



REQUEST for PROPOSALS
for
Training Workshops

Deadline: March 1, 2003

<http://aoc.uoregon.edu>

January 1, 2003



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SECTION I. General Information

A. Introduction

Agents of Change is a 3-year project funded by the U.S. Department of Education Fund for the Improvement of Postsecondary Education (FIPSE) to better prepare students as future teachers, architects, and stewards of the built environment. Through *Agents of Change*, faculty and teaching assistants (TAs) from accredited architecture programs will be trained to investigate actual buildings, conduct post-occupancy surveys, and develop exercises to implement at their home institutions. *Agents of Change* will generate an ever-increasing library of case studies published on the Web; increase the pool of qualified architectural technology faculty as graduate students are trained and motivated to enter the teaching ranks; and ultimately train future architects to create buildings that provide for human health and well-being while using energy responsibly. For additional information about *Agents of Change* see the project web site, <http://aoc.uoregon.edu>.

Based on the hypothesis that exposure to on-site, performance-focused, case study development enhances architectural education, we look to teams of architecture faculty and TAs to integrate this experiential learning approach in their curricula, thus becoming Agents of Change. *Agents of Change* seeks faculty interested in sponsoring a regional training workshop. There are two opportunities to administer this training. The first in January 2004, the second in August 2004. You may apply for either or both of these training dates, but you can only receive a \$15,000 award to support one training date. The deadline for proposals is **1 March 2003**.

B. The *Agents of Change* Training Model

Agents of Change provides a comprehensive training strategy to continuously supply generations of experienced faculty-TA teams, expand and improve the knowledge base through case studies, and cultivate a new generation of skilled architects versed in building evaluation. The primary activities of our self-sustaining model train participants to:

- use state-of-the-art data acquisition systems and handheld equipment
- conduct case-study investigation of nearby buildings
- practice acquired teaching skills through the teaching of peers
- develop case-study exercises tailored for their home institution's curriculum
- train successive generations of TAs to use and teach the case-study approach.

At the core of our model are three-day sessions held between academic terms for direct, peer-to-peer training of 24 TAs and faculty with follow-ups at SBSE summer retreats. Training teams of TAs and faculty is key to implementing change. The teams are coached in conducting a case-study course on their own. Participating schools are eligible to borrow from the *Agents of Change Project* a mini teaching toolkit that contains equipment and teaching materials to support case study development, train the next generation, and thereby help perpetuate the model. To ensure training effectiveness, enrollment at each workshop is limited to 24. We encourage the broadest geographic diversity of participants at each training session and have structured the 3-year project to address the following issues:

1. cost efficiencies through participant travel cost reductions at regional trainings
2. conflicts with prior academic commitments (holding the training between terms allows students and faculty to better concentrate on their *Agents of Change* experience)
3. each institution's differing cycles of TA selection
4. time to apply and test some component of the case-study approach in a course
5. opportunities to reinforce the lessons learned from the national training sessions

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6. the common break in academic schedule for both semester and quarter system institutions.

As a follow-up to the training, TA–faculty teams will be encouraged to participate in the annual SBSE summer curriculum development retreat to present their students’ case studies and discuss how they have incorporated the building case-study approach in their courses. The SBSE Retreat provides an arena for the TAs to demonstrate their skills to the evaluators and share experiences with faculty and other TAs.

Format and Activities. Trainee teams conduct a case study—propose inquiry questions, frame a hypothesis or hunch about the probable outcomes, formulate a research methodology for gathering data, use field protocols to physically collect data, analyze results, and cogently report findings. The framework for the training sessions provides concrete experiences for participants to learn how to teach by being taught, beginning with the basics of data acquisition and gaining hands-on experience measuring buildings and their environments. Led by TA and faculty trainers, each day incorporates peer-to-peer teaching combined with critique and evaluation. These activities are outlined in the sample program schedule (Figure 1) and described below.

	Day 1 Thursday INVESTIGATING	Day 2 Friday MEASURING	Day 3 Saturday TEACHING
9:00A	Welcome Introductions	Measurements in Buildings Teams conduct field evaluations Hypotheses revisited	Case Study Building Presentations Exercise Development and Presentation Roundtable Discussion
11:00A	Tools Training, Treasure Hunt Toolkit introduction Equipment and exploratory exercises Hobos launched	Methodologies revised	Passing the Baton, Role of TAs Case Study Discussions Protocols for judging case studies
12:15P	Take a Tool to Lunch (no-host)		
1:30P	Building Introduction by Architects	Data Analysis	Morning’s Discussions Continue Passing the baton, Role of TAs, Case study methodology
2:00P	Background Information Energy bills, data analysis	Data Presentations by Teams Hobo Data Analyzed	Group Evaluation Roundtable Farewell and Group Photo
4:00P	Hypothesis Generation Methodology Development Equipment Assembly		
5:30P			
6:30P	Team-Building Dinner	Program Debriefing Dinner	

Figure 1. *Agents of Change* Training Session Schedule

Day 1: Investigating. The PI welcomes participants and introduces the training session objectives and schedule. TA and faculty trainers introduce themselves and describe their *Agents of Change* and Vital Signs experiences. Trainee team members introduce themselves, their reasons for participation, and what they hope to learn. The PI then disaggregates the group so that trainees from the same school are on different investigative teams. This redistribution provides opportunities for participants to learn about other architecture curricula, expand their network, and encourage greater autonomy from the TA trainees since they will not be on the same team as their supervising faculty.

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Teaching Toolkits. TA trainers present tips on collecting and analyzing data over a period of time as well as introduce the following equipment and teaching materials:

Equipment Loaner Tool Kit

- Onset™ Hobo dataloggers (10)
- Kestrel™ 3000 weather meter (1)
- Raytek™ infrared thermometer (1)
- Testo™ Velocity sticks (2)
- Pilkington™ Sun Angle Calculator
- Suunto™ compass/clinometer (1)
- Sylvania™ light meters (2)
- solar transit construction instructions
- pocket balometer

Teaching Kit given to trainees

- Tool kit equipment lists and vendor contact information
- Sample grant proposal for equipment
- Sample case study exercises for term-long, half-term, two-week, and three-day field investigation exercises
- Links to exemplary case studies
- Hypotheses-building exercise
- Evaluation criteria for case studies
- Equipment images (jpg files)
- How to Run a Tool Day

Equipment Exercises. Through hands-on, exploratory exercises participants learn to use the toolkit equipment and other devices from the University of Oregon (UO): luminance meters, CO₂ monitors, sling psychrometers, sun angle calculators, and hot-wire anemometers. Exercises include a Treasure Hunt in and around a building to find and calculate values (e.g., interior illuminance, solar radiation, electric current, and surface temperature), an exciting, effective means to become familiar with the equipment, its application, and its capabilities.

Days 1 and 2: Investigating and Measuring. Conducting a Case Study. Participants learn first-hand about the case-study process by conducting a mini field investigation of a building selected by the PI. They go through the following steps of the case study process:

- study building background material and discuss design issues with the architect
- assemble a list of inquiry questions and topical areas of study
- develop questions into testable hypotheses
- discuss appropriate methodology and equipment
- collect and analyze data
- present summaries and design lessons learned.

The TA and faculty trainers facilitate all steps and provide feedback to the TA–faculty trainee teams.

Day 3: Teaching. Course Planning. Using the curriculum materials in the Teaching Toolkit, teams outline a strategy to implement and integrate case-study exercises into their courses in the upcoming terms. After the strategies are outlined, participants develop case-study assignments such as a two-day exercise, term project, five-week study, or even a one-hour exercise on observation and hypothesis development. Case-study investigations spanning a term would, of course, allow full development of ideas and data. Strategies are presented to the group for critique and suggestions.

