



# ElevatelP



This publication is available online at <a href="https://ised-">https://ised-</a>
isde.canada.ca/site/elevateip/en/node/3?auHash=TxbgJodPlTiwKZXplwSFL1NhBg76ZWob9D0okm64IV8

To obtain a copy of this publication, or to receive it in an alternate format (Braille, large print, etc.), please fill out the Publication Request Form at www.ic.gc.ca/publication-request or contact:

ISED Citizen Services Centre Innovation, Science and Economic Development Canada C.D. Howe Building 235 Queen Street Ottawa, ON K1A 0H5 Canada

Telephone (toll-free in Canada): 1-800-328-6189 Telephone (international): 613-954-5031 TTY (for hearing impaired): 1-866-694-8389

Business hours: 8:30 a.m. to 5:00 p.m. (Eastern Time)

Email: ISED@canada.ca

#### **Permission to Reproduce**

Except as otherwise specifically noted, the information in this publication may be reproduced, in part or in whole and by any means, without charge or further permission from the Department of Industry, provided that due diligence is exercised in ensuring the accuracy of the information reproduced; that the Department of Industry is identified as the source institution; and that the reproduction is not represented as an official version of the information reproduced or as having been made in affiliation with, or with the endorsement of, the Department of Industry.

For permission to reproduce the information in this publication for commercial purposes, please fill out the Application for Crown Copyright Clearance at <a href="https://www.ic.gc.ca/copyright-request">www.ic.gc.ca/copyright-request</a> or contact the ISED Citizen Services Centre mentioned above.

© Her Majesty the Queen in Right of Canada, as represented by the Minister of Industry, (2021).

Cat. No. lu37-31/2022F-PDF ISBN 978-0-660-43093-5

Aussi offert en français sous le titre Guide du Programme ÉleverlaPI.



# Section A – General Information

## 1. Introduction

This program guide and <u>glossary</u> has been developed to assist in the completion of the proposal form for ElevateIP. It provides information on the program, how to submit the proposal as well as the criteria against which the proposal will be assessed.

It is important to read this guide before you begin filling out the proposal form so you clearly understand the objectives of ElevateIP and to determine if you are eligible to receive funding.

Your proposal must be complete and have all the required information as outlined in this guide in order to be considered for funding.

Applicants are encouraged to review the ElevateIP website for program information, updates and FAQs.

If you have any additional questions, please contact us at: <u>ic.icspnpelevateip-icspepeleverpi.ic@ised-isde.gc.ca</u> or 1-800-328-6189

# CONFIDENTIALITY, PROACTIVE DISCLOSURE AND TRANSPARENCY REQUIREMENTS

Any information in the proposal that, in the Applicant's opinion, is of a proprietary or confidential nature must be clearly marked by the Applicant as "Proprietary" or "Confidential" on each relevant item or page or in a statement covering the entire proposal. No commercially confidential information which is submitted will be disclosed unless otherwise authorized by the Applicant or required to be released by law.

Information provided by Applicants may be accessible under the Access to Information Act.

Innovation, Science and Economic Development Canada (ISED) may share information in a proposal with provincial and territorial governments or other federal departments/agencies to improve national coordination and bilateral decision-making related to ElevateIP.

Once projects are approved, as part of the Government of Canada's policies to ensure transparency and accountability, ISED is required to proactively disclose project information when it is in the public interest to do so. This may include but is not limited to open accessing pricing, work progress and the like. Additional disclosure, milestone reporting and transparency requirements can be found in the Recipient Contribution Agreements, ElevateIP templates, and on the Treasury Board of Canada website.

Although information remains confidential under the aforementioned conditions, any document or content submitted as part of the ElevateIP application process shall be deemed and remain the property of ISED.

# 2. About ElevateIP Program

Intellectual Property (IP) can be a key component of enabling the growth and competitiveness of highpotential firms. For startups and scaling firms, failure to develop an IP strategy and appropriately protect their IP rights in the early stages of firm development may result in challenges at later stages of their life cycle, preventing these firms from achieving growth, generating additional employment, and becoming strategic anchor companies.

Through accessible IP assistance, startups will be better able to grow and protect their investments. To that end, Budget 2021 announced the launch of ElevateIP, with a \$90M investment over four years to help Business Accelerators and Incubators (BAIs) provide startups with access to professional IP services.

#### 2.1 PROGRAM OBJECTIVES

ElevateIP aims to meet the following program objectives:

- facilitate IP supports by BAIs to startups at key junctures in the entrepreneurial process to enable the rapid scaling, growth and sustainability of startups in Canada
- help increase the IP capacity of the BAI ecosystem in Canada by enabling IP education for BAIs and their startup members, facilitating the exchange of best practices, encouraging collaboration, and providing greater access to IP advice and support as an integrated component of general business supports offered by BAIs
- enable BAIs to provide targeted supports, supports that are customized to the unique requirements of each startup, to help startups secure and maintain IP rights, while enabling longer-term IP benefits to be delivered through the BAI ecosystem

# 3. Program requirements

Proposals must meet a number of program requirements to be considered for funding. This section describes these program requirements in greater detail, including eligible Applicants, eligible activities, and eligible costs.

#### 3.1 ELIGIBLE APPLICANTS

Eligible Applicants for ElevateIP are:

- Canadian not-for-profit BAIs; and
- Canadian not-for-profit organizations that represent networks of BAIs.

In the case of a group of eligible Applicants collaborating on a proposal, one eligible Applicant must act as the lead Applicant to submit the proposal.

Strong proposals will demonstrate geographic representation at the national or regional level, and will have multiple Applicants working together in partnership. Applicants are encouraged to reach out to their networks to discuss opportunities for collaboration under this proposal.

Please note: The Province of Quebec's M-30 legislation may apply to Quebec based Applicants. All Quebec based organizations must demonstrate their compliance with the Act prior to entering into a

Contribution Agreement. For further information, consult the following website prior to submitting your proposal for funding: An Act respecting the Ministère du Conseil exécutif (M-30).

#### 3.2 ELIGIBLE ACTIVITIES

Eligible activities fall under three main categories related to increasing IP capacity in Canada and assisting startups in developing and/or implementing their IP strategies:

- IP Awareness: Increasing IP awareness and educational opportunities for startups through activities such as workshops, programs, and conferences, peer to peer learning opportunities etc. so they have the foundational IP knowledge required to succeed. Recipients are encouraged to leverage existing educational resources to deliver these services.
- Developing IP Strategies: Providing startups with the tools, talent and supports to manage and make
  the most of their IP assets. An effective IP strategy is the first step in giving startups a roadmap to
  developing and utilizing their IP assets in a strategic manner and setting the stage for longer term
  success.
- Implementing IP Strategies: Enabling startups to realize the objectives of their IP Strategies by
  providing the supports required to execute the strategy, such as through IP landscape analysis and the
  costs related to the formal protection of IP

Recipients of ElevateIP funding must deliver programming under all three of the above categories. However, within the three categories, each Recipient will have the freedom chose an individualized mix of activities that best suits the needs of their respective ecosystems and the startups they serve. Recipients must be able to deliver ElevateIP programs and services to startups in both official languages (English or French).

ElevateIP will also reimburse the Recipient for eligible costs it distributes to project Collaborators undertaking project activities. Project Collaborators can be any organization that will support the delivery of eligible project activities. For example, if the Recipient engages an IP strategist to provide IP landscape analysis for startups, ISED will reimburse the Recipient. The Contribution Agreement will outline how funds will flow from ISED to the Recipient to project Collaborators. In general project Collaborators can be other BAIs, not-for-profits, non-profits or for profit organizations.

#### 3.3 ELIGIBLE COSTS

Eligible costs are the necessary and reasonable expenditures incurred by the Recipient to carry out eligible activities. These include, but are not limited to, the following:

- Cost of labour (e.g. salaries and benefits) which can be specifically identified and measured as having been performed carrying out eligible activities
- Travel costs for Recipient staff that are in accordance with the National Joint Council Travel Directive;
- Professional fees (e.g. consultants, technical expertise, legal, and translation);
- Direct materials and supplies;
- Fees related to filing and/or registering IP with IP offices;
- Costs paid to project Collaborators undertaking eligible activities;
- Costs associated with procuring space or equipment necessary to carry out the eligible activities, including for workshops, events, and meetings;
- Evaluation and audit fees;
- Other costs incurred to carry out the eligible activities.

In addition to project related costs, the Recipient and other BAIs or organizations that represent a network of BAIs that are Partners on the project may be allowed to claim a percentage of their administrative costs. Total administrative costs covered by the program are limited to 10% of ElevateIP's total contribution. Administration costs include costs that support the day-to-day operations of the Recipient, for example:

- Costs of Labour (e.g., salaries and benefits) related to the administration of the project
- Operational costs related to carrying out eligible activities
- · Office supplies and equipment.

Eligible costs must be incurred in the same fiscal year in which the contribution funding is provided.

#### 3.4 INELIGIBLE COSTS

Ineligible costs are costs that are incurred by the Recipient but are not reimbursable by ISED. These include, but are not limited to, the following:

- Costs related to litigation;
- Ongoing licensing fees;
- Costs associated with the repayment or refinancing of an existing debt;
- Costs related to lobbying;
- Costs associated with the purchase of any assets for more than the fair market value of said asset;
- Costs of amortization;
- Costs of land, building or vehicle acquisition;
- Costs of goodwill;
- Dividend, bonuses, or other fees to the project management team;
- Entertainment expenses, including but not limited to alcohol, non-travel expenses.

#### 3.5 EXPECTED RESULTS AND OUTCOMES

Successful proposals under this Call for Proposals will be awarded a 4 year, non-repayable Contribution Agreement with a maximum value of \$87 million to provide Canadian startups with key IP supports. To inform the performance obligations of the Recipients, ElevateIP has established an overarching framework to track performance that includes key expected results and core indicators. Over the course of four years, the program aims to meet the following expected results:

- IP capacity amongst BAI's and startups is increased as a result of IP educational activities
- Startups supported by Recipient organizations will have access to high quality IP services from qualified and experienced personnel
- Services offered by Recipient organizations will be accessible and inclusive
- Startups supported by Recipient organizations will make use of IP through the development of IP strategies, and by seeking and obtaining formal IP protections
- Startups supported by Recipient organizations develop the tools and expertise necessary for sustainable expansion and growth

ISED recognizes that diverse and inclusive workplaces foster innovation, growth and adaptability by allowing different perspectives to be heard and promoting novel ideas. To foster diversity and inclusion, ElevateIP requires that Recipients report against performance indicators and targets related to the participation of underrepresented groups.

Contribution Agreements will establish specific performance indicators and targets for Recipients. These indicators will be assessed during the lifecycle of the program and include the following:

| Immediate outcomes   |   |
|--|---|
| Outcome  | Performance indicators  |
| Canadian startups access IP support services   | <ul> <li>Percentage of startups supported by BAIs accessing IP assistance;</li> <li>Percentage of startups accessing IP support services from underrepresented groups (as defined as those majority owned by women, Indigenous peoples, LGBTQ2S+ individuals, visible minorities, and persons with disabilities)</li> <li>Number of startups supported</li> <li>Startup satisfaction</li> </ul> |
| BAIs and startups<br>supported have knowledge<br>of Canada's IP system,<br>including the value of IP | <ul> <li>Percentage of BAIs and startups supported that report increased<br/>knowledge and understanding of the IP system as a result of the<br/>support provided.</li> </ul>   |
| Barriers to accessing IP support services are reduced  | <ul> <li>Percentage of Recipients that have developed and begun<br/>implementing plans to reduce/prevent barriers to those participating<br/>in IP supports</li> </ul>  |
| Intermediate outcomes  |   |
| Outcome  | Performance indicators  |
| Canadian companies make use of IP  | <ul> <li>Percentage of startups that have a formal IP strategy</li> <li>Percentage of startups seeking new formal IP protection</li> <li>Percentage of startups obtaining new formal IP protection</li> </ul>   |
| Ultimate outcomes  |   |
| Outcome  | Performance indicators  |
| Canadian companies experience expansion and growth   | <ul> <li>Revenue growth rate of startups</li> <li>Employment growth rate of startups</li> <li>Average number of FTEs hired per participating BAI</li> </ul>   |

Performance metrics to track results against these performance indicators will be finalized and outlined in the Contribution Agreement. Recipients will be required to collect, manage and share data with ISED on a regular basis, including through, but not limited to, quarterly reports, in order to accurately report on achieved results and support program performance measurement. The Contribution Agreement will outline in more detail the data and reporting requirements of Recipients.

