

Monday, April 30, 2007
SBIR Pre-Conference Workshops & Meetings

1:00pm-6:00pm: SBIR Conference Registration & Service Desk Open
 4:00 – 6:00PM Exhibit Space Set-up

7:30am-4:30pm	<p>Workshop A: Phase 1 Proposal Preparation Workshop <i>Pre-Registration required; Additional fees apply</i> Presented by: Gail & Jim Greenwood, <i>Greenwood Consulting Group</i></p> <p><u>Description:</u> This pre-conference workshop will provide attendees with a strong introduction to the SBIR and STTR programs, and then progress into a simple but effective four-step process for preparing a competitive Phase 1 proposal. Attendees also will be given an opportunity to review a sample Phase 1 proposal, and discover the value and limitations of sample proposals.</p> <ul style="list-style-type: none"> • Workshop check-in and Continental Breakfast: 7:30am • Session starts: 8:00 am • Materials, lunch, and break refreshments provided <p>Room: Auditorium</p>
1:00 – 4:30pm	<p>Workshop B: The Commercialization Imperative <i>Pre-Registration required; Additional fees apply</i> Presenter: Lea Strickland, FOCUS Resources</p> <p>Description: Government grants and contracts are not the end game. Commercialization of the technology, products, and research that are funded in part by federal funds is the objective. Turning your idea into a thriving product in an existing business or an entirely new business is one component of the SBIR Program – Phase III is Commercialization, but it doesn't include SBIR dollars and it isn't a 1- 2-3 process with the government as your customer at the end of the grant. Commercialization is imperative to building your business and no one will do it for you. Learn how to go from concept to commercialization, from lab to life, and get started today!</p> <p>Workshop check-in: 1:00 Session starts: 1:30 pm Materials and break refreshments provided</p> <p>Room: Empire AB</p>
1:30pm-4:30pm	<p>State Representatives Meeting (<i>Invitation Only</i>) Room: Crown</p>
4:00pm-5:00pm	<p>Conference Orientation Session for New Attendees Conference structure, sessions, and resources and preparation for approaching and meeting with Program Managers and/or other potential collaborators.</p> <p>Presenter: Mark Henry Room: Empire CDE</p>
5:30pm-8:30pm	<p>Welcome Reception OFFSITE LOCATION: Sigma Xi – Scientific Research Society, RTP</p>

	<p>Busses leave Sheraton starting at 5:30. Return busses from 7:00 – 9:00</p> <p>Bus tour of highlights of Research Triangle Park on the way to reception.</p> <p>Network with fellow attendees, speakers, and SBIR Program Managers. Hors d'oeuvres and beverages to be provided.</p>
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<p>DAY ONE - Tuesday, May 1, 2007 Sheraton Imperial Conference Center</p> <p>7:00am-5:00pm: SBIR Registration/Service Desk Open 7:30am-6:00pm: Exhibit Area Open 2:00pm-6:00pm: One-on-one Sessions</p>
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Time	Program Session
7:30–8:15	<p>Continental Breakfast <i>Room: Exhibit Area</i></p>
8:15am-8:45am	<p>Opening Remarks & Conference Overview</p> <p>Introduction: <i>Dr. Terry Payne, Oak Ridge National Labs, Conf. co-chair</i> Presenter: <i>Dr. Robert McMahan, NC Board of Science and Technology</i> Room: <i>Imperial 1-5</i></p>
8:45am-10:00am	<p>SBIR/STTR 101 – Program Overviews <u>Description:</u> A general program overview will be given, explaining the basics of the SBIR and STTR Programs and providing general information that applies to all agencies. Updates about program status and participants will be included.</p> <p>Introduction: <i>Conference Chairs</i> Presenters: <i>Joe Hennebury, DOT Program Manager</i> <i>Steve Guilfoos, AF Program Manager</i></p> <p>Room: <i>Imperial 1-5</i></p>
10:00am-10:30am	<p>Networking Break: Visit Exhibit Area</p>
10:30am-12:30pm	<p>Agency Overviews <u>Description:</u> This session will provide an introduction to the participating Agencies to help you identify which best fit your interest area and to help you select which afternoon Expanded Sessions you should attend.</p> <p>Introduction: Presenters: <i>SBIR/STTR Program Managers – All Agencies</i> Room: <i>Imperial 1-5</i></p>
12:30pm-2:00pm	<p>Lunch</p> <p>Briefing on SBIR Reauthorization - Rick Shindell, ZYN Systems</p> <p>Main Presenter: <i>John Richert, NC Biotechnology Center</i> Room: <i>Empire Ballroom</i></p>
2:00pm – 6:00pm	<p>One-on-One Sessions</p>

	Room: Imperial 6-7																																																									
2:00pm-6:00pm	<p>Agency Presentation Sessions - Presented in Three Tracks Description: Select the agency presentations most relevant to your interest area. The sessions are intended to further introduce you to the agencies so that you can identify which agencies you should visit in the Networking Area.</p> <table border="1"> <thead> <tr> <th></th> <th>Track A</th> <th></th> <th>Track B</th> <th></th> <th>Track C</th> </tr> <tr> <th></th> <th>Imperial 1 - 3</th> <th></th> <th>Auditorium</th> <th></th> <th>Imperial 4 - 5</th> </tr> </thead> <tbody> <tr> <td>2:00 - 2:20</td> <td>DoD: Army</td> <td>2:00- 2:30</td> <td>DOC: NIST/NOAA</td> <td>2:00- 2:30</td> <td>DOT</td> </tr> <tr> <td>2:20 - 2:40</td> <td>DoD: Navy</td> <td>2:30- 3:00</td> <td>EPA</td> <td>2:30- 3:00</td> <td>USDA</td> </tr> <tr> <td>2:40 - 3:00</td> <td>DoD: Air Force</td> <td>3:00- 3:30</td> <td>Dept. of Energy</td> <td>3:00- 3:30</td> <td>Dept. of Homeland Security</td> </tr> <tr> <td>3:00 - 3:20</td> <td>DoD: MDA</td> <td>3:30- 4:00</td> <td>NASA</td> <td>3:30- 4:30</td> <td rowspan="4">Dept. of Health and Human (NIH)</td> </tr> <tr> <td>3:20 - 3:40</td> <td>DoD: DARPA</td> <td>4:00- 4:30</td> <td>NSF</td> <td></td> </tr> <tr> <td>3:40 - 4:00</td> <td>DoD: CBD</td> <td></td> <td></td> <td></td> </tr> <tr> <td>4:00 - 4:20</td> <td>DoD: SOCOM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>4:20 - 4:40</td> <td>DoD: DLA</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Track A		Track B		Track C		Imperial 1 - 3		Auditorium		Imperial 4 - 5	2:00 - 2:20	DoD: Army	2:00- 2:30	DOC: NIST/NOAA	2:00- 2:30	DOT	2:20 - 2:40	DoD: Navy	2:30- 3:00	EPA	2:30- 3:00	USDA	2:40 - 3:00	DoD: Air Force	3:00- 3:30	Dept. of Energy	3:00- 3:30	Dept. of Homeland Security	3:00 - 3:20	DoD: MDA	3:30- 4:00	NASA	3:30- 4:30	Dept. of Health and Human (NIH)	3:20 - 3:40	DoD: DARPA	4:00- 4:30	NSF		3:40 - 4:00	DoD: CBD				4:00 - 4:20	DoD: SOCOM				4:20 - 4:40	DoD: DLA				
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3:00pm-5:00pm	<p>Refreshments Available Room: Exhibit Area</p>																																																									
	<p>Dinner on Own Complimentary Shuttle Service to: SouthPoint Mall and American Historic Tobacco District Busses leave at 5:30 and 7:00 outside registration area. Seating is first come-first serve. Busses leave SouthPoint and Tobacco District to return to Sheraton at 8:00, 9:00 and 10:00PM</p>																																																									
<p>DAY TWO - Wednesday, May 2, 2007</p> <p>7:00am-5:00pm: Registration/Service Desk Open 7:30am-5:00pm: Exhibit Area Open 8:30 - 5:00 One-on-one sessions</p>																																																										
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8:30am-5:45pm	CONCURRENT SESSIONS																																																									

