

THE WILLIAM AND FLORA HEWLETT FOUNDATION

Education Program, Open Educational Resources (OER) Component: Request for Proposals

LAUNCHING THE DEVELOPMENT of an OER WORLD MAP: Phase 2

Proposals due by: 4pm PT/11pm UTC, August 15, 2014

Link: <https://drive.google.com/folderview?id=0B5FQbmPL4C6TVjgxYjl2YmFCNE0&usp=sharing>

I. BACKGROUND

The idea behind Open Educational Resources (OER) is simple but powerful - educational materials made freely and legally available on the Internet for anyone to reuse, revise, remix, and redistribute. These digital materials have the potential to provide people everywhere equal access to our collective knowledge and provide many more people around the world with access to quality education by making lectures, books and curricula widely available on the Internet for little or no cost. By enabling virtually anyone to access, translate or tailor educational materials, OER has the potential to contribute to a person's career and economic development. After a decade of development, more and more projects and initiatives and people in an increasing number of countries have become engaged in creating and using OER.

However, in spite of various awareness raising activities, it is still difficult to have a global overview of OER projects and initiatives. It is even a challenge to be aware of the scope of initiatives in one's own locale and country. An OER World Map could be a means of illuminating the OER world. Although there are already a number of excellent efforts to map various aspects, no comprehensive view has been created. Taking up this challenge, the UNESCO/COL and UNESCO Chairs in OER undertook an international consultation in the OER community in November 2012: *Can the global OER community design and build an "OER World Map" together?*

About 900 people took part in the discussion that resulted in the following advice for the development stage¹:

- Use Free and Open Source Software and international classification standards to the extent possible;
- Projects included in an initial development phase need to be clearly delimited and defined;
- People need to be identified as well, to create a roster of OER experts;
- Data could be sought from existing sources, and a very simple form created for data entry;
- A limited amount of data should be collected;
- The organizational approach for the mapping should be based upon collaboration with a central hub and local data collection and initial quality control;
- Existing related efforts should be recognized and engaged, such that duplication of effort is avoided.

¹ The summary report of the international conversation is available at <http://bit.ly/YKEDAO>

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We believe an OER World Map could help illuminate the OER world, similar in intent to the [Open Access Map](#). A map would provide a picture of the global OER movement, serving as a tool to identify OER projects and initiatives, facilitate connection among OER providers, teachers, and learners, and act as a resource for communicating with stakeholders. Building such a map through a collaborative effort would engage community members and highlight the collaborative and generative nature of OER. Widespread participation could also promote a sense of community ownership of the map, thereby contributing to both its comprehensiveness and sustainability.

OER World Map – Phase 1

An open Request for Proposal for Phase I of this project was held from November 2013 – January 2014. For Phase I, three organizations were selected from a pool of 20 proposals from around the world. The organizations were each awarded US \$25,000 to develop an early prototype of an OER World Map and present it at the annual Hewlett Foundation OER Grantees Meeting.

All proposals, reports, software, designs, and presentations were openly licensed, and are available online at: <https://drive.google.com/file/d/0B5FQbmPL4C6TUIFZMkU2OWFKUmM/edit?usp=sharing>.

A video of the presentations is also available online at: <http://new.livestream.com/iskme/events/2939761/videos/48942423>.

OER World Map – Phase 2

This open Request For Proposal for Phase 2 of the process is fully in the spirit of the transparent and collaborative work of the global OER community. The aims of Phase 2 are to develop a functional web site that can build upon existing OER mapping efforts, encourage interoperability of mapping efforts, foster international collaboration, and highlight OER efforts around the world in a way that is easy for a wide variety of audiences to understand. One contract or grant of \$200,000 will be awarded for Phase 2.

II. OBJECTIVES

The work of Phase 2 has the following objectives:

1. To build upon the designs, feedback, and lessons learned from Phase 1.
2. Over time and as the project scales, to help teachers and learners answer the following key questions:
 - a. What OER are available in my country?
 - b. What OER are available in my language?
 - c. What OER are available for grade level X?
 - d. What OER are available for learning (subject X)?
3. To launch the collaborative development of Phase 2 of the OER World Map through a simple, focused approach.
4. To build a functional web site.
5. To ensure that both the database and map and the collaborative process will scale in a piece-by-piece manner. Future additions to the database and map could include, for example, data on language, or data to complete regional information on OER, or data on a specific level of education, or data on a specific area such as OER health.

