

NSF I-Corps Teams

Executive Summary Form

This Executive Summary Form contains everything you will need to complete your Executive Summary for the NSF I-Corps Teams program. We’ve already filled in some of the blanks. We’ve also provided some tips in this document and some examples attached to the email we sent you. Here’s how we recommend you use this form:

1. Fill it out.
2. Email the draft to Elyse Ball, eball@uakron.edu, to get initial feedback.
3. Email an updated draft to Norm Rapino, norman.rapino@utoledo.edu, to get additional feedback and set up a practice “Application Interview.”
4. Submit your final draft at <https://nsfiip.force.com/icorps/s/login/>.

Team Information

**Which program best describes your team?** Answer = Site Recommended Team

**Academic Institution:**\* Insert the name of your university.

**Entrepreneurial Lead (EL)**

EL Name:

EL Email:

EL Qualifications (please provide a 5-sentence bio): *Be sure to include what degree program the EL is in, if the EL is working on the innovation that is central to this I-Corps proposal, if the EL has any publications or presentations, and if the EL participated in UARF’s regional I-Corps program.*

**Technical Lead (TL)**

TL Name:

TL Email:

TL Qualifications (please provide a 5-sentence bio): *Be sure to include if the TL is an inventor of the technology that is central to this I-Corps proposal and if the TL participated in UARF’s regional I-Corps program.*

**I-Corps Mentor (IM)**

IM Name:

IM Email:

IM Qualifications (please provide a 5-sentence bio): *Be sure to include details about the IM’s experience working in private companies or commercializing technology, how long the IM has known the TL and EL, and if the IM participated in UARF’s regional I-Corps program with this team and/or with other teams.*

**Are there any other Team members in addition to those listed above?**

Click “Yes” if you have more than one EL, TL or IM. You’ll need to provide a name, email and qualifications for each team member.

Submission Information

**Should your team be invited to submit an I-Corps Teams grant proposal, who will be submitting the grant proposal as PI?** Answer typically = Technical Lead

**Is your team submitting from another federal agency?** Leave this blank.

**There are two pathways to establish for the NSF I-Corps Teams program. Which is your team claiming?**

If you don’t have a prior NSF grant on this research topic, answer = Participating in a regional I-Corps Program

If you do, answer = Both. Include your previous NSF research award numbers here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Past I-Corps Experience

**Has the team participated in a local or regional I-Corps program run by an I-Corps Node, Site or Hub?** Answer = Yes

**Please specify which Node, Site or Hub?** Answer = Great Lakes Regional Hub

**Please specify program dates?** Insert the date you “graduated from I-Corps” (i.e. the date of our last I-Corps meeting)

**Nominating Node, Site or Hub Official Name:** Answer = Elyse Ball

**Nominating Node, Site or Hub Official's Email:** Answer = eball@uakron.edu

**Nominating Letter from Node, Site or Hub:** Must be available upon request from NSF. We will write this letter for you.

**Please specify which team members participated?** List whether your team’s EL, TL, and/or IM participated.

**How many customer/stakeholder interviews did you complete as part of that program?** Needs to be a number. Include the interviews you did during I-Corps + any interviews you’ve done since the program ended. (20+ is required, 30+ is ideal)

**Has a company been formed to commercialize this innovation?**

If you don’t have a company, answer = No

If you do have a company, answer = Yes. Include your company name here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Has the company received investment or public funding? (Yes or No)

Technology (Intellectual Merit)

**What is the IP status of the innovation?** Pick one of the following:

* Not disclosed to tech transfer office (TTO)
* Disclosed to TTO
* Patent application filed by TTO
* Patent issued

If you chose “Patent application filed by TTO” or “Patent issued,” insert the patent number here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Brief Description of Technology\* (Intellectual Merit)** *- This section should be 250 words or less.*

*The first sentence should be a high level and straightforward description of your technology and what it could do. Then, spend 1-3 sentences diving deeper on your technology. NSF wants to fund I-Corps Teams that are working on transformational scientific and technological advancements, so be sure to highlight transformational or cutting-edge aspects of your technology – and feel free to use a bit of technical jargon if you want. (If your technology is software only, you need a particularly strong statement of what makes your software so advanced. NSF will not fund apps. They want to see software platforms that use AI or machine learning, or “interactive and visual software platforms that access a proprietary data set in a cloud-based system.”) Clearly explain what is unique about your technology and its capabilities relative to other approaches. This is a great place to bring in info from the Competitive Analysis Form you did during I-Corps to explain how your technology is superior to other products on the market and emerging technologies. Explain what customers told you about the 1-2 competitive advantages that matter most to them. If you have any data that shows your technology can achieve the competitive advantages, summarize it very briefly (2-3 sentences).*

Insert your answer here.

Commercial Potential

**Brief Description of Commercial Applications\* (Broader Impacts)** *- This section should be 500 words or less.*

*This section is your current hypothesis of the potential customers and applications for the technology. Be very specific about your market and who your customer is. Don’t list “industries” (e.g. oil and gas), but instead, list types of companies and people with job titles. Explain in 1 sentence the problem you are solving for your customer. State how many interviews you’ve completed so far (during and after UARF’s regional I-Corps program). Explain the top 2-3 things you learned during those interviews. This is a great place to bring in quotes from customer interviews or key learnings you included in your Week 3 and Week 5 PowerPoint presentations. Explain the 2-3 things you would like to learn next. If possible, list the names of 5 customers you would like to interview if you get into I-Corps Teams (these customers should be people that could help you learn the 2-3 things you said you wanted to learn). If you’ve done all this and still have space, include 1 sentence about the size of your market based on the TAM and SAM you calculated on your Market Research Form in UARF’s regional I-Corps program.*

Insert your answer here.

Commercial Plan

**Brief Description of Current Commercialization Plan\*** *- This section should be 500 words or less.*

*A commercialization plan consists of steps and milestones. The reviewers understand it is preliminary and likely incorrect. It just shows you have given some thought to the issue. You are not “graded” on the accuracy of this portion of the Executive Summary. You’ll probably want to split this section into 3 paragraphs.*

*Paragraph 1 should explain how you are going to address the technical risk. For example, milestones might be running tests on what you currently have, building a feasibility prototype or building a first product prototype. You should have 3-5 milestones. Make sure you customize these milestones and add details to make them specific to your business. Explain what technical risk each milestone addresses. If you know anything about the tests your customers would like to see, include that info here.*

*Paragraph 2 should explain how you are going to address the market risk. For example, milestones might be doing more customer discovery, learning about how customers buy products, performing field tests with customers, and adding more business people to your team. Make sure you customize these milestones and add details to make them specific to your business. Be sure to explain any “burning questions” you want answered about the market before you dedicate the next 5-10 years of your life to building a product. You should have 3-5 milestones.*

*Paragraph 3 should explain whether you plan to form a company or license the technology to an existing big company. (“I don’t know yet” is also an acceptable answer.) If you are planning on forming a company, milestones might include actually forming the company, applying for SBIR funding, raising venture capital, and hiring key team members to expand your team’s expertise. If you are planning to license the technology, milestones might include applying for translational research grants like PFI or Ohio Third Frontier’s TVSF program, taking steps to identify potential licensees, and reaching key technical milestones to get potential licensees excited. Again, make sure you customize these milestones and add details to make them specific to your business.*

Insert your answer here.