	<p style="text-align: center;"><i>Presented in Three Tracks</i></p> <p>All Conference Attendees are invited to attend any of the sessions. To assist you in selecting which Track to attend, please keep in mind:</p> <ul style="list-style-type: none"> • Track A is primarily geared to those interested in finding out more about the program or those relatively new to the SBIR/STTR program. Sessions in this Track will help provide you with critical baseline information. • Track B focuses on partnerships, resources, and special interest areas. • Track C provides enhancements, including sessions on procurement, business development, valuation of technologies, and financing options.
<p>8:30am-10:00am</p>	<p>Track A: Demystifying Proposal Preparation <u>Description:</u> This session, presented by a former SBIR program manager, demystifies the proposal preparation process by introducing a simple, logical framework to show how all of the proposal components work together, for all agencies. In particular, you will be shown the information you need to gather before you start writing, so that the proposal will nearly write itself.</p> <p>Presenter: Dr. Robert Berger, Berger Consulting Room: <i>Imperial 3</i></p>
	<p>Track B: Reviewing your Proposal's Review <u>Description:</u> Most proposals that are submitted whether they are chosen for funding or not will be reviewed by technical reviewers who will provide a written summary of their comments. This information is especially valuable when the project is not funded. Learn how to use this information to your benefit.</p> <p>Presenter: Mark Henry Room: <i>Imperial 4-5</i></p>
	<p>Track C: Becoming an Investor-Ready Entrepreneur</p> <p>NOTES:</p> <ul style="list-style-type: none"> ▪ PRE-Registration Required (capped at 70) ▪ NO Additional Fee ▪ Full day Event - Runs 8:30 – 5:00 <p><u>Description:</u></p> <ul style="list-style-type: none"> ▪ Learn about the equity funding "food chain" ▪ Find out what investors look for and expect from the companies they fund ▪ Learn how to make your company "investor-ready" (and improve your business while you're at it) ▪ Assess your own "readiness" at each step of the way ▪ Hear from those who've "done it". Panelist will include serial entrepreneurs and angel investors who've "been there" ▪ Receive a comprehensive workbook, ongoing counseling support and access to additional online resources ▪ Save countless hours and enhance your chances of successfully raising equity capital

	<p>Presenters: Tim Janke, NC SBTDC / Inception Micro Angel Fund Bill Parrish, NC SBTDC Horace Stimson, Developing Businesses, Inc Tom Weithman, Gap Fund, CIT Kip Johnson, Womble Carlyle Sandridge & Rice Roland Johnson, Piedmont Pharma John Ciannamea, Academy Venture Funds</p> <p>Room: Imperial 1-2</p>
10:00am-11:00am	<p>Networking Break - Visit the Exhibit Area</p>
11:00am-12:30pm	<p>Track A: Formation of an SBIR/STTR Eligible Company <u>Description:</u> Determine what you need to do to set-up a traditional or even non-traditional business to take advantage of the SBIR/STTR programs. Learn from start-up experts and local companies.</p> <p>Moderator: John Richert, NC Biotech Center Panelists: Ken Eheman, Wyrick Robbins Bill Wofford, Hutchison Law Group Jose Cortina, Daniels Daniels and Verdonik</p> <p>Room: Imperial 3</p>
	<p>Track B: Balancing Act – Meeting your research Milestones, while marketing your business. <u>Description:</u> How to cost-effectively market your company, its successes and the reasons why you should be marketing WHILE staying on track with your research. It is never too early.</p> <p>Presenter: Linda Gretton, Targacept, Inc. and Debra Perret, Targacept, Inc.</p> <p>Room: Imperial 4-5</p>
	<p>Track C: Investor Ready Entrepreneur, Continued Pre-Registration Required Room: Imperial 1-2</p>
12:30pm-2:00pm	<p>Lunch - The Research Triangle Park: Driving Innovation for Future Success</p> <p>The Research Triangle Park, the nation's leading and largest research park, is home to a vibrant business environment that fosters innovation and knowledge creation. Building on a 48 year legacy, RTP is cultivating a competitive future position by nurturing creativity and innovation and strategically diversifying the region's business climate. Learn more about this prestigious location and the entrepreneurial climate that drives its success.</p> <p>Introduction: Lea Strickland, FOCUS Resources Presenter: Rick Weddle, The RTP Room: Empire Ballroom</p>
2:00pm-3:00pm	<p>Track A: Accounting and Audits <u>Description:</u> The financial aspects of your SBIR are critical to successfully completing the project AND continuing to be eligible to participate in the programs. Understand the requirements and enable your business to integrate those requirements for receiving, using, and reporting federal funds into how you do business. Be sure you can receive funds and get</p>

