

# Program Guidelines

#### Version 4: November 25, 2024

Please note that these guidelines are subject to change.

It is important to regularly check for updates or revisions to ensure you are following the most current version.



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#### **SECTION 1**

## **Program Overview**

AccelerateIP is an ElevateIP Recipient, a national program of Innovation, Science and Economic Development Canada. The program is being delivered by New Ventures BC (NVBC), with Innovate BC as its prime delivery collaborator, alongside a network of accelerators, incubators and tech organizations. The program will run until March 31, 2026.

AccelerateIP's primary goal is to break the cycle of IP scarcity by investing in the talent and capital necessary to strengthen Canada's innovation ecosystem. It aims to provide services and support to technology startups based in British Columbia, Yukon, Northwest Territories and Nunavut, to facilitate their rapid scaling, growth and long-term viability. The program is designed to increase access to education, skills development, mentorship and professional support for startups to protect, implement and leverage their intellectual property.



# **Program Structure**

AccelerateIP is an integrated, three-stream, IP capacity-building program. Eligible applicants can apply through the <u>program portal</u>.



#### **Stream 1: IP Education**

In this Stream 1, participants receive foundational IP training through online educational modules, in-person and online webinars and a 24-hour IP Certification Program for startups led by IP experts. Train the Mentor workshops are also being offered to select organizations to build IP knowledge and capacity for mentorship among Business Accelerators and Incubators (BAIs).



#### Stream 2: IP Strategy

Stream 2 tiers include 1:1 IP mentorship and financial support for covering some legal costs to develop targeted IP strategy, enabling startups to maximize their IP assets and set the stage for long-term success through effective IP strategy development.

- Tier 1: Mentorship from program partners
- Tier 2: IP strategy support from legal service providers



#### **Stream 3: IP Implementation**

Stream 3 facilitates the achievement of startup objectives in their IP strategies through support for strategy execution. This includes covering some costs associated with formal IP protection and implementation.

# Stream 1: IP Awareness and Education

### 3.1 Eligible Activities

- Foundational IP content through self-guided online education modules
- Educational events and webinars delivered in-person and online by NVBC with guest speakers
- Educational events and webinars delivered in-person and online by partners and collaborators across British Columbia, Yukon, Nunavut, and Northwest Territories
- 24-hour IP Certification Program, delivered in-person and online, in small cohorts comprised of other startups

### 3.2 Eligible Recipients

All applicants must meet the following program eligibility requirements:

- A startup based in British Columbia, Northwest Territories, Yukon Territory or Nunavut
- Use innovative technology and / or operate in the tech sector
- Have fewer than 500 employees

Non-profit organizations that meet the above may also apply.





### **3.3 Application and Selection Process**

#### **Online education**

 All applicants that meet the general eligibility requirements can access resources after they register and apply to Stream 1 through the <u>program portal</u>

In person and online education events delivered by NVBC and/or program partners

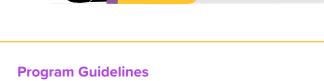
 Startups can visit New Ventures BC's <u>event</u> page for links to all event registration pages. No portal registration is required

#### AccelerateIP will prioritize startups that are:

- Majority-owned by underrepresented groups
- Demonstrate involvement in priority industries for the Program's provinces and territories, including, Healthtech, Cleantech and Datatech
- Are an existing client of AccelerateIP Program partners or collaborators

#### **IP Certification Program**

- Eligible applicants must apply through the program application portal. Applicants will need to answer an initial IP assessment and outline their learning objectives for the course
- Selection will be based on program priorities, application strength and availability. This program is offered both online and in-person





# Stream 2: Developing IP Strategy

### 4.1 Eligible Activities

#### 4.1.1 Tier 1: Mentorship from Program Partners

Startups can receive up to eight hours of mentorship\* over the course of the program.

Eligible activities may include but not limited to:

- Reviewing commercialization strategy needs
- Assessing IP strategy within a business context
- Providing general guidance and support relative to IP
- Assessing when legal engagement is required
- Preparing to hire or meet with a legal service provider

IP mentors are existing mentors, advisors, or Executives in Residence at accelerators, incubators, and other tech organizations that are partners of the AccelerateIP program. They have either completed mandatory IP mentorship training or possess extensive expertise in intellectual property. IP mentors do not provide legal advice.

