



## **Expression of Interest (Eoi)**

# **IP Strategy Development & Implementation for Startups**

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## Introduction:

North Forge Technology Exchange is pleased to invite law firms, IP agents, or professionals to submit proposals for providing IP strategy development and implementation services tailored to startups. As a leading incubator and accelerator supporting startup innovation, we assist budding entrepreneurs in securing and leveraging their intellectual property rights to foster growth and success.

## Background:

We are North Forge Technology Exchange – a non-profit incubator accelerator that works with startups across Canada in technology, STEM, and advanced manufacturing from the ideation stages all the way through to Series A. We fuel Manitoba's innovation economy, providing founders with experienced mentors, entrepreneurs-in-residence, award-winning growth coaches, and a unique, online four-stage Founders program. We have worked with over 300 companies since June 2020 that have created over 1,500 jobs.

Armed with North America's largest fabrication lab (FabLab™), we operate out of 33,500 square feet across Innovation Drive and Innovation Alley in Winnipeg, including a new 4,000 sq foot location in Thompson, Manitoba.

## Project Overview:

The Government of Canada has launched the [ElevateIP Program](#) to help Canadian startups access intellectual property services. The program starts in 2023 and lasts till March 2026. North Forge, in collaboration and partnership with Communitech, will focus on helping startups protect, strategically manage and leverage their IP assets in Manitoba and Saskatchewan.

The primary objective of this project is to develop tailored IP strategies for startups, considering their unique needs and challenges. The selected service providers will collaborate with North Forge and startup founders to create comprehensive IP strategies and implementation plans that protect their innovations, enhance market positioning, and facilitate future growth.

The program will be delivered through a 3-tiered approach:

- Tier 1 focuses on IP education and is delivered through online resources (availability to be determined).
- Tier 2 provides access to subject matter experts for IP assessments and to IP professionals for IP strategy development.
- Tier 3 focuses on the creation of IP assets that are delivered by an IP professional.

## Impact Of the Project

- Capacity building of Business Accelerators, Incubators and startups.
- Access to high quality services from qualified personnel.
- Startups use these resources to formally file their Intellectual Property.
- Startups use tools and resources for sustainable expansion and growth including creating employment opportunities.

## Scope of Work:

The service provider is expected to perform the following tasks:

- Conduct IP Audits & Assessments:** Assess the startups' existing intellectual property assets, including patents, trademarks, copyrights, and trade secrets.
- Customized IP Strategy Development:** Create personalized IP strategies aligned with each startup's business goals, market objectives, and target industries.
- IP Commercialization Support:** Offer guidance on IP monetization, licensing opportunities, and technology transfer.
- Risk Mitigation:** Identify and address potential IP infringement risks and recommend proactive measures to safeguard the startups' intellectual property.
- Customized IP Contracts and Agreements:** Create agreements and contracts such as (but not limited to) NDAs, Privacy Policies, Terms of Service etc.

## Preferred Expertise:

Proposals will be evaluated based on the following criteria. Preference will be given to firms that have offices in Manitoba and/or Saskatchewan:

- a. **Relevant Experience:** Demonstrated experience in providing IP strategy services to startups or early-stage companies.
- b. **Team Expertise:** Qualifications, certifications, and expertise of the team members involved in the project.
- c. **Understanding of Startup Ecosystem:** Knowledge and understanding of the challenges and needs specific to startups in the IP domain.
- d. **Methodology and Approach:** Clear and innovative methodology for developing tailored IP strategies for startups.
- e. **Cost-effectiveness:** Competitive pricing and transparent fee structure for the proposed services.
- f. **References and Success Stories:** Positive feedback from previous startup clients and examples of successful IP strategy development.
- g. **Additional Value-Added Services:** Any extra support or resources offered to startups beyond IP strategy development.
- h. **Office location in Saskatchewan and/or Manitoba:** Any office located in either of the two provinces. If not located here, where is the nearest office that an ElevateIP startup can approach the service provider.

## Submission of EoI:

Provide an estimated costs, timeline for completing the IP services for startups. Include key milestones and deliverables as shared in Annex - A.

## Questions and Feedback:

All questions and queries can be sent directly to Atif Mumtaz, Program Manager for ElevateIP at email [amumtaz@northforge.ca](mailto:amumtaz@northforge.ca).

## Proposal Submission:

Please submit your proposal to us at the email provided. Electronic submissions are preferred, and all documents should be sent to [IP@northforge.ca](mailto:IP@northforge.ca).

Thank you for considering participating in this exciting opportunity. We look forward to receiving your proposal and working together to empower startups with effective intellectual property strategies.

Sincerely,

A handwritten signature in blue ink, appearing to be 'Joelle Foster', written in a cursive style.

Joelle Foster  
CEO  
North Forge Technology Exchange

# **Annex - A**

**IP Strategy Development & Implementation for Startups**

**Professional Service Provider Quotation Form**

## IP Strategy Development Work

The form must be completed by a professional services provider in support of an application for funding under the ElevateIP program.

Stage of Support	Description of Category	Activities	Estimated Time to Completion	Quoted Price
<b>Assessment</b>	This will include providing basic technology, market and IP assessments to determine the value of the opportunity, the value of investing in the IP with a protective strategy.			
<b>Search</b>	Provide comprehensive IP searching services including Freedom-to-Operate (FTO), and interpretation from an IP/technology practitioner (or) Provide formal legal opinions (patentability/trademarking/trade secret).			
<b>Strategy</b>	Support the development of an IP road map, as part of developing an IP Strategy and management framework that suits the startup.			



## IP Strategy Implementation Work

Stage of Support	Description of Category	Activities	Quoted Price
<b>Consult</b>	A contracted consultant provides support for the internal implementation as noted above, and supports the protection execution with Startup leadership.		
<b>IP Filings</b>	Filing costs		
<b>Contracts</b>	Writing Contracts, agreements, policies (privacy, data etc), terms of service etc.		

Provider Firm Name: \_\_\_\_\_

Provider Signature: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Date: \_\_\_\_\_