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>> If you have any questions throughout the webinar, you can type them in the chat box and we will answer them. The webinar will begin shortly. hi. We would like to thank you for participating in our webinar. And and you have questions, you can e-mail them or give us a call. With that said, our webinar will now begin. Thank you.
>> Hello, everyone. This is Robyn Sturm Steffen. I lead the administration's efforts to increase the use of challenges. There are apples challenges in doing something new for the first time. It's probably not surprising to you to find some of the greatest successes come from when people captor. There is a small for fast-growing a marketplace for companies that provide a lot of challenges across the competition from design to evaluation, including not only technical assistant, but communities and challenge management. As agencies in the past have never done prizes, most agencies up until recently, didn't have relationships with any of these companies that bring this expertise, and so the general service administration has been taking steps to makitiesier for the entire public sector to tap private sector expertise. So I want to personally thank the general service administration for all their great work on that front, including pulling together today's webinar. This is actually part one of a two-part series. The goal is to be able to share with you all over the two-part series, a couple of things. Today you're going to have a chance to learn from your peers. There's really no better way to learn about the marketplace, and how to think about tapping that to advance your goals and you're agencies. And then on February 16 at 2:00 p.m., there's going to be part two of the two-part series. A good way to think of it is a minivendor fair where GSA has actually asked a number of the companies that are at the cutting edge of this work to join us and tell you about what they do, and also have invited folks who are leading efforts around makingitiesier for agencies to tap private sector expertise. They will share information about the new schedule on challenges and competitions, which is 5414 G and talk about agencies like you can begin to use that schedule to be able to bring on greater capacity and infrastructure to do very high impact and ambitious challenges in 2012. So moving right on to today's webinar, I want to quickly give you a sense of the agenda. In particular, I'm going to turn it over quickly to conversation with our five fantastic panelicians. I want you to know there will be a significant period of time for everyone to ask questions of the panelists. A big part of what we want to do today is make the panelists available for the questions that you have as you are following in their footsteps. So stay tuned for that. It will be coming later in the webinar. We have reserved half an hour for Q&A from all of you, so start thinking about what you're questions are. We will be compatrioted to accept those in the chat box. So with that, let's turn to our wonderful panel. We're so grateful that each of you have taken time to share with us your best practices. It will be meaningful for everyone who is thinking about taking this step to find out what you have done over the past couple of years. So I'm going to introduce each of the five. As I introduce you, it would be great if you could just say a small bit about who you are, and give context to the folks on the phone today about the challenge that you were working on that led you to seek external expertise. And so with that, I will ask Adam Wong to kick us off.
>> Okay. Thanks, Robyn, and thank you for having me today. I'm looking forward to the panel and answering some questions. My name is Adam Wong. I'm a program analyst at HHS. And I'm the project offerser of the Investing in Innovation program, which is a two-year program that soaks to launch 10-15 challenges per year, beginning last March. So we're coming up on the end of our Quist near. We were looking for a full-service contractor that could guide us through the entire process. We really came into this with very little experience and knowledge of the challenge enterprises process, and eventually, we settled -- not to say settled, we chose capital contracting corporation, and they helped us. And so far, it's been going great. And I look forward to discussing in further detile.
>> Fantastic. Adam, can you just say one word about what the Investing in Innovation is looking to spur? Are you trying to build cars are seek new ideas or stimulate

developers to create new code?

>> We're really focusing on areas in health IT that could use a boost. That we find any gaps where we don't really see innovation happening. Any apps, mobile health apps that we think could benefit, you know, a large segment of the U.S. population. So we kind of -- it ranges from behind the scenes code to things that are much more consumer-facing.

>> Great. Thank you so much. So the second panelist that is joining us today comes from the Department of Transportation. James Pol. Can you say a little bit about the challenge that you'll be talking about and the qualities that you are seeking in a partner?

>> Good afternoon, everyone. Thank you. My name is James Pol. I'm with the U.S. department of transportation, and I conducted a challenge called the connected Connected Vehicle Technology Challenge, which was a challenge to bring focus and attention to the student community and information sciences, computing sciences, transportation, and automotive engineering to focus their attention on a research program area that has emerged other the last couple of years within the Department of Transportation, which is vehicle electronics for the next generation of cars. And the work that we had done with our support contractors had been largely on focusing the message of conveying to the audience what kind of things we were looking for, how best to target the student community through a variety of different media and how to define the challenge that it would make sense for a student to participate in.

>> Great. Thank you so much, James. Jason Crusan comes to us from NASA. Jason?

>> Thanks. I'm Jason Crusan, from NASA. We wanted to -- a totally different tack in we wanted to develop an operational platform in which we could order up software solutions on a regular basis and over a long period of time. So we set up the NASA tournament lab platform. It has -- it is to advance learning and understanding in our knowledge base of how to run tournaments and open innovation. Because of that, we did, under a contract with Harvard university as our main interface to give that knowledge about opening up innovation, and they awarded subcontracts today with top coder, which is a software platform, and we have been running challenges from crater image processing from our moon data, to tablet applications for on you astronaut crew.

>> Fantastic. Jackie haven has a until of challenges under her belt as well.

>> Thanks. I'm so excited to be here and tell you a little bit about myself. I'm jack see hasten with the Department of Agriculture's center for nutrition policy and promotion. And in March of 2010, we launched our first competition, and gave $60,000 in prizes to create software tools and games that encourage children directly or through their parents to make more nutrition food chases. That was our first competition, and we worked closely with challenge post. I say the smartest thing we did was to bring them on. I look forward to telling you more about it as the afternoon goes on.

>> Thank you very much. Last, but in the least, from the National Science Foundation, Suzie Iacono.

>> I'm the senior science adviser for the directorate at NSS. We're planning this spring to launch a program we're calling U.S. ignite. That program has three main goals. The first is to stitch together islands of bond band around the country, cities and regions like Chattanooga, Tennessee, and Cleveland, Ohio, that have broad band, we want to stitch them together on a national scale in a network we call gee knee. We want to enable scientists, entrepreneurs, students, to have access to this test bed so they can conduct at scale experiments and innovate in a test bed that is not available any place else on the globe. And thirdly, we would like to jump-start gigabit application governments in smart transportation, cyberlearning, public safety. And so to summarize, we really found a third goal, jump-starting gigabit operations to be difficult for us. So we found one and had grants come in that we fund. We thought if we're going to jump-start these applications, with need to have access to the developer community. So we selected the Moz -- Mozoa foundation. We use a cooperation mechanism, and we're setting up our first contest now. That will be followed by a developer challenge that will take place over about six months.

>> Thanks. Fantastic. You have had a chance to know a little bit about the five panelists is and the great work they're going in this space. The five companies and organizations that he's individuals are working with are just five in a very vibrant marketplace. You should check out as well those that are on schedule 5414 C as well

as others that have worked in the public and private sectors. We wanted to bring you real life stories from the agencies that are endorsing these big companies. Great. So thank you all for the wonderful introductions. Lots of details to jump into here. Why don't we start by doing a little bit of a deeper dive for each of you in terms of the needs that you perceived when you looked at the teams you had in house and what would be required to have a successful challenge. What were the top two or three things that you were looking for when you were looking for a company or external expert to work with? Suzie, dew point to start?

>> I just had to unmute myself. Absolutely. So we chose Mozilla foundation and we elected to use this cooperative agreement mechanism for a number of factors. We really neededded to have a close, collaborative relationship with the organization that will carry out these prizes and competitions for us. And that is because our plans are evolving. So we did not know up front exactly how we wanted to manage the competitions, who exactly the judges might be, what exactly the criteria are, what exactly the timing was. So articulate all of that up front was not just going to work for us. And so we needed to find an organization that was willing to be collaborative, that also shared our values. So we very much want to develop applications that are going to have a big impact on the country, whether it's home-bound he would elderly, school children at risk to pass stem classes, and so we needed to have an organization who also was trying to, if you will, kind of do really good things for society through the competitions. And so we actually had a process set up whereby we had three candidates that came to NSF. They presented to us their ideas, and then we had a panel of experts that asked them questions. And so it just so happened that Mozilla said they are collaboratives they will work with other organizations, we found that their values are very closely aligned with ours, and then they have this reach into the open source development community that we just don't have at NSF. So right now we're really happy with the choice that we have made.

>> That's very helpful. Thank you. I'm going to ask you to elaborate agent bit more on a couple of things that you said. You talked about how you were looking for an organization that was wanting to collaborate with you. You talked about having an existing community that had skills and talent that you were looking to tap, and being able to piggy-back on that existing community. Can you say a little bit more about what goal it was that you wanted Mozilla to play vis-a-vis to what tasks would they be taking the lead on vis-a-vis NSF?

>> Okay. So they are the designers, if you will, of the competitions and the prizes. And I mean that from soup to nuts. That they show us color boards. You know, pick styles, depending on the audience that we're trying to reach. They develop slates of mentors and judges. They have a long history in innovation challenges, and so they have lots of people who they know are really great at this. They are willing to work with the people who are developing that network that I mentioned, genie. So we need our open source developers to be able to deploy them on a brand-new test bed. And so we need for the Mozilla folks to be willing to do things that are untried that really require experimentation and creativity. So we're asking them to help us build what we're calling a sandbox, which will be an area within the U.S. where there will be interconnected cities and inroads into anchor institutions where we have our genie test bed so the developers can easily use the sandbox. Have easy access to it when they want to deploy their new applications. They are setting up -- around the country. There is going the be one in UCLA in March to try to make what we're doing quite visible. We really want to get a lot of people involved. And so there is this kind of broad reach into the developer community. We also want to go quite deep because we really want to develop applications that will really work or really be able to be deployed. And so they actually are willing to have weekends where the developers will come and they're willing to kind of hold their hands, give prizes at the end of the weekend for who is doing well to spur them on to the next stage. So they're really willing to work with us for a long period of time and work with the developers so that at the end of the day, you know, six months down the road, we're truly going to have some applications that take advantage of the most advanced networks in the world and will bring true advantage to people. So it's their willingness to grapple with us in the space that that caused us to pick them. And we're working very closely with them. I mean, we have teleconferences. We meet face-to-face quite often. So it's quite intense.

