

December 16, 2021

Ontario Intellectual Property (IP) Advanced Curriculum Call for Proposals

Program Guidelines and Requirements

Funded by

December 16, 2021

Ontario IP Advanced Curriculum Call for Proposals

Please review the attached document and submit your application electronically according to the guidelines provided by **11:59pm EST on February 1, 2022**.

Applications will not be accepted unless:

- submitted electronically according to the instructions. Submission by any other form such as facsimiles or paper copy mail will not be accepted.
- received by the date and time specified.

Key dates

Date	Description
December 16, 2021	Call for Proposals released.
February 1, 2022 11:59pm EST	Closing Date and Time for Submissions. Submissions received after the closing date and time will not be considered for evaluation.
March 2022	Successful applicants notified.

eCampusOntario will not be held responsible for documents that are not submitted in accordance with the above instructions.

NOTE: A decision regarding funding will be communicated to all applicants, and lead organization in a multidisciplinary team, by email.

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Summary of Call for Proposals

In July 2020, Ontario announced the launch of an [Intellectual Property \(IP\) Action Plan](#), informed by the report and recommendations of the Expert Panel on IP. One of the pillars is to strengthen IP literacy by developing standardized digital basic and advanced IP education curricula.

eCampusOntario is now inviting proposals for the development of an advanced curriculum focused on IP commercialization strategies.

This made-for-Ontario advanced IP curriculum will be available **at no cost** to Ontarians considering commercialization opportunities, to sharpen their ability to generate, protect and leverage their IP in a global context. This curriculum is intended to include examples from key sectors (Artificial Intelligence, Medical Technologies, and Automotive Technologies) and serve a breadth of learners including entrepreneurs, staff at small- and medium-sized businesses (SMEs), researchers seeking to commercialize their discoveries, and staff from Innovation Intermediaries such as Tech Transfer Offices, applied research offices, and Regional Innovation Centres. The curriculum itself will act to expand and enhance IP knowledge and capacity across Ontario and be consistent with the Government's vision for improving Ontario's economic position with respect to IP.

The Call for Proposals will seek a multidisciplinary team of experts (with a designated lead partner) from within Ontario's innovation ecosystem to work collaboratively to create a course that meets the learning objectives as identified by the Expert Panel on IP in its February 2020 Report: [Intellectual Property in Ontario's Innovation Ecosystem](#) (the "Report").

Context

Rapid technological change is challenging traditional economies and has given rise to a new economy driven by intangible assets such as IP. More than ever, wealth is driven by ideas and data rather than resources and traditional “tangible products”.

Ontario is home to world-class postsecondary institutions and research, a top-ranking entrepreneurial and start-up ecosystem¹, with leading incubators and accelerators². Yet Ontario faces critical challenges in realizing the commercial value of homegrown IP.

To help Ontario navigate these challenges, the Province appointed an Expert Panel on IP (the “Panel”) in April 2019. This Panel of five experts in IP law, innovation ecosystems, IP education and commercialization undertook consultations and developed recommendations for Ontario to improve its IP position to more successfully compete in the intangibles economy.

The Panel’s report was released and published by MCU, in partnership with the Ministry of Economic Development, Job Creation and Trade (MEDJCT), in February 2020. It identified sophisticated IP knowledge as an essential requirement for innovators, intermediaries, postsecondary institutions, researchers and students, among others, to capitalize on the economic potential of commercializing IP.

The Panel recommended that the Ontario government develop both basic and advanced IP curricula to address the diversity of educational needs in the innovation ecosystem. Ensuring that education is available and easily accessible is a critical first step toward helping individuals in the innovation ecosystem to understand the value of protecting ideas and to develop the tools needed to develop their IP portfolios and IP strategies.

An advanced IP curriculum is needed to address the complex learning and skills required by Ontario’s inventors, creators, entrepreneurs and innovators as they meet the challenges of the modern innovation economy. Throughout the ecosystem, organizations and individuals work collaboratively to innovate, commercialize IP, and create and grow companies. Now, more than ever, the process from discovery to commercialization to company growth involves creative, far-reaching collaborations. As such, proposals in response to this Call for Proposals should reflect a multidisciplinary approach to IP commercialization that integrates legal and business concepts in a manner that fully integrates the lived experience of Ontario’s research community and its entrepreneurs.