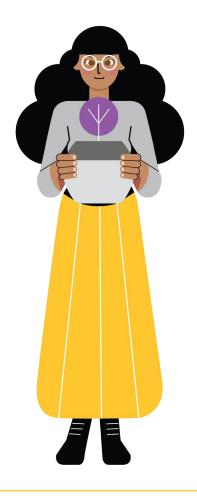
\*Successful applicants are approved for up to two one-hour sessions of initial mentorship. Following these two hours, the mentor will evaluate their progress and reassess if they would benefit from additional mentorship, for up to a total of eight hours.

#### 4.1.2 Tier 2: Strategy Support from IP Service Providers

Startups may be eligible for support covering 75% of their legal costs up to \$25,000 over the course of the program, with a minimum startup co-investment requirement of 25%.

Startups whose majority owned by Indigenous peoples may be eligible for support covering 90% of their legal costs, up to \$25,000 over the course of the program, with a co-investment requirement of 10%.

Startups are responsible to pay any costs over and above AccelerateIP's max contribution amount. Approved legal costs will be paid directly to the legal service provider chosen by the applicant. Legal service providers must be from the program's <u>registered service provider</u> <u>list</u>. Applicants may also request that a provider be registered by the program asking their provider to fill out the registration form accessed through the <u>our Service Providers webpage</u>.



### Eligible activities may include, but are not limited to:

- IP audits
- IP budget review
- IP competitive analysis
- IP strategy
- IP valuation
- Analysis of IP landscaping
- Common contracts and document templates ie: employment agreements, contractor agreements, IP assignment or transfer agreements or NDAs
- Freedom to operate or infringement searches
- Legal contractual analysis ie: commercialization of IP opportunities
- Out-licensing strategy development
- Patentability analysis
- Prior art search
- Trademark and branding strategies
- Trademark clearance searches
- Other services may be eligible on a case-bycase basis

#### Ineligible costs:

- Ongoing licensing fees
- Costs related to maintenance or renewal fees of IP applications or registrations
- Costs associated with the repayment or refinancing of an existing debt
- Incorporation costs
- Contracts not related to IP protection

### 4.2 Eligible Recipients

In addition to meeting general program eligibility, **applicants must fall into one of the following categories**:

- Have completed a minimum of one education offering from Stream 1 or equivalent
- Be an existing client of a Program Partner or Collaborator
- Be eligible based on the IP Assessment through the program platform

### For Tier 2: Strategy Support applicants, in addition to the criteria above, applicants must:

- Have a registered business number (incorporation not required)
- Agree to meet co-investment requirement of minimum 25% of the service provider cost or 10% for Indigenous-owned start-ups
- Obtain a quote from a legal service provider(s) who is registered or eligible to register\* with AccelerateIP. See section 4.3.2 for quote requirements.

\*If the applicant's service provider is not within AccelerateIP's registered service provider list, applicant should share the <u>registration information</u> with their service provider, and the provider must be approved by the program.

- Must demonstrate IP knowledge by fulfilling one of the following:
  - Proof of completion of Stream 1 IP Certification Program Level 1, Level 2, or equivalent training, such as <u>IP Pathways –</u> <u>IP Certification Program</u>\*
  - Proof of completion Level 2 of IP Assist
  - Proof of having at least one in house IP expert\*\*

\* Proof of registration is acceptable at the time of the application for the Certification sessions. However, award letter won't be issued until the proof of successful completion is provided.

\*\* In house IP Expert is a staff member with formal IP qualifications or significant experience in managing IP. Minimum formal qualification is IP Management Training within the last five years. External consultants and advisors do not qualify.

# 4.3 Application and Selection Process

Selection will be based on the following.

#### **Program Priorities**

- Majority owned by underrepresented groups
- Demonstrate involvement in priority industries for the program's provinces and territories, including, Healthtech, Cleantech and Datatech
- Are an existing client of AccelerateIP
  Program partners or collaborators

#### **Evaluation Criteria**

- Clearly demonstrate how the services
  would benefit their startup
- Complete an initial IP Assessment
- Provide business and technology details
- Demonstrate intention to grow their business in Canada



#### **Step 1 – Application**

Eligible applicants fill out the application forms on the program portal, including the Initial IP Assessment.