>> Great. That's super helpful. Adam, can you tell us a little bit about in a

similar vein, what were the things that as your team thought about your work, health
information technology and doing prizes to advance that, that you knew you were
going to need system external expertise, and also about the role that your partner
is playing now that you have them on board.
>> Sure. We were excited to get into the challenges in prizes space, but we had
minimal experience in it. So we were looking for a real full-service provider. That
could handle as much of the process from conception to finish. I mean, this included
things like advising on challenge on topics, determining challenge parameters such
as the amounts and the time lines, handle the logistics of judging and reaching out
to developer networks. This company had been running their own challenge and had
this experience. They also hold several large conferences per year that focus on new
technology to help IT and breakthrough research with the developer networks, which
we wanted to engage. So far, they have fulfilled all these obligations for us, and
as we have worked together over the past 10 months now, I think we've absorbed a lot
of the knowledge that they presented and learned a hot about exactly how to do a lot
of these things ourselves. Obviously, they continue to help us out with a lot of the
things that we otherwise don't have the expertise or the time or the resources to do
ourselves.
>> Yeah. I wonder if you would say a little bit more. I think one of the things that
excites me and others about this model is thinking about ways that engaging external
expertise can be a way to build new capacity within the public sector such that as
prizes become mundane and something that every single agency does as appropriate to
achieve their mission, it is something that we can have the expertise to do. So
thinking about these relationships as people in terms of both having success and
also beginning to build some of that knowledge and expertise and awareness in the
department. Can you say a little bit more, Adam, about what steps your team took
either in designing the contract or in terms of setting up the statement of work or
even just day-to-day enteraction -- interactions to maximize the relationship
building for the HHS side in its relationship with health 2.0.
>> Yes. So I think that our statement of work and our contract ends up focusing a
lot more on the govern Nance and structure of how the program would operate as well
as spelling out all the duties that 2.0 would do. For example, we made sure to have
several advisory bodies set up through the contract that would be able to bring in
not only health 2.0 expertise, but also expertise from other outside enthities who
could be able to provide some really useful knowledge, as opposed -- so we set up
our own internal commitee that would evaluate proposals coming in for the potential
challenges and we also had the contractor set up what we call the I 2 technical
expert panel, which brought in experts from across the nation about 22 meet on a
regular, quarterly basis to provide overall guidance on how they perceive the
contract and program to be progressing. You know, give us some ideas for potential
challenges, areas that we're hitting too much or not enoughs and give us a journal,
-- general ombudsman point of view.
>> So you worked into this board that helps to provide 2 pent 0's work and feedback
to the HHS team about both substance and design and implementation. Did I capture
that right?
>> Yes. And they have been very helpful in having this external body made up of
people from lots of different organizations, I think is a good balance to the just
ONC and federal government employees and experts that we mostly rely on.
>> And we can see some similarities in what we're hearing in terms of looking for
existing communities, help with teeing up judges, thinking about doing a lot of
outreach in building partnerships as well as messaging the support for competitors
between both of the panelists thus far. Adam, one of the things you talked about is
the role that the organization plays in terms of allowing HHS to do volume. So as
part of the investing and innovation, you mentioned a large number, I think up to 15
challenges each year for the next two-years which is exciting in terms of being able
to experiment across a large number of challenges and to be able to learn from that
and see what comes across the whole portfolio. Can you say anything about the
experience in termses of having -- terms of having health will it be 0 on board to
do that experimentation?
>> Yes. With this program, we really dove right into the deepened in terms of the
number of challenges and how much we want to get accomplished over what feels like
it's going to be a very short two-years. So health 2.0 has helped us out a lot in
kind of treating our challenge efforts as a portfolio of innovation. For example, we

have short challenges that last for only two or three months, and others that last for a full six months and require teams made up of people from different industries and different areas of health IT. So I think that health 2.0's guidance has really helped us keep a good balance between the challenges and who they appeal to and what kind of topics we're approaching.
>> And just to remind me, you engaged with them -- as opposed to a cooperative agreement; is that right?
>> Yes, uh-huh.
>> Jason, I'm going to call on you because you know you have done a lot of thinking as well about having, as you mentioned, an on demand capacity to be able to do prizes in a systematic way. So I'd love for you to talk a little bit about the questions I just asked Adam in terms of what are the pieces and how do they play that NASA couldn't do on its own, and how do you think about structuring those relationships so NASA gets the capacity and can do more and more on its own in the months and years to come.
>> We wanted to stand up a virtual facility, Jews like on the order of lab tests or have a specific piece of material tested, we wanted to have that came capability to order software algorithms, that we are having trouble solving or trying to accelerate providing solutions to this. [Brief pause in captions to change captioners] open innovation and the underlying dynamics and how to drive consensus, participation, team formation and all the different aspects of that.
>> It was important for us to have an impure cold data or the main are in that. So with that is why we have Harvard. At the same time, NASA and Harvard did not have a complete -- community a potential servers -- solvers. There are a couple of vendors in the software space, and in this case, there is a little bit more with top coder. They brought an active community of software developers that was readily available for us to actually start throwing problems at them in collect solutions. Along with the community that a lot of this vendors have, in any challenge, how do you develop objectives or subjective systems where you have your solutions and you ask which one is better. In the software world you do that through benchmarking and again, one of the platforms that topcoat had was in charging to the point where we could judge one code versus another regardless of the language it was written in.
>> So we could do an objective scoring system to pick the best solutions that are out there. Also that they split their contacts -- concept they could run from the other rhythmic challenges which are math and physics problems, pick a better software development application and run every segment of a software development as a challenge and getting a working piece of software, whether it is a business system or an interface piece of software for one of our technical goals that we had.
>> So it was finding the right vendor out there in partnership between Harvard and topcoat that gave us this ability to advance our learning and education ourselves. But also all the data we have available from our platform and experience and that is made available to academics to study and hopefully from the you all collectively line from that experience.
>> Great, thank you so much. Jason, can you say more about what the like in practice in terms of, in terms of division of labor between your team and the Harvard and topcoat or teams, how often are you talking, who is taking the lead and what are the key pieces that Topcoader is the lead on.
>> Tactically what this means, on the NASA site, the NASA folks on our team, we actually go work with our various programs that we have and identify potential applications were running a challenge actually makes sense. We are the chief in marketing and internal to the organization to find this challenging problems that we have.
>> The way we end up working it, once we identify a problem, tactically what we do is put together across team, us, Harvard and Topcoader . We take a look at the problem and electively between all three organizations, look at the problem decomposition. A lot of our problems are very space Center or NASA centric. So there is a bit of -- over to generic physics or mathematical problems. We hope to facilitate that collectively between all three we hope to facilitate that collectively between all 32 to keep -- decompose the problem.
>> Want to have that done, we turn the majority over to the Topcoader folks to figure out, now that we have a problem statement, how do we decompose this to challenge them. It is a single other rhythmic challenge where we can have one challenge or is it so big that we need a series of them to solve the problem ?

