Request for Information (RFI) NTER Transition

DATE: November 4, 2014

SUBJECT: Request for Information (RFI)

DESCRIPTION: The U.S. Department of Energy (DOE) is issuing a Request for Information (RFI) to gain public input on its plan to transition stewardship of the National Training and Education Resource (NTER) from DOE as soon as spring 2015. Information sought under this RFI is intended to assist DOE's understanding of potential strategic approaches to transitioning central administration of NTER to the private sector and the potential impacts on users. DOE seeks input from entities interested in taking over NTER as well as from impacted parties. The information collected may be used for internal DOE planning and decision-making purposes.

BACKGROUND: The U.S. Department of Energy (DOE) developed the National Training and Education Resource (NTER) to provide an open source platform for multimedia, self-paced training courses designed to build skills in clean energy vocations at lower costs than proprietary packages. NTER offers DOE and other organizations a unified platform to provide state-of-the-art training. NTER users earn certifications and demonstrate competency that translate directly into on-the-job performance. Its highly modular design allows it to be used as a stand-alone open-source toolkit or combined with proprietary third-party materials. NTER is a learning management system (LMS) and Content Management System (CMS) that streamlines the delivery of training and content to stakeholders. It was designed to leverage open source code, enabling educators to create content and students to take courses easily.

DOE conceived of NTER for weatherization workforce development training and integrated a large number of existing open source code technologies into this unique training platform. The approach enabled a low-cost open sharing platform focused on clean energy training. DOE operates and maintains NTER, provides customer support, and facilitates the NTER Open Source User Community (NTERCom.org).

NTER has served a broad range of customers, including students, professionals, educational institutions, and government agencies. It offers a large selection of multimedia, interactive courses that emphasize energy, technology, and professional development. This content can be distributed to other independently maintained NTER installations (or "nodes"). The content developed and deployed using NTER demonstrates that the platform is capable of easily creating, supporting and rapidly deploying online training.

NTER's promise is twofold, both in its open source licensing and in its capability to facilitate distributed, experiential learning across almost any modality. In the interim, however, NTER requires further development to upgrade its core code (e.g., PHP, ILIAS, Moodle) to current standards. Additional development is also needed to make NTER the state-of-the-art learning

platform it was envisioned to be, including upgrades to support valued enhancements (e.g., 3D technology upgrades, mobile applications, peer review capabilities, automated tutoring). DOE estimates these improvements to be a heavy technical lift for the NTER community, and the costs to be relatively large.

Supplementary Information

The following information provides the range of NTER resources and documentation to help current and prospective users and developers understand and operate NTER. This information is available on DOE's website (http://energy.gov/eere/education/nter) and will continue to be available after the transition begins in spring 2015.

- How-to Videos for NTER (http://www.youtube.com/channel/UCXyHRUkawakhmTDCGCTVZ2Q?feature=watch)
- Installation and Maintenance Documentation (http://sourceforge.net/projects/nter/files/)
- NTER Code (https://code.google.com/p/nter/)
- Frequently Asked Questions (http://energy.gov/eere/education/frequently-asked-questions)
- Link to the NTER Open Source User Community (http://ntercom.org) for further information and contacts to NTER vendors

External entities with their own NTER nodes will have ongoing access and use as NTER is a compilation of open source resources available to anyone.

NTER Open Source License and Creative Commons

- The NTER platform (code) is licensed under the General Pubic License, version 2 (GPL-v2.0, (http://www.gnu.org/licenses/old-licenses/gpl-2.0.html).
- NTER content is licensed under the creative commons by attribution 3.0 license (CCBY 3.0) (http://creativecommons.org/licenses/by/3.0/us/).

PURPOSE: DOE seeks input from the public on its plan to transition its stewardship of NTER potentially beginning in spring 2015. Since the platform was deployed in June 2012, DOE has served as the central developer and administrator of its community, providing maintenance and technical assistance (e.g. help desk) to end users. As an open source training platform, NTER is available for any entity's use in creating its own node and registry. DOE would like to transition the administration of the NTER system to an entity that will further develop its capability and expand its use through marketing and branding.