Objective

The Expert Panel Report noted two capacity-building goals that an advanced IP curriculum should be designed to achieve:

- Increase the IP sophistication of innovators and support intermediaries to facilitate informed strategic decision-making around IP generation and commercialization, including increasing capacity to work with IP experts; and
- Provide innovators and support intermediaries with skills to be better informed about how and when to seek IP legal expertise.

eCampusOntario is soliciting proposals for the development of a comprehensive advanced IP curriculum, to serve the innovation sector, the postsecondary education sector and the broader public, that meets, at minimum, the following eight advanced learning objectives, as identified in the Report:

1. Know how to develop a sophisticated IP strategy for business growth including methods of insulating oneself from predatory competitors or frivolous lawsuits

This content should include a focus on the Ontario, Canada and global contexts in light of the borderless nature of IP and the need for global protection. It should explore, at minimum, licensing strategies (including sublicensing and cross-licensing), developing an IP ecosystem of related products and services, and third party IP and freedom to operate. A focus should be placed on providing practical examples from a variety of sectors, with an emphasis on **Artificial Intelligence, Automotive Technologies and Medical Technologies (see below)**. For example, in respect of all three sectors, there should be content that discusses in some depth the area of software patents, copyright in software as well as hybrid patent/trade secret strategies. In addition, there should be discussion of issues of data ownership and commercialization in all three sectors, which are experiencing growth in data-driven enterprises.

2. Know how to implement, monitor and adjust one’s IP strategy to meet changing environments or conditions

This content would cover, in depth, IP due diligence and best practices to ensure that the IP portfolio and IP strategy are top of mind in the commercialization process taking into account the specifics of where the IP is generated (for example, research institute, University, researcher (creator/inventor), SME) and who ultimately owns it.

3. Identify and seize IP commercialization opportunities as they arise

This content would discuss the importance of and provide guidance on fostering an innovation and IP culture within the organization. It would include anticipating opportunities and threats in a global growth strategy. It might also include content around senior leadership and the role of a chief technology officer (CTO), chief science officer (CSO) or VP – IP and Innovation.

4. Identify trends and best practices within the industry in which one operates

The content would discuss the importance of and approaches to ongoing IP intelligence gathering in general and sector-specific insights in particular to align the IP strategy with IP and business trends relevant to the organization. Proposals in response to this call should provide content in this regard that is specific to Artificial Intelligence, Medical Technologies, and Automotive Technologies.

5. Know how to negotiate complex IP agreements with third parties from a position of strength

This content would provide a detailed explanation of the most common types of IP agreements. It will offer the learner negotiation strategies and techniques in order to ensure that they are prepared to enter into sophisticated discussions, whether in relation to their own IP or the use of third-party IP.

6. Recognize potential conflict of interest and other IP ownership challenges and how to resolve them

This content would explore questions of IP ownership in greater depth, including how to resolve issues of ownership when multiple parties are involved, IP rights clearance and freedom to operate. The content should provide insights on the differences between different IP commercialization support intermediaries like University technology transfer offices, on-campus incubators and accelerators, entrepreneurship centres. Some of these agencies are in conflict of interest if they represent the interests of different individuals or organizations (ex: students, third party industry partners, academic researchers). Learners should be fully cognizant of the mandates of the support intermediaries to enable them to identify the appropriate agencies to assist them in achieving their IP goals.

7. Know when to seek expert legal advice and from which experts

This content would provide more depth of understanding about the role and differing skills of various IP professionals, especially registered IP agents, business lawyers and IP strategists. It should offer “do-it-yourself” strategies while also providing guidance on the circumstances for which reliance on external experts is essential.

8. Know how to take charge of engagements with relevant IP legal experts, especially in sophisticated discussions around IP strategy in a global marketplace

This content would be intended to empower the client to drive the discussion based on their global goals and to seek out those experts (as discussed in response to learning objective 7, above) who can best advise on global IP strategy.