>> At the same time, as they are developing a game plan for the execution to find the solution, our Harvard researchers are looking over the shoulders all the time, looking for opportunities to an experiment where we can control the different variables within the challenge. In order to be will to clean out some piece of information to tell us how competitors compete and why the compete. Or had we not just get a solution, but it sure we get the maximum solution rid
>> So at any given time, let's experiment on this challenge. It is the right time to do it, it is the right type of challenge and let's experiment on team formation. Or let's run 3 parallel challenges with return types of people from the community and give them a treatment to understand what drives the solutions we are getting and how we are getting to get -- how we are getting people to compete on the period
>> That we cannot collectively on an integrated plan and execute it. It is a tightly knit community and I don't think a day or so is by but the team is not working together on a joint problem statement or any one of those steps in the whole process. We are virtually all over the place. We have some folks here in DC, some in Houston and our other NASA centers across the country.
>> Our whole team is virtually located. So it is using virtual tools for all of us to jump on and work on the problems. We are actually in the process of helping or expanding on our existing platform that we have. We are at a place where we hash out the zip purchase in the backend collectively -- hash out these on the backend collectively. It is a close-knit team that is working together.
>> Great, that is super helpful. Just to underscore a couple of points that Jason had in addition to what we heard so far. The access on the role of the agency in bringing forward needs or problems that need to be addressed, but the role of the partner of the external experts in helping to take that problem and define it and shape it and articulate it in a way that will blend it asked to be a -- put it best to be a prize that will it tracked the largest number of solvers.
>> In the piece around obstructive evaluation, and how additional bells and whistles on it technical platform could allow for leader boards and automatic analysis of some of the more objective solutions, such as outdoor events and [Indiscernible] that Jason and his team are working on . That is incredibly helpful.
>> Jackie I'm going to turn to you next and ask you to address some of the same pieces in terms of, you will pull together your very first challenge and did it on a rapid timeline. As he thought about that and look at you -- as you thought about that and looked ahead, what do you want in a contractor and what role did the challenge post play the -- post -- host play ?
>> It was a full service for us, and we had a very short timeframe. It was very exciting and we really relied on their expertise. We are mostly nutritionists and have never run a challenge. It surrounded a data set on data. And they brought a community to us that we were not familiar with or worked with on a regular basis.
>> I think the key is they helped us with the rules. Generating the rules and from our experience, you live and die by their rules. So they had lawyers that specialize in the rules of competition, and they were instrumental hoping the USDA legal team who was not familiar with competitions at that point, in answering questions and to really make sure that we had rules we could live by.
>> Can you give an example of something they shared with you at your team may not have thought of on their own ?
>> Even to the point, there are so many details , but what comes to mind would be, even in terms of the prizes. For example, because we were so quick to get up and running , there was a possibility that prices might be added during the competition. The way that is written in the rules is that everyone knows who they join the competition, there may be additional prizes later on. There was a stipulation that it had to be done by the -- a certain date what the prizes will be. We worked with the companies that sponsor the prizes. General Electric sponsored with us to give a price for Scott -- college students who came up with the best solution. They advised us how we could meet that happened through the legal structure and what would be necessary.
>> They were really instrumental all along the way in terms of all the gala these and language and which states and territories and the list goes on and on about the contributions to the rule. We -- after living through several competitions, it comes down to the rules, how you express what you're looking for, what the winners need to provide and some consistency.
>> Did the like a different process than the one you had previously been through in