Strategies for Teaching the Next Generation. Teams brainstorm and discuss strategies for implementing training of the following year's TAs at their home institution. These strategies vary widely from institution to institution and could include ways to:

- modify existing courses
- design and implement new courses
- increase the quantity of TAs

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- strengthen the quality of TAs through professional development
- secure additional financial support for faculty professional development
- obtain funding for equipment purchases
- generate greater interest in the subject matter to expand the pool of prospective TAs.

Training Evaluation. As a group, participants discuss the pros and cons of the training session. Participants an evaluation at the end of the training session. Trainee teams submit their course syllabi before and after training with updates requested throughout the duration of the project so the evaluation team can conduct comparative analyses of the effects of the training on curricular reform.

Recruiting Trainees. Teams of faculty and TAs from architecture schools in the U.S. are recruited through several means:

- direct contact (email and phone calls) with SBSE faculty
- announcements in September and in April to ACSA (Association of Collegiate Schools of Architecture) faculty councilors, technology faculty, and the student organization (AIAS) presidents at all 109 U.S. schools of architecture
- articles and announcements in the ACSA and SBSE newsletters in addition to Crit, the journal of the American Institute of Architecture Students (AIAS)
- online ad on the SBSE listserver and project Web site.

Applications. The *Agents of Change* training is designed for teams of TAs and their supervising faculty. Technology faculty without TA support are encouraged to apply as a team with students, department chair, or design faculty. Each candidate team submits an application that describes:

- classes to be taught in the coming year (syllabi)
- enrollment numbers, demographics, and equipment available at their institutions
- his or her teaching and learning styles
- what she or he hopes to gain from and contribute to the Agents of Change training
- preliminary ideas about how to integrate case study approaches in his or her curriculum
- experience conducting a case study
- teaching experience using field evaluation as a teaching strategy
- TAs: a letter from her or his department head verifying appointment or selection
- letter of support from the department chair with a commitment to provide partial funding at whatever level the budget allows (e.g., per diem, ground transportation reimbursement) demonstrating their support for *Agents of Change* training.
- agreement to participate in AOC evaluations on dissemination effectiveness
- travel budget and itinerary.

Selection Criteria. The PI reviews applications for demonstration of the following:

- need for and benefits of attending the training session
- potential for contributing to the exchange of ideas
- likelihood of applying the case-study approach in courses during the subsequent academic year
- strong indication of commitment to becoming an effective teacher
- a faculty–TA team application
- experience as a TA
- architecture subject courses taught
- diversity of geographic area.

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Passing the Baton: Training the Next Generation. Following the *Agents of Change* training sessions, newly trained TAs and their supervising faculty are expected to accomplish five teaching goals at their home institutions:

1. incorporate the case-study approach in their courses and revise and supplement teaching toolkit exercises
2. evaluate and post high-quality case studies on department Web site linked to *Agents of Change*, SBSE, and Vital Signs Web sites
3. train the new, incoming TAs and extend the pedagogy
4. participate in evaluation of dissemination and adoption of the model
5. host information sessions (brown bag lunch, workshop, lecture) to spread the word to colleagues and other students (potential TAs).

Teaching Toolkit Exercises and the Web. Teaching Toolkit exercises are passed from generation to generation of TAs. Instructional materials are available online for those who cannot attend the training session but are interested in obtaining the teaching notes, sample exercises, and teaching strategies. The agents of change are expected to modify the materials for their use and share these adapted materials online.

Extending the Training. Several means are available to transfer the experience and information to the next generation of TAs. Because of the range of curricular scenarios at various institutions, we anticipate TA–faculty teams will select and adapt methods, either independently or in combination, to best suit their operations and schedule. In all cases, the primary mechanism is peer-to-peer teaching using the Teaching Toolkit exercises, the experience of which is passed to the new TAs. The faculty and peers provide critiques on presentation skills, communication, and accuracy of information. The *Agents of Change* trainees become the trainers. They replicate the training they received, and thus, pass the baton.