Eligible Proposals

Multidisciplinary Team with Lead Organization

Proposals must be put forward by multidisciplinary teams and must identify a lead organization that will be accountable as set out by the terms and conditions that will follow in a funding agreement. This lead organization will be considered the Applicant and would be responsible for planning, coordinating, and managing all aspects of the Project. Proposals are sought from individual organizations or partnerships between one or more organizations that meet the requirements listed below. All Proposals must identify an existing team, or a clear plan to assemble a project team that meets the requirements of a multidisciplinary team. Proposals should demonstrate how the team members will be involved in and contribute to the Project, and the Project should reflect the input and expertise of each team member.

Requirements

The team must also have demonstrated expertise and experience in:

- the commercialization of IP and IP strategy in the aforementioned three technology areas;
- IP law (especially but not limited to patents; the individual should have experience in practice or as in-house counsel working for SMEs);
- working with early stage and scaling Ontario companies on their IP portfolios and strategies;
- supporting entrepreneurs, small- and medium-sized enterprises (SMEs), researchers, and staff (gleaned from experience working for an innovation intermediary [e.g., Technology Transfer Office, applied research offices, and Regional Innovation Centre, Campus Incubator, Innovation Office]);
- developing teaching material/courses (at least one member of the team should be experienced in curriculum development and course delivery).

Other Requirements

In addition to meeting the learning objectives identified above, proposals must clearly explain how relevant examples from the Key Sectors will be included (i.e., Artificial Intelligence, Medical Technologies, and Automotive Technologies).

Please note that these examples must be practically useful for learners in that they have to be able to apply what they have learned to their own IP development processes and challenges.

Preference will be given to proposals that will use recent and relevant IP examples that are reflective of the experience of innovators and entrepreneurs working in the Ontario/Canadian context.

This Call for Proposals requires that the Successful Applicant commit to ensuring that all materials are available to the public at no cost.

The following components for submissions are required and are outlined in greater detail in the attached application form:

- Details about content delivery formats that meet the learning objectives (outlined above).
- Metrics for determining whether learners have achieved the learning outcomes as planned.
- Confirmation that the course will be available in English and French. If the team is not able to create the course in both languages, professional translation services, with appropriate expertise in connection with IP and the law, will be used.
- Confirmation that the course will be compliant with the Accessibility for Ontarians with Disability Act (AODA)³ and conform to the Web Content Accessibility Guidelines (WCAG) 2.0.
- Confirmation that the course can be made publicly available at no cost.
- Information about the team involved (i.e. names, titles, short biographies and current curriculum vitae of team members) and each member's respective role in the team with an emphasis on expected contribution and timeframe of work.

Of particular interest are project plans that integrate and test their proposed learning design with focus groups of learners. These learners should represent the diversity of the Province's IP ecosystem and potential users of that ecosystem.

Eligible Expenditures

Eligible expenditures are budget items directly related to the provision of the advanced IP curriculum.

This could include:

- Project management and/or coordination.
- Salaries/wages and benefits.
- Project delivery (e.g., content development and/or sourcing, technology, subject matter expertise, supplies, materials, quality assurance, copy editing, media production, research and analysis, travel, hospitality, accommodation).
- Translation or accessibility formatting costs to ensure the curriculum is available in English and French and is compliant with the *Accessibility for Ontarians with Disabilities (AODA) Act*³.
- Reasonable costs for purchasing equipment. All equipment costs must be directly associated with the Project proposed and justified appropriately in the budget.
- Administrative costs related to the Project (up to a maximum of 5% of total budgeted costs).

Expenditures must be reasonable and necessary for the project's successful completion and implementation. The budget must include all costs directly related to the Project, including any proposed cash or in-kind contributions. Costs must be clearly linked to the activities identified in the Project objectives and work plan section of the application.

Funding will be determined based on an evaluation of the proposal, including the total proposed budget submitted by the applicant.