## 4. Project funding

Recipients are required to disclose any sources of funding that will be used in supporting eligible activities. This includes any financial assistance Recipients have requested and/or received prior to the Contribution Agreement being signed.

Recipients may be reimbursed for up to 100% of costs incurred while delivering IP awareness activities and supporting startups' development of IP strategies. However, startups receiving funding to implement their IP strategy will be required to co-invest at a minimum 10-35% of eligible costs. Recipients must ensure that no single startup receives more than \$100,000 in ElevateIP funding.

#### 4.1 STACKING AND OTHER GOVERNMENT ASSISTANCE

Total Canadian government assistance for eligible activities, including federal, provincial/territorial and municipal governments, cannot exceed 100% of total eligible expenditures. Recipients must clearly demonstrate that no one expense is charged to two levels of government.

### 5. Assessment criteria

Successful Applicants will be selected through a competitive process administered by ISED officials. It will evaluate each proposal's capacity to achieve results, as well as alignment with all three of ElevateIP's <u>program objectives</u>. Proposals can be submitted in either official language.

Assessment criteria include those listed in the tables below, with strong preference given to:

- proposals consisting of networks of Applicants, or those demonstrating significant collaboration
- proposals with broad geographic coverage (i.e. national or regional coverage) and diverse representation
- proposals that demonstrate a plan to build longer term IP capacity, with components that are sustainable beyond the end of the program

#### APPLICANT'S TRACK RECORD

- Experience in providing IP supports
- Experience supporting startups
- Experience in administering workshops, seminars, and other capacity-building events
- Experience in administering grants and management of projects of similar size and scope
- Experience of the management team and technical staff (both Recipient and Partners)

#### STRENGTH OF PLANS TO PROVIDE IP SUPPORT

- Activities are relevant and support the overall program objectives
- Project plan clearly identifies how the work will be done, who will do this work and when it will be completed
- Capacity to develop a reporting and monitoring system to provide accurate reporting on all project activities
- Potential risks and risk mitigation strategies are identified
- Capable of beginning service offerings in Fall 2022

# ABILITY TO ADDRESS IDENTIFIED GAPS IN EXISTING SERVICE OFFERINGS

- Ability to deliver broad geographic coverage
- Knowledge of the innovation ecosystem/community to be served
- Experience providing services and/or opportunities to underrepresented communities (including women, Indigenous people, racialized groups, people with disabilities and LGBTQ2S+ individuals)
- Planned project activities targeted to reach underrepresented groups

#### SUSTAINABILITY

- Clearly indicates how the Recipient will build long term capacity beyond the program's mandate
- Strength of new and existing collaborations/networks amongst participating organizations

#### FINANCIAL CAPABILITY

- Demonstrates adequate financial controls and systems
- Sufficient sources of funding to carry out project activities
- Budget provides detailed description of eligible costs
- Justification of eligible costs needed to carry out project activities

The Government of Canada reserves the right to accept a proposal, in whole or in part, and give consideration to factors such as government priorities, geographic coverage and diversity.

## 6. Approval and Contribution Agreement

Once the competitive assessment process has been completed, Applicants will be informed of the status of their submission.

Following Applicant selection, the Government of Canada will work with successful Applicants to negotiate and enter into a Contribution Agreement(s). The Contribution Agreement is a Government of Canada-prepared document that will include the legally binding responsibilities and obligations of both parties.

