Request for Proposals (RFP)

To: Offerors
From: Institute of International Education, Inc. (IIE)
Subject: EducationUSA Adviser Training Institute: Essentials of Advising (Level 1)

RFP Issue Date: February 10, 2020
RFP Closing Date: May 1, 2020
RFP Closing Time: 11:59 pm EST
Performance Period: May 29 – October 15, 2020

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-value proposal for the requested services. The Contract resulting from this award will be a Cost-reimbursement contract serving the below mentioned program.

Offerors are encouraged to read this RFP in its entirety (including any and all attachments), paying specific attention to the instructions and requirements included herein. Issuance of this solicitation does not, in any way, obligate the Institute of International Education (IIE) to award a contract, nor will IIE pay for any costs incurred in the preparation and submission of a proposal. The agreement resulting from this RFP will be provided to the most responsive Offeror(s) whose Offer will be the most advantageous to IIE in terms of cost, functionality, and other factors as specified in this RFP.

The required services are described in the “Statement of Work” in Attachment A. IIE encourages your organization to indicate its interest in this RFP by submitting a proposal according to the instructions in “Proposal Preparation Instruction”. Proposals will be evaluated based on the “Evaluation Criteria”.

All proposals are due by the dates and times stated above. Any proposal received after the required time and date specified for receipt shall be considered late and non-responsive. Late proposals will not be evaluated.

Questions: Any questions are to be submitted in writing via email to the email address listed below no later than April 11, 2020 at 8:00 pm EDT. No questions will be entertained if they are received by means other than the specified email address. No oral answers will be provided. Answers to questions IIE deems relevant to this RFP will be published on April 18, 2020 at 8:00 pm EDT on IIE’s website under Subawards and Procurement (https://www.iie.org/Work-With-Us/Subawards-Procurements).

Nicole Ambacher, Training Manager
Institute of International Education
1400 K Street, NW, 7th Floor
Washington, DC 20005
Email: NAmbacher@iie.org

Nicole Ambacher, Training Manager
Institute of International Education
1400 K Street, NW, 7th Floor
Washington, DC 20005
Email: NAmbacher@iie.org
Proposal Submission: Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: NAmbacher@iie.org. Be sure to include in the subject line: EducationUSA Adviser Training Institute. IIE will not accept proposals received by fax.

Table of Contents

SECTION 1: BACKGROUND AND PURPOSE ................................................................. PAGE 3
SECTION 2: RFP CONDITIONS ................................................................................. PAGE 4
SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS ....................................... PAGE 5
SECTION 4: TERMS OF PAYMENT ........................................................................... PAGE 7
SECTION 5: EVALUATION OF PROPOSALS ............................................................... PAGE 8
ATTACHMENT A STATEMENT OF WORK ............................................................... PAGE 9
ATTACHMENT B ON-CAMPUS ADVISER TRAINING MODULES ...................... PAGE 11
ATTACHMENT C EDUCATIONUSA ADVISER COMPETENCIES ....................... PAGE 13
ATTACHMENT D COST PROPOSAL TEMPLATE ................................................ PAGE 16
ATTACHMENT C ADDITIONAL REQUIREMENTS .............................................. PAGE 17

RFP SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal Announced</td>
<td>February 10, 2020</td>
</tr>
<tr>
<td>Offerors Questions Submission / Expression of Interest Deadline</td>
<td>April 11, 2020 (8:00 pm EDT)</td>
</tr>
<tr>
<td>Responses to Offeror’s Questions</td>
<td>April 18, 2020 (8:00 pm EDT)</td>
</tr>
<tr>
<td>Proposal Submission Due Date</td>
<td>May 1, 2020 (11:59 pm EDT)</td>
</tr>
<tr>
<td>Anticipated Decision and Selection of Offeror</td>
<td>May 15, 2020</td>
</tr>
<tr>
<td>Service Agreement Executed</td>
<td>May 29, 2020</td>
</tr>
</tbody>
</table>
SECTION 1: BACKGROUND AND PURPOSE

Institute of International Education

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

For more than 90 years, IIE has promoted educational exchange around the world. The Institute currently implements more than 250 programs benefiting 25,000 men and women from 175 nations. Foremost among these programs is the world-renowned Fulbright Program, which IIE has had the honor to administer on behalf of the U.S. Department of State since the program’s inception in 1946. In addition to the U.S. Department of State, program sponsors include: the U.S. Agency for International Development (USAID); World Bank; major philanthropic foundations; private and public corporations; foreign governments; and individuals.

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

EducationUSA

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.

EducationUSA Adviser Training Institute

The EducationUSA Adviser 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 Adviser 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 Adviser Training Institute is a core activity of EducationUSA’s Professional Development Program and is offered multiple times each year, targeting different levels of advising.

Fall 2020 Training Institute

The EducationUSA Training Institute: Essentials of Educational Advising will take place September 14 – 25, 2020. Building upon regional and on-line training for new advisers, the program will provide advisers with foundational knowledge of key topics: EducationUSA as a public diplomacy tool; structure and diversity of the U.S. higher education system; international student admissions and financial aid procedures; and an introduction to resources available to support advisers in their work. Advisers will gain skills in student advising, advising center management, networking, and promotion of U.S. higher education.

Advisers must serve at least one year as an EducationUSA adviser prior to attending the Training Institute and complete the EducationUSA on-line course and the virtual Pre-Training Institute workshop. Level 1 competencies focus on working with students and building knowledge of U.S. higher education, the State Department, and EducationUSA policies and procedures. The goal of the Adviser Training Institute is to provide them with skills in advising and an in-depth understanding of the U.S. university admissions process. Participating EducationUSA advisers are selected by the U.S. Department of State through a competitive nomination and selection process.

Purpose of Request for Proposal

The purpose of this Request for Proposal ("RFP") is to invite qualified campus groups to submit a proposal to host the on-campus portion of the EducationUSA Training Institute: Essentials of Advising (Level 1) outlined more
fully in Attachment A. The on-campus portion of the Adviser Training Institute will take place September 20-26, 2020, with advisers arriving on Sunday, September 20 and departing on Saturday, September 26.

Proposals must be submitted by Campus Groups consisting of at least three institutions, including at least one public institution, one private institution, and a community college. 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). 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. Proposals from, that include, or that include interaction with, minority serving institutions are encouraged. It is preferable for classes to be in session during the program in order to expose advisers to campus life.

The purpose of the on-campus portion of the Adviser 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 IIE EducationUSA team members to ensure that the program meets participants’ needs.

Upon award, the training program and modules should be discussed with the IIE EducationUSA team members who will work with the presenters and the Group Coordinator. Final program design will be a collaborative process carried out by the host institutions and IIE EducationUSA team members. 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.

Responsibilities of the selected Campus Group will include:

- Work collaboratively with EducationUSA to design and carry out the program; conduct a regular call with the EducationUSA Training Manager, as needed.
- 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 Adviser 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.

SECTION 2: RFP CONDITIONS

IIE reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Offeror or other party.
- Accept other than the lowest price offered.
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
- Award more than one contract.

Nothing in this RFP is, or should be relied on by Offeror as a promise or representation by IIE. IIE does not make any representation or warranty as to the completeness of this RFP or have any liability for any representations (express or implied) contained in, or omissions from, this RFP. This RFP and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Proposal.
Offeror shall keep the RFP and its contents confidential and shall return the RFP (without keeping copies) to IIE if the Offeror elects not to submit a proposal, or upon being requested to do so by IIE.

Any information or materials submitted in response to this RFP and/or as a proposal (whether successful or unsuccessful) shall become the property of IIE and will not be returned.

In submitting a proposal, you must agree that your offer shall remain firm for a period of no less than 120 days from the RFP closing date.

