

PTAG RFI: USPTO seeks Contractor to review and revise the Patent Examiner Training program.**THIS IS A PTAG SOURCES SOUGHT REQUEST FOR INFORMATION (RFI) ONLY.**

This PTAG 6.1.1 Sources Sought (request for information) Notice (RFI) is strictly for market research ONLY. It is for informational and planning purposes and shall NOT be construed as a solicitation or as an obligation or commitment by the Government at this time.

PTAG

The Government contemplates utilizing the Alternative Competition Method in accordance with the Patent and Trademark Office Acquisition Guidelines (PTAG) and the Patent and Trademark Office Efficiency Act 35 U.S.C. 2(b)(4)(A). This Sources sought notice is intended as preliminary market information gathering which the United States Patent and Trademark Office (USPTO) will use to determine which small business contractor(s) is/are the most likely to successfully meet the agency's needs and are thereby eligible to participate in an alternative competition.

As a result of this market research, the solicitation will only be issued to the/ those qualified small business contractor(s) that is/are deemed most likely to successfully meet the agency's requirements as stated below.

- This RFI is being made available under **PSC U008 - EDUCATION/TRAINING- TRAINING/CURRICULUM DEVELOPMENT** and **NAICS: 611430 - Professional and Management Development Training**

REQUEST FOR INFORMATION – PTA TRAINING CONSULTATION, ELEARNING & DELIVERY BACKGROUND

The United States Patent and Trademark Office (USPTO) intends to make a firm-fixed price award to one or more firms that can fulfill the following requirements for transforming the Patent Training Academy (PTA) focused on innovation and the development of new instructional ideas that support a reimagined training model. This award includes three (3) major elements:

1. Training Consultation for Program Revision;
2. Development of eLearning Content;
3. Training Delivery Support Services.

USPTO's Patent Training Academy is the training program responsible for preparing new hires to be patent examiners. It is designed to give new examiners the skills, knowledge, and confidence they need to begin their careers. In FY 2026, USPTO hired 963 new examiners.

Currently, the training program is delivered over 10-weeks and is comprised of a 125-course curriculum. The program follows a university-style model that uses a mix of large-lectures and small group lab sessions to give examiners opportunity to apply what they have learned. Through a combination of the use of a practice training application, active learning exercises, lecture and dedicated examination time, the goal of the program is to provide patent examiner new-hires the needed competencies to successfully examine in a Technology Center (TC) with guidance from experienced examiners.

OBJECTIVE

The USPTO seeks a training partner that can bring innovative approaches, fresh ideas, and creative solutions to help modernize and strengthen the Patent Training Academy. The objective of this RFI is to seek capable contractors who could provide the USPTO with Training Consultation for Program Revision, Development of eLearning Content, and Training Delivery Support Services.

REQUIREMENTS:

Training Consultation for Program Revision: The USPTO seeks firms with experience in instructional design consultation services to provide innovative, modern, and forward-looking solutions that introduce new ideas, enhance learner engagement, and create a more effective, scalable, and future-ready training experience for patent examiners, to include:

- Expertise in instructional design and adult learning theories and principles.
- Experience providing innovative solutions to enhance engagement and learning in large training programs with extensive curriculums, specifically more than 40 courses in a single curriculum.
- Experience with providing reimagined solutions including AI to enhance learning and taking complex, detailed curriculum and transforming the curriculum to provide faster acquisition of job skills and application of content.
- Ability to work with subject matter experts to elevate learning objectives and ensure content alignment with learning objectives for highly complex legal and examination procedure topics.
- Ability to work with subject matter experts to review and upgrade course activities for highly complex legal and examination procedure topics.
- Ability to work with subject matter experts to review and modernize course pedagogy for highly complex legal and examination procedure topics.
- Ability to work with subject matter experts to recommend updated assessments of learning objectives and outcomes.
- Experience in providing consultation services for legal content.
- Ability to develop training content and related deliverables in fresh, exciting, and engaging ways.
- Experience in recommending appropriate scheduling for redesigned training programs.
- Ability to recommend ideal learning environment and delivery method, to include in-person learning classroom set-up, classroom technology requirements, and eLearning content at both headquarters and alternate locations.