# Section B – Proposal form instructions

## 1. Submission details and deadline

To be considered for funding, proposals must provide all the required information, as stated in this guide. A complete proposal package must include:

- 1. The ElevateIP Proposal Form; and
- 2. Required Supporting documents (see Attachments section below)

The deadline to submit a proposal to ElevateIP is June 28, 2022 at 8:00pm Eastern Daylight Time. Upon submitting the form, Applicants will receive a pop-up confirmation of submission as well as an email confirming receipt. It is highly recommended that your proposal be submitted before the deadline to ensure there are no unforeseen issues at the time of submission. Late submissions will not be considered for funding.

The proposal form may be submitted in either official language.

Applicants with additional questions are encouraged to visit the website or are invited to contact ISED at: <u>ic.icspnpelevateip-icspepeleverpi.ic@ised-isde.gc.ca</u> or 1-800-328-6189.

# 2. How to download and open the PDF form

The proposal form is an electronic Adobe PDF form and can only be opened using Adobe Reader. We recommended that you download the PDF, save it locally and open it is using Adobe Reader.

To download and open a PDF form, you need to have Adobe Reader 10 or higher installed. Please note that free versions of Adobe PDF viewers/readers are available. Mobile devices such as iPads, tablets and mobile phones can't be used for the ElevateIP proposal form.

#### FOR PC USERS:

- Find the link of the file you want to save (you may need to go back to the previous page to find it).
- Right-click the link.
- Select "Save target as" or "Save link as".
- Choose the location on your computer where you would like to save the file.
- Select "Save".
- Use Windows Explorer to get to the location where you saved the file.
- Right click on the PDF file.
- Select "Open with".
- Select "Choose program".
- Select "Adobe Acrobat Reader".

- Make sure to check the box that says, "Always use this program to open these files".
- Select "OK".

#### FOR MAC USERS:

- Find the link of the file you want to save (you may need to go back to the previous page to find it).
- Press the Control (Ctrl) key and click on the link.
- When the option menu appears, choose "Download link to disk" or "Download linked file".
- Choose the location on your computer where you would like to store the file. Your computer will start the download once you have selected a location.
- Use Spotlight or Finder to look for the downloaded file.

Once the form is completed, attach the required additional documents to it and electronically submit by clicking on the "Submit" button at the bottom of the proposal form.

# 3. Accessibility

Please note the submission of the proposal form requires a PDF entry. The Government of Canada recognizes that PDF files have limited accessibility and are incompatible with some screen readers.

If you cannot access the proposal form or your organization requires another submission format, please email ic.icspnpelevateip-icspepeleverpi.ic@ised-isde.gc.ca for assistance.

Please ensure you are able to access the proposal form early in the process. Exceptions or extensions to the deadline will not be granted and assistance cannot be provided within the last 24 hours.

# 4. How to fill out the proposal form

Questions marked with an asterisk (\*) on the proposal form are mandatory.

#### APPLICANT INFORMATION

Provide the requested information for the **lead Applicant** only. The lead Applicant is the BAI or the not-for-profit organization representing a network of BAIs that is responsible for preparing and submitting the proposal form. If the proposal is selected for funding, the lead Applicant would also be responsible for signing the Contribution Agreement with ISED.

#### **Business Incubators and Accelerators (BAIs) are:**

**Accelerator:** A business accelerator is an organization that offers short-term programs that provide startups with access to intensive mentoring, investors and other forms of support to help them grow and develop their markets. Businesses using accelerators are typically startups that have moved beyond the earliest stages of getting established; they are autonomous, but require guidance and peer support in order to grow. Accelerator programs are carried out in cohorts, and generally last less than a

year. The goal of these programs is to ensure that companies emerge ready to operate on their own and are in a position that allows them to take a share of their target markets.

**Incubator:** A business incubator is an organization that offers long-term programs that provide innovative startups demonstrating high growth potential with access to coaching, mentoring, investors and other forms of support to help them establish themselves. Usually, incubators also offer startups access to logistical and technical resources, training, and shared office space. Because each business grows at its own pace, the programs offered by incubators may last from several months to a few years. These programs aim to provide startups with the tools and knowledge they need to become self-sufficient.

