



**LICENSING EXECUTIVES SOCIETY
INTERNATIONAL**

**Request For Information for
e-Content Design and Development
for the LESI Academy**

**Jeffrey S. Whittle, Co-Chair
LESI Education Taskforce**

**Partner and Head of Technology Law Section,
Bracewell & Giuliani, LLP**

jeffrey.whittle@bgllp.com

**Rob McInnes, Co-Chair
LESI Education Taskforce
Partner, DibbsBarker**

Issued Date: June, 2013

Deadline Date: September 20, 2013



1. GENERAL INFORMATION

This is a Request For Information (RFI) for the design and development of e-content for the new Licensing Executives Society International Academy (LESI Academy). This RFI is for informational purposes--to gain insight on the potential pricing and time lines for creating various types of e-content with supplemental guides, and for building an e-library and e-directory. This RFI contains information on the current state of this LESI content and proprietary knowledge assets, on the potential infrastructure that may be used for its distribution, and on how the new content is to be designed. This RFI requests a response from qualified vendors via an online survey along with samples. Please see Sections 3.0, 4.0 and 5.0 for further information.

1.1 THE OBJECTIVE

Licensing Executives Society International (LESI) is seeking to create an online Academy that promotes learning about Licensing, Technology Transfer, and Intellectual Property Rights and professional networking *simultaneously*. LESI plans to accomplish this goal by giving its Members and Affiliates across the globe access to its proprietary curriculum with complementary instructional aids, to specialized virtual instruction, to an e-library of its proprietary resources, and to a directory of its subject matter experts---alongside social learning and popular networking tools.

LESI believes that a learning platform consisting of a database, content management system, and user interface will be required for the LESI Academy, but is seeking recommendations from qualified vendors under a separate RFI being published concurrently. In releasing that RFI, LESI is soliciting recommendations for a learning platform mainly from vendors specializing in social learning technologies, mobile learning technologies, and learning management systems, but is open to recommendations from other technology vendors.

With this RFI, the LESI Education Taskforce (Taskforce), a special committee formed within LESI to create and oversee the LESI Academy, is seeking to qualify vendors who can: (1) design and develop e-content in a multitude of formats--dependent on the learning platform ultimately selected; (2) create complementary course descriptions, pre-tests, quizzes, assessments, and possibly workbooks, case studies, reports, or job aids for each program of study; (3) build an e-library of knowledge assets from existing articles, presentations, research, reports and video; (4) create a directory of LESI subject matter expert and (5) host up to 12 live webinars per year. The LESI Taskforce will, of course, provide access to LESI subject matter expert for consultation.

Selected vendors will be notified following close of this RFI and will be engaged in discussions. Such vendors may be asked to submit either a response to a Request For Proposal or a Request For Quote. The Taskforce expects to issue a formal RFQ, but there is no guarantee an RFP or RFQ will be issued, as LESI reserves the right to proceed with purchase without issuing an RFP or RFQ.



1.2 ABOUT LESI

LESI is a non-profit, global business association committed to advancing the business of intellectual property globally. Founded in 1972 and incorporated in 2000, LESI is comprised of 32 national and regional societies representing more than 13,000 professionals involved in the licensing, transfer, and management of intellectual property rights. Individual members include management representatives from large, medium, and small companies, scientists, engineers, academicians, governmental officials, lawyers, patent and trademark attorneys and consultants. Member Societies of LESI include:

Andean Community	Chinese Taipei	Philippines
Arab Countries	Czech Republic	Poland
Argentina	France	Russia
Australia	Germany	Scandinavia
New Zealand	Hungary	Singapore
Austria	India	South Africa
Benelux	Israel	Spain
Brazil	Italy	Portugal
Britain & Ireland	Japan	Switzerland
Canada	Korea	Turkey
Chile	Malaysia	USA
China	Mexico	

More information about LESI can be found at: <http://www.lesi.org>

2. BACKGROUND

LESI has a curriculum composed of Licensing, Technology Transfer, and Intellectual Property Rights workshops; a vast array of proprietary articles, research, presentations, and reports; and a number of senior-level professionals eager to engage in discussions with junior Members about issues pertaining to licensing. The LESI Taskforce would like to leverage all of these resources in creating the online LESI Academy.

