

The Centre for Commercialization of Research (CCR)

Description

The Centre for Commercialization of Research (CCR) generates economic benefits for Canada through the successful commercialization of new technologies and knowledge by helping high-potential, innovative companies build the capacity to become sustainable global competitors.

CCR works with early-stage, innovative companies, with excellent potential. CCR's core value is its expertise and time along with that of their partners, as well as access to a vast array of networks. CCR connects companies to the resources they need, when they need them. The team and its partners help select the most appropriate resources and create a customized solution. The resources may include advice, connections to additional local and global partners, professional services, highly qualified management staff and sources of funding

Ontario Centres of Excellence's CCR is funded by the federal government under a Networks of Centres of Excellence (NCE) program for Centres of Excellence for Commercialization and Research (CECR).

The CECR program is overseen by a tri-agency NCE Steering Committee made up of the Deputy Minister of Industry Canada, the Presidents of the three granting agencies and the President of the Canada Foundation for Innovation. Day-to-day administration of the CECR program is provided by the Networks of Centres of Excellence Secretariat. OCE is accountable to the Secretariat for the CCR funding.

CCR has received a grant for a five-year period under a funding agreement between OCE and the three granting agencies.

Mission and Objectives

The specific mission of CCR is to:

- Support Canadian entrepreneurs to accelerate the commercial introduction of leading edge technologies, goods, services and business models in the priority areas of the federal Science and Technology Strategy:
 - health
 - information and communications technology

- environment
- energy and natural resources
- Play a key role in building a Canada-wide commercialization network
- Promote a Canadian culture of entrepreneurship

Information for potential CCR clients

Can the Centre for Commercialization and Research help me?

Before reading any further try answering the following questions. They will help you decide whether the team at CCR is the right one to help you.

- Is or will the company be incorporated in Canada?
- Does the project involve innovation developed in a Canadian, publicly funded research institution or does the company have a formal relationship with the institution or will it set one up as part of its commercialization plan?
- Does the company have a credible business plan or equivalent, including a statement of needs?
- Does or will the company have the capacity to proceed with the envisioned project and contribute to costs?
- Is the company's offering unique and proprietary technology with defensible intellectual property and/or a high barrier to competition?
- Is there a large national or international addressable market?

If you answered 'yes' to these questions, we'd love to talk to you. Read on for further details about what CCR can offer and our model for interacting with clients.

Person to contact

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Summary of Resources

Facilitated Access to Business Resources – Advice and direct assistance to access to a range of business services and resources including funding, market research, highly qualified people, professional services, industry networks, intellectual property management, training and other business needs.

Eligibility: Any entities, or individuals involved in the commercialization of research.

Commercialization Resources – Assistance and financial support to achieve a specific commercialization milestone enabling the company to advance their commercialization plan.

CCR may share the costs with the company of achieving a well articulated and meaningful commercialization milestone. Specific commercialization needs addressed must fit with the eligible commercialization costs.

Eligibility: An incorporated Canadian corporation with unique and proprietary offering which has defensible intellectual property (IP) and an addressable market. Must have a business plan. The company must be able to provide matching costs. CCR funding is repayable under a Memorandum of Understanding.

Embedded Executives – Assistance and financial support to acquire the services of an experienced entrepreneur or business executive to work inside the company for a limited time as an embedded executive.

The assignment will be designed to match the company's specific needs and resources. A typical assignment would place an embedded coach inside the company for 4-6 months. Compensation options for executives may include *pro bono* arrangements, honoraria, and future considerations such as equity or conditional deferred fees. The company and CCR will jointly select an executive from OCE's extensive network of management experts.

Eligibility: An Incorporated Canadian corporation with unique and proprietary offering which has defensible IP and an addressable market. Must have a preliminary business plan. The company must be able to provide matching compensation to the candidate. CCR funding is repayable under a Memorandum of Understanding.