	<p>reimbursed for costs by establishing the accounting and financial management systems that work and meet the requirements. Getting right is a competitive advantage, getting it wrong can cost you an important source of funding.</p> <p>Presenter: Lea Strickland, FOCUS Resources Room: Imperial 3</p>
	<p>Track B: Partnering with Federally-Funded Research and Development Centers and Universities <u>Description:</u> What is the advantage to partnering with Federal Funded Research and Development Centers and Universities on SBIR proposals? This session will discuss how partnering with FFRDCs and universities can improve the probability of your proposal being funded. Specifically discussed will be:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How do I find the right organization/person with whom to partner? <input type="checkbox"/> How does partnering strengthen my proposal? <input type="checkbox"/> Why do the FFRDCs and universities not commercialize the technology on their own? <p>After attending this session, a principal investigator will have a much better understanding of the advantages of partnering on SBIR proposals.</p> <p>Moderator: Terry Payne, Oak Ridge National Lab Presenters: Ed Linsenmeyer, Navy Federal Lab, Panama Terry Maynard, Office of Technology Transfer, Argonne National Lab Brent Ward, RTI Clyde Higgs, NC Research Campus</p> <p>Room: Imperial 4-5</p>
	<p>Track C: Investor Ready Entrepreneur, Continued Pre-Registration Required Room: Imperial 1-2</p>
3:00pm-4:00pm	<p>Networking Break - Visit the Exhibit Area</p>
4:00pm-5:00pm	<p>Track A: Protecting Your Competitive Advantage and Ownership Issues <u>Description:</u> The end goal of an SBIR/STTR project is a commercialized product that is profitable. Above average profits come from having a competitive advantage. To protect the competitive advantage and to be attractive to investors, the idea may need intellectual property protection. Come learn the big picture concepts you need know now and learn the how to avoid SBIR pitfalls that can hurt long-term viability. Session will also cover issues revolving around the ownership of your intellectual property.</p> <p>Presenter: Kevin Flynn, The Eclipse Group Jesse Erlich, Burns & Levinson LLP</p> <p>Room: Imperial 3</p>
	<p>Track B: Success Stories: University Spin-outs and their use of SBIR/STTR to jump-start them. <u>Description:</u> SBIR/STTR is an invaluable source of funding in</p>

	<p>commercializing your invention. University inventors can jump-start their spin-outs and small businesses interested in partnering with a university can jump-start their companies by leveraging SBIR/STTR funding. This panel comprised of faculty inventors and a technology transfer office director will share their insights and experiences on how to effectively do this.</p> <p>Moderator: Karen LeVert, Southeast TechInventures Panelists: Michael Escuti (North Carolina State University), Catherine Innes (University of North Carolina), Adam Wax (Duke University)</p> <p>Room: Imperial 4-5</p>
	<p>Track C: Investor Ready Entrepreneur, Continued Pre-Registration Required Room: Imperial 1-2</p>
6:00pm	Exhibit Area Closes
<p>DAY THREE - Thursday, May 3, 2007</p> <p>7:30am-1:00pm: SBIR Registration/Service Desk Open</p>	
8:30am-12:30pm	<p style="text-align: center;">CONCURRENT CONFERENCE SESSIONS <i>Presented in Three Concurrent Session Tracks</i></p> <p>All Conference Attendees are invited to attend any of the sessions. To assist you in selecting which Track to attend, please keep in mind:</p> <ul style="list-style-type: none"> • Track A is primarily geared to those interested in finding out more about the program or those relatively new to the SBIR/STTR program. Sessions in this Track will help provide you with critical baseline information. • Track B focuses on partnerships, resources, and special interest areas. • Track C provides enhancements, including sessions on procurement, business development, valuation of technologies, and financing options.
7:30am-8:30am	<p>Continental Breakfast Room: Exhibit Area</p>
8:30am-10:00am	<p>Track A: Agency Evaluation Panel <u>Description:</u> How do granting and contracting agencies evaluate your proposals? Hear from the SBIR/STTR Program Managers directly. They will tell you how their agencies work and how they differ!</p> <p>Moderator: Terry Payne, Oak Ridge National Lab Presenter: Federal Agencies Room: Imperial 5-7</p>
	<p>Track B: Commercialization Plans: What to write, What to do <u>Description:</u> Writing a well crafted commercialization plan is a good start and necessary for a Phase II submission. But what can you do to begin implementation of</p>

