

**Workshop****Tech Transfer Bootcamp****Level****Basic****Duration****2 days** – 8.30am to 5.00pm.**Program**

A detailed description of the workshop program is below.

**How this workshop helps tech transfer professionals**

This intense and comprehensive skills development workshop has been designed for those that are new (or near-new) to technology transfer and need to accelerate their learning of the basic skills and agreements used in the technology transfer process.

It is also a useful refresher for more experienced technology transfer professionals.

Importantly, the unique needs and perspective of universities and research institutes in the technology transfer process are kept in focus, as well as the needs of industry partners.

Common points of tension in university / research institute / industry partner relationships are covered, as well as ways to overcome these points of tension, while still meeting the needs of each.

The workshop presents an international perspective, sharing the presenter's experiences of technology transaction dealings with parties in the United States, Europe, and Asia.

After this skills development workshop, participants will have an excellent all round appreciation of the tech transfer process, as well as have the skills and knowledge to work on tech transfer projects confidently.

**Customisation**

The content of this workshop can be changed and customised to enable specific learning objectives to be achieved.

**Presenter**

Philip Mendes

**Delivery style**

Interactive workshop style.

Emphasis on discussion, participants asking questions, contributing their comments, and sharing their experiences.

We find that this interactive workshop style keeps participants alert and achieves a more effective learning and skills building outcome.

**Materials**

Each participant receives a set of bound workshop materials which will be an ongoing reference resource.

**Certificate of Completion**

A Certificate of Completion is provided to each participant.

**TECH TRANSFER BOOTCAMP - Skills, Tools, and Know How**

<b>DAY 1</b>		
8.30	<b>Registration</b>	
9.00	<b>Welcome and Introductions</b>	Welcome, introductions, and overview of 2 day workshop.
9.15	<b>What is Intellectual Property</b>	An overview of the different types of intellectual property, and what they protect, including: patents, copyright (including software), designs, trademarks, plant breeders rights, eligible layout rights, and confidential information.
10.00	<b>What is the Patent Process</b>	Patent processes: priority date, provisional applications, PCT applications, national phase, pitfalls of patenting too early, the timing of patent applications. Choices to be made in the patent application process and the factors that influence them.
10.30	<b>Morning Tea</b>	
11.00	<b>Choosing whether to protect IP by patenting, or by trade secret</b>	IP Protection strategies. Pros and cons of patenting. When patenting should be considered. When protection strategies other than patenting should be considered. Factors influencing the choice.
11.30	<b>The Commercialisation Window</b>	The window of opportunity to commercialise IP. When it is too soon. When it is too late. The criteria for each. Maximising the commercialisation window opportunity.
12.00	<b>Achieving both the academic publication objective as well as the IP protection and commercialisation objective</b>	The importance of achieving the academic publication objective, and why it must be achieved. The importance of achieving the IP protection objective, and the commercialisation objective. Strategies to ensure that each objective can be achieved without sacrificing the achievement of the other objectives.
12.30	<b>Lunch</b>	
1.30	<b>Evaluating Technology for Commercialisation</b>	Criteria for assessing a technology commercialisation candidate, including: patentability, novelty, the state of the research, IP ownership, assessment of the market including need and market size, etc
2.15	<b>Practical exercise: Assessing the commercialisation prospects of IP</b>	Presentation of an Invention Assessment Tool for a hypothetical parcel of IP. Allocation of participants to small groups. The factors influencing commercialisation identified. Each group assesses the commercial prospects of a hypothetical project, and reaches a consensus on whether the project is a candidate for commercialisation effort and resources, and why.
3.00	<b>Afternoon Tea</b>	
3.30	<b>Practical Exercise Report Back and analysis</b>	Report back on practical exercise, and discussion of the factors influencing the selection of commercialisation projects.
4.15	<b>IP ownership defects that impede commercialisation, and fixing them</b>	Common due diligence IP ownership and rights defects that impede commercialisation. Recognising them, and how to solve them. Collaborators, contractors, students, and other joint owners. Anticipating the due diligence defects that a commercial partner might find, and fixing them first. Implications and impact of due diligence defects not fixed.
5.00	<b>Close</b>	

**TECH TRANSFER BOOTCAMP - Skills, Tools, and Know How**

<b>DAY 2</b>		
9.00	<b>What you must know about Confidentiality Agreements</b>	The essential terms of a Confidentiality Agreement that must be appreciated. Common terms. Common traps and pitfalls. Strategies and approaches to dealing with confidential disclosures and Confidentiality Agreements so as not to put the commercialisation opportunity at risk, and still protect the IP.
9.45	<b>What you must know about Material Transfer Agreements</b>	The essential terms of a material transfer agreement. Common terms. Common traps and pitfalls. Strategies and approaches to dealing with Material Transfer Agreements. The controversial issues in MTA's, including the ownership of New IP arising under the MTA.
10.30	<b>Morning Tea</b>	
11.00	<b>What you must know about Research Agreements</b>	The essential terms of a Research Agreement. Common terms. Common traps and pitfalls. Strategies and approach to dealing with Research Agreements. Models for the ownership of IP. Issues that are recurrent problems and how to solve them. Management of technical risk.
11.45	<b>Traps for the unwary: the implications of joint ownership, and rights of first refusal</b>	Joint ownership of IP suggests that the joint owners have equal and mutual rights over the jointly owned IP. But that is not the case. Unharmonised laws in different countries can result in one joint owner being disadvantaged. Implications of joint ownership of patents, in various countries considered. Why you need to know joint ownership rules of other countries. Rights of first refusal, options to license and options to negotiate. US models, and relevant US laws that non US parties need to know.
12.30	<b>Lunch</b>	
1.30	<b>Strategies to find commercial partners and licensees</b>	Strategies to identify potential commercial partners including potential licensees. Where "deal opportunities" come from and who makes them.
2.00	<b>Commercialisation Pathways: Licensing v Assignment</b>	Deciding whether to assign intellectual property, or to license it. Advantages and disadvantages of each approach. Factors to assist making the right decision.
2.30	<b>Commercialisation Pathways: Licensing v Start Up company</b>	Deciding whether to license intellectual property, or to form a start up company. Advantages and disadvantages of each approach. Factors to assist making the right decision.
3.00	<b>Afternoon Tea</b>	
3.30	<b>What you must know about License Agreements</b>	The essential terms of a license Agreement. Parties. Affiliates. Field. Territory. Grant Rights. Access to Improvements. Sublicensing. Reserving research rights. Applying for and Managing Patents. Prosecution of Infringers. Confidentiality. Publications. Risk Provisions. Indemnities. Warranties. Diligence Obligations. Termination. Assignment. Dispute Resolution. Governing Law. Financial Terms. Up front payments. Milestone payments. Different types of royalty structures. Royalties where product infringes a patent. Know how royalties. Royalties of sales, on sub-license income. etc.
5.00	<b>Close</b>	