Facilitated access to capital – Advice and assistance to determine the best financing options available to the company, and introductions to national and international investors through OCE's expanding network. CCR will broker the arrangements and the terms of its financial contribution which could include promissory notes and convertible debentures and in selected cases could include a management fee. Typical leverage is 5:1

Eligibility: An incorporated Canadian corporation with an offering unique and proprietary which has defensible IP and an addressable market. Must have a formal business plan.

New Entrepreneur Micro-Finance – Assistance and financial support to pre-incorporated and early stage start-ups by providing young entrepreneurs with just enough capital to get an idea off the ground. Each entrepreneur involved in the project receives up to \$6,000 in financial support (to a maximum of \$18,000 per project) with favourable repayment terms. Typically a loan at prime interest rate + 2% repayable if the company is cash flow positive within two years.

Above all, entrepreneurs at this stage benefit enormously from the expertise and time provided by CCR and its partners. They are also provided with introductions and connections to a vast array of networks, potential partners and customers.

Eligibility: New entrepreneurs able to work in Canada who have unique and proprietary offerings which will have a national or worldwide market. Recipients must be enrolled in or have just graduated from a Canadian college or university and be prepared to work on the project full time for a minimum of 3 months. If this is a pre-incorporated start-up and the project is successful, the recipients must agree to transfer the technology into a new or existing start-up incorporated in Canada.

Event Sponsorship – CCR will very selectively sponsor investment in commercialization focused events and initiatives in Canada.

Funding levels

The maximum funding available to one company is \$250,000. Any other requirements are reviewed on a case by case basis.

Eligibility

Eligible sectors/technology type

Opportunities in the following sectors:

- Energy, environment and natural resources
- Health and medical technologies
- Information and communications technologies
- Convergent technologies in the above sectors.

Enterprises / Individuals who are eligible

- High potential entrepreneurs
- Emerging enterprises with breakthrough innovations
 - The innovations should have been developed by Canadian publicly funded research institutions, such as Universities, Colleges, Research Hospitals etc. The company may be a direct spin-off from the University or the innovation could have been acquired under licence from the research institution or
 - The company should have a formal relationship with such an institution, i.e. a research collaboration or
 - The company intends to set up such a relationship as part of the commercialization plan, e.g. acquire a licence from a research institution or set up a research collaboration

Eligible activities

Activities should be related to commercialization and address market-directed business needs.

Examples are business intelligence, market research, marketing, governance, management, business planning, financing, product validation and intellectual property.

Eligible costs

Expense Category	Funding Amounts	Expense Detail
Commercialization Costs	Up to 50%	<ul style="list-style-type: none">• Pre-commercialization support (e.g. IP protection, market studies, business plan development, counselling/mentoring, technology evaluation)• Specialized equipment / directly related operating costs• Capital equipment (vital to commercialization, not eligible for any other federal program assistance, less than \$1M and less than 20% of commercialization costs)

Ineligible for funding		<ul style="list-style-type: none"> • Construction, purchase, lease of building or building space (exception of the space to house the Administrative Centre)
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Contributions to funding

Where funding is arranged, the company, or other partners, must be able to at least match the amount, in cash or in-kind. Examples of in-kind contribution include, the time of someone working on the project and the value of project essential infrastructure items.

Intellectual Property and Infrastructure ownership

The Intellectual Property and Infrastructure associated with the project remain entirely in the possession of the company and CCR does not claim any ownership or exploitation rights over them.

Relationship between funding provided and other sources of funding

It is desirable to have complementary sources of support and funding for the same item, e.g. embedded executive, professional services etc. The aim is to bring together partners with complementary resources to increase the probability of success.

Engagement Process

1. Initial Engagement

Company submits basic information about themselves and their innovation to CCR.

A CCR representative sits down with a company representative to discuss whether CCR and the company would be a good fit.

If the company passes this initial screening, they move to the Assessment step (see below). For further details about the Initial Engagement phase, [click here](#).