- Applicants that already worked with a partner or collaborator associated with the program can indicate that in the application form
- Applicants have the option to add a 'collaborator' to help with the application process. Collaborators can access all the information entered during the application process. They are not impacting the selection process

#### Step 2 – Reviewing Process

- Application review by the program team and the partner organization
- Applications are accepted throughout the duration of the program and reviewed ongoing basis based on program priorities, evaluation criteria and partner / mentor availability

#### **Step 3 – Selection**

 Applicants will receive an email from the program team regarding the result of the reviewing process

#### Step 4 – Starting Mentorship

 Approved applicants will be contacted by their associated partner for starting the mentorship hours



#### Step 5 – Completion and Final Survey

 After completing the mentorship hours, applicants will mark their completion of the program in the portal and complete a survey

#### 4.3.2 Stream 2, Tier 2: Strategy Support from IP Service Providers – Application and Selection

#### Step 1 – Obtain a Quote

- Eligible applicants determine the services required from a legal Service Provider and get a quote, either from their existing service provider, or a registered service provider with the program
- AccelerateIP does not expect that startups are required to pay for quotes to apply for the program
- Retroactive applications are eligible so long as invoices have not yet been paid and the start date is after April 1, 2025. Startups should include the unpaid invoices in the application

#### **Quote requirements:**

- **Contact details:** Provide the full name, address, email, and signature of the service provider responsible for the work.
- List of services: Please refer to our list of eligible services under each stream.
- Specific work details including the estimated completion date for each service
- Quoted price for each service in CAD, detailing the number of hours and hourly rate, applicable taxes, disbursements, and any other charges.
- Total amount in CAD, specifying the pre-tax and after-tax totals.
- Project start and end dates.

**Please note:** The duration of a Stream 2-2 project is maximum three months, regardless of circumstances. This includes for matters outside of your control, such as time to review, timing of office actions.

#### **Step 2 – Application**

- Eligible applicants will complete their application, including the IP Assessment form and upload a quote on the program portal
- Applicants have the option to add a mentor or a BAI member as a 'collaborator' to help with the application process.
   Collaborators can access all the information entered during the application process, though they are not impacting the selection process

#### Step 3 – Recommender

- Applicants that are existing clients of a program partner or collaborator will add them as a Recommender as a part of the application process
- By confirming, accelerators acknowledge that the applicant is, or has been, a client / member of their accelerator within the last 24 months. As such, the applicant should have benefitted from the accelerator's services and support, such as business advisory, funding assistance, mentorship, and in-kind services."





#### **Step 4 – Reviewing Process**

 Applications are reviewed by the program team. Applications will be accepted and approved on a rolling basis throughout the duration of the program



#### **Step 5 – Selection**

- Applicants will receive an email from the program team regarding the result of the reviewing process
- If approved: Startups will receive an Award letter indicating their approved services and maximum amount covered by AccelerateIP. Approved applicants will need to sign the Award letter on the portal within two weeks to accept the award
- If declined: Applicants may be referred to Stream 1 or 2 prior to being eligible to re-apply in future
- If waitlisted: The program will notify the startup when another round of funds become available

#### Step 6 – Services

- Applicants receive the approved services from their service provider
- Services must be completed within the projected start and end dates, as specified in the award letter

#### Step 7 – Invoicing and Payment

- Once services are complete, startups will add their legal service providers to the program portal. The legal service provider will be asked to upload two separate invoices for New Ventures BC / AccelerateIP and for the startup amount to pay
- The invoice for AccelerateIP amount to pay should be 75% of the approved services received, 90% for startups that are majority owned by indigenous peoples, up to the approved award as indicated in the startup's agreement (Step 5)
- Startups upload a receipt as proof of payment to the portal for their co-investment which should match the invoice for the startup amount to pay sent by the service provider.
- The final invoiced services are required to match the approved services

#### Step 8 – Survey

 Startups are required to complete a survey after the completion of the services

#### Step 9 – Payment

 Once the survey is completed, AccelerateIP team will verify the uploaded documents, payment will be made to the service providers and applicants will be notified through the program portal

### 4.4 Changes After Approval

- Changes to services after approval must be requested to AccelerateIP before the project end date, and must be approved in writing by AccelerateIP. Please note that each application can approved for changes in services after approval only once.
- Changes to budget after approval require a re-application in the portal if it exceeds the approved amount.
- Extensions to the project end date are generally not permitted. They must be requested to AccelerateIP before the approved project end date and must be approved in writing by AccelerateIP. Please note that maximum duration for Stream 2-2 is three months.
- Changes to a service provider after approval require a re-application in the portal
- If re-applying, AccelerateIP will void a startup's award and notify them via email. Re-applying doesn't guarantee approval.
- Each request will be reviewed on a case-by-case basis and AccelerateIP reserves the right not to approve the change requests for any reason.

