

Suggested Timeline and Technical Assistance

Within 2 months of winning a Phase I award

A team meeting with company, Karen West (KW), Suzanne Hamlin (SH) and Jane John (JJ), MTI consultants to outline Phase II process and strategize Phase II objectives and goals.

Within 3 months of winning a Phase I award

Company applies for Pre-Phase II Grant funding

4 months after winning Phase I

Company applies for MTI Phase 0 award, if appropriate

KW supplies Phase II template

Company begins drafting Phase II – emphasis on workplan, commercialization plan and obtaining letters of support/funding for Phase II and Phase III

Company outlines any market or business information required from JJ

3 months prior to due date

Company begins drafting commercialization plan

Company continues outlining Phase II work effort

2 months prior to due date

Company submits initial rough draft to KW for review and comments

Commercialization worked concurrently with SH

Company starts working with Stan Gavitt (SG) to update company indirect rate

Company updates all registration information (grants.gov and CCR)

1 month prior to due date

Company submits 2nd draft for review by KW

Company submits rough budget numbers to SG

2 weeks prior to due date

Company submits 3rd draft for review by KW

Company continues to work with SG on budget

1 week prior to due date

Company submits final draft for review by KW

2 – 5 days prior to due date

Company submits Phase II proposal electronically

The **MTI Technical Assistance Program** involves four qualified consultants hired by MTI to assist companies in the SBIR/STTR proposal writing process. Please see reverse for qualifications.

All Phase II Agencies (except DOD – 10 hours consultation prior to invitation & 10 after):

Karen West – 20 hours advice and strategic planning, proposal review and editing, advise on electronic submittal of proposals.

Stan Gavitt – up to 10 hours assistance on compiling a company indirect (overhead) rate, Phase I budget preparation assistance.

Jane John – up to 20 hours of market research to support commercialization planning.

Suzanne Hamlin – up to 20 hours of commercialization planning assistance, plan review and commenting.

MTI Consultant Qualifications

Karen West of *C & P Management Services, LLC* is a consultant specializing in assisting small businesses in writing competitive SBIR/STTR proposals. She is a recognized expert in Maine with her extensive SBIR/STTR experience. Karen is familiar with federal regulations, proposal development and subcontract management experience in government and civilian contracting, subcontracting positions. She has extensive technical writing expertise including co-author on a publication, titled [A Guide to Successful SBIR/STTR Proposal Writing](#), and authored a guide on the NIH's granting process and is an invited panel member for the NSF and the USDA's Phase II SBIR review process. Karen leads MTI's Technical Assistance Program (TAP).

An ex-Air Force certified technical training instructor, she has developed SBIR/STTR proposal writing courses and routinely gives SBIR/STTR workshop presentations.

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Jane John, owner of *On Point Research* (Brunswick, Maine, USA), provides information and analysis that helps companies reduce risk in their many business decisions. The firm has prepared Market Views for over 100 small- to medium-sized companies in New England, helping them assess niche industries. *On Point Research* also works on contract to national firms, doing research that supports new product assessment. Information sources include major commercial databases as well as telephone research. Jane has a Master's Degree in Library and Information Science from Denver University in Colorado. She worked fifteen years in corporate libraries for before starting *On Point Research* in 2001.

Jane is a past president of the Association of Independent Information Professionals. She is also a member of the Association for Consulting Expertise (Maine). *Contact Info: telephone: 207-373-1755, email: jjohn@onpointresearch.com*.

Stanton W. Gavitt, Jr., CPA had six years of Public Accounting experience with a large firm and twenty two years in industry working for a large government contractor prior to going into business for himself in 2001. During his time in industry he spent a significant portion of his time working with the accