Request for Proposals

EducationUSA Training Institute: Enhancing Advising Expertise (Level 2)

Date of Issue: November 17, 2014
Application Deadline: Friday, January 2, 2015 (11:59 PM ET)
Announcement Type: Sub-award
Period of Performance: April-May, 2015

Groups of accredited U.S. higher education institutions are invited to submit proposals to host the on-campus portion of the EducationUSA Level 2 Training Institute program in the spring of 2015. This training is supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State in cooperation with the Institute of International Education. Questions about the program, hosting responsibilities, or the proposal should be directed to Allison Viescas, Senior Manager – Operations, Institute of International Education, aviescas@iie.org.

Background

EducationUSA is a global network of hundreds of advising centers located in 170 countries supported by the Bureau of Educational and Cultural Affairs at the U.S. Department of State. EducationUSA centers actively promote U.S. higher education around the world by offering accurate, comprehensive, and current information to prospective international students about accredited educational institutions in the United States. Millions of students learn about U.S. study opportunities through EducationUSA centers each year. Visit www.educationusa.state.gov for more information.

The Institute of International Education (IIE) is an international, independent, not-for-profit organization founded in 1919. IIE administers the Global EducationUSA Services program, through a cooperative agreement with the U.S. Department of State, Bureau of Educational and Cultural Affairs, to advance the goals for the global network. IIE promotes the United States as the destination of choice for higher education and supports the network’s use of new and enhanced marketing tools showcasing the quality and welcoming environment of U.S. higher education to encourage international students to pursue U.S. study, increases EducationUSA collaboration with the U.S. higher education community to further international student mobility, and builds EducationUSA advisers’ level of expertise in educational advising for study in the United States. In-depth information on IIE, its programs and initiatives can be found at www.iie.org.

Overview of the EducationUSA Training Institute

The EducationUSA Training Institute is an intensive training and professional development program designed to provide EducationUSA advisers with the knowledge and skills needed to enhance their effectiveness and build professional competency. Each two-week EducationUSA Training Institute is comprised of a Washington, DC-based workshop, including sessions at the U.S. Department of State and an on-campus training element with site visits to public and private institutions. The Training Institute is a core activity of EducationUSA’s Professional Development Program and is offered annually, targeting different levels of advising.

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Spring 2015 Training Institute

*EducationUSA Training Institute: Enhancing Advising Expertise* will take place (**April 20, 2015- May 1, 2015**). The Level 2 program is designed for experienced EducationUSA advisers with a firm grasp of the basic skills and knowledge needed to perform their jobs, and a successful track record of working with students. Building upon their previous training as well as their professional experience, the program will increase advisers’ depth of knowledge on key topics related to advising students, supporting U.S. institutions, managing an advising center, and representing and advocating for EducationUSA to a variety of audiences. Participating EducationUSA advisers are selected by the U.S. Department of State through a competitive nomination and selection process.

**Host Campus Requirements and Responsibilities**

Applicants should be accredited U.S. post-secondary educational institutions (non-profit or for-profit), U.S. higher education associations, university systems, consortia, or qualified entities that meet provisions in IRS section 26 USC 501(c)(3).

The on-campus portion of the EducationUSA Training Institute will take place (**April 27, 2015 - May 1, 2015**). Proposals must be submitted by *Campus Groups* consisting of at least three institutions, including at least one public institution, one private institution, and one community college. A diversity of academic focus areas, missions, and student backgrounds among the institutions is desirable, and the institutions should be within two hours driving distance of each other. It is preferable for classes to be in session during the program in order to expose advisers to campus life. The selected Campus Group must:

- Work collaboratively with EducationUSA to design and carry out the program; conduct a phone call with the EducationUSA Training Manager at least monthly in the lead up to the program.
- Secure faculty and staff from the campuses to deliver interactive training sessions.
- Provide on-campus meeting space and other facilities.
- Oversee all logistics, including arranging lodging, food that meets certain dietary restrictions, and ground transportation. If adequate facilities are available, the opportunity to stay on campus in a conference center facility or residence hall will maximize advisers’ first-hand experience of campus life.
- Organize an orientation meeting for all presenters and others involved in the program at all of the campuses one month prior to the start of the Training Institute. EducationUSA staff will attend the meeting to provide information about the program, review program plans and answer questions.
- Provide a final program schedule and all materials (e.g. PowerPoint presentations) for final review by EducationUSA staff two weeks prior to the start of the program.

**Proposal Guidelines and Requirements**

*The purpose of the on-campus portion of the Training Institute is not to showcase a particular host institution. Rather, it is to provide advisers with hands-on, experiential learning delivered by experts in the fields of recruitment and admissions, financial aid and student affairs. Campus Groups must demonstrate that they have the capacity to design and deliver such intensive training, and are willing to work collaboratively with EducationUSA to ensure that the program meets participants’ needs.*

The Group Coordinator for the Campus Group that is selected to administer the program will be notified of this decision by the middle of January 2015. Group Coordinators whose campuses are not selected will be notified shortly thereafter.

A complete proposal will include the following three parts:

1. **Basic Information**
   - Name, title and contact information (email, phone, address) for the Group Coordinator, who will serve as EducationUSA’s main contact for the Campus Group as a whole.
2. Proposal Narrative
A detailed description of the proposed training program based on the Training Modules in the accompanying document should include:

a) Day-by-day schedule, including:
   - Description of the session format and content.
   - Learning objectives and expected outcomes.
   - Interactive learning activities. Lecture-format presentations should be kept to a minimum.
   - Names, titles, and short bios of the faculty and staff who will participate in the session. So that a variety of institutional perspectives are represented, it is preferable to have representatives from each of the campuses involved in each session.
   - Where the session will take place (campus and facility)

b) Details about logistics – accommodations, meals, ground transportation, etc.

c) Activities outside of the training sessions, e.g. campus tours, tourist activities, etc.

When planning the proposed schedule, please note the following:

- Advisers will arrive from Washington, DC on Sunday, (April 26, 2015). Arrangements should be made for dinner that evening (e.g. a welcome dinner on campus).
- Training activities should be planned for Monday, (April 27, 2015) through Thursday, (April 30, 2015) (four full days). The final on-campus day, Friday (May 1, 2015) is reserved for EducationUSA-led activities, though some participation by campus staff may be requested.
- Advisers will depart on Saturday, (May 2, 2015). Lodging will be required through that date, along with breakfast on the day of departure.

Proposals should include all of the content and activities specified for each module in the Training Modules document, but Campus Groups may also propose additional topics and activities to benefit advisers and capitalize on the strengths of the institutions involved. The modules need not take place in the order presented. All modules should be designed as experiential learning opportunities, and should include as much hands-on experience for advisers as possible. The modules should be discussed with EducationUSA training staff who will work with the presenters and the Group Coordinator. Final program design will be a collaborative process carried out by the host institutions, IIE, and EducationUSA. Therefore, the selected Campus Group should expect some modifications to the proposed schedule and must be willing to remain flexible through the program design process and training period.

- In addition to the Training Modules, proposals should include opportunities for advisers to interact with international students during meals, as part of campus tours, etc.
- Training activities should generally take place from 9:00 AM - 5:00 PM each day. The last half-hour of each day will be reserved for an EducationUSA staff-led debriefing session, which should be reflected in the proposed schedule.
- Ample time should be left for breaks during the program, as well as for Q & A and group discussions throughout the program.
- Campus groups may propose “extracurricular” activities such as cultural outings in the evenings, but should ensure that the program schedule includes adequate time for advisers to rest and process what they are learning. It is recommended that activities outside of the daily schedule be optional.

Proposals should be submitted by close of business on Friday, January 2, 2015 as an email attachment to Allison Viescas, Senior Manager – Operations, Institute of International Education, aviescas@iie.org.
• EducationUSA does not have a preference for particular geographic areas, and location will not be a factor in the evaluation of proposals. While proposals may include information about the local geographic area, the primary focus should be on training content.

3. **Budget**
   Prepare budget based on estimated program expenses using the Budget Template provided.
   • There will be 23-29 participants (20-25 advisers and 3-4 EducationUSA staff). For purposes of completing the budget, please plan based on 25 participants total. The program will include six nights and five program days. Lodging will be required through Friday night, along with breakfast on Saturday. Please budget for advisers to share double rooms to reduce lodging expenses.
   • Lodging and meals must not exceed the government per diem rate for your geographic area. Per diem rates can be found here: [www.gsa.gov/portal/category/21287](http://www.gsa.gov/portal/category/21287).
   • Ground transportation includes transit to and from the local airport, as well as transportation among campuses during the program.
   • Materials include photocopies, presentation materials, etc.
   • Add additional rows as needed.
   • Reimbursable program costs should not exceed approximately $15,000. Proposals that demonstrate institutional cost-share will be deemed most competitive.

EducationUSA will reimburse all approved costs as outlined and agreed to in the final budget.

**Implementation**
If your campus group proposal is selected, the primary campus will be notified and expected to execute a service agreement with the Institute of International Education. The selected campus group proposal, budget and any subsequent material submitted in response to requests for additional information, will become the basis for contractual agreements. Subsequent to selection of campus group, service agreement negotiations will establish the following conditions, based on the campus group proposal: all pricing, adherence to scheduling logistics, method of payment, and certain penalty clauses relating to delays or conditions of the project that are not met.

**Proposal Timeline**
Actual implementation activities will be started as soon after the selection and contract agreement process as practical.

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<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Request for Proposal announced</td>
<td>Monday, November 17, 2014</td>
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<tr>
<td>Deadline to submit questions and/or express interest in submitting a proposal</td>
<td>Thursday, December 18</td>
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<td>IIE hosts a webinar to answer any final questions and also sends answers to FAQs to all campus representatives who have expressed interest and/or submitted questions</td>
<td>Friday, December 19</td>
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<td>Deadline for submission of complete proposal</td>
<td>Friday, January 2, 2015  (11:59pm ET)</td>
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<tr>
<td>EducationUSA notifies selected campus</td>
<td>Monday, January 16, 2015</td>
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<td>Service agreement executed</td>
<td>Friday, January 30</td>
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