corruption, ethics, intellectual property protection, workforce development, information technology, accountability, etc.)
- Financial management systems (topics may include public revenue models, civic works, transparent procurement processes, accountability for proper stewardship of funds, etc.)
- Intersection of government with business and civil society
- Strengths-based leadership in designing/executing public management initiatives and building diverse teams
- Innovating public management solutions to strategically respond in times of crises and engaging community stakeholders to make collaborative decisions

### 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 challenges 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: ENSURING INCLUSIVE PROGRAMMING

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. As such, Institutes must provide support and accommodations to ensure



Fellows of all abilities have the opportunity to participate in all program activities and engage with other Fellows.

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

The Fellowship strives toward the active, intentional, and ongoing engagement of diverse groups of people as valued decision-makers, leaders, and drivers of change. As such, Institutes will incorporate diversity and inclusion practices into all aspects of programming and logistics and must foster ECA's mission to promote mutual understanding between citizens of other countries and citizens of the United States. When designing programming, Institutes must provide Fellows with opportunities to engage with a broad range of Americans and perspectives including gender, age, religion, political views, and socioeconomic status.

***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 must be prepared to provide accommodations for Fellows with various types of disabilities and should detail in their Institute Narrative(s) how these accommodations will be managed. 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 accommodation needs during the Summit.

**SECTION VII: SUPPORT FOR FELLOW HEALTH & SAFETY**

Fellow health and self-care are important aspects of any exchange program. As such, Institutes will provide support for any and all Fellow health and safety issues that may arise including but not limited to precautions related to COVID-19. Institutes must be prepared to identify local resources and medical professionals as needed and provide appropriate staff to manage medical or other crisis situations. Institutes must alert IREX of noted Fellow health and safety concerns and follow identified procedures and warning protocols for addressing Fellow conduct, as detailed in the Mandela Washington Fellowship Terms & Conditions.

**SECTION VIII: COMMUNICATION REQUIREMENTS**

In order to maintain consistent messaging about the Mandela Washington Fellowship and ensure U.S. Department of State equities are reflected in Fellowship communications, Institute Partners will:

- Send all articles or press releases to IREX for clearance prior to publication and follow all U.S. Department of State branding and signage requirements for all events, remarks, program documentation, online websites, and social media posts related to the Mandela Washington Fellowship.
- Identify the U.S. Department of State as the funder of the Mandela Washington Fellowship on all public-facing platforms and communications.
- Notify IREX in advance of any anticipated host institution engagement with any U.S. Government officials related to the Mandela Washington Fellowship.



## SECTION IX: INSTITUTE NARRATIVE

The Institute Narrative should provide IREX and the U.S. Department of State with a clear concept of how the structure and content for the proposed Leadership Institute will meet **identified ECA strategic priorities for the 2021 Mandela Washington Fellowship**. The Institute Narrative should walk readers through a Fellow's experience in the program and clearly outline the proposed approach for key program components and learning objectives. The Institute Narrative should not exceed 10 pages single-spaced.

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

- Institute Overview
- Institute Objectives and Goals
- Weekly or Thematic Unit Overview, including topics to be covered and their relevance to the Institute's theme or sub-theme, as well as thematic learning objectives or goals
- Summaries of activities and approach for the following program components:
  - **Orientation:** A concise overview of the program for Fellows, including principal objectives, 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, addressing both academic and administrative elements.
  - **Practical Academic Sessions:** 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 connect American examples to 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, skill-building exercises, experiential activities, and assignments.
  - **Site Visits:** An important form of experiential learning, most successful when complementary to the thematic structure and/or preceded by an academic session to provide background and context. These visits offer Fellows critical insight into how Americans deal with challenges, both successfully and unsuccessfully. They also serve as introductions to a broad network of Americans whose work may be applicable to Fellows' home contexts. Provide an overview of Institute site visits and how they will complement and build on the Institute themes.
  - **Leadership Training:** The Common Leadership Curriculum (CLC) and Leadership Development and Action Plan (LDAP) will provide a central framework for all Leadership Institutes. In addition to confirming the Institute will dedicate three hours of programming each week to the CLC, Institutes must ensure leadership topics and skill-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 providing another reference 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 activity structure.
  - **Cultural Exchange:** Promotes a primary goal of the Mandela Washington Fellowship by increasing 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 relationships and mutual understanding between Fellows and Americans. Describe the Institute's plan for community engagement, including networking and cultural activities planned to introduce Fellows to Americans both professionally and personally in the local community.