2.1 CURRENT STATE OF LESI PROPRIETARY INFORMATION AND RESOURCES

The LESI workshop curricula currently exists within the framework of large PowerPoint presentations that need to be divided into much smaller, more topic-specific, segments of e-content and formatted either as online courses or as knowledge assets--depending on the software and platform selected. Within the learning platform, these segments of e-content will need to be grouped into "programs of study," or curricula, worthy of a certification of completion for continuing education purposes.



The types of content and size of each of the PowerPoint presentations are as follows:

1. The LESI 100 program of study - More than 150 slides covering the topics of *Introduction to IP; Basics of IP Commercialization & Licensing; Determining License Fees & Royalty Rates; Managing Licensing Risks*
2. The LES 200 set of courses - More than 225 slides covering *Basics of IP and Licensing; IP Management; Deal Valuation & Negotiation; Maintaining IP Agreements*
3. The LES 300 program - More than 450 slides covering *Due Diligence and Patenting; Licensing Agreements; Risk-Shifting Provisions; Holistic IPM Model/Toolkit; Value Extraction; Value Reporting; Valuation (advanced); Negotiation (advanced); Ethics*

Within each PowerPoint, the content is presented mostly as bullet points--often without instructor notes. LESI will provide access to a subject matter expert for assistance in drafting content for these areas. Some editing and restructuring of the existing content will be necessary, and some of the language used will need to be simplified for second language learners since this content has proven most valuable to businesses in emerging economies that are wanting to learn how to replicate the best practices perfected in the U.S.

Wherever possible, the Taskforce would like content to be replaced with graphic illustrations, simulations, or link to resources in the e-library that is to be created. All content should be conformed to the proper British standards for English, with all research properly cited. In cases where additional content or citations for research is needed, a LESI subject matter expert may be consulted.

The segments of e-content created will need to be grouped into programs of study worthy of a certification of completion for continuing education purposes. Course descriptions, pre-tests, quizzes, assessments, and possibly workbooks or job aids will then need to be created to supplement each e-segment and/or program of study as is appropriate.

LESI also has the potential to build an extensive e-library of proprietary articles, research, presentations, and tools derived from the many conferences, networking events, reports and surveys the Association has sponsored over the last 40 years. The current format of these resources ranges from MS Word documents, PowerPoint presentations, and Excel spreadsheets to gif and jpeg images, video, audio, simulations, Shockwave/Flash and apps. The LESI Taskforce is already at work cataloguing these resources, but anticipates the need to house these within a searchable database and that many may first require editing and/or reformatting depending on the learning platform selected.

The Taskforce, of course, recognizes that maintaining the e-library will require ongoing effort. The Taskforce is looking to create enough knowledge assets to serve as a foundation for what could eventually become one of the largest libraries of proprietary e-content related to



Licensing, Technology Transfer and Intellectual Property Rights. The Taskforce is looking to work with vendors to determine the optimal number and types of assets that will be required prior to launch of the new learning platform.

The Taskforce also would like to create a directory of LESI subject matter experts that Members can call on to facilitate discussions pertaining to the subjects covered in the LESI curriculum offered. Member information will be provided by the Taskforce, but assistance will be needed with creating the directory within the confines of the new learning platform.

3. CONTENT DESIGN REQUIREMENTS

The vendor must be able to design e-content and supplemental materials following the evidence-based Guided Experiential Learning model for instructional design, with consideration for *The First Principles of Instruction* (Merrill, 2002) and Clark and Mayer's (2003) *e-Learning and the Science of Instruction* as is applicable. Information pertaining to the Guided Experiential Learning Model for best practices in instruction is provided in the Addendum of the RFI. The work of Merrill (2002) and Clark and Mayer (2003) can be found online.

The Taskforce would like to ensure that e-content designed and developed for the LESI Academy further engages Members and Affiliates in learning through the use of various kinds of interactions and graphic illustrations, along with extensive use of the professional networking and social learning tools to be provided within the learning platform for the new LESI Academy.