Failure to follow the specifications and requirements provided in this RFP may result in disqualification.

The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the successful Offeror.

SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS

Proposals are expected to be comprehensive and include the information set forth below. Offerors are also invited to send any additional information or supplemental material they believe will aid IIE in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought.

Include only your own work and no text copied from sources outside of your organization, unless those sources are adequately cited and credited. In order to be qualified for this RFP, all Offerors are requested to provide the following information, and format their proposal as follows:

1. Letter of transmittal, one page
   This letter will summarize in a brief and concise manner, the Proposer’s understanding of the scope of services and make a positive commitment to perform the work in a timely manner. The letter should name all of the persons authorized to make representations for the Offerors. The Letter of Transmittal shall be signed by a representative who is authorized to contractually bind the Offerors and include the agent’s title or authority. The letter should not exceed one page in length.

2. Basic information, one page
   - Legal name, registered address, and “Remit to” mailing address, if different from registered address
   - Name of authorized representative for this RFP, with telephone number(s), and e-mail address
   - General information about your organization and the services it offers
   - Name, title, and contact information (email, phone, mailing address) for the Group Coordinator, who will serve as EducationUSA’s main contact for the Campus Group as a whole. The Group Coordinator will be considered key personnel and once selected, any change in this position would require approval by IIE.
   - Name, title, and contact information for the Institution Coordinator at each participating institution, who will serve as the main point person at the institution for the project. The Group Coordinator may also serve as the Institution Coordinator for her or his home institution.
   - Brief (250 words) description of each participating institution including: number of students, degrees offered, academic focus areas, available scholarship opportunities, and a summary of any collaboration with EducationUSA to date.

3. Qualifications and Capabilities
   - Brief description of the organization/entity and experience in the field that illustrates overall services and capabilities to meet the terms of the RFP
   - Years of relevant experience
• Any plans to outsource/subcontract the services or any part thereof

4. Implementation of the Statement of Work

• Detailed description of the services being offered and any information relevant to meeting the technical specifications stated in Attachment A. The proposed training program should be based on the Training Modules found in Attachment B, and take into account the EducationUSA Adviser Competencies found in Attachment C.

• Methodology, and reasoning behind the methodology chosen

• Quality control plan including:
  o A description of internal review procedures that facilitate high-quality standards
  o How quality control will be managed when completing multiple projects for multiple clients

• Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted

5. Cost Proposal

• Submit a detailed cost proposal, in U.S. dollars, in the recommended format shown in Attachment D

• A detailed cost proposal should be submitted for the services described in the statement of work. It is recommended that the Offeror use the cost proposals Template accompanying this RFP. IIE’s review of the cost proposal shall determine if the overall costs proposed are: realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror’s proposal.

• Breakout of estimated costs by as stated in Attachment D, as referred to in Scope of Work (Attachment A).

• Include any additional cost items that the Offeror wishes to propose

• Please submit a comprehensive narrative/budget notes to describe individual cost items as needed.

In preparing the budget, please consider:

• For the purposes of completing the budget table, please plan based on 28 participants total (approximately 24 advisers and 4 EducationUSA staff).

• The program will include six nights and 7 days, inclusive of a Sunday arrival and lodging through Friday night, along with breakfast on Saturday prior to a Saturday departure. The training program is 5 days, Monday-Friday, with Friday being dedicated to EducationUSA activities, if needed.

• Lodging and food must be within the per diem for your geographic area. Per diem rates can be found here: www.gsa.gov/portal/content/104877.

• 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.

• Include any additional cost items that the Offeror wishes to propose.

• Total cost proposed.

• If additional rows are needed for “other” expenses, please add them to the chart.

• Proposals that include institutional cost-sharing will be considered more competitive.

• If the budget includes indirect costs, include a copy of the Offeror’s Negotiated Indirect Cost Rate Agreement (NICRA).

