

Guiding the VALUE CHAIN OF INNOVATION



Borman & Company works with research-intensive clients, including medical centers and universities, to manage their value chain of innovation. We help world-class institutions forge successful private sector research and licensing relationships, command the data and financial infrastructure required for Bayh-Dole compliance and advance effective technology transfer through every step along the path to commercialization. Our focused team of subject matter experts has direct experience in your complex environment — we have sat in your seats. We roll up our sleeves, take on your challenges and work with you every step of the way.



Our focused team of subject-matter experts has

BAYH-DOLE COMPLIANCE

We are the experts in Bayh-Dole compliance and have helped scores of institutions meet the mandate. We do this by maintaining relationships with federal agencies and keeping up to date on changes in agency reporting requirements (primarily iEdison). Now that Congress has expressed heightened interest in the data generated as a result of Bayh-Dole reporting, and with recent changes to the regulations, it's even more important for every institution, large or small, to be on top of its game. Failure to accurately meet reporting requirements deadlines can put your ownership of intellectual property and research funding at high risk. In addition, both universities and the companies that are the Licensors need to be mindful of who has been designated the lead in complying with Bayh-Dole. We have seen clients lose track of downstream responsibilities in this regard.

At its core, effective compliance reporting relies on data integrity. For universities and medical centers that have a history of grants that may span decades, finding and remediating the data presents a significant challenge. We clean up the backlog of notifications and work with your team to reconfigure underlying systems and processes as needed (finance, data and personnel) in a way that assures compliance and ease of reporting going forward.

“Borman & Company came in to conduct a complete IP portfolio review that involved going through 20 plus years of patent and licensing documentation. Their strong established relationship with the NIH was a tremendous asset in helping our tech transfer office clear up the backlog and strengthen the institution’s iEdison reporting and compliance procedures going forward.”

INFLEXION POINTS ON THE



INNOVATION



DISCOVERY

direct experience in your complex environment

COMPETITIVE INTELLIGENCE SERVICES

At Borman & Company we focus on the question of the potential value of intellectual property within the context of the marketplace. Our clients rely upon this analysis to support investment, sale, or licensing of a technology or invention. Critical considerations in the assessment of commercial value consider timing and entry barriers: are we early or late to market and what factors may be blocking entry? We often find adjacent markets or applications where a technology may find a home. Our industry partners call on us to identify pockets of innovation that may fit with their strategic needs and IP portfolio. We make introductions and foster collaboration so that industry and institutional partners work together productively to bring research along the path to commercialization.

“The team at Borman & Company has a unique set of qualifications that lends itself to assisting academia. Having a team that has worked in the academic environment with specific focus on intellectual property matters gave them unique insight to support our experienced tech transfer office.”

INVENTION VISUALIZATION SYSTEMS

What good is innovation and invention if the value is not communicated to the marketplace in a meaningful way? Far too many institutions present their intellectual property as a list of inventions/ patents that speak from the internal PI's perspective. This approach does not capture where innovation is headed and may fail to connect with the needs of industry. Borman and Company works with clients to build the underlying analysis that supports moving innovation from academia to industry. With the financial and technical data mapped, an institution can effectively communicate the value to potential partners in a way that connects with their needs.

VALUE CHAIN OF INNOVATION



OUR SERVICES

TECH TRANSFER BACK OFFICE

- Bayh-Dole Compliance
- iEdison Disclosure & Patent Review
- Royalty Investigation/Reconstruction
- Data Forensics Remediation

INTELLECTUAL PROPERTY EVALUATION

- Competitive Technical Analysis
- Evaluation Method Selection
- IP Portfolio Management
- Dispute Resolution Support

INVENTION TECHNOLOGY SOURCING

- Market Opportunity Analysis
- Research Partner Identification
- Partner Relationship structure
- Innovation Sourcing for Industry

MARKETING FOR TTO'S

- Technology Positioning
- Brand Definition & Strategy
- Partner Outreach
- SEO/Websites/Content

SBIR/STTR SERVICES

- Invention Reporting
(via iEdison & other Agency Systems)
- Grant Application Support
- Partner Identification

OPEN INNOVATION

- Technology Scouting/Assessment
- Building the Innovation Mindset
- Change Management