	<p>your commercialization plan, even before your Phase II is funded? This 90 minute session will provide a framework for writing a commercialization plan appropriate for a Phase II submission using the 15 page template as the model to work from. Within that framework, we will also explore what you can be doing now, even before your “product” is done, to begin implementation of your commercialization plan.</p> <p>Presenter: Lisa Kurek, Biotechnology Business Consultants Room: Empire D-E</p>
	<p>Track C: Business Planning that Tells your Story <u>Description:</u> Your company has won a Phase II SBIR grant and it will be completed in 18 months. You know you will need additional grant funds. What do we do next? How much money do we need? From where are we going to get the funds? Do we need to get all the way to market with these funds? How much is it going to cost us? We are going to address these and other similar questions in this session.</p> <p>Presenter: Dick Kouri, NC State College of Management Room: Empire A-C</p>
10:00am-10:30am	Networking Break
10:30am -12:00pm	<p>Track A: Capstone Session - A Fireside Chat with SBIR Successes and a Follow-on Investor <u>Description:</u> Join a lively and spontaneous conversation between seasoned entrepreneurs building companies (and an accelerator) using SBIR financing and an investor who provides both traditional venture funding as well as grants and loans to help companies from seed funding and Series A through an exit. Topics of discussion will range from understanding the dynamics and forces shaping the growth of technology-based entrepreneurial companies to the challenges of building a valuable company, financing a prototype, wrapping up a final stage of research, or getting to and growing revenue.</p> <p>Moderator: Bob McMahan, NC Board to Science and Technology Panelists: John Cambier (NC IDEA), Karen LeVert (STI), Jonathan Gindes (Affinergy)</p> <p>Room: Imperial 5-7</p>
	<p>TRACK B: Agency Commercialization Assistance Programs <u>Description:</u> This session introduces “Agency Commercialization Programs” presented by Joe Hennessey of NSF and Michael Caccuitto from DoD. Technology 2020 has a stage based technology company development process developed by its Centers for Entrepreneurial Growth (CEG). The process of commercializing technology flows out of is summarized in this presentation. The balance of the session is devoted to brief overviews of the commercialization programs from NSF and DoD and quickly move to open questions from members of the audience. This is a wonderful opportunity to get direct answers to your questions from the program directors.</p> <p>Presenters: Shawn Carson, Tech 20/20 Mike Caccuitto, DoD Joe Hennessey, NSF</p> <p>Room: Empire D-E</p>
	Track C: State and Regional Resources Beyond SBIR

	<p>Description: This will be a panel discussion and Q&A that will cover what three groups can do to assist you as you work through the SBIR/STTR process. Each group will address their specific core competencies and how these can be applied to your efforts. From “cradle to grave” assistance is available and there is extensive experience in helping companies through the maze of paperwork, grant compliance and execution and the ultimate marketing of your product.</p> <p>Moderator: Tom Elam, Procurement Technical Assistance Center, NC</p> <p>Presenters:</p> <p style="padding-left: 40px;">Joe Flynn, PTAC, TN Michael Muthig, Concurrent Technologies Corp., T2Bridge Will Austin, NC Military Foundation</p> <p>Room: Empire A-C</p>
POST-CONFERENCE WORKSHOPS - Thursday, May 3, 2007	
POSTCONFERENCE WORKSHOPS offered REQUIRE advance registration and additional fees. Check with the Conference Registration Desk for space availability. Registration closes when full or at noon, Wednesday, May 2, whichever comes first.	
12:30pm-4:30pm	<p>Workshop C: Phase II Proposal Preparation Workshop <i>Pre-Registration required; Additional fees apply</i></p> <p>Description: This post conference event will be an abbreviated Phase 2 proposal preparation workshop. Topics to be covered include Phase 2 basics, critical differences among Phase 2 agencies, a recommended four-step process for developing a competitive Phase 2 proposal, and an introduction to SBIR/STTR technology commercialization.</p> <ul style="list-style-type: none"> • Workshop check-in and box lunch: 12:30pm-12:45pm • Session starts: 1:00pm • Materials, lunch, and break provided <p>Presented by: Gail & Jim Greenwood, Greenwood Consulting Group Room: Auditorium</p>
12:30pm-4:30pm	<p>Workshop D: R&D Project Planning, Cost Estimating and Control <i>Pre-Registration required; Additional fees apply</i></p> <p>Description: Small-budget, short-duration projects, like SBIR/STTR, are absolutely the most dangerous to manage. When problems occur, and they will, there is precious little time or budget available to effect corrective actions. In addition, the proper planning, cost estimating and demonstration of project management skills are vital to crafting winning proposals. This short workshop, presented by a 30 year veteran of the R&D Project Management wars and a specialist in SBIR/STTR, will present the actionable fundamentals of what every applicant and project manager needs to know/do to be successful. A class workbook will be provided.</p> <ul style="list-style-type: none"> • Workshop check-in and box lunch: 12:30pm-12:45pm • Session starts: 1:00pm • Materials, lunch, and break provided <p>Presented by: John Davis, SBIR Resource Center Room: Piedmont Room</p>