Canadian not-for-profit organizations that represent networks of BAIs are: Organizations of multiple member BAIs that provide services to those organizations, including events, facilitating the sharing of resources and best practices, and data collection and analysis

#### Is the Applicant acting as a "Lead Applicant"?

In the details section on the Proposal Form, please describe the purpose of bringing together multiple Partners, as well as how all Partners will work together (e.g., will the lead Applicant sign agreements with each Partner?)

#### **Proof of Not-for-profit status**

Applicants must be not-for-profit organizations as defined in the <u>Canada Not-for-profit Corporations</u> <u>Act</u>. Please attach proof of the lead Applicant's not-for-profit status (e.g., articles of incorporation). Note that attachments must be less than 100Mb in size.

#### **Number of employees**

Provide the current number of full-time and part-time employees working for the lead Applicant. Do not include employees located outside of Canada.

#### AUTHORIZED PROPOSAL CONTACT

Provide the contact information for one representative of the lead Applicant. Preferably the individual who was responsible for completing the proposal form.

#### **EXECUTIVE SUMMARY**

Provide a brief overview of your proposal and how it will address the goals of ElevateIP. It should include major projects, capacity of participating Partners to deliver on proposed activities, and expected results.

#### LIST OF PARTNERS

#### **Partners**

Provide the contact information for all participating Partners. Partners are the BAIs or networks of BAIs who, along with the lead Applicant, will be responsible for achieving objectives of the project. Participating organizations that are not BAIs or networks of BAIs should be listed as Project Collaborators further down in the form.

#### Role of Partners in current proposal

Provide a short description of how each Partner will participate, including expertise to be leveraged.

#### Any financial contribution to the current proposal

Can include cash or in-kind contributions. Please provide the estimated dollar value in Canadian dollars.

#### IP ownership

If relevant to proposal, please provide a very brief explanation of ownership or other necessary context for background IP required to complete project activities.

#### Project activities outside of Canada

Activities should be undertaken in Canada, but in some exceptional circumstances, necessary expertise may not be available domestically. In that case, Applicants must provide a clear rationale as to why the specific project activities must take place internationally. In addition, please identify how those specific activities would benefit Canadian firms, including how the proposal will help to build necessary capacity domestically.

#### APPLICANT AND PARTNERS PROFILE

The strength of the information provided in this section will play a role in the assessment of the Applicant's track record and its suitability and capacity to deliver the project. Ensure that information provided clearly addresses the assessment criteria provided in <u>section A.5</u> of this guide.

#### Financial management capabilities of Applicant and Partners

Describe the financial systems and controls that the Recipient will have in place to ensure sound management of program funds. This includes how the Recipient will distribute funds to project Partners and the processes in place to ensure those funds are directed towards eligible costs.

#### Services and/or initiatives provided to/for underrepresented groups

This could include any targeted initiatives or services offered to the Applicant's startup members or the broader community. You may also highlight any efforts to increase diversity within your organization (for example, if your organization is committed to the 50-30 challenge, please indicate that here).

#### PROPOSAL AND ACTIVITIES

Provide a detailed description of planned activities and how they will meet the objectives of ElevateIP.

#### Anticipated start and end date

Dates should refer to when incurred project costs are estimated to start and stop. Note that all project activities must be complete by March 31, 2026.

#### Project plan

Provide details of projects to be completed under each of the three Activities. This should include a short description, timing, and roles of any participating Partners. Under Implementing IP Strategies, please include details on your proposed co-investment structure. This should include what percentage

of costs startups are expected to cover (ElevateIP requires a minimum of 10-35% co-investment for this Activity) and how they will be paid to the Recipient.

#### Number of startups expected to be serviced

Fiscal year is April 1 to March 31. When entering your data, you cannot leave any section blank. Enter a zero for any fiscal year where you do not anticipate serving any startups.

#### Summary of the project's national and/or regional coverage

Identify in what geographic region(s) the proposal will take place. As mentioned in <u>section 3.1</u>, strong proposals will have broad regional or national coverage.