terms of defining some of the criteria, for example grants ?
>> Yes very different. We were really thrilled with the whole idea of these
competitions. It is so different than contracts. We generally dealing contracts
here. As I know you have talked to many different times about how wonderful these
solutions are, because a government contractor would generally go out and we would
have to have all the creative ideas and knowledge and maybe nutritionists don't know
about IT in software development or so to have a disparate solutions was terrific.
So the whole idea of having contractors lay out what that might look like was a
whole different process to get the service rather than to contract to get the end
product. We were thrilled with the outcome it
>> I know you all looked at a number of different companies as you're thinking about
two to work closely with. What are the main criteria Jackie, that were most
important to you in selecting the contractor ? And I will actually remind everyone
that we are going to be taking questions from everyone who is on the call for our
panel. Now is a great time to be sending those in. So Jackie ?
>> We actually did a matrix and can't tap the -- contacted several, maybe up to 10
different companies at that point. We were looking for the type of platform that --
challenge the other was not up -- challenge .gov was not a yet, so we were looking
for a company that had run similar competitions and have the scope that we were
looking for. Some that we talked to were more idea generating platforms and we were
not looking for ideas we were looking for software solutions.
>> So companies who have bad, and really what finished the challenge for us, was
certain interpersonal skills and conversations that we had. We got the sense they
need to be responsive and very intuitive and they definitely were. That was a big
key for us. As others on the panel mentioned, they often sought to and work with
these companies and how quickly things need to be done. Just the sense that the
challenge for us was the best match.
>> Thank you so much. James, I would love for you to talk about that as well about
the experience you all had with the connected vehicle technology channel --
challenge in terms of thinking about the roles were most excited about. The partner
that worked with you to do this also. Each of the panelists have added another level
of texture, with Jackie in this piece that translates some of the goals of the
competitions into specific and binding rules that will really help to ensure that
the product they ultimately pay for is the one that USDA hopes to get. So James,
with that I will continue. If you could talk a little bit about what you're really
looking for , as well as what, in retrospect , was most valuable about that
partnership.
>> Thank you Robin. Certainly the thing we were most looking for was a partner that
would help guide us through the process of simply finding the challenge and making
it option -- function the way in -- we intended it to do. I think the recurrent
being in participants up to now, we have a steep learning curve in terms of going
through this. We did not have a long history of conducting challenges and
competitions. It was very much the same. In fact, I would say there was some
additional disadvantage to the Department of Transportation, because there really
isn't any price authority anywhere within the department with the exception of
authority within the federal aviation administration.
>> So the challenge concept was really born from the contractor that was our chief
information officer and the DOT's government plan. We were looking for challenges
and competition as a component of the overall government plan. The former
administrator for my agency, and that would be the research and innovative
technology administration, was an active participant in the DOT open government plan
and often felt there was an opportunity for research and innovative technology
administration to be an active participant in the challenges and competitions.
>> So the contractor that was the CIO became in fact my contractor. I never had the
opportunity to contract with them directly. Working with them was helpful in terms
of being able to simply grasp the concept of what challenges and competitions could
do. There was obviously a steep learning curve in terms of what exactly could this
type of activity do for federal government and how to translate that more
specifically into a research program on connected vehicle's which is about vehicles
being able to communicate with other vehicles wirelessly. And not only was just
other vehicles, but with infrastructure, like traffic signals or ramp be doing
systems -- metering systems.
>> So the challenge was being able to find somewhere where we could construct a

challenge that would be helpful for our program, at the same time not be something
to a satiric that it would close everybody out -- so esoteric that it would close
everybody out. So we narrowed the focus of this challenge to an ideation challenge.
That would be one in which we posted some very simple rules and explained parameters
of what the connected vehicle technology challenge is about. Again, it is about
vehicles communicating with other vehicles. If cars could talk, what they say ?
>> Being able to communicate that type of branding helped us focus the messaging
that we wanted to do. This is where we have a lot of participation through the
Department of Transportation up in Cambridge Massachusetts. So it became a very come
-- collaborative government with contractor partnership involving a couple of
different agencies within the Department of Transportation.
>> And again, working with phase 1 was very helpful in terms of being able to sort
out what was within the range of what we could accomplish.
>> Great, think you so much. With that, I want to turn to the question that are
burning in all of your minds. So please send us the questions that you want to ask
the panelists. If there is a specific panelists you want to hear from, please
indicate in your question which panelist you want your question directed to. I have
one coming in from JoAnn. You JoAnn says, can we back up a little bit and have the
presenters talk about how they got are good ? I have heard about attorneys assisting
them, but I'm not sure how they got started. I am curious how they develop the
outreach. Did they use social media, [Indiscernible] and what is the GSA schedule
that was mentioned earlier been a source for these challenges ?
>> I'm going to turn the question to the panelists in just a moment. But we will
answer the last these which is about -- the last piece which is, what is the GSA
schedule that was mentioned ?
>> GA Released 541G which is dedicated to competitions and it means companies can
apply to be on that schedule. Essentially simplifies -- it's the lies -- it
simplifies the process if someone wants to contact one of the companies. They are
approved. It does not eliminate all the processes the agency the to go through, but
it reduces the amount of time it takes to get a contract from 15 months to down --
as soon as 16 -- as soon as six weeks. In terms of GSA to play a role, for those
companies that are on the schedule, it makes it faster and easier for agencies like
yours to be able to develop relationships. I will say that because that schedule is
fairly new, it was actually not in place at the point that any of our panelists were
going to their selection process.
>> I suspect that many would use that process if it would've existed at that time.
So let's take the question of how did you get started and how did you find out about
the marketplace and ultimately, how did you contract or build the relationship with
a partner ? What mechanism did you use ? Jason, I will ask you first.
>> We really got started in the whole area of open innovation for a pilot program in
our Nampa -- NASA Johnson space Center. We were looking at building our various
technical gaps and looking at all potential solutions based on things that were out
there. We used contracting and FCIR. One of our key folks at the agency was
introduced through some training programs to open innovation. He started aching
about that quite a bit more and we ran a series of pilot programs, your a standard
traditional procurement. So we did a RFP and put in place to run pilot programs
through various platforms just to get experience at the very beginning.
>> From those pilot programs, in order to get to the NASA turning a lap, -- lab, we
only ran one pilot out of a dozen. We saw that software was a little bit different
from our experience and we went ahead and said, we came up with, for the NASA [
Indiscernible] lab and we wanted to order solutions and to learn more about it. We
also thought about knowing that we needed to get a little bit smarter.
>> So we actually put out and RFI initially and targeted some academic institutions
to see who out there had interest in working with the government, related to the
social science advance in open innovation. We got a very limited response to be
quite frank. But one of them was Harvard.
>> From that we actually used this as a basis for a soul source contract -- sole
source contract.Our actual contract with Harvard is not exclusive with Topcoader, we
are looking at experimenting with other platforms as we get more experience under
our belt and utilize some other platforms.
>> So currently they have the Topcoader piece, but we are going to branch out to
others as well. Nassau as a whole -- NASA is a whole, we proceeded on and in
addition to our lab platform, we ran another set of petitions to select a