Proposals are expected to be comprehensive and include the information set forth below. Offerors also are invited to send any additional information or supplemental material they believe will aid IIE in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought.

In summary, proposals should address the following:

A. General Questions
   i. General information about your organization and the services it offers
ii. References

B. Planning
   i. Project Plan
   ii. Whether you will utilize subcontractors

C. Other Planning Details (if applicable)
   i. Project communication plan
   ii. Training

D. Budget & Estimated Pricing
   i. In submitting a quotation, you must agree that your offer shall remain firm for a period of no less than 120 days from the RFP closing date.

Failure to follow the specifications and requirements provided in this RFP may result in disqualification.

6. Additional Information

Proposals are expected to be comprehensive and include the information requested above. Offerors also are invited to send any additional information or supplemental material they believe will aid in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought. The total length of the proposal should not exceed 10 pages, exclusive of the budget.

SECTION 4: TERMS OF PAYMENT

If your campus group proposal is selected, the primary institution will be notified and expected to execute an agreement with the Institute of International Education. The other institutions will be expected to enter into lower tier agreements with the primary institution. 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.

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

SECTION 5: EVALUATION OF PROPOSALS

Basis of Award: The award will be made to the Offeror(s) whose offer presents the best value: the optimal combination of technical merits and reasonable cost.

A. Technical Approach

Provide a clear, specific, and succinct technical proposal that covers both the conceptual and practical approaches of how to achieve the objectives described in this RFP. Please note that proposals from, that include, or that include interaction with, minority serving institutions are encouraged. Specifically, please address the following:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrates understanding of EducationUSA advising network</td>
<td>10 points</td>
</tr>
<tr>
<td>Thoroughness of proposal (descriptive)</td>
<td>10 points</td>
</tr>
<tr>
<td>Clearly defined learning outcomes and objectives</td>
<td>10 points</td>
</tr>
<tr>
<td>Quality of experiential &amp; interactive learning activities</td>
<td>10 points</td>
</tr>
</tbody>
</table>
Creativity of session content and delivery 10 points
Inclusion of representatives from each institution in sessions 5 points
Pace and flow of each sessions and breaks (day-by-day schedule) 5 points
Opportunities to interact with international students 5 points
Thoroughness of logistical info (including accommodations, meals, and transportation) 10 points
Inclusion of extra-curricular activities 5 points

B. Cost Reasonableness and Financial Capability 20 points
Submit a detailed budget and budget narrative to carry out this work. IIE’s review of the budget shall determine if the overall costs proposed are realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror’s Technical Proposal. Please note that proposals which include institutional cost-sharing will be considered more competitive.

a. Submit a reasonably comprehensive budget narrative/budget notes to describe individual cost items as needed.

| Total | 100 points |

Offerors determined by IIE, with consultation and approval by the U.S. Department of State, to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this process. Written notification will be sent to these bidders via email.
ATTACHMENT A STATEMENT OF WORK

Host Campus Requirements & Responsibilities

The on-campus portion of the EducationUSA Training Institute will take place September 20 – 26, 2020, with advisers arriving on Sunday, September 20, 2020 and departing on Saturday, September 26, 2020. Proposals must be submitted by Campus Groups consisting of at least three accredited U.S. post-secondary educational institutions, including at least one public institution, one private institution, and a 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 various aspects of campus life.

Responsibilities of the selected Campus Group will include:

• Work collaboratively with IIE EducationUSA team members to design and carry out the program; conduct bi-weekly calls with the EducationUSA Training Manager, as needed, and conduct one Pre-Training Institute virtual workshop session with IIE EducationUSA team members, as needed.
• 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 necessary 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 Narrative

A detailed description of the proposed training program, based on the Training Modules in Attachment B, 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) A monitoring and evaluation plan to assess participant satisfaction and learning during the on-campus component of the Institute. This plan should include pre- and post-program assessments, as well as one or more mid-program check-ins to allow for adjustments to content and to address concerns.