- **Networking Opportunities:** Create additional linkages for Fellows to interact 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 independently pursue personal interests. 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 give feedback during the Institute to ensure that any academic, administrative, or personal issues of concern can be addressed in a timely manner. Institutes will host a group of leaders able to provide feedback on things that are both working and not working. Detail how the Institute will gather and incorporate feedback from Fellows throughout the program.

## SECTION X: BUDGET GUIDELINES

Applicants are required to submit an Institute Partner Budget using the 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 an explanation of how the cost was derived. If a line item includes both ECA-requested funds and cost share funds, be sure the amounts for each funding category (ECA/Cost Share) are noted separately 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:** The budget may not exceed \$200,000 in total ECA-requested funds. All implementation costs incurred over \$200,000 must be assumed as cost share by the host institution. Requested funds should be listed in Column G on the budget sheet titled "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 listed in Column H on the budget sheet named "Institute Partner Cost Share."

**IREX Debit Card Amount:** Institute Partners may request funds for the supplemental stipend and/or meal monies be distributed directly to Fellows on an IREX-provided debit card. Funds to be distributed via an IREX-provided debit card should be listed in Column I on the budget sheet named "IREX-provided Debit Card." Funds distributed on this card must include an additional 14% tax withholding listed on the "IREX-provided Debit Card Tax Withholding" line of the budget worksheet. The purpose of this withholding is to offset IREX's tax liability in distributing these funds to Fellows. These monies are reduced from the total available subaward amount of \$200,000.



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

**Staff Costs:** These expenses should include all key Institute personnel salary and benefits costs. All budgeted personnel costs should fall within the anticipated seven-month period of performance from January 15, 2021 to September 15, 2021. The calculations/formulas used to determine staff costs must be clearly visible in the budget worksheet.

The budget narrative must clearly list each key staff member, including the Administrative and Academic Directors, and detail how costs were derived. Please use one of the models 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 to September 15, 2021 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 Institute implementation. 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 expenses are set according to institutional policy. In the budget narrative, be sure to state the appropriate fringe rate for each staff member 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 institution's confirmed 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.).

**Common Leadership Curriculum Training:** Institutes may include the registration fee, at the prevailing rate, for the [Successful CliftonStrengths® Coaching](#) course for the designated staff/faculty CLC facilitator under ECA-requested funds or as cost share. Associated travel or per diem costs may also be included at U.S. Government per diem rates: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem). ***In cases where Fellowship funds are utilized to provide the Institute facilitator with official CliftonStrengths® training, the facilitator will not receive the set compensation rate for Sessions 2 and 3.***

**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 your institution's NICRA or similar document from a cognizant agency. Indirect costs can be included as cost share. The calculations/formulas used to determine indirect costs must be clearly visible in the budget worksheet.

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

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



**Lodging:** 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 that Fellows are mid-career professionals, single rooming arrangements (private or within a suite) are preferred; 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 your institution's context, meals are typically provided through a combination of various means including campus meal cards, group meals, and monies provided directly to support grocery shopping or eating in local restaurants. The monies budgeted on this line should encompass the full amount to provide Fellows with meals for 40 days during the Institute. The only exceptions are funds for group meals and the opening and closing meals, which should be included in the relevant budget lines titled "Group Meals" and "Welcome/Farewell Events" described below. Monies for Fellow meals must be reasonable to provide the planned number of meals for the local cost of living.

**Institute Textbooks and Materials:** Institutes should cover all costs of materials related to and required for the Institute. While laptops and like materials should not be purchased for each Fellow for parity, they may be rented. Cell phones will be provided for Fellows by IREX and should not be included in Institute budgets. Education costs which are not per participant should be included under the "Education Materials" line item.

**Supplemental Allowance:** Institute budgets must include a \$650 per-person stipend to cover the following expenses:

**Book and Cultural Allowance:** Funds to purchase U.S. study books and materials in Fellows' areas of interest. These funds can also be used to cover admissions to cultural events of personal interest; however, these funds may not be used to cover mandatory program activities or materials.