DOE's mission is to ensure America's security and prosperity by addressing its energy, environmental, and nuclear challenges through transformative science and technology solutions. Serving as the central administrator and core developer for NTER on a sustained basis is not within DOE's core mission. DOE's intent has been to transfer stewardship of the platform to an

entity within the open source community in order to maximize market adoption while fostering open source, shared learning environments. It is envisioned that one or more non-governmental entities with expertise in open source development of educational content creation and sharing will be most qualified to take over this well-developed product and its customer-base. This Request for Information (RFI) seeks input from those entities interested in taking over NTER as well as from impacted parties.

DISCLAIMER AND IMPORTANT NOTES: This RFI is not a Funding Opportunity Announcement (FOA); therefore, EERE is not accepting applications at this time. EERE may issue a FOA in the future based on or related to the content and responses to this RFI; however, EERE may also elect not to issue a FOA. There is no guarantee that a FOA will be issued as a result of this RFI. Responding to this RFI does not provide any advantage or disadvantage to potential applicants if EERE chooses to issue a FOA regarding the subject matter. Final details, including the anticipated award size, quantity, and timing of EERE-funded awards, will be subject to congressional appropriations and direction.

Any information obtained as a result of this RFI is intended to be used by the government on a non-attribution basis for planning and strategy development; this RFI does not constitute a formal solicitation for proposals or abstracts. Responses to this notice will be treated as information only. EERE will review and consider all responses in its formulation of program strategies for the identified materials of interest that are the subject of this request. EERE will not reimburse costs incurred in responding to this RFI. Respondents are advised that EERE is under no obligation to acknowledge receipt of the information received or provide feedback to respondents with respect to any information submitted under this RFI. Responses to this RFI do not bind EERE to any further actions related to this topic.

PROPRIETARY INFORMATION: Because information received in response to this RFI may be used to structure future programs and FOAs and/or otherwise be made available to the public, **respondents are strongly advised to NOT include any information in their responses that might be considered business sensitive, proprietary, or otherwise confidential.** If, however, a respondent chooses to submit business sensitive, proprietary, or otherwise confidential information, it must be clearly and conspicuously marked as such in the response.

Responses containing confidential, proprietary, or privileged information must be conspicuously marked as described below. Failure to comply with these marking requirements may result in the disclosure of unmarked information under the Freedom of Information Act or otherwise. The U.S. Government is not liable for the disclosure or use of unmarked information, and may use or disclose such information for any purpose.

This is a Request for Information (RFI) only. EERE will not pay for information provided under this RFI and no project will be supported as a result of this RFI. This RFI is not accepting applications for financial assistance or financial incentives. EERE may or may not issue a Funding Opportunity Announcement (FOA) based on consideration of the input received from this RFI.

If your response contains confidential, proprietary, or privileged information, you must include a cover sheet marked as follows identifying the specific pages that contain confidential, proprietary, or privileged information:

Notice of Restriction on Disclosure and Use of Data:

> Pages [list applicable pages] of this response may contain confidential, proprietary, or privileged information that is exempt from public disclosure. Such information shall be used or disclosed only for the purposes described in this RFI DE-FOA-0000840. The government may use or disclose any information that is not appropriately marked or otherwise restricted, regardless of source.

In addition, (1) the header and footer of every page that contains confidential, proprietary, or privileged information must be marked as follows: "Contains Confidential, Proprietary, or Privileged Information Exempt from Public Disclosure" and (2) every line and paragraph containing proprietary, privileged, or trade secret information must be clearly marked with double brackets or highlighting.

EVALUATION AND ADMINISTRATION BY FEDERAL AND NON-FEDERAL PERSONNEL: Federal employees are subject to the non-disclosure requirements of a criminal statute, the Trade Secrets Act, 18 USC 1905. The government may seek the advice of qualified non-federal personnel. The government may also use non-federal personnel to conduct routine, nondiscretionary administrative activities. The respondents, by submitting their response, consent to EERE providing their response to non-Federal parties. Non-federal parties given access to responses must be subject to an appropriate obligation of confidentiality prior to being given the access. Submissions may be reviewed by support contractors and private consultants.