#### **Activities on Federal Land**

The <u>Impact Assessment Act</u> outlines a process for assessing the impacts of "designated projects" carried out on federal lands. Applicants should indicate if any of their proposed project activities will take place on federal lands. For the purposes of the Act, federal lands means:

- a. lands that belong to Her Majesty in right of Canada, or that Her Majesty in right of Canada has the power to dispose of, and all waters on and airspace above those lands, other than lands under the administration and control of the Commissioner of Yukon, the Northwest Territories or Nunavut:
- b. the following lands and areas:
  - i. the internal waters of Canada, in any area of the sea not within a province,
  - ii. the territorial sea of Canada, in any area of the sea not within a province,
  - iii. the exclusive economic zone of Canada, and
  - iv. the continental shelf of Canada; and
- c. reserves, surrendered lands and any other lands that are set apart for the use and benefit of a band and that are subject to the <u>Indian Act</u>, and all waters on and airspace above those reserves or lands. (*territoire domanial*)

#### PROJECT MANAGEMENT AND IMPLEMENTATION

#### **Project Collaborators**

Describe the role of each project Collaborator and their contribution to project activities, highlighting where this proposal will foster new collaborations. Project Collaborators can be any organization that will support the delivery of eligible project activities and may receive program funding via the Recipient. Financial contributions can be in cash or in-kind.

#### Project plan

This section requires a project plan be attached as a separate document. The plan should outline all major project milestones and deliverables, including the lead individual/organization and estimated start and end dates. Note that attachments must be less than 100Mb in size.

#### Plan to track required data and performance of your project activities

Detail how the Recipient will track performance against key program outcomes and performance indicators. This should include how the Recipient will collect, manage and store data related to the program. Recipients should clearly demonstrate how their data management processes will allow them to report against all performance indicators identified in <u>section 3.5</u> of this guide. Recipients will

also need to detail how they intend to obtain information from the startups they serve (e.g., via surveys, membership contracts, etc.) and how these processes may or may not differ from the way they currently track and report on internal metrics.

#### BENEFITS

#### **Diversity and inclusion**

Detail the proposed approach to fostering diversity and inclusion. This could include specific project activities targeted at underrepresented groups, or requirements on the diversity of participating organizations.

#### **Regional benefits**

Highlight how the proposal will benefit the region(s) and the innovation ecosystem, beyond the participating startups receiving services.

#### Other benefits

Highlight any other benefits of your proposal. For example, you may wish to identify specific sectors that are targeted by your proposal and/or how your proposal will foster collaboration across BAIs and/or other organizations.

#### SOURCES OF FUNDS

All funding from other sources must be identified in this section. This includes funding requests that are pending approval. All funds must be stated in Canadian dollars and by government fiscal year (April 1 to March 31) and can include cash and in-kind. When entering your data, you cannot leave any section blank. Enter a zero in any section where you do not have a source of funds.

#### **Anticipated co-investment**

This line item should reflect the anticipated co-investment from startups receiving services under the Implementing IP Strategies activity stream. As described in <u>section 4</u> of this guide, startups will be required to co-invest a minimum 10-35% of the eligible costs related to implementing their IP strategies.

#### Other government funding

Identify all sources of funding from Federal, Provincial and Territorial, or Municipal governments. This should include pending requests for funding.

Total project funding must equal the total estimated costs provided in the next section.

#### **ESTIMATED COSTS**

Provide your best estimate of total project costs in Canadian dollars by government fiscal year (April 1 to March 31). Refer to <u>section 3.3</u>. of this guide for the types of eligible costs that would fall under administrative or project related costs. When entering your data, you cannot leave any section blank. Enter a zero in any section where you do not have any estimated costs.

#### Administrative costs

This could include administrative costs incurred by both the Recipient and/or other BAIs or networks of BAIs that are Partners on the project. Note that the amount ISED will pay towards administrative costs is capped at 10% of the total value of ISED's contribution. Any additional administrative costs will need to be covered by the Recipient and/or project Partners.

#### **Direct project costs**

This could include costs incurred by both the Recipient and/or other BAIs or networks of BAIs that are Partners on the project.