4. INFORMATION REQUESTED

The purpose of this request is to gather information for developing the e-content and resources needed for the LESI Academy. Vendors are encouraged to complete an online survey and submit samples of their work, which will be used to qualify vendors.

The attached survey consists of 13 questions listed on the following pages for your convenience. Vendors should be prepared to submit all of their responses at once since respondents will not be able to re-submit their survey once it has been received via email.

Additionally, vendors are asked to provide three samples of your work with the total cost to client, production time, and number of contributing staff members for each, along with a recent copy of your company's Dun & Bradstreet Business Information Report. These samples and D&B Report should be sent via email to: Jeffrey S. Whittle, Co-Chair, LESI Education Taskforce, at: jeffrey.whittle@bgllp.com and LESI.OnlineEd@bgllp.com



5. THE LESI ACADEMY CONTENT DESIGN & DEVELOPMENT SURVEY

The questions listed in this section of the RFI are attached hereto in an editable word document. Please tell us about your company. Please include name, website URL, contact person with their contact information, years in business, service or industry awards, number of courses created, and types of content designed and developed.

1. Please tell us about your production model. How many people typically work on different types of e-content (please list for each). Does your company work on multiple courses simultaneously? Please include your company's turnaround times for producing different types of e-content? (Please quantify for each type of e-content you produce).
2. Please tell us about your company's services. What types of e-content do you offer? What types of supplemental materials are included with the pricing of your course design and development work course descriptions, formative assessments, pre-tests, feedback surveys, and/or job aids? Does your company provide system services such as registration functions, e-commerce, continuing education credit related services, recordings, and/or portal branding? What is your experience with international organizations? Does your company provide and/or partner with any language translation services?
3. Please tell us about your company's policy for uploading content to a learning platform. Is there a cost associated with this service? Does your company provide a Learning Content Management System (LCMS) for LESI self-upload, to track user activity, and deliver reporting metrics to the organization? Will your company need to make edits once a course has been uploaded? What policies do you have in place in the event that content becomes corrupted or will not upload?
4. Please tell us about the types of social learning technologies you have used. Which do you prefer? Why? What social networking tools do you typically utilize within your courses? How do you use these tools? For example, how do you use these tools to meet different learning objectives?
5. Please tell us how your company prefers to work with subject matter experts. For example, do you prefer to consult via email, chat, phone, document -sharing tools or by other means?
6. Please tell us about your experience in mobile learning. What types of devices have you formatted content? Does your format readily adapt to the device used to access it?
7. Please tell us about the content delivery technologies you prefer to use and why. Do you have any partnerships with providers of LMS/Learning Platform solutions?



8. Please tell us what authoring tool(s) you would likely use to create content for LESI. Can you show proof of your purchase/right to use this software? Do you have any kind of partnership with this provider?
9. Please tell us about your pricing model. What features and services are included in hosting webinars? creating e-content? e-Directories? e-Libraries? What additional costs are typically incurred by your clients throughout the process? Please include information on international participation in webinars.
10. Currently, LESI uses the Sitefinity web-hosting software and Avectra member database. Any system is expected to be compatible and interoperable with this software with minimal modification. Please tell us about your experience and capability with these software platforms.
11. LESI wishes to minimize development costs, production timelines, and complexity of any system. Our philosophy encourages the integration of "off-the-shelf" products, including, for example, Constant Contact, DropBox, etc. Please tell us about your philosophy and experience of using off-the-shelf software as part of an integrated systems solution.
12. If needed, would your company be willing to create a complimentary three- to five-minute sample of your e-content work using content provided by LESI?
13. Please provide any additional information you feel would help LESI further qualify your company to engage in discussions pertaining to the design and development of LESI content.

6. DISCLAIMERS

It is specifically understood that any costs or information provided as part of this process is not to be construed as an offer on the part of those providing information, or as binding upon either LESI or the vendor. Information obtained as a result of this request will be used for planning purposes only. This request does not constitute a solicitation or a request for proposal or quotation.

All information received in response to this request marked as proprietary will be handled accordingly. Responses to the request will not be returned. LESI is not obligated to provide any comments, documentation, or other type of response regarding the results of its review.