2. Assessment

Company must be prepared to disclose the details of their business so an in-depth needs analysis can be undertaken. CCR and the company will jointly decide on a number of items including the following:

- Best strategy for the company
- Which partners and other organizations may offer the right assistance
- Whether other technologies would strengthen the company's IP position
- High level elements of a project plan
- How to integrate the company into the CCR network to capture other benefits

3. Develop a Proposal for Funding

The company prepares the proposal and submit it for approval.

If approval is given, additional terms, milestones, deliverables and financial details are also stated.

4. Project Execution

The company is issued with a contract.

Once the project begins, the CCR representative will monitor progress on an on-going basis and offer advice.

The company will be required to submit information for interim and final reviews. Reviews must take place at least every six months.

5. The Continuing Relationship

Following the final review, the CCR representative will make recommendations for next steps for the company. The CCR contact will continue to offer assistance and look out for new opportunities for the company well beyond completion of the project.

Further details about information submission requirements and assessment criteria used at each stage are show below.

1. Initial Engagement

Initial Submission of Information - The basic information submitted for the initial screening should consist of the following:

For New Entrepreneur Micro-finance

Application to be 3-5 pages long and include the following information. [Click here for the Application Package.](#)

- What is the Innovation and how is it novel
- Who is the customer?
- What need or gap does it address/solve?
- How do you make money?
- Who are the competitors?
- Who makes up the team?
- What is the project plan?
- What are the expected outcomes?

For other assistance

- Company must supply basic business information, using the CCR application form. [Click here for the form.](#)
 - Name, address, primary contact, etc.
 - Referred by whom (if applicable)?
 - Incorporation info (incl. date)
 - Link to Canadian publicly funded research institution
 - Other sources of support – past/present
 - Past links with OCE
 - Scale (employees, revenues, etc.)
 - Brief description of business, including technology description, category or sector, products, markets, etc.
 - Stage of development , incl. financial status
 - What you are looking for from CCR
- Business plan or equivalent (mandatory)

Submission timelines

Companies may submit their information to CCR at any time.

Submission of further information

When the company reaches the assessment stage and beyond, the information they will be required to submit will depend on their particular circumstances. The CCR representative will supply full details at that time.

2. Assessment

Assessment criteria - What we look for

The information you supply will allow those assessing your company to answer the following questions:

- “How good is the intellectual property?”
- “Is there really a viable market for products based on the intellectual property?”
- “Is there a clear, compelling and competitive reason for the customer to purchase the product?”
- “Can the innovation provide the customer with an advantage in terms of the task completion?”
- “What is the best practice business model for this company?”
- “Can this company manage its way to success?”
- “Will there be new jobs created as a result of the commercialization program?”
- “In which way will the implementation of the commercialization program provide economic benefits?”

Below are the more detailed criteria used when making assessments

Assessment Stage Criteria

- Sector fit
 - Does the innovation fit into CCR priority areas: environment, energy, natural resources, information and communication technologies, health and medical (criterion relaxed for OCE start-ups)

- Does the innovation match OCE areas of expertise
- Program fit
 - Does the plan fit CCR's goals, programs and expertise
 - Would another organization be a better fit
 - Does the company appear to need what CCR can provide
 - Is the company in a "gap" where other support is lacking
 - Is the company willing to abide by CCR due diligence process, work toward business milestones, and provide deliverables including performance data
- Quality of the opportunity
 - Are the technology values and market opportunities clear
 - Is the intellectual property position strong
 - Does the company have the nucleus of a strong team
 - Is the company "coachable" – is it willing to accept advice and make necessary changes

3. Develop a Proposal for Funding

Proposal Stage Criteria

- Strength of innovation and its competitive advantage.
 - Does the innovation provide a sustainable competitive advantage or is the innovation in question only incremental?
- Market opportunity and potential economic impact
 - What is the market potential at which the company's product is targeted?
 - To what extent will the product or service create economic value?
 - Are the competitors known and the level of competition understood?
- Product strategy and commercialization plan
 - Do the proposed activities accurately address the company's needs?
 - Is the means by which the company will exploit their innovation reasonable?
 - Is the marketing strategy appropriate?
- Strength of the team
 - Does the team have both the technical and business experience to commercialize the innovation?
- Value of the potential investment
 - Does the investment promise acceptable leverage and ROI?
 - Does the investment generate commercial value from Canadian university research?
 - Is the level of risk-sharing appropriate?