Ineligible Expenditures

Expenses that are not directly related to the provision of the Advanced IP Curriculum or directly required to meet the deliverables of the Project – except administrative expenses related to Project delivery – are ineligible for funding consideration. This includes: all major capital expenditures, such as the acquisition of land/buildings; overhead; costs related to the development of the proposal or application; executive or senior management salaries; administrative salaries, except for Project management costs covered under administrative expenses related to Project delivery; losses on other Projects or contracts; any costs, including taxes, for which the recipient has received, will receive or is eligible to receive a rebate, credit or refund; costs covered by other funding; contingency or unexplained miscellaneous costs; and Harmonized Sales Tax (HST) for tax exempted organizations.

Submission Process

The deadline for eCampusOntario to receive proposals is 11:59pm EST on February 1, 2022. Institutions are asked to submit a signed PDF copy to ipcurriculum@ecampusontario.ca with **Ontario Advanced IP Curricula Call for Proposals** as the subject line.

Any additional relevant information may be attached as appendices to the completed application, if required. Please note: Due to the high volume of anticipated applications, information provided in appendices will be considered supplemental to the main application.

For questions regarding the submission process, please contact ipcurriculum@ecampusontario.ca.

Proposal Review and Evaluation Criteria

eCampusOntario will establish a panel of internal/external experts to assess the proposals through an appropriate review process and to fairly evaluate proposals against the eligibility criteria outlined in the eligible projects section of this document.

Proposals will be evaluated according to the following general categories:

Criteria	Weight (% of total)
Viability of the Proposal in Meeting Learning Objectives and Timeliness	30%
Impact	30%
Project Management & Governance	20%
Budget	20%

Proposal Review and Evaluation Criteria (cont'd)

1. Viability of the Proposal in Meeting Learning Objectives and Timeliness (30%)

- Explain how the curriculum will align with the eight identified learning objectives.
- Outline Project milestones using the template provided.

2. Impact (30%)

Provide a plan for sustaining and measuring Project impact over time.

3. Project Management & Governance (20%)

For each team member, provide:

- First name, Last name
- Institution(s), Organization(s) and/ or Affiliation(s)
- Job(s) and/or Title(s)
- Project role(s) and contribution(s) to the project
- Description of how their lived experience and/ or expertise will contribute to the objectives of the course.

4. Budget (20%)

Provide a detailed budget that explains itemized eligible expenses using the template provided.

Appendix 1 – Key Terms

Accelerators and Incubators means organizations that support entrepreneurs to transfer knowledge and intellectual property from institutions into the economy. These intermediaries are often housed in universities, and they provide a combination of services for start-ups including mentorship, funding, networking, training and/or office space. Typically, incubators support start-ups entering the beginning stages of building their company, whereas accelerators advance the growth of existing companies with an idea and business model in place.

Innovation Intermediaries means organizations that help early stage start-ups launch or scale their business. These include private/for-profit Accelerators and Incubators, on-campus Technology Transfer Offices and public entities (e.g., Regional Innovation Centres).

Intellectual Property (IP) means creations of the mind and can include things like copyright, industrial designs, patents, artistic works, trademarks and trade secrets (confidential information). Key Sectors: The sectors prioritized for the purpose of development of the advanced IP curriculum, being the artificial intelligence, medical technology and automotive technology sectors.

Learners: Any entity or individual receiving supports related to the advanced IP curriculum. This includes, but is not limited to, those considering commercialization opportunities, private sector and independent researchers and individuals working for, or receiving commercialization and/or entrepreneurship supports.

Project: All activities that meet the criteria set out in these program guidelines and requirements. **Project Budget:** A detailed breakdown of all expenses and funding contributions (cash and in-kind) required to carry out the Project.

Project Plan: A detailed breakdown of all key Project activities, timelines, and outcomes expected as a result of the Project.

Successful Applicant: An applicant that has been awarded funding and is responsible for delivering a Project. The Successful Applicant is responsible for signing and fulfilling all requirements of a funding agreement, including but not limited to: receiving and managing the funds, ensuring coordination of Project partners and activities, and communicating with eCampusOntario regarding the status of the Project on behalf of all partners.

Endnotes

1. Startup Genome. The Global Startup Ecosystem Report (2021)
2. UBI Global. World Rankings of Business Incubators and Accelerators (2019-2020)
3. To learn more about AODA Compliance please refer to [Accessibility for Ontarians with Disabilities Act, 2005 \(Ontario\)](#)