III. DESCRIPTION OF THE WORK

1. To develop the site: a functional web site that serves as the launch of the OER World Map.
The site must be developed using Free and Open Source software.
2. To design a wireframe² that demonstrates how future additions to the data and map could extend the scope of the OER World Map.
3. To use Free and Open Source Software that could generate visual representations of the data, including but not limited to a geographic world map.
4. To determine a focus for populating the initial version of the database and map, that is the focus of the information to be included – for example, tertiary education OER projects or initiatives.
The initial map may include, but is not limited to geographic representation of the data.
5. To determine the specific data elements – for example, project name, web site, language(s), contact person(s). Data added to the database must carry an open license ([CC0 or equivalent](#)).
6. To review the existing databases or directories and identify key sources that could populate the database.
7. To review and integrate existing OER mapping efforts where feasible.
8. To develop a strategy for collaboration to build, populate and sustain the database.
9. To keep a log of the process and any problems and evaluate the work accordingly in a brief report to guide further development.

IV. QUALIFICATIONS

Throughout this RFP a “Consultant” refers to any non-profit organizations worldwide with a 501c3 IRS tax status or equivalent, Non Governmental Organizations, and for-profit organizations. Any of these types of organizations from around the world may apply; please note that the Foundation may request additional documentation for due diligence purposes.

The Consultant should have an understanding of the global OER movement, and experience in database development and the visual representation of data. Experience working in collaboration on international projects would be an asset.

The execution of the OER World Map will require managing a network of organizations and relationships, multiple contracts if subcontracts are awarded, and the data and software that underpin the user experience. Consultants will also possess the following areas of expertise:

1. Project management
2. Extensible, web-based software development using open source, proprietary, or hybrid platforms
3. Database management
4. An understanding of the principles of cartography and data visualization
5. User interface design and expertise

² http://en.wikipedia.org/wiki/Website_wireframe

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We are willing to accept applications from organizations or individuals with significant project management experience and that can pull together a team of committed individuals with the necessary competencies and expertise in the above areas. The Consultant also should be able to demonstrate that adequate human resources and time will be allocated to the project. Experience working with nonprofit organizations and foundations is an advantage.

V. INTELLECTUAL PROPERTY

To ensure that Education Program grants have as broad an impact as possible, the Program strongly prefers grantees to license non-software copyrightable work created with grant funds under the Creative Commons Attribution license ([CC BY](https://creativecommons.org/licenses/by/4.0/)).

Sample works include any content created under grant funding, such as research reports and scholarly articles, data sets, simulations, open educational resources, and videos. The CC BY license allows subsequent users to copy, distribute, adapt, and republish the work, provided they attribute it in the manner you specify. You should review the full legal text of the license at <http://creativecommons.org/licenses/by/4.0/legalcode>; a summary may be found at <http://creativecommons.org/licenses/by/4.0/>.

Software itself must be licensed using an Open Source Initiative-approved license or equivalent. See <http://opensource.org/licenses/> for more information.

VI. DELIVERABLES

The key deliverables include:

1. An openly licensed web site depicting OER activities on a visual map.
 - a. OER activities must be viewable according to three or more of the following:
 - i. Country
 - ii. Region
 - iii. Language
 - iv. Grade Level
 - v. Content Type
 - vi. Project Type
 - vii. Other – please specify in your response.
 - b. As a minimum, the site should allow anyone to enter a project title, description, geographic location, and site URL.
2. A blueprint of the project that provides for additional data and components to be added in the future.
3. An openly licensed report (15 - 20 pages) of the development steps and challenges, along with recommendations for building the map further, with respect to its scale and scope. The report should also include recommendations for managing data integrity and quality. This report will be published online.

VII. BUDGET

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One contract or grant of \$200,000 will be awarded for Phase 2. The recipient will have one year to develop and document a fully functional web site. A functioning site will be demonstrated at the 2015 OER Grantees Meeting in April/May, 2015. Participants in the grantees meeting will provide feedback and comments on the early version of Phase 2.