- Other considerations
 - Will the proposed activities, together with support from any other sources, make the company “investment-ready”?
 - *Can an appropriate financial arrangement be structured that is acceptable to the client, CCR and relevant partners?*
 - Will the company bring other future value to the CCR network (e.g., research investments, new partnerships)?

Decision time frames

Provided all the required information is submitted, applicants will be informed of the decision within 30 days.

Note

While all eligible parties are entitled to apply for CCR resources, access to them is provided on merit. Even where an applicant has submitted a complete application and met all CCR program criteria, there is no guarantee the applicant will proceed to the next phase or be awarded funding, as resources are limited. In no case is CCR under obligation to approve funding.

Peer review

Amounts over \$30,000 - External review by experts in the field
 Amounts over \$100,000 - External review by an Independent Investment Panel from the financial community

Expert Reviewers are drawn from OCE’s network of experts and come from academia, industry and the financial community. They are carefully selected on a case by case basis for their knowledge regarding the individual technology or service involved.

Common weaknesses and errors in applications

- do not have business plan
- do not have a link with a public research institution
- do not have defensible intellectual property or high barrier to competition
- believe available funding is a grant

Administration of any funding - Contract and release of funds

If the proposal is approved, the company will be issued with a contract. The contract will contain:

- Project definition
- Start/end date
- Specific details on use of funds
- Expected outcomes
- Financial terms

The company must agree to supply performance information during and beyond completion of the project.

Funds will be released to the company on receipt of the signed contract. Disbursement may be in instalments in the following cases:

- Funding amount is large
- Interim goals have been set. Release of subsequent instalments dependent on attainment of goals.

Evaluation of outcomes

Contracts include a commitment to supply performance information during and beyond completion of the project.

The company and CCR prepare at least one interim review, and a final report, which document the status and progress against milestones and financial goals as set out in the Proposal. Reviews should take place within six months of each other. The final report includes a recommendation from the CCR for next steps.

OCE - CCR *New Entrepreneur* Program Application Package



Instructions - please read carefully before starting

The following form is provided to present your proposal to the OCE Commercialization Investment Committee for funding.

General Information

- Please work with an OCE Business Development (BD) Manager in the preparation of this proposal.
- Write this proposal as a continuous flowing document. Avoid repetition, ambiguous, unverified or non-factual information and motherhood statements. All market intelligence and other data should be properly referenced. Information should be evidence-based.
- Be clear and concise and limit your proposal to 4 pages of written 10pt font text (exclusive of pictures, tables, graphs, etc.). Additional supporting materials can be attached in an appendix. You may resize the text boxes or eliminate them altogether if this allows you to create a more cohesive document.
- Funding must be used for one or more of the following activities:
 - Pre-commercialization support (IP protection, market studies, business plan development, counselling/mentoring, technology evaluation)
 - Specialized equipment / directly related operating costs
 - Capital equipment (vital to commercialization, not eligible for any other federal program assistance)
- A Budget in spreadsheet format should always accompany your written proposal.

Eligibility

- New entrepreneurs able to work in Canada and having novel proprietary technology and an addressable national or worldwide market. Recipients must be enrolled in or have recently graduated from a Canadian college or university and be prepared to work on the project full time for a minimum of 3 months.

Supporting Material

- Tables, pictures, graphs, videos, etc. may be inserted directly into the body of this document
- Supporting materials can be attached as separate files and may include: business plan, résumés, market study, expert opinions, testimonials, letters of endorsement, emails, patent filings, field trial results, journal and business articles, quotations, sales orders, or any other material you deem important to support your proposal.