non-software type platform and have just been an award recently on that.
>> That was an open competition and again was before the scheduled was in place.
Ours is not unlike any other contract we have done. But we have actually done a lot
of market research and made aware to companies that are in this open innovation pays
that we are putting procurements out and proactively let them know about your
procurement activity.
>> We got a good amount of activity recently and it has not been different than our
traditional contracting.
>> Thank you so much Jason. Susie, I would like you to allow proposal, because you
entered you are to use different mechanisms, which is the cooperative agreement is
supposed to using [Indiscernible] . Provide you could -- or have to could provide
more detailed to JoAnn in using cooperative agreement and how did you get started in
knowing what is the universe of companies that you wanted to think about and
organizations you wanted to think about gauging and having on your short list.
>> I will actually start at the beginning because I want to make an important point.
First what got us started was the fact that we had a problem that could not be
solved with expertise within our own organization or the mechanisms that we are
currently using. So we started talking to a lot of people about what we wanted to
do. I want to let everybody on the call understand that there have been two people
that I have worked with over the past year that have been instrumental in helping us
get going and they are on this call. So Robyn, you have been incredibly helpful in
helping us sort out what is allowed by legislation, sharing best practices from
other agencies. Jason at NASA has been incredibly helpful to us coming to NSF and
facilitating a session with a group of interagency people wanting to do a
competition around the data.
>> So there is a growing community of practice. People have experience to which
everyone can tap and use. That was extraordinary for us in getting started. I don't
know how we would have done it without these folks.
>> Back to the cooperative agreement. Once we started talking and realized this was
something that was feasible that we could do, we started talking internally at NSF,
with our general counsel, with our policy office , and we brought them on board to
help us make the decision about whether it should be a contract, a traditional
grant, or a cooperative agreement.
>> I did not do that alone, my office did not do it alone. We really included the
folks who down the road might have concerns or issues, so they understood why we
needed to do this, that we did have the right to do it, and this would be a first
for NSF, but let's carve out that the pathway and figure out how we can do it.
>> We actually started getting information from people with experience about the
organization that they had used. So as a new urbanization came to my attention, I
immediately had a phone call with the principles in that organization, letting them
know what we were trying to do and finding out from them how they could help us.
>> From those conversations, we actually selected the three organizations that we
thought had true potential for helping us, and so we asked them to send us draft
proposals that the staff at NSF went through. We thought the proposal is for all
the. We've been have them submit real proposals through the NSF regular mechanisms,
again bringing along the lawyers and policy people all along the way.
>> Then we had what we can -- what we call a reverse site visit. We had each of the
organizations come to NSF. Principals had an opportunity to present to a panel of
experts what in fact they were proposing to do to address the issues that NSF had
given them to respond to.
>> And so through this process, it became incredibly clear to everyone, the policy
office, the lawyers, that a contract was not going to work, as I mentioned before,
because this was such an evolutionary type of process that needed to be worked on.
>> The cooperative agreement activism would be the best for us. So at conclusion of
this reverse site visit, we picked one of the organizations and then we were able to
fund them. So because it is a cooperative agreement, as we've said previously, it is
a very close collaborative relationship, meaning that they are sending us monthly
reports and really working side-by-side with us as we move forward.
>> Susie, how long would you say that process took from start to finish in terms of
selecting the entity with which you would do the cooperative agreement, and also
could you say a little bit more about how you thought about who should be on the
judging panel for selecting the entity that you wanted to work with ? I know those
are both things you thought a lot about.

>> We started last May and June having those phone conversations as the potentials
-- potential organization came to our attention. We had conversations with you,
Robin and others. We brought in our NSF lawyers, probably around the same time,
because I did not want to go down this path without them. I needed their blessing.
We held to the reverse site visit in July. We made the award in late September in
fiscal year 11. And the first contest is the aviation contest planned in March. So
it has taken us about 10 months of idea incubation to where we are going to see the
first announcement and contest.
>> In picking the people for the reverse site visit, I looked around and asked the
question, who has expertise in prices and competition ? So we usually have panels of
experts and scientists who come to NSF and review proposals. That is our bread and
butter. So once the price for me has been a little bit of resistance from scientists
to the idea of rises and additions. -- Competition -- of prices and competition. I
don't know if they're worried about the driven out of their business by anybody who
can submit to a prize. It is a different vehicle, right, for getting solutions.
>> So I did not want to bring in the regular expert and -- in particular subject
matters in computer science. I really wanted to bring in people who have thought
about contests and two a try to employ them in their organizations and found them to
be useful. So I was trying to get a panel that would not balk at the first question
of why would we even do prices. I wanted people -- would we even do prices -- prices
-- Prizes. I wanted people who could tell us what was the best thing for NSF to do
on the short-term and the long-term. It took quite a while to figure out who those
people were.
>> We brought six people to NSF that fit that category of April that new would have
-- people that we knew that would know how to employ contest.
>> We have another question coming in. To what extent as you're procurement office
been involved in developing and managing the competitions ? I will give a panel a
moment to think about it while I select another resource that comes from you also
from GSA. So GSA in 2010 held an industry day in which they brought in a number of
companies that are in this price and challenge marketplace. They actually kicked off
the industry day by asking across a broad range of products and services that we
have talked about in the webinar today. They asked companies to respond and let us
know what products and services they offer. Karen has done a great job in fulfilling
some of that.
>> It is not an accomplishment of the entire marketplace , but it is reduced
incentives to RFI as opposed to an RFP , is a great place to start to see the
companies that are out error -- there and do something that could definitely help
save the work on your own in terms of doing some of the market-research about two is
out there and what they are doing. So that is another great resource.
>>'s attorney back to what extent your perfume it office has been involved in
managing the competition ? Does anyone have a strong feeling that they won't respond
to this question ? -- That they want to respond to this question ? If not I will
turn to Adam to share your thoughts.
>> I don't really have a strong answer. But that is because our put your good
offices of not been involved since we awarded the contract. It has been entirely ONC
and a contractor run process. But leading up to the contract award, they were very
helpful in reviewing his work -- this work and some of the other elements in the
RFTO end making sure they abided by all standards and in relaying things to ODC to
make sure there is nothing completely out of order.
>> How about you Jackie ?
>> We of course work of art contract management branch and they make us -- make sure
that what we are doing meets all the criteria that is necessary. So they helped us
set up the vehicle and that is their job.
>> Great. I suspect Jeff, that part of the response you're getting from our
panelists reflects the fact that the prices are essentially -- prices -- but the
folks on the phone used in distinct authority and did not need to engage procurement
folks to define the management of the competition like you would for a competition
that is [Indiscernible]. Jason do you have any other thoughts that NASA has used
that you could add ? You could think of our contract --
>> You could think of our contract is a program definition and actual platform
maintenance and that kind of thing that we do. The way we structure our put your bed
is, you can think of each challenge that we place on the platform as 100%
performance for the sub task. Meaning that we either get a solution or we don't get