There is no guaranteed funding for a Phase 3 of the OER World Map. Therefore, the site must be designed to be functional, and allow the OER community to continue development in the future.

VIII. ROLE OF CONSULTANT

The William and Flora Hewlett Foundation (“Hewlett Foundation”) is the client for this project. Cathy Casserly, Interim Education Program Officer, will be the primary contact at the Hewlett Foundation for Phase 2.

The Hewlett Foundation will create an advisory group of three to four individuals for this project, likely to include representatives from other funding entities. The advisory group will review proposals and interim reports, and will provide feedback on the issue-area research, proposed visualization tools, and final products.

The Hewlett Foundation will share the deliverables and associated tools publicly. If there are portions of the report that are sensitive or confidential, the Foundation may decide to redact these portions before making the report available to external audiences.

IX. APPLICATION PROCESS

If you are interested in participating in the RFP, please send an email with your organization’s name and a point of contact to Cathy Casserly (HFCasserly@gmail.com) by 4pm PT/11pm UTC on July 25, 2014. This will allow for answers to questions about the RFP to be shared with all interested applicants.

The Foundation requests submission of one electronic copy (PDF, MS Word, or PowerPoint) of the proposal, not to exceed fifteen (15) pages including a work plan and budget, sent by email to Cathy Casserly (HFCasserly@gmail.com) no later than 4pm Pacific Time/11pm UTC on August 15, 2014. Please note that this deadline is firm. Proposals that are received after the exact day and time will NOT be considered. Proposals will not be accepted that exceed the fifteen page limit, which is inclusive of all appendices and supporting materials. Applicants should be available for a phone call with the Hewlett Foundation during the week of August 25, 2014 to provide additional information about the application, as necessary.

Proposals should include the following information:

- A brief overview of the organization/institution, including experience undertaking consultancies of a similar nature and the capacity to work in an international environment;
- Evidence of institutional support for the work;
- Details of the Consultant who would lead the work and the roles of others on the project;
- The focus area for data collection, with the rationale for its choice;
- A description of the proposed methodology, work plan and timeline that would be used to deliver the project aims;
- Identification of partners and the outline of a strategy for collaboration;
- An explanation of the risks and obstacles the project might encounter and how they will be addressed
- A detailed budget (maximum \$200,000 US), documenting how the proposed number of staff hours was determined as well as other major budget items. Please use the Hewlett Foundation template, available at: <https://drive.google.com/file/d/0B5FQbmPL4C6Td3MwNmVjSWxPbnM/edit?usp=sharing>

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- A contact name, location and telephone/Skype ID, fax and email details.

X. CRITERIA FOR SELECTION

- Coherence between the mission/focus of the institution/organization and the submitted plan of work
- Evidence of institutional support for the initiative and the potential for ongoing support
- Track record in OER and data base development and visual presentation
- Evidence of institutional and individual competence in designing, hosting, and sustaining international projects
- An international outlook and experience with international collaboration
- Proposed use of Free and Open Source Software and international classification standards
- The extent to which the work builds upon an existing similar or complementary effort
- Accessibility: Whenever possible, materials created using Foundation funds should be open and accessible to a variety of learners. See <http://handbook.floeproject.org/index.php/Home> for information.

XI. ANTICIPATED TIMETABLE

One grant or contract of \$200,000 will be awarded in November 2014. The final report and deliverables will be due no later than December 1, 2015, with an interim project check-in and demonstration scheduled for April/May 2015 at the annual OER Grantees Meeting.

Activity	Deadline
Send email response re: Intention to Bid	July 25, 2014
Proposal due by 4pm PT/11pm UTC	August 15, 2014
Notification of RFP selection	September 12, 2014
Discussion and finalization of work plan between selected organization and Hewlett Foundation staff	September 12 – October 9, 2014
Submission of final work plan	October 10, 2014
Notification of Hewlett Foundation Board Meeting decision; grant/contract awarded	November 18, 2014
Interim project check-in and demonstration at annual OER Grantees Meeting	April/May 2015
Final report & deliverables	December 1, 2015

Please submit any questions about this request for proposals via email or phone to Cathy Casserly (HFCasserly@gmail.com). Answers to the questions will be shared with all applicants.