#### Voiding applications for incomplete or expired Awards

Accelerate IP has the right to void or terminate a startup's Award when the startup:

- Does not sign their Award letter within two weeks' time
- Does not complete their services within the start and end date provided
- It is determined the startup falsified or misrepresented information in their application



# Stream 3: IP Implementation Support from Legal IP Service Providers

### 5.1 Eligible Activities

Startups may be eligible for support covering 75% of their legal costs up to \$60,000 over the course of the program, with a minimum startup coinvestment requirement of 25%.

Startups that are majority-owned by Indigenous peoples may be eligible for support covering 90% of their legal costs, up to \$60,000 over the course of the program, with a co-investment requirement of 10%.

Startups are responsible for paying any costs over and above AccelerateIP's max contribution amount.

Approved legal costs will be paid directly to the service provider chosen by the applicant.

Legal service providers must be from the Program's <u>registered service provider</u> <u>list</u>. Applicants may also request that a provider be registered by the program by sharing <u>our Service Providers webpage</u> with their service providers, if not in the list.

#### Eligible activities may include, but are not limited to:

- Patent application preparation and filing
- Patent prosecution
- Trademark application preparation and filing
- Trademark prosecution
- Industrial design application preparation
  and filing
- Industrial design prosecution

- Copyright registration
- Legal contractual drafting ie: commercialization of IP opportunities\*

\*Must be directly connected to or primarily in support of the implementation of the applicant's IP strategy

• Other services may be eligible on a case-bycase basis

#### Ineligible costs:

- Litigation costs, including enforcement of IP rights against a third party
- Ongoing licensing fees
- Costs related to maintenance or renewal fees of IP applications or registrations
- Infringement and enforcement related costs

### 5.2 Eligible Recipients

Costs associated with the repayment or refinancing of an existing debt

- Incorporation costs
- Contracts not related to IP protection

All applicants must meet the general eligibility requirements of the program. In addition, startups need to meet the following requirements:

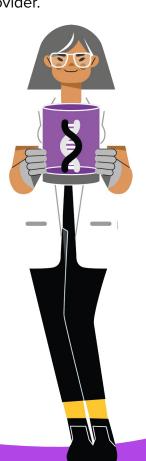
- The startup must agree to meet co-investment requirement of 25% and 10% for startups that are majority indigenous-owned.
- Obtain a quote from a legal service provider(s) who is registered or eligible to register\* with AccelerateIP. See section 5.3 for quote requirements.

\*If the applicant's service provider is not within AccelerateIP's registered service provider list, applicant should share the <u>registration information</u> with their service provider.

- Must have an existing IP strategy
- Must be incorporated
- Must demonstrate IP knowledge by fulfilling one of the following:
  - Proof of completion of Stream 1 IP Certification Program Level 1, Level 2, or equivalent training, such as <u>IP Pathways – IP</u> <u>Certification Program</u>\*
  - Proof of completion Level 2 of IP Assist
  - Proof of having at least one in house IP expert\*\*

\* Proof of registration is acceptable at the time of the application for the Certification sessions. However, award letter won't be issued until the proof of successful completion is provided.

\*\* In house IP Expert is a staff member with formal IP qualifications or significant experience in managing IP. Minimum formal qualification is IP Management Training within the last five years. External consultants and advisors do not qualify.



### **5.3 Application and Selection Process**

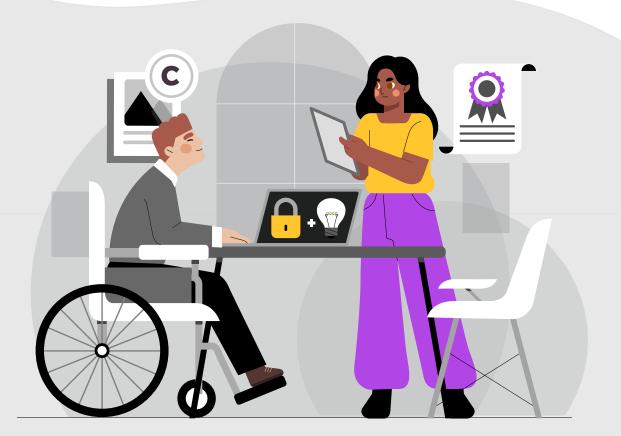
All startups that meet the General Eligibility Requirements will create a profile on the program platform and submit an application. Selection will be based on:

#### **Program Priorities**

- Startups that are majority owned by underrepresented groups
- Existing customers of program partner BAIs or collaborators
- Sectors prioritized: Cleantech, Healthtech, Datatech

#### **Evaluation Criteria**

- Clearly demonstrate the needs and how the services
  would benefit their companies
- Company info
- Strength of existing strategy
- IP knowledge and experience
- Potential for commercial value of IP (assets)
- Evaluation by the Selection Committee consisting of IP experts



#### Step 1 – Obtain a Quote

- Eligible applicants determine the services required from a legal Service Provider and get a quote, either from their existing service provider, or a registered service provider with the program
- AccelerateIP does not expect that startups are required to pay for quotes to apply for the program
- Retroactive applications are eligible so long as invoices have not yet been paid and the start date is after April 1, 2025. Startups should include the unpaid invoices in the application

#### **Quote requirements:**

- **Contact details:** Provide the full name, address, email, and signature of the service provider responsible for the work
- List of services: Please refer to our list of eligible services under each stream
- Provide specific work details for each proposed service, including:
  - Duration of the service
  - If applying for a patent or trademark, please include details such as filing country, plus include a working title, brief description or docket number (do not include confidential information)
  - If applying for prosecution work, include associated application number and filing date
  - If applying for legal contractual drafting, include type of contract and how it is primarily in support of the implementation of the applicant's IP Strategy
  - Quoted price for each service in CAD, detailing the number of hours and hourly rate, applicable taxes, disbursements, and any other charges
- Total amount in CAD, specifying the pre-tax and after-tax totals
- Project start and end dates

**Please note:** The duration of a Stream 3 project is maximum six months, regardless of circumstances. This includes for matters outside of your control, such as time to review, timing of office actions.

#### **Step 2 – Application**

- Eligible applicants will complete their application, including the IP Assessment form and upload a quote on the program portal
- Applicants have the option to add a mentor or a BAI member as a 'collaborator' to help with the application process.
   Collaborators can access all the information entered during the application process, though they are not impacting the selection process

#### Step 3 – Recommender

- Applicants that are existing clients of a program partner or collaborator will add them as a Recommender as a part of the application process
- By confirming, accelerators acknowledge that the applicant is, or has been, a client / member of their accelerator within the last 24 months. As such, the applicant should have benefitted from the accelerator's services and support, such as business advisory, funding assistance, mentorship, and in-kind services."

#### **Step 4 – Reviewing Process**

 Applications are reviewed by the program team and a selection committee. Applications are reviewed based on program priorities and evaluation criteria



#### **Step 5 – Selection**

- Applicants will receive an email from the program team regarding the result of the reviewing process
- If approved: Startups will receive an Award letter indicating their approved services and maximum amount covered by AccelerateIP. Approved applicants will need to sign the Award letter on the portal within two weeks to accept the award
- If declined: Applicants may be referred to Stream 1 or 2 prior to being eligible to re-apply in future
- If waitlisted: The program will notify the startup when another round of funds become available

#### Step 6 – Services

 Applicants receive approved services from their service provider within the approved project timeline

#### Step 7 – Invoicing and Payment

- Once services are complete, startups will add their legal service providers as "Recommender" to the program portal. The legal service provider will be asked to upload two separate invoices for New Ventures BC/AccelerateIP and for the startup amount to pay
- The invoice for AccelerateIP amount to pay should be 75% of the services received, 90% for startups that are majority-owned by indigenous peoples, up to the approved award as indicated in the startup's agreement (Step 5)
- Startups upload a receipt as proof of payment to the portal for their co-investment which should match the invoice for the startup amount to pay
- The final invoiced services are required to match the approved services



Cont



#### Step 8 – Survey

 Startups are required to complete a survey after the completion of the services

#### Step 9 – Payment

 Once the survey is completed, AccelerateIP team will verify the uploaded documents, payment will be made to the service providers and applicants will be notified through the program portal

### **5.4 Changes After Approval**

- Changes to services after approval must be requested to AccelerateIP before the project end date, and must be approved in writing by AccelerateIP. Please note that each application can approved for changes in services after approval only once.
- Changes to budget after approval require a re-application in the portal if it exceeds the approved amount.
- Extensions to the project end date are generally not permitted. They must be requested to AccelerateIP before the approved project end date and must be approved in writing by AccelerateIP. Please note that maximum duration for Stream 3 is six months.
- Changes to a service provider after approval require a re-application in the portal
- If re-applying, AccelerateIP will void a startup's award and notify them via email. Re-applying doesn't guarantee approval.