Project Information

Project Title:

Applicant 1 Name / Position:

Applicant 1 Address:

Applicant 1 University /College Name / Department / Faculty:

Applicant 2 Name / Position:

Applicant 2 Address:

Applicant 2 University /College Name / Department / Faculty:

The Project Pitch

In ONE paragraph only for each bullet, describe as concisely as possible the following:

- *What is the Technology and how is it novel*
- *Who is the Customer*
- *What Pain does it address/solve*
- *How do you make money*
- *Who are the competitors*
- *Who makes up the team*
- *What is the project plan*
- *What are the expected outcomes*

Appendices:

Attach any additional supporting materials that you deem important to support your proposal. (ex. Business plan, résumés, market study, expert opinions, testimonials, letters of endorsement, emails, patent filings, field trial results, journal and business articles, quotations, sales orders, etc.)

**OCE Market Readiness and Embedded Executive Program Application
Package
Instructions - please read carefully before starting**



The following form is provided to present your proposal to the OCE Commercialization Investment Committee for funding.

General Information

- Please work with an OCE Business Development (BD) Manager in the preparation of this proposal.
- Write this proposal as a continuous flowing document. Avoid repetition, ambiguous, unverified or non-factual information and motherhood statements. All market intelligence and other data should be properly referenced. Information should be evidence-based.
- Be clear and concise and limit your proposal to 8 pages of written 10pt font text (exclusive of pictures, tables, graphs, etc.). Additional supporting materials can be attached in an appendix. You may resize the text boxes or eliminate them altogether if this allows you to create a more cohesive document.
- The latest revision of the Budget spreadsheet should always accompany your written proposal.
- To the best of your ability, provide content in each section. Suggested content is provided for guidance only. Content bullets should be deleted in the final application.
- Commercialization of Research funding is highly flexible and may be used to support any reasonable activity that will help you commercialize your technology, provided a compelling and credible business case is presented.

Eligibility

- To be eligible for funding under the Market Readiness program, the Intellectual property must have been developed at an Ontario college, university or research hospital.
- To be eligible for funding under the Embedded Executive program, the applicant must be an Incorporated Canadian Corporation having unique proprietary technology with defensible IP, an addressable market, and a preliminary Business Plan. The company must be able to provide matching compensation to the candidate. See additional instructions in the "Team" section of this application.

Supporting Material

- Tables, pictures, graphs, videos, etc. may be inserted directly into the body of this document
- Supporting materials can be attached as separate files and may include: business plan, résumés, market study, expert opinions, testimonials, letters of endorsement, emails, patent filings, field trial results, journal and business articles, quotations, sales orders, or any other material you deem important to support your proposal.

Reviewers

- For Market Readiness applications, please provide contact information for at least 4 external reviewers – 2 from a related Industry to validate the technology and 2 from the business / financial sector to validate the business case. These should be entered in the on-line portion of this application. Please note that OCE and external reviewers are required to respect the confidentiality of all proposals.

Project Information

Project Title:

Applicant Name / Position:

Department / Faculty / Institution:

Abstract - The Pitch

In ONE sentence only for each bullet, describe as concisely as possible the following:

- *What is the Technology*
- *Who is the Customer*
- *What Pain does it address/solve*
- *How do you make money*
- *What is the current IP position*
- *How much funding/resources are you looking for and how it/they be used*
- *What are the expected outcomes*

The Technology

Address all applicable items:

- *Briefly Describe the Technology*
- *Describe the "wow" factor*
- *Clearly indicate the Academic connection to the Technology (this is an eligibility criterion for Market Readiness funding)*
- *Describe the project background or genesis (include prior OCE involvement, projects, funding and outcomes)*
- *Explain the "job" your technology does*
- *Describe how your technology brings the Solution to the Problem*
- *Is the Technology Disruptive, Neutralizing or Incremental*
- *Clearly describe the primary Differentiators - key advantages of your technology compared to the market leaders*
- *Indicate if this a Platform Technology or a specific technology solution*
- *Do you have or are you planning to have a Technology Pipeline which will provide a sustainable revenue opportunity*
- *What are the Competitive Technologies – briefly Benchmark your technology against them*
- *Include any other pertinent information related to your technology*

