University of Oklahoma OICP	Policy and Procedure No. 002-2022	October 27, 2022
Subject **iPath Program**	Version No.__1__ Version No._____ Version No._____ Version No._____ Version No._____	Author(s): John M. Hanak

Purpose:

This document establishes the policy and procedures for the operation of the iPath (Innovation Pathway) Program for the University of Oklahoma's three campuses. The iPath Program provides direct assistance to university researchers in the commercialization of their innovations – to articulate the full scope the value of the innovation will provide in a business market sense.

Primary Strategic Imperative/Objective Justification:

Strategic Imperative: 3. Venture
Strategic Objective: E. Innovation Pathway Program

Policy Statement:

Started in late 2021, the iPath program was designed and delivered as a standalone program encompassing an ideation phase followed by a capital strategy development phase. It concluded with pitches by cohort participants to investors. The popularity of the iPath Program to date has resulted in the establishment of this policy and procedure document and features improvements and revisions from its original format based upon critical feedback from participants, speakers, mentors, investors and other constituents.

The iPath Program will now encompass three distinct, but related phases:

1. Phase I – Ideation (cohort-based online platform with six weekly virtual meetings);
2. Phase II – Business Plan Development (Self-paced use of an online platform);
3. Phase III – Capital Strategy Workshop (Two-day in person sessions concluding with pitches to investors).

Each phase has a separate application process and applicants may apply to "test out" of certain phases if specific requirements, as explained on the application form, are met.

Procedure

1. Application Links
    a. Phase I - https://ousurvey.qualtrics.com/jfe/form/SV_b7z9X7gsK5ywqEe
    b. Phase II - https://ousurvey.qualtrics.com/jfe/form/SV_4JItUbT3mxtdumy
    c. Phase III - https://ousurvey.qualtrics.com/jfe/form/SV_0vmdxaq2cwKGeea

2. Roles and Responsibilities
    a. OICP Leadership and Staff
        i. Oversee the application process and scheduling of phases.
        ii. Provide the necessary login information for Phase I and Phase II participants to access WKI Online and LivePlan respectively.
        iii. Appoint and manage the selection committee for each phase of iPath.
        iv. Lead the overall marketing and awareness effort.
    b. OICP Staff
        i. Provide all administrative support required (separate functions for Norman and HSC). This includes clerical, scheduling and event support
        ii. Coordinate all associated invoicing and payables activity.
        iii. Support the marketing and awareness needs on each location (Norman, HSC, Tulsa) as needed.
    c. OTC
        i. Assist in the marketing of the overall iPath program.
        ii. Participate on the selection committee meetings as scheduled.
        iii. Conduct Phase I Ideation training as needed.
        iv. Provide coaching support as needed during all phases.
    d. VPR Offices – Norman and HSC
        i. Participate in iPath marketing activities as reasonably requested by OICP
        ii. Participate on selection committee activities as requested
        iii. Attend "graduation" activities as appropriate.
    e. Selection Committee
        i. Standing members include the CICO, Directors of Technology Management at OTC, Senior Legal Counsel for Research, and others as may from time to time be appointed.
        ii. Key functions include the review of applications and selection of participants in each phase; participation in the phases as requested, and attendance at a final 'Pitch' event.
3. Planning and Dates
    a. iPath Phase I will remain a demand-based activity. It is currently anticipated that Phase I training will be activated whenever a sufficient number (5 or 6) of accepted applicants to create a class cohort is reached in each location.
    b. iPath Phase II is an individualized activity and a selection committee meeting will be convened whenever applications are filed. Accepted applicants will be provided login credentials for LivePlan for one year with coaching assistance offered on an as-needed basis.
    c. iPath Phase III is an in-person workshop and will be conducted whenever accepted applicants reach a sufficient level (4 or 5 minimum) to create a meaningful cohort.

4. Application Process
    a. Qualifications to Apply:
        i. Reference the Qualtrics links above.

  ii. Applicants for each phase…

    a. Must be committed to completing the weekly assigned training modules;

    b. Must be committed to being present and participative for the weekly on-line Phase I Zoom calls;

    c. Must be committed to working on Phase II Business Plan (as evidenced by login record for LivePlan)

    d. Must be committed to attending the Capital Strategy Workshop in person as scheduled.

5. Screening and Selection Processes

  a. See Roles and Responsibilities above.

6. Announcements Protocol

  a. Phase I acceptance will be via email to all applicants. Consideration will be given by OICP to a broader announcement or press release.

  b. Phase II and Phase III acceptance announcement will be done via email to all applicants. Consideration will be given by OICP to a broader announcement or press release.

  c. Phase III will conclude with a pitch event to investors. OICP reserves the right to publicize that event – both before and after – as it deems appropriate.