a solution.
>> If we get a solution we pay that performance fee and it gives them some incentive. If we don't get a solution we don't pay that fee. So in setting up the initial contact structure, but since then it is basically the responsibility of the contractor officers technical officer to certify when them milestone is Matt or not.

>> -- When a milestone is met or not. That is in a nutshell how ours works.
>> In a moment I will ask panelists think about what insight they might have for agencies that are following in their foot steps and thinking about engaging a contract in 2012. But let's not be shy and please send your questions to us. This is a great opportunity to be able to get candid thoughts from folks who have done this before. And thank you again to all of the panelists for sharing your time and thought.
>> So without, let -- so with that, let's turn to the question, is there anything you would say to someone, if only I had known, or the most important thing is, or the definitely never do is -- this. Jackie, do you want to start off ?
>> I definitely think the community that you and GSA has put together and ask westerns and get some handholding, I am always happy to do that and have done not and that is helpful to talk to someone else in the government who has had similar issues and how they went through them. So please feel free to work out to this network and ask questions. That is my best advice.
>> Great. Adam ?
>> Sure. When we were looking into what exactly we wanted to do with the challenge program, we spoke with and attribute a number of differentchallenge firms, including Topcoader , Inosenter and --. Given our lack of knowledge of the prizes process, we found this extremely hopeful in verifying -- helpful in verifying information in general about how worms that this kind of work -- how firms conduct this kind of work. So I would definitely recommend that you do some preliminary research and reach some of these other firms and help verify your thinking.
>> James, do you have thoughts ?
>> Sure. My main thought is that if you are looking at engaging a contractor in 2012, you probably want to focus most on their skills for facilitation. The process of defining a challenge involves a lot of people from different discipline. The subject matter experts of course, but you also need to draw in people from procurement, from the chief counsel's office, and administrative offices also. That way , everyone can build a collective consensus of how this is going to build out and how appreciate. -- It will be shaped.
>> We came to the core of being able to define a prior challenge and I am relying on facilitation now are focusing on a couple of upcoming challenges that we are beginning to develop.
>> Great, thank you so much. Jason and Susie, I know you're be shared some thoughts, but any final thoughts that you want to be sure to get in ?
>> A couple thoughts that have not been set yet, there are a lot of advantages in working with these implementing partners and contractors. One of the things , you need to look at not just asking for their assistance and problem decomposition or for their platform only. They also have a community they bring to the table of potential solvers for you. It is those communities are relatively unique and they have also run challenges. The other part of it is come you cannot underestimate the value in the helping and collection of all potential solutions and at the end even the intellectual property transfer or how do that intellectual property transfer resides back to the government through an open source and to maximize the reuse of all the solutions that we are getting involved. That is just a parting out. -- Bought -- thought.
>> Susie ?
>> One should not under estimate the amount of work that goes into the development of the challenge itself. So once you decide that is what you want to do, it really takes a lot of thought to get it right. That is incredibly important if you want to challenge to be not a dud, but something that you're proud of and that has really made a difference.
>> So the startup work, the planning, that is just so important. Of course the actual contest is incredibly important, but setting it up, shaking it and making sure does what you want takes a lot of work and is really important to good outcome.