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

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

When planning the proposed schedule, please note the following:

• Advisers will arrive from Washington, DC on Sunday, (September 20, 2020). Arrangements should be made for dinner that evening (e.g. a welcome dinner on campus).
• Training activities should be planned for Monday, (September 21, 2020) through Thursday, (September 24, 2020) (four full days). The final on-campus day, Friday (September 25, 2020) is
reserved for EducationUSA-led activities, though some participation by campus staff may be requested.

- Advisers will depart on Saturday, (September 26, 2020). 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 and IIE EducationUSA team members. 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 “extra-curricular” 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.
- EducationUSA does not have a preference for particular geographic areas. While proposals may include information about the local geographic area, the primary focus should be on training content.
ATTACHMENT B ON-CAMPUS ADVISER TRAINING MODULES

The on-campus training modules below outline the content required for a Level 1 Adviser Training Institute and should guide how you design your proposal. Proposals should include training on most or all of the content areas highlighted in these modules.

Module 1: Admissions and Recruiting – Undergraduate and Graduate

Suggested training staff: Admissions office officials, recruiters, and staff from undergraduate and graduate schools, faculty who work with admissions on recruiting (if applicable), anyone else involved in the recruitment process (e.g. if a dean is involved in determining institutional priorities/target numbers)

- Structure of the admissions office, roles and responsibilities for admissions and recruiting- differences in undergraduate and graduate recruitment
- How is the annual recruitment plan determined (both domestic and international)- undergraduate and graduate?
- How are institutional priorities determined for undergraduates and graduate departments?
- How do they virtually reach out to international students? How can students let them know virtually that they are interested?
- What does a recruiter look for in a country visit/fair/recruiting event?
- Discussion on how EducationUSA has assisted on certain visits and how we can provide more assistance
- Examples of both strong and weak visits (both domestic and international) and lessons learned
- Student panel/discussion on how they selected the schools they decided to attend

Module 1a: Admissions Insider: A Day in the Life of an Admissions Officer

Suggested training staff: Admissions office officials and staff

- Visit to an admissions office
- Discussion of roles and responsibilities of an admissions officer, e.g.
  - Marketing strategies and outreach activities conducted (e.g. attending college fairs, visiting high schools, etc.)
  - Communication with prospective students, including international students
  - Communication with guidance counselors and EdUSA advisers
- How advisers and admissions staff can stay connected and serve as resources for each other
- Advisers practice explaining their home country education systems to an admissions officer and discuss different issues/challenges admissions officers have observed in international students

Module 2a: The Life Cycle of an Application – Undergraduate

Suggested training staff: Admissions office officials and staff, faculty who review applications (if applicable), anyone else involved in the decision process (e.g. if a dean is involved in reviewing certain types of applications)

- Application elements and requirements for each type of institution represented (essays, test scores, etc.)
- Discussion of the review process, e.g. where the application goes when it arrives on campus, who reviews it (single reader, multiple readers, committee), criteria upon which decisions are based, how they are weighed-especially for international students, etc.
- Examples of both strong and weak applications (both domestic and international)
- Simulation of an admissions panel – advisers review real applications (with identifying information taken out), debrief with whole group comparing different approaches and results
- Discussion with undergraduate and graduate schools on how admissions committees work

Module 2b: The Life Cycle of an Application – Graduate

Suggested training staff: Admissions office officials and staff, faculty who review applications, anyone else involved in the decision process (e.g. if a dean is involved in reviewing certain types of applications)

- Application elements and requirements for each type of institution represented (essays, test scores, etc.), including differences by discipline
- Discussion of the review process and how it differs from the undergraduate application review process, e.g. where the application goes when it arrives on campus, who reviews it, criteria upon which decisions are based, etc.
- Examples of both strong and weak applications (both domestic and international)
Simulation of an admissions panel – advisers review real applications (with identifying information taken out), debrief with whole group comparing different approaches and results

Differences between MA and PhD application process.