#### Eligible activity costs

Costs should be broken down into those costs required to implement the three eligible activities: IP Awareness, IP Strategy Development and IP Strategy Implementation.

#### LIST OF ATTACHMENTS

- Proof of not-for-profit status
- Project plan
- Financial Statements for the lead Applicant and any Partners

Please ensure all requested attachments listed in the proposal form are included, and check boxes are selected. You can attach documents to your pdf proposal form by clicking the "add attachments" button. Note that each attachment must be under 100Mb in size.

#### AUTHORIZATION

Please click "I Agree" to authorize the disclosure of the information contained in this proposal, as detailed in the proposal form.

#### CERTIFICATION

Please click "I Agree" to certify the proposal form.

#### **AUTHORIZED OFFICER**

Authorized Official is an individual who is authorized to legally sign on behalf of the organization.

Once completed, hit "submit". If you receive an error message, please review to ensure all sections have been filled out correctly and resubmit proposal.

# Section C – Glossary

**Accelerator:** An organization that offers short-term programs that provide startups with access to intensive mentoring, investors and other forms of support to help them grow and develop their markets. Businesses using accelerators are typically startups that have moved beyond the earliest stages of getting established; they are autonomous, but require guidance and peer support in order to grow. Accelerator programs are carried out in cohorts, and generally last less than a year. The goal of these programs is to ensure that companies emerge ready to operate on their own and are in a position that allows them to take a share of their target markets.

**Applicant:** The BAI or organization representing a network of BAIs that is submitting a proposal to ElevateIP. In the case of multiple BAIs collaborating, the Applicant is the lead BAI responsible for submitting the proposal.

**Collaborator:** An organization that will support the delivery of eligible project activities and may receive funding via the Recipient.

**Contribution Agreement:** A written agreement between the Government of Canada and an eligible Applicant that sets out the obligations and understandings of both with respect to one or more transfer payments. The Government of Canada is responsible for drafting the Contribution Agreements.

**Diversity:** The demographic mix of a community, with a focus on the representation of equity-seeking groups who have historically been underrepresented or marginalized in certain contexts..

**Eligible costs:** The relevant, reasonable and essential expenses to which ElevateIP funding may be applied and are necessary to carry out eligible activities. These costs are further established in the Contribution Agreement.

**Incubator:** An organization that offers long-term programs that provide innovative startups demonstrating high growth potential with access to coaching, mentoring, investors and other forms of support to help them establish themselves. Usually, incubators also offer startups access to logistical and technical resources, training, and shared office space. Because each business grows at its own pace, the programs offered by incubators may last from several months to a few years. These programs aim to provide startups with the tools and knowledge they need to become self-sufficient.

**Ineligible costs:** Costs to which ElevateIP funding may not be applied, but may be necessary to carry out eligible activities. These costs are further established in the Contribution Agreement.

**Intellectual property:** An invention, a literary or artistic work, a symbol or logo, a picture or a design, and more. There are many types of IP which can include copyright, patents, trade secrets, designs, trademarks, etc.

**Not-for-profit organizations representing networks of BAIs:** Organizations of multiple member BAIs that provide services to those organizations, including events, facilitating the sharing of resources and best practices, and data collection and analysis

**Partners:** BAIs or networks of BAIs who, along with the lead Applicant, will be responsible for achieving objectives of the project.

**Project:** The combined activities that are required to accomplish a stated objective and the completion of the activities may result in specific outcomes being achieved. The Contribution Agreement will include a statement of work that details the eligible project and its related activities

**Proposal:** Refers broadly to the set of documents submitted to ISED in order to participate in the selection process for funding from ElevateIP.

**Stacking Limit:** The maximum level of total Canadian government (federal, provincial/territorial, municipal) funding authorized for any one activity, initiative or project of a Recipient.

**Startup:** A young, innovative business with strong growth potential that is of interest to investors and providing an innovative solution to a particular target audience.

**Recipient:** Canadian not-for-profit BAIs, groups of not-for-profit BAIs in which one BAI acts as the lead Applicant, and not-for-profit organizations who represent networks of BAIs, that have been selected to receive funding under ElevateIP.