**Incidentals Stipend Allowance:** Funds to cover any incidental expenses that they personally incur over the course of the Institute. Fellows often use these funds to purchase additional toiletries, snacks, and phone cards, or to cover medical co-pays.

This stipend is meant for Fellows' personal use only and must be distributed directly to Fellows upon arrival at their Institutes 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:** 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. All amounts listed in other budget line items should be the totals not including any applicable taxes that have been withheld and should not reduce the meals or supplemental stipend amounts noted above.

**Institute-specific Tax Withholding:** Institutes are solely responsible for determining and withholding taxes on funds provided directly to participants per their institution's guidelines. If applicable, include any required institutional tax withholding on the "Institute-specific Tax



Withholding” line of the budget worksheet and detail how these costs were derived in the budget narrative.

**IREX-provided Debit Card Tax Withholding:** Funds distributed via the IREX-provided debit card must be listed in Column I and include an additional 14% tax withholding listed on the “IREX-provided Debit Card Tax Withholding” line of the budget worksheet to offset IREX’s tax liability in distributing these funds to Fellows. These monies are reduced from the total available subaward amount of \$200,000.

**Guest Speaker Honoraria:** Honoraria for speakers who are not being compensated by the subaward on a salaried basis, including those facilitating CLC Sessions 1, 4, and 5 if applicable, cannot exceed \$250 per day for preparation and delivery. Costs above the \$250 per day 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, which may be found 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 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, which may be found at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem). Explain how group costs are calculated.

**Welcome/Farewell Events:** Both a welcome and farewell event are required. Costs for welcome and farewell events cannot exceed \$45 per person with maximum ratio of two guests per 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 the institution’s seal.

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

IREX will cover the cost of one staff member per Institute to attend the Summit in August. Institutes may choose to send up to two additional staff to the Summit (5 days/4 nights). Any additional Institute staff must be cost-shared or included in 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, which may be found at the following site: [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem).



**SECTION XI: 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 2021 should submit the online application and required documents no later than **Friday, October 30, 2020**. 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>• Institute Narrative clearly outlines how proposed programming will advance each of the 2021 Priorities outlined on Page 2 of this document.</li> <li>• Academic content is designed for and targeted to adult learners using adult learning principles and experiential training techniques.</li> <li>• Proposed sessions demonstrate relevance to current challenges across Sub-Saharan Africa, prioritizing U.S.-based examples of approaches to similar challenges.</li> <li>• Programming highlights key U.S.-Africa strategic policies and topics, including at least three of the topics listed on Page 6 of this document.</li> <li>• Institute Narrative demonstrates a good balance of theoretical knowledge and practical skills and provides clear linkages between academic sessions leadership content, site visits, community service, and other activities.</li> <li>• In addition to the CLC, structured leadership skill-building sessions are incorporated 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>• Institute has identified a faculty/staff member to lead CLC Sessions 1, 4, and 5 and participate in the Virtual Institute Partner Retreat. Additional consideration will be given to Institutes with existing internal expertise and experience utilizing the CliftonStrengths® assessment.</li> </ul>



	<ul style="list-style-type: none"> <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 for the campus and community.</li> <li>• Structured and unstructured networking opportunities allow Fellows to create and cultivate one-on-one collaborative relationships with mentors, peers, and professionals.</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>• All programming sessions and activities reflect diverse viewpoints and a balance of political perspectives.</li> <li>• Opportunities are provided for Fellows to share their country histories and cultures both with Americans and among their Fellowship cohort.</li> <li>• Community service activities are designed to allow Fellows’ substantive engagement, ensuring they can make meaningful and lasting connections with Americans.</li> <li>• Organized community service activities represent a diverse set of service opportunities.</li> <li>• A minimum of 10 hours (15 hours are preferred) 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 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 institution and community resources.</li> <li>• Institution has experience designing and successfully implementing short-term, customized academic exchange programs.</li> <li>• Supplementary staff are available to support program implementation and Fellow health and safety as needed.</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>• Proposed housing is an easy walk to campus or transportation is easily available and/or provided to Fellows.</li> </ul>



	<ul style="list-style-type: none"> <li>• Local grocery and convenience stores are either within walking distance or other transportation arrangements are available for 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 and describes how these accommodations will be managed throughout programming.</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 total 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 have been derived.</li> </ul>