The Market Opportunity

Address all applicable items:

- Define who your Customer is (What is the Target Market / Audience)
- Explain what Need your technology fills, Pain it addresses or Problem it solves (The "Opportunity")
- Describe the Value Proposition to the customer (faster, cheaper, better, etc.)
- Indicate if there is Customer Pull (Is there anyone asking for your solution and is prepared to give you money for it) or if this is a Technology Push (fill an as yet unrealized need)
- What is the Benefit to Ontario (economic, human capital development, societal) (This is an eligibility criterion for Market Readiness funding)
- What is the Benefit to Canada (economic, human capital development, societal) (This is an eligibility criterion for Embedded Executive funding)
- Indicate which model(s) your technology solution falls into (Niche Market, Complex Custom Solution or a Mass Volume Commoditization model)
- Indicate the Total Addressable Market size (Include \$ from all sources local/regional/global and provide references)
- What is the Immediate Addressable Market size (estimate who, where, \$ size, when and provide validation)
- Describe the First Market Segment you will go after / serve (your "Beachhead")
- Indicate the other Market Segments you can tap in to.
- List your Competitors, and indicate how they are positioned in your market (price point, market segment, customer profile, etc. a comparison table may be useful here)
- Include any other pertinent information regarding your market and opportunity

The Commercialization Plan - Path to Market

Address all applicable items:

- *Indicate if this a Start-up or a License opportunity to an Ontario receptor (this is an eligibility criterion for Market Readiness funding)*
- *Indicate if this is an incorporated company and date of incorporation (this is an eligibility criterion for Embedded Executive funding)*
- *Describe your Commercialization Strategy (strategy to exploit your technology to make a profit)*
- *What is your Marketing Strategy (how will you promote and sell your products or services including market research and advertising – your go-to-market strategy)*
- *What is your Communications Strategy (describe your audience, message, action items)*
- *Describe the Customer Engagement model*
- *Indicate who the Potential Channel Partners and/or Receptors for the Technology are*
- *Map out your Strategic Partners from supply to distribution to sales*
- *Describe any Commercialization Agreements (customers, partners, distributors, etc.) that are currently in place*
- *Are you using or planning to use professional industrial design expertise, branding and/or trademarks to build awareness in your product/technology and enhance brand/corporate equity? If so, describe.*
- *Describe your business Ecosystem (the major players in your market segment - product champions, industry leaders, key corporations, dominant competitors, strategic partners, etc.)*
- *Provide a brief summary of any marketing research you or others have conducted*
- *Include any other pertinent information regarding your commercialization plan*

The Commercialization Plan - Business Case

Address all applicable items:

- Describe how you will make money (license, royalties, services, sales of devices – include rates, price points, cost of goods, selling price, etc.)
- Provide a brief table of your expenses, costs and revenues demonstrating when and how you will be profitable (pro-forma profit and loss statement up to the point at which you are profitable)
- What is your immediate revenue model
- What is your plan to get you to First Revenue and when do you expect to achieve it
- What is your Sustainable Revenue Model
- Describe any Recurring Revenue associated with your business or license
- Indicate the total \$ investment in the business to date from all sources (private, VC, Angel, Gov., etc)
- What is your current cash "burn rate"
- Estimate funding required to achieve First Revenue
- Provide a Cash Flow Projection up to cash neutral and indicate when you expect to be cash neutral
- Describe any credit facilities you have access to
- Describe your "Funding Roadmap" - Indicate how much money you need, when you need it and where it will come from during each applicable stage of your business development (Bootstrap, Pre-Seed, Seed, Private Equity VC Rounds ABC, Mezzanine, IPO, Acquisition, etc.) Only provide information you can reasonably estimate or can derive from industry norms.
- OR/ As best as possible, describe the on-going funding / investment requirements at the various stages of evolution of your business and describe your plan to raise these funds
- What other OCE Centres or Government / Institutional funders are involved in this project (who, how much, terms and conditions)
- Include any other pertinent information regarding your business case