SECTION II. SCOPE OF WORK

Faculty submitting a proposal for a training workshop grant should be prepared to adhere to this schedule:

January and August 2004 Training Workshops

January 1, 2003	RFP Announcement (SBSE and AOC web sites, SBSE list serve, <i>SBSE News</i>)
March 1, 2003	Proposal deadline
March 15, 2003	Winners announcement
June 15, 2003	January 2004 and August 2004 trainings marketing #1
July 15, 2003	January 2004 and August 2004 trainings marketing #2
August 15, 2003	January 2004 and August 2004 trainings marketing #3

January 2004 Training Workshop

June 1, 2003	Post workshop schedule and venue on AOC website
October 15, 2003	Participant application deadline
November 1, 2003	Training participants announcement
January 2004	Training workshop
Spring 2004	Follow-up evaluation

August 2004 Training Workshop

December 1, 2003	August 2004 training marketing
March 1, 2004	August 2004 training marketing; post workshop schedule and venue on AOC website
May 15, 2004	Participant application deadline
June 1, 2004	Training participants announcement
August 2004	Training workshop
Fall 2004	Follow-up evaluation

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SECTION III. PROPOSALS: Preparation, Evaluation, Selection

A. Proposal Content

1. Cover page with contact information including your name, institution, address, telephone number, fax number, and e-mail address. Also include this information for all submitting faculty members and your contract negotiator. Typically the contract negotiator is a person in your university's "Contracts and Grants" or "Sponsored Project Office." In the event that you receive an award, we will need to quickly finalize a subcontract between the University of Oregon and your school. If you fail to include the correct information here, your access to the \$15,000 award may be significantly delayed. If your proposal involves a team of faculty members, please designate one person as the *Agents of Change* contact person.
2. Narrative describing the proposed training workshop (three pages maximum). Specifically include:
 - a. A brief description of your interest in the pedagogical approach of teaching and field investigation of existing buildings
 - b. A description of the regional training venue and implementation of the model training workshop schedule (workshop setting, meeting spaces, lodging, meals/refreshments, local transportation, audiovisual, available measurement tools, etc.)
 - c. A description of the case study building where the participants will conduct a mini-case study, suggested building performance topics, and questions for consideration
 - d. Availability of qualified faculty trainers and teaching assistants.
3. Budget (Excel Spreadsheet) to include: The award does NOT allow salary and fringe benefits, tuition, equipment purchases (computers, printers), nor indirect costs (overhead). Awards are contingent on continued project funding from the U.S. Department of Education Fund for the Improvement of Post-Secondary Education (FIPSE).
 - a. Lodging for 24 trainees (4 nights) and 4 TA and faculty trainer teams (double-occupancy for TAs, single-occupancy for faculty)
 - b. Small honorarium and travel expenses for faculty trainers
 - c. Dinners (2 nights)
 - d. Supplies: packet materials reproduction (e.g., CDs, building drawings, workshop evaluations, pre- and post-case study exercise evaluations; logistical materials (e.g., name badges, signage).
 - e. Transportation (lodging to/from workshop site, workshop site to/from case study building)
 - f. Marketing (at least 3 marketing cycles)
 - g. Workshop administration.
4. Appendix:
 - a. Biographical sketch of your key players (one paragraph each). Please include case study, Vital Signs, and/or *Agents of Change* experience in addition to SBSE membership.
 - b. Letter of commitment from building occupant/owner granting permission to conduct case study at building.
 - c. Letter from architect committing to design intent presentation at the training workshop.