Development of eLearning Content: The USPTO seeks firms with experience in the development and implementation of eLearning content that uses innovative instructional design, interactive learning strategies, artificial intelligence-enabled solutions, gamification, and cutting-edge ideas for improving learner engagement and knowledge retention, to include:

- Expertise in the design of eLearning content, using standard eLearning authoring tools such as Articulate Storyline 360, Adobe Captivate, and similar platforms, including AI-enabled development features where appropriate.
- Expertise in incorporating instructional design and adult learning theories and principles to eLearning content.
- Experience in building in adaptive gamification into eLearning content to increase learner motivation, participation, and retention.
- Experience in designing microlearning content.

- Ability to leverage AI-informed approaches to support content development, learner personalization, scenario generation, assessment design, or other enhancements, as appropriate.
- Ability to work with subject matter experts to ensure the design correctly represents legally accurate materials.
- Experience in incorporating clean visuals, graphics, and ensuring 508-compliance of all materials.
- Experience in graphic design, visual clarity, and technical writing to ensure clear instructions and flow of all eLearning content.
- Experience in intuitive, learner-centered design.
- Experience in clearly defining design processes, to include steps in design processes, timelines, and checkpoints for subject-matter expert review.
- Ability to convert 25 courses into eLearning modules in 3 months. Courses range from 1 hour to 2.5 hours' worth of content.

Training Delivery Support Services: The USPTO seeks firms with experience in the implementation of Training Delivery Support Services that promote flexible, imaginative, and innovative methods for supporting instructor-led and technology-enhanced learning, to include:

- Experience providing training in person and online, using agency collaboration tools such as MS Teams.
- Experience in ensuring best practices in engagement and adult learning theory are incorporated into training delivery.
- Ability to deliver training on all agency examination processes, procedures and tools accessing patent applications, in-house tools for searching US and Foreign Patents that allow examiners to generate correspondence to applicants, case management tools.
- Ability to deliver professional training that is consistent with USPTO standards to support professional development to USPTO patent examiner employees. The training must be conducted by a variety of means including in person, in a classroom or lecture setting, and/or using agency collaboration tools such as MS Teams.
 - Please state if you have specific experience with intellectual property (IP), patent examination, and patent prosecution processes.
- Experience in ensuring continuity in training to avoid re-scheduling of training classes.
- The ability to provide feedback and suggestions for USPTO training and materials to enhance learning.
- Ability to provide training at all USPTO designated training locations, such as the Headquarters in Alexandria, Virginia, and regional offices in San Jose, California, Dallas, Texas, and Detroit, Michigan.
- The ability to ensure training coverage for the newly designed training program. Example Current schedule listed below:

Phase 1	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	8:30 a.m. – 5:00 p.m. ET (8-hour days)				
Week 2	8:30 a.m. – 5:00 p.m. ET (8-hour days)				
Week 3	7:30 a.m. – 5:00 p.m. ET (9-hour days)				Off

Week 4	7:30 a.m. – 5:00 p.m. ET (9-hour days)	7:30 a.m. – 4:30 p.m. ET (8-hour days)
Week 5	7:30 a.m. – 5:00 p.m. ET (9-hour days)	Off
Week 6	7:30 a.m. – 5:00 p.m. ET (9-hour days)	7:30 a.m. – 4:30 p.m. ET (8-hour days)
Week 7	7:30 a.m. – 5:00 p.m. ET (9-hour days)	Off
Week 8	7:30 a.m. – 5:00 p.m. ET (9-hour days)	7:30 a.m. – 4:30 p.m. ET (8-hour days)
Week 9	7:30 a.m. – 5:00 p.m. ET (9-hour days)	Off
Week 10	7:30 a.m. – 5:00 p.m. ET (9-hour days)	7:30 a.m. – 4:30 p.m. ET (8-hour days)

PROGRAM TIMELINE

Contractors would be expected to begin delivering consultation services in October 2026, with an expectation of revised training program initiatives to begin implementation in January 2027.

REQUESTED INFORMATION

As part of the RFI response, vendors are asked to discuss their ability and provide their solutions and business offerings for this requirement, and to specifically address the questions listed below. General responses with generic capability statements that do not address the specific content of this RFI may not be considered.