REQUEST FOR INFORMATION QUESTIONS:

DOE is seeking information in three topic areas:

1. Information from Potential Adopters
2. Input from Current Users
3. Other Feedback

Topic 1: Information from Potential Adopters

DOE seeks to understand respondents' strategic plans, capabilities, and experiences behind taking over management of the NTER platform. Specific information includes how NTER would be maintained, updated, delivered, branded, and marketed; and how industry would access it. Please add additional information that is relevant to your response.

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1. Strategic Plan

Under one approach being considered, DOE would release registration of the NTER domain name (nterlearning.org) and trademark. The NTER website software would continue to be available as open software. DOE expects that one or more external users would step in and establish a business entity to assume the NTER domain name and trademark and provide services to its customers. Additional expectations include further developing open source software, performing code updates, and defining the relationship between and interactions among developers, users, vendors, and service providers. DOE seeks to understand the viability of this business model and any potential issues with its execution. DOE would also like respondents to provide estimates of the timeline for making the necessary changes and updates to fully deploy new platforms or continue operations for customers.

Questions:
a. What is the viability of this proposed business model, and what are the potential issues with its execution, if any?
b. What would a timeline and estimated schedule look like?
c. If limited funds were available via a competitive solicitation, how would this impact your business plan? Note that the timeline to conduct a competitive solicitation process could require 3-6 months.

2. Capabilities

DOE seeks to understand the ability of private sector entities to take over NTER's central administration and the domain name while continuing to offer services to customers.

Questions:
a. What are your company's specific capabilities and experiences related to this transition; to managing NTER's further development; and in marketing IT open source tools?

3. Experience with open source development and administration

Entities considering NTER's central administration should have a robust understanding of open-source software; the capacity to implement technical improvements (e.g. codebase, authoring tools, mobile, security, interface, graphics, and data analytics); the ability to provide customer service; and a plan to attract future customers. If you have experience with NTER, please provide specific information in your answers about it, as well as your capabilities.

Questions:
a. What are your company's capabilities in the areas described above?
b. What are your company's plans to capitalize on the investment to-date in NTER—and to transform it into the training solution it was designed to be?
c. What are the technical challenges in taking over central administration?

d. What is the potential timeline that would be required for the transition?

Topic 2: Feedback from Current NTER Users

DOE recognizes that a number of organizations are hosting nodes or using others' nodes to distribute their courses. Many entities currently using NTER operate their own nodes and will be able to continue their activities. Under the proposed open source transition strategy described above:

> 1) DOE will no longer host or manage registry for NTER
> 2) DOE will no longer provide technical support for NTER
> 3) DOE will no longer control the domain name nterlearning.org
> 4) DOE will release the NTER trademark
> 5) Courses on nterlearning.org will no longer function, requiring current users to host their own. *Note: To ensure the NTER brand continues, the domain name and trademark would need to be registered.*

Question:
   a. What would be the impact of this transition on your operation?
   b. What additional steps could DOE take to minimize these impacts?

Topic 3: General Feedback

DOE welcomes any general feedback that may not be captured from the questions in the prior topics that you, or your organization, believe is relevant to its transition plan for NTER.

REQUEST FOR INFORMATION RESPONSE GUIDELINES: Responses to this RFI must be submitted electronically to NTER-RFI@ee.doe.gov no later than 8:00 p.m. (ET) on December 3, 2014. Responses may be **no more than 5 pages**, must be in 12 point font, and have 1 inch margins. They must be provided as a Microsoft® Word (.docx) attachment to the email. Only electronic responses will be accepted.

Please identify your answers by responding to a specific question or topic, if possible. Respondents may answer as many or as few questions as they wish.

EERE will not respond to individual submissions or publish publicly a compendium of responses. A response to this RFI will not be viewed as a binding commitment to develop or pursue the project or ideas discussed.

Respondents are requested to provide the following information at the start of their response to this RFI:

- Company / institution name;
- Company / institution contact;
- Contact's address, phone number, and e-mail address.

Thank you. The Department of Energy appreciates your time and effort in responding to this Request for Information.