Please note that this request may or may not lead to a competitive procurement.



7. CONTACT INFORMATION

The sole point of contact regarding this RFI is:

Jeffrey S. Whittle, Co-Chair, LESI Education Taskforce
Partner and Head of Technology Law Section, Bracewell & Giuliani LLP
jeffrey.whittle@bgllp.com and LESI.OnlineEd@bgllp.com

Please submit all questions and communications to LESI Education Taskforce Co-Chair Jeffrey Whittle via email at the addresses provided above. *No phone calls will be accepted.*

All responses to this RFP must be e-mail in by 12:00 PM CT on September 20, 2013.

8. REFERENCES

Clark, R.E., Yates, K., Early, S. & Moulton, K. (2009). An analysis of the failure of electronic media and discovery-based learning: Evidence for the performance benefits of guided training methods. In K.H. Silber, & R. Foshay, (Eds.). *Handbook of Training and Improving Workplace Performance*, Volume 1: Instructional design and training delivery. Washington, DC: International Society for Performance Improvement.

Clark, R. C., & Mayer, R. E. (2003). *e-learning and the science of instruction*. San Francisco: Jossey-Bass.

Merrill, M. D. (2002). First principles of instruction. *Educational Technology, Research and Development*, 50(3), 43-59.



9. ADDENDUM

Guided Experiential Learning

Richard Clark and Kenneth Yates
Center for Cognitive Technology

Guided Experiential Learning (GEL) requires the use of the five training principles that Merrill¹ identified as the active ingredients of the most effective, evidence-based adult training systems currently in use. The five principles must be included in all courses regardless of delivery medium or training content. Hundreds of studies stretching back over the past four decades have concluded that “information is not training” and that providing novice to intermediate level trainees with a field-based problem or an immersive situation alone are not adequate to achieve individual or team learning². Very advanced trainees or experts do not benefit from GEL but are not harmed.

Thus, in a GEL course, all trainees must receive: 1) Realistic field-based problems to solve; 2) Analogies and examples that relate trainee’s relevant prior knowledge to new learning; 3) Clear and complete demonstrations of how to perform key tasks and solve authentic problems; 4) Frequent practice opportunities during training to apply what is being learned (by performing tasks and solving problems) while receiving corrective feedback; and 5) Application practice that includes “part task” (practicing small chunks of larger tasks) but also “whole tasks” (applying as much of what is learned as possible to solve the complex problems that represent challenges encountered in operational environments).

These five training methods are based on Merrill’s principles and can be developed differently for different delivery media and in ways that support amount of practice necessary to support learning and transfer.

When subject matter experts are available, GEL also requires the use of cognitive task analysis to determine training information content. GEL also allows for the retention of effective elements of traditional training methods and specifies that all lessons in a course must be sequenced “as performed in the field” (or if there is no necessary sequence, easier to learn tasks are taught before more difficult tasks). GEL specifies how the five training methods described above will be combined with currently used training methods by requiring the following elements in all lessons in the following sequence: 1) Objectives (specifying actions, conditions and standards that must be achieved); 2) Reasons for learning (advantages of learning and risks of failure to learn and transfer); 3) Overview (knowledge models and content outline); 4) Conceptual Knowledge (Concepts and processes necessary to learn to perform a task with examples and analogies that support learning); 5) Demonstration of the procedure (a clear “how to” description for all elements of a task); 6) Part and whole-task practice of procedures with corrective feedback; 7) Challenging, competency-based tests that include reactions (trainee confidence and value for the learning) and learning (memory for conceptual knowledge and application skill for all procedures). For more information about GEL, please access the following web page and when you select the tab for

Publications you will find a number of chapters and articles on the research background of GEL.

www.cogtech.usc.edu

¹ Merrill, M. D. (2002) First principles of instruction, *Educational Technology Research and Development*, 50(3), 42-59 ISBN 1042-1629

² Kirschner, P., Sweller, J. and Clark, R. E. (2006). Why minimally guided learning does not work: An analysis of the failure of discovery learning, problem-based learning, experiential learning and inquiry-based learning. *Educational Psychologist*. 41(2), 75-86.