Training Consultation for Program Revision

1. Describe the largest training program for which your company has been a training consultant. Please include the number of employees impacted and the number of courses impacted. If for a government contract, please provide the contract number and the Contracting Officer.
2. Describe the process you follow in identifying and providing transformative solutions for training content.
3. Provide examples of innovative solutions you have suggested for curriculum revisions.
4. Describe your experience with providing instructional design consultation services for technical, legal, regulatory or IP audiences.
5. If you do not have prior experience providing instructional design consultation services for technical, legal, regulatory, or IP audiences, what risks or challenges would you foresee in delivering this scope of work and how would you propose to mitigate them?
6. Given the anticipated scope of this project, revising approximately 125 courses for implementation by January 2027 (approximately 3 months), please describe your firm's capacity to support this effort, including staffing, project management approach, relevant experience, and any assumptions or constraints that may affect schedule feasibility.

Development of eLearning Content

7. Provide at least 2 specific examples of content that you have redesigned from an in-person delivery model to a computer-based training (CBT) for technical, legal, regulatory, or IP

audiences. If for a government contract, please provide the contract number and the Contracting Officer.

8. Provide at least 2 specific examples of eLearning modules in which you have incorporated gamification elements. Describe the content of the module, the specific gamification elements incorporated, and your methods of assessing success. If for a government contract, please provide the contract number and the Contracting Officer.
9. How do you ensure gamified content meets accessibility requirements?
10. Describe how you use and incorporate AI into your computer-based training (CBT)?
11. Our patent examiner training content is highly technical and complex. Please describe your approach to designing and developing accessible learning for this type of subject matter, including how you simplify complex information, engage learners, and ensure accuracy and usability.
12. Given the anticipated scope of this project, converting a minimum of 25 in-person courses into eLearning modules by January 2027 (approximately 3 months), please describe your firm's capacity to support this effort, including staffing, project management approach, relevant experience, and any assumptions or constraints that may affect schedule feasibility.

Training Delivery Support Services

13. Describe your experience delivering intellectual property (IP), patent examination, patent prosecution, or legal training.
14. If you do not have prior experience delivering intellectual property (IP), patent examination, patent prosecution, or legal training, what risks or challenges would you foresee in delivering this scope of work and how would you propose to mitigate them?
15. Describe your experience delivering training on highly technical and complex topics. How did you prepare your trainers to learn and deliver the content?
16. How would you advise your trainers to respond to questions on highly technical and complex topics for which they may not be fully knowledgeable about the topic?
17. Describe how you ensure that your trainers are providing highly engaging training that incorporates practices in adult learning theory. How do you recruit and prepare trainers for this role?

HOW TO RESPOND TO THIS SOURCES SOUGHT NOTICE

- Questions and responses are to be submitted via email to Roy.Pitman@uspto.gov and Christopher.Ward@uspto.gov.
- **In your email, please include in the subject: ACQ-26-9999 USPTO PTA Training Consultation, eLearning & Delivery**
- NO PHONE CALLS PLEASE
- The response to this RFI should provide USPTO management with an understanding of the contractor's experience and the range of services provided. This will allow USPTO to conduct thorough market research, identify suitable providers, and make informed decisions.

DEADLINES:

Questions regarding this RFI are to be submitted via email no later than **Monday, September 21, 2026, at 1:00 PM ET**

- **Responses** are due no later than **Monday, September 28, 2026, at 1:00 PM ET**
- Late responses may be considered at the government's discretion.

Responses should include:

1. A capability statement
 - Which includes a detailed response to the “REQUESTED INFORMATION” above.
2. The name of your firm
3. Your SAM.gov UEI number (if available)
4. Whether or not your firm is a Small Business under NAICS: 611430 - Professional and Management Development Training
5. The complete address, email and phone number of the primary contact
6. Your firm’s GSA schedule contract number(s) (if applicable)
7. Note: you must be registered in the SAM.gov database prior to any award of a contract or agreement.

Disclaimer: This PTAG Sources Sought Request For Information (RFI) notice is issued solely for Market Research information and planning purposes only and does not constitute a solicitation. All information received in response to this RFI that is marked as proprietary will be handled in accordance with procurement integrity requirements. Responses to this notice are not offers and cannot be accepted by the Government to form a binding contract. Responders are solely responsible for all expenses associated with responding to this RFI.