>> Even if you have contractors who are helping you.
>> All right -- right.
>> People are less shy about entering their questions and so we will try to get through as many as we can. One question that came in comes from Gail. Can you address the legal challenge that may be solved through use of a contractor vis-&à;-vis judging, for sample utilizing key to -- compete ? So are there things that are easier from a legal perspective when you use a contractor versus doing it in-house ? I'm not sure who is the best to answer this question.
>> This is Jackie and I did not find any advantage. I still think we have to go through all the holidays. So for us there is no advantage -- we have to go through all the gala these -- would gala these -- legalities.
>> I agree or is no difference whether you use a contract your or going in-house. The primary difference comes with whether you use federal employees or external experts. But whether or not you have a contractor does not seem to matter.
>> I am not an expert on all the bodies of law that you mentioned, but I do know that, many of them, for example the paper reduction act, which is a useful model for thinking about other bodies of law. The question that matters most is who competition is sponsored by. If the agency is the one sponsoring the competition, even if they do it through a contractor, the same legal framework applies that says it is an external contest. That is what the rules really change in terms of what is triggered and not triggered. I can't say that is true through all the bodies, but I think it is a useful framework and reflects the responses from our panelists.
>> Does anyone have any further thoughts on the they wanted to share ?
>> Okay. Another question coming in and we will make this the last question is, did any of the panelists find a federal wide legal positions on ideas or ownership ? To the contractor have ownership ? So this question is funded -- is fundamentally around who owns the solution at the end of the contest. It is the competitor, the agency or a third-party altogether ? I'm going to ask John to bring the question about procurement and in addition to asking that question, in terms of how did you decide who has the property rights in the competition you worked on, did working with a contractor in any way influence or come into consideration when you're thinking about different contract or is -- contractors ? So I will turn to you first.
>> A couple of things. I will separate what we are doing with Nassau. We addressed the property question as part is -- of the rules. We are looking for very specific software implementation or Allbritton at solutions. As part is the rules definition, there is an intellectual property transfer that is an incentive fee that they are getting. This is one area that is quite advantageous to the government in that, when IT transfer occurs here, what we end up doingor what Topcoader does , they transfer the intellectual property rights and assign full rights underneath the copyright to the US government. The US government cannot copyright, so we can receive an assignment of copyright.
>> Or we can actually choose to have that intellectual property come in in terms of an Outer rhythm or software and make it to -- give it to open source making it available for us to use. So depending upon the challenge and other sensitivities that come into the solutions, we can make that choice.
>> On our non-software challenges that we have been running, we have primarily to a number of them. It depends upon the level of design in which you're getting back in your solution set. If you're just running and ideation challenging you're just getting ideas, there may be no intellectual transfer for and ideation challenge. When you're getting to solutions, you can get the full intellectual property rights. Depending upon how much of an incentive you're doing, but in all cases you can put that into your rules set and the likelihood of actually getting a solution is driven by your incentive fees and the willingness for the participants to sign rights over. But it should be stated upfront so they know what is occurring when they put their submissions in. So we have always been very open on that in the rules we put out.
>> Thank you so much, and I would add to that, in terms of thinking the -- with the federal wide legal position is, just a quick note that it does depend on which authority you're using to do your competition. If you use the newly prize authority in the compete act, the rule is that Congress they a lot of flexibility to the agencies to determine what is the right intellectual property regime for the roles of the competition for each agency. But Congress does clearly state that of course, no agency should have intellectual property without very clear notice and consent

from the submitter. That is generally not a problem, because the predators give consent to the rules in many challenges upon the way they submit solutions. It is also reflected and echoed in the America impedes act that this is very clear and upfront and really in put it in terms of how they have overall success of not only this challenge, but the ecosystem of challenges going forward.
>> So we are now at 3:24 PM and I want to be respectful of the timeline for the webinar. This has been such a fantastic conversation and I cannot date the panel in a for sharing their time and not -- thought. I am sure all the lines were not muted, you would hear loud and appreciative applause across the government right now. I think all of you -- I think it -- thank all of you for that.
>> A few things to leave you with. One is there is clearly been a lot of value that has been achieved by partnering with an external entity to be able to solicit their expertise on me different aspects of prizes design and implementation. I think the speakers spoke to that in a telling way.
>> Another thing that came out to me was the value of actually dedicating some funding to creating thecapacity to be able to do these types of prizes and challenges on and on demand way. So using that as an opportunity to think about either building a contractor or cooperative agreement with one of these external entities that keys up an entire fully of experimentation over set of problems and challenges that your agency has. There is great value in doing that in terms of being able to get the most benefit from the work that is required in terms of developing these relationships with external entities.
>> I do want to note to everyone a couple of things. One is that this webinar has been recorded and will be available on howto.gov as part of their training on demand series. Everyone can share that with others and listen to it again and again if there are questions you want to go back to. Karen leads that they're actually wonderful source it my last point, and it's sequel to this, it will be on September 15 at 2 PM. It will be on the challenges -- this webinar will follow this conversation but will focus on giving everyone a chance to meet some of the vendors, some of the companies that have signed up to the schedule and are available and have indicated interest in working with the public sector to put some fabulous expertise.

>> On a closing note, I would say this webinar is in many ways indicative of how valuable the fast-growing community of practice is to everyone who is beginning to experiment with prizes and challenges in their own agency . Everyone on this call has been incredibly generous with her time and they are dead be not the only ones. If you have worked on this issue or worked with a particular company or entity or external expert and would like to be available for others to reach out to, please let Karen know. She is collecting the names of individuals who have worked with specific companies or entities and who are willing to talk with other agencies if they have specific questions.
>> That would be a valuable addition to the resources that we have offered and developed to date. So please let Karen know if you would like to share experience. So with that, I will thank all of you with all the great work I know you're doing and your willingness to spend time with us today and learn how to do it even more effectively and efficiently. As always, I am also available if you have further questions. I look forward to talking to all of you soon.
>> I want to thank everyone for attending the webinar today. I have sent out a survey in your chat box. Your input is valuable to us, so please completed. You also receive this survey in an e-mail in about one hour. If you could take a couple of minutes to give you -- as your feedback, we appreciate it. Everyone have a wonderful day.
>> [Event Concluded]