• Each request will be reviewed on a case-bycase basis and AccelerateIP reserves the right not to approve the change requests for any reason.

### Voiding applications for incomplete or expired Awards

Accelerate IP has the right to void or terminate a startup's Award when the startup:

- Does not sign their Award letter within two weeks' time
- Does not complete their services within the start and end date provided
- It is determined the startup falsified or misrepresented information in their application

#### **SECTION 6**

# **Monitoring and Reporting**

- Partners, collaborators and applicants may be asked to collect metrics on behalf of the Program that are reported to ISED
- Participants will be required to complete satisfaction and/or other surveys as are required by the program
- AccelerateIP will report quarterly to ISED on program participation in each stream
- Success stories may be shared as marketing materials, with the startup's consent

# **Frequently Asked Questions**

### Eligibility

#### What is your definition of underrepresented group?

For this program, according to ISED, underrepresented groups refer to those who identify as women, Indigenous, visible minorities, LGTBQS2I+ and/or persons with disabilities.

#### My startup is a non-profit, am I still eligible?

Non-profit organizations are eligible if they meet the general eligibility requirements.

#### Is this program only for BC, Yukon, Nunavut, NWT?

Yes. However, if you're in another part of Canada, you may apply with a different <u>Elevate IP</u> recipient. Please note that startups can work with one ElevateIP recipient.

#### Can I apply for both AccelerateIP and IP Assist at the same time?

So long as the services are not overlapping. You must disclose what other funding sources or applications you are completing relating to IP in your application form.

#### Do I need to work with a partner or collaborator organization?

No, anyone can apply. Priority will be given to those who apply with a partner or collaborator organization. You also have the option to be paired with New Ventures BC or another partner organization.

### Application

#### I already have an existing external IP mentor. Can I apply to Stream 2: Mentorship program with my mentor?

Yes, you can, so long as they are eligible and working at a partner or collaborator organization associated with the program.

#### Can I apply to any of the streams or do I have to do them in order?

You don't have to do them in order, but you must meet eligibility requirements for each stream to qualify.

#### Can I apply to multiple streams simultaneously?

You can, but you need a strong strategy to apply to Stream 3, so likely you want to complete Stream 2 first.

### Can I apply to Stream 2-2 and Stream 3 more than once, throughout the program's duration?

Yes, so long as you don't go over the total max amount of funding of \$25,000 for Stream 2-2 and \$60,000 for Stream 3.

#### Is grant stacking possible?

Yes, but the startup must show they paid their 25% co-investment.

### Can I apply to Stream 2 and 3 with an activity that is not listed within the Eligible Activities?

You can apply under "other", and it will be reviewed, but it might not be approved.

#### Can I file an international patent?

Yes, you can file an international patent.

#### Do you accept retroactive applications for Stream 2 and 3?

Yes, if the invoices have not yet been paid. We cannot reimburse startups for invoices; the program can only pay service providers directly.

### **Co-Investment**

#### How does the co-investment structure work?

The startup must pay either 25% or 10% to the service provider for services. AccelerateIP can cover up to \$25,000 or \$60,000 for Stream 2-2 and Stream 3, respectively. If the bill is higher than the max amount AccelerateIP can cover, the startup must pay the rest to the service provider.

#### Example 1:

IP Strategy 2-2 quote for \$20,000, tax: \$2,400 and total: \$22,400

Startup @ 25%: \$5600

AccelerateIP @ 75%: \$16,800

#### Example 2:

IP Implementation 3 quote for \$100,000, tax: \$12,000, total: \$112,000

AccelerateIP @75%: \$60,000 maximum

Startup @25%: \$28,000 and the difference: \$24,000, so a total of \$52,000

If you did not find the answer to a question you have, please email accelerateip@newventuresbc.com.