Module 3a: Tuition, Fees and Financial Aid – Undergraduate

Suggested training staff: Financial aid officers, international admissions officials

- Overview of tuition rates, additional fees, cost of living, etc. for each type of institution represented using actual website to simulate the student experience
- What sources of aid are available for international students (grants, loans, work study etc.)
  - Need based vs merit based and how these are awarded
  - Conducting a scholarship search
  - Review examples of actual aid applications from international students and aid packages received
- Case studies of problems international students have faced in this realm and how they were resolved

Module 3b: Tuition, Fees and Financial Aid – Graduate

Suggested training staff: Financial aid officers, international admissions officials, faculty who employ graduate assistants

- Overview of tuition rates, additional fees, cost of living, etc. for each type of institution represented and specific academic programs.
- What sources of aid are available for international students (grants, loans, work study etc.)
  - Determining eligibility for grants, teaching assistantships, research assistantships
  - Review examples of actual applications from international students and aid packages received
- Discussion of assistantships and how they are awarded – with graduate students represented if possible. What are the responsibilities of TAs and RAs?
- Case studies of problems international students have faced in this realm and how they were resolved

Module 4: The International Student Experience

Suggested training staff: International Students Office staff, student affairs staff, resident life staff

- How to help international students find the “right fit”
  - Overview of campus culture at the different types of institutions represented
  - Advanced strategies and resources for conducting a college search
  - How to learn about a campus’s culture when unable to visit
- Visas and immigration
- Key issues in U.S. student life – in loco parentis, “helicopter parents,” etc.
- 21st century technology on campus
  - Use of social media in interacting with students
  - “Smart” classrooms
  - How to navigate an institution’s website to find needed information
- Role of the International Students Office with international students on campus
- When there’s a problem: support for struggling international students
- Best practice for integrating international students into campus life (particularly for those who have the option to live off campus)
- How EducationUSA advisers and staff working with international students can stay connected and serve as resources for each other
- International student panel

Module 5: Community Colleges – Structure and Outcome

Suggested training staff: Faculty and staff from community colleges, admissions office officials

- Overview of the role and mission of community colleges in opening access to higher education and serving as a community-based institution of higher education
- Preparing students for transfer to four-year institutions and transfer policies and the related advantages and challenges
- Workforce development programs
- Activity or discussion with advisers regarding the challenges associated with presenting the U.S. community college model to educators, parents and students in their countries
Module 6a: Meet the Academic Programs – Networking Fair
Faculty and staff from academic units at each of the host institutions participate in a college fair-style networking session. Advisers will have the opportunity to talk individually with department representatives about admission and degree requirements, course content, faculty research, etc.

Module 6b: Meet the Academic Programs – Department Visits
Advisers visit academic units in small groups. Activities should include an overview of academic programs, visits to classrooms/laboratories, discussions with faculty, and interaction with international students if possible. Attendance at an evening class is an option that we could provide to advisers.

Module 7: Title IX
*Suggested training staff: Faculty and staff from the Title IX office*
- Overview of the role and mission of Title IX
- Concept of mandatory reporting on campus and implications for students and faculty on campus
- Procedures and principles

Module 8: Student Housing Tour
Advisers visit student housing. Activities should include an overview of the housing options, visits to a student apartment/common rooms if at all possible.
ATTACHMENT C EDUCATIONUSA ADVISER COMPETENCIES

The EducationUSA Adviser Competencies are designed to provide a common definition of what it means to be an adviser. Developed by REACs and EducationUSA professional development staff, the competencies set forth the key duties of an adviser and encapsulate the knowledge, skills, and attitudes required to perform these duties effectively.

Recognizing that the expectations of the adviser position often vary over time and by location, and that advisers build professional expertise and take on additional duties as they gain experience, each competency is divided into Level 1, Level 2, and Level 3. Broadly:

- Advisers at Level 1 develop their skills working with students and increase their knowledge of U.S. higher education, public diplomacy, the Department of State, and EducationUSA policies and procedures.
- Advisers at Level 2 perform advising center management duties, engage in strategic planning, and advocate for and represent EducationUSA in addition to Level 1 duties.
- Advisers at Level 3 serve as a resource for less experienced advisers, develop specific areas of expertise, deliver training, and contribute to the knowledge base of the network in addition to Level 1 and 2 duties.

Using the Competencies

The competencies define the work requirements at each level of advising and serve as a foundation for adviser professional development. REACs use the competencies to help advisers establish professional goals, assess their progress and development, determine training needs, and identify appropriate training activities to meet those needs. EducationUSA professional development staff and REACs use them to design training that focuses on specific competencies and advising levels, and addresses areas of particular need within the network.

It is not expected that all advisers will engage in all of the activities outlined, or that all advisers should attain the highest level on each competency. Resources vary by location, and advisers often balance their advising work with other professional responsibilities. Advisers should work with their REACs to determine locally appropriate activities within each competency, and set realistic and manageable goals for their professional development.

Competency 1: Help Students Have a Successful Study Experience in the U.S.

Advisers at Level 1 should:

- Establish effective advising relationships with students through:
  - Individual advising sessions
  - Group advising sessions
  - Use of all available communication tools (e.g. email, phone, social media, etc.)
- Use key information resources to help students conduct a college search, including:
  - Field-specific search engines
  - The EducationUSA website
  - The Council for Higher Education Accreditation (CHEA) website and other resources to determine an institution's accreditation status
  - Other EducationUSA and State Department resources (e.g. the weekly update, Connections, etc.)
- Help students complete the application process by providing guidance on:
  - Application procedures for different institutions, including materials required and the use of the common application
  - Standardized tests, including acronyms and required scores
  - Elements of effective application essays and recommendation letters
  - How a U.S. admissions office works, how decisions are made, etc.
- Assist students in financing their education in the U.S. by providing guidance on:
  - Differences in costs for different types of institutions and programs
The basics of the U.S. financial aid system, including differences between undergraduate and graduate financial aid, and resources available to international students.

- Help students successfully navigate the visa process by providing guidance on:
  - Types of visas required for different populations (i.e. student, intern, trainee, etc.) and regulations
  - Application requirements and procedures
  - The SEVIS system and how it is used

- Plan and deliver a Pre-Departure Orientation.
- Counsel matriculated students on cultural, social, and academic adjustment issues as requested.
- Abide by all EducationUSA Principles of Ethical Practice as they pertain to working with students

Competency 2: Advocate for U.S. Higher Education

Advisers at Level 1 should:
- Understand and be able to explain the basic structure and characteristics of the U.S. higher education system to students and other audiences, including:
  - Types of institutions (e.g. public, private, research university, liberal arts college, community college, technical school, etc.) and their defining characteristics.
  - Degree structures and curriculum models.
  - The accreditation system.
  - The student grading system.
  - Unique characteristics and strengths of the U.S. higher education model. Campus culture and student life (e.g. housing, student services, etc.).
  - How the U.S. system differs from their home country higher education system.
- Be able to “tell the story” of the American college experience.
- Provide contacts for visiting representatives from U.S. institutions seeking to arrange visits to local institutions

Competency 3: Manage an Advising Center

Advisers at Level 1 should:
- Understand and be able to explain the structure of the EducationUSA network, including internal and external stakeholders (e.g. students, supervisors, REAC’s, Program Officers, Embassies staff, etc.), their roles, and their expectations of advisers to students and other clients.
- Communicate effectively with all center stakeholders, using the appropriate chain of communication and communication methods within the network (e.g. with REAC’s, through listservs, etc.)
- Collect and compile basic center statistics accurately and on schedule, and use the Center Reporting System and Activity Tracker as required by the State Department.
- Organize a physical advising center that effectively serves the needs of students and other stakeholders.
- Understand how to use basic social media tools in marketing and outreach efforts, including region-specific social media and tools. Comply with and promote host institution strategies for the use of social media.
- Demonstrate strong organization and time management skills.
- Abide by all EducationUSA Principles of Ethical Practice as they pertain to advising center management

Competency 4: Represent and Advocate for EducationUSA

Advisers at Level 1 should:
- Demonstrate an understanding of and commitment to EducationUSA’s mission, including U.S. public diplomacy goals, throughout their work, and articulate the importance of EducationUSA’s work to a variety of audiences including host organizations and Public Affairs Sections.
- Understand and adhere to EducationUSA’s guidelines and policies, including the policy on commercial agents, Principles of Ethical Practice, and the Free Services document.
• Convey a positive attitude towards the U.S., enthusiasm for U.S. higher education and its benefits, and a belief in the value of international exchange.
• Conduct all activities and interactions in a professional manner, and provide excellent customer service.
• Actively seek out collaboration with other organizations and institutions (e.g. Embassies) to support students and fulfill EducationUSA’s goals.

Competency 5: Build Professional Competence and Contribute to the Knowledge Base of the Network

Advisers at Level 1 should:
• Understand the adviser professional development track and available training opportunities (e.g. in-country training, EducationUSA Training Institute, webinars, etc.), and be willing to engage in appropriate professional development activities as identified by self and REAC.
• Apply knowledge and skills acquired through training and other professional development activities in their work, and be able to articulate the impact of such opportunities on their effectiveness as advisers.
Submit a detailed, budget for the services described in the technical proposal. IIE’s review of the cost proposal shall determine if the overall costs proposed are: realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror’s Technical Proposal.

Please see the separate attachments for the Budget Template. Please replicate and complete that budget chart, based on estimated program expenses.

- For the purposes of completing the budget table, please plan based on **28 participants** total (approximately 24 advisers and 4 EducationUSA staff).
- The program will include six nights and 7 days, inclusive of a Sunday arrival and lodging through Friday night, along with breakfast on Saturday prior to a Saturday departure. The training program is 5 days, Monday-Friday, with Friday being dedicated to EducationUSA activities, if needed.
- Lodging and food must be within the per diem for your geographic area. Per diem rates can be found here: www.gsa.gov/portal/content/104877.
- 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.
- Include any additional cost items that the Offeror wishes to propose.
- Total cost proposed.
- If additional rows are needed for “other” expenses, please add them to the chart.
- **Proposals that include institutional cost-sharing will be considered more competitive.**
- If the budget includes indirect costs, include a copy of the Offeror’s Negotiated Indirect Cost Rate Agreement (NICRA).
1. **Experience and Qualifications:** Submit a narrative description of relevant experience. This narrative cannot exceed two pages and must address the following:

   a) The number of years of relevant experience. A minimum of five years of relevant professional experience providing the services to clients.

   b) A brief description of experience in the field.

   c) Number of employees (if applicable).

   d) A description of resources (personnel) currently available in-house to provide the required services.

   e) A description of any plans to outsource/subcontract the services or any part thereof.

   f) A description of relevant personnel qualifications, including CVs for key individuals, where applicable. CVs are not included in the 2-page length limit.

2. **Quality Control Plan:** Submit a single narrative for this factor, regardless of the number of services offered. This narrative cannot exceed two pages and must address the following:

   a) A description of internal review procedures that facilitate high-quality standards.

   b) Identification of individuals responsible for ensuring quality control.

   c) Whether or not outsourcing/subcontractors are used and, if so, the quality control measures used to ensure acceptable subcontractor performance.

   d) How potential problem areas and solutions are handled.

   e) The procedures for ensuring quality performance when meeting urgent requirements.

   f) How quality control will be managed when completing multiple projects for multiple clients.