The Team

Address all applicable items:

- *If this is an application for an **Embedded Executive**, include the following information in this section: Position Summary, major responsibilities, key reports, key near-term priorities, candidate's experience, critical competencies, networks, and personal attributes that will lead to successful achievement of the established priorities and milestones as set out in the project plan section. Include proposed compensation, weekly time commitment, project duration, expected outcomes and expectations of the individual's on-going role in the business. Applications for an embedded require that the applicant be a legally incorporated (Canadian) company (this is an eligibility criterion) and must be accompanied by a preliminary business plan and the candidate's curriculum vitae.*
- *Describe your motivation in undertaking the project / business*
- *Provide summary profiles of your key team members - technical, business, academic, relevant experience, sector expertise, etc.*
- *Indicate if your team is well rounded and highlight any deficiencies and / or needs*
- *Who makes up the Technology team*
- *Who makes up the Commercialization team*
- *Who makes up the Business team*
- *Who makes up the Executive Management team*
- *Who are your Advisors or Mentors*
- *Who is on your Board of Directors*
- *Who are the Investors and Owners of the current business incl. relative amounts (founders, family, friends, angel, OCIF, etc.)*
- *Do you have any Employees and do you plan on having adding any - if so when*
- *Which team members have previously applied for or have been involved in OCE Projects*
- *Include any other pertinent information regarding your team*

The Intellectual Property (IP) Position and Risk

Address all applicable items:

- Describe where you are in the Technology / Product Life-cycle – conceptual, virtual model, proof of principle, prototype, pre-commercial beta, etc..
- Describe any Technical Uncertainty
- Identify any Market Barriers
- Describe the Buying Constraints of your customers
- Explain any Regulatory or Certification requirements
- Indicate how much Runway the proposed funding will provide you (time in months before you run out of money without additional funding)
- Describe your IP Strategy and internal IP Policy
- Indicate the kind of IP you have i.e. patent, know-how, trade secret, source code, copyright, trademark, moral right, mask work, industrial design, public domain). Indicate if you have freedom to operate / right to use
- Explain who currently owns the IP rights, what if any are your institution's rights, and if it needs to be licensed in or out in your proposed business model
- Indicate the current legal position of your IP - (has it been registered or filed, defended, granted, etc.)
- Describe your IP Positioning: defensive, offensive, co-operative, is there any prior art, is there room for expansion of claims, etc.
- Is there any additional IP you require to bundle with yours to make it economically viable or attractive
- Indicate the current Status of any Patents: Provisional Filing, PCT, National Phase, National Registration, Maintenance, etc.
- Identify the Jurisdiction(s) your IP is or should be protected / registered in
- Include any other pertinent information regarding risk assessment

The Project Plan Details

Address all applicable items:

- Describe / list the tasks, milestones, deliverables, timing in each phase of this project. A Gantt chart (a bar chart that illustrates a project schedule including start and finish dates of the terminal elements and summary elements of a project) can be an effective way of illustrating this.
- Describe the Key Resources required for each milestone (people, financial, reports, technology, materials and supplies, etc.)
- Describe and justify the Use of Funds including documentation to substantiate your request (provide estimates, quotations, etc. as attachments)
- Indicate the Critical Path for your proposed project
- Identify key Go / No-go points (i.e. phases / gates / decision points)
- Clearly articulate the Expected Outcomes (what does success "look like")
- Include any other pertinent information regarding your project plan

Appendices: Attach any additional supporting materials that you deem important to support your proposal. (ex. Business plan, résumés, market study, expert opinions, testimonials, letters of endorsement, emails, patent filings, field trial results, journal and business articles, quotations, sales orders, etc.)