You are encouraged to avoid unnecessarily elaborate presentations. Communicate your ideas in a complete and concise fashion. Submit proposals (e-mail preferred) to akwok@uoregon.edu or fax/mail proposal by 5:00P PST March 1, 2003, to:

Alison Kwok, *Agents of Change* Project
Department of Architecture
1206 University of Oregon
Eugene OR 97403-1206
FAX: 541-346-3626

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B. Evaluation and Selection

The *Agents of Change* Advisory Committee will review the proposals. Successful and competitive proposals will demonstrate the following:

- High potential for attracting participants
- Implementation of the Agents of Change (AOC) training approach and model
- Provocative case-study building for field-based investigation
- Ability to administer logistics in a cost-effective manner
- Involvement of trainer teams of TAs and faculty
- Implementation of case study methodology within own curriculum
- Commitment by the proposing institution, including but not limited to providing support personnel, facilities, skills, and resources, to successfully accomplish the stated goals of the Agents of Change
- Interest and capabilities of the proposing party in the pedagogy of curricular innovation in field investigation
- Proposed outreach activities beyond the AOC workshop to the community (e.g., students, faculty, practitioners, public).

In conjunction with the evaluation and selection of proposals based on each of the criteria above, the Advisory Committee will also take into account the gender diversity of the proposed trainer team and geographic diversity of proposed site.

C. Provisions

The *Agents of Change* project will provide:

- Loaner toolkits
- Project observers (Alison Kwok, Walter Grondzik, two University of Oregon graduate teaching fellows)
- Evaluation materials
- Recorder/photographer
- Material masters as appropriate (e.g., application, teaching materials kit, project information, evaluations for training session pre- and post-test surveys)



AMENDMENT I to RFP
January 22, 2003

This amendment clarifies allowable costs under ADMINISTRATIVE SUPPORT for the budget. The award DOES allow salary, fringe benefits for the Project Investigator and student wages up to \$2000 or 13% of the award.

A sample Excel spreadsheet is provided here as a guideline for the Budget.

Lodging & Meals (Participants)	
Lodging (12 double-occupancy rooms, \$20/person, 4 nights, 24 participants)	\$ 1,920.00
Meals (2 team building dinners - \$20/person, 35 people)	\$ 1,400.00
Break refreshments (2 days, 2 breaks coffee, snacks \$8 x 37)	\$ 560.00
Lodging & Meals (Invited Trainers, GTFs)	
Lodging (3 single rooms, \$40/person, 3 Faculty Trainers, 4 nights)	\$ 480.00
Meals (\$35/day, 5 days, minus 2 dinners)	\$ 435.00
Lodging (1 double-occupancy rooms, \$20/person, 4 nights, 2 GTFs)	\$ 160.00
Meals (\$35/day, 5 days, minus 2 dinners)	\$ 290.00
Lodging (1 rooms, \$20/person, 2 UofO GTFs)	xx
Meals	
Lodging (2 single rooms, \$40/person, Kwok, Grondzik)	xx
Meals	xx
Consultant Honoraria	
Faculty Trainers (3 @ \$300/day x 3 days)	\$ 2,700.00
Travel, shuttle, parking, phone (3 @ \$500)	\$ 1,500.00
Ground transportation	
2 15-passenger vans, 2 days	\$ 400.00
Materials and Project-related Expenses	
Photocopying, printing, packet materials, packets, evaluations and surveys	\$ 500.00
disks, toner, paper, files, notebooks, supplies, film and processing, computer maintenance, videotapes	
Postage, Federal Express, tools freight	\$ 100.00
Telecommunications	\$ 100.00
Project Dissemination (e.g. ASES, SBSE, other)	
Participant support (@\$250 x 2 students x 1 conferences)	\$ 500.00
PI support	
RT airfare (\$500 x 1 conferences)	\$ 653.00
Lodging (\$91/day x 4 days) estimates based on UO rates	\$ 364.00
Meals (\$35/day x 5 days)	\$ 175.00
Misc., taxi, phone, etc. (\$70)	\$ 70.00
Registration Fee (\$335)	\$ 335.00
Administrative Support	
Faculty Academic Salary (1 month @ .25 FTE) based on \$50k salary	\$ 1,388.89
Benefits, academic year (.41)	\$ 569.44
Student Wages (1 @\$400)	\$ 400.00
Benefits, academic year (.05)	\$ 20.00
Total Training Session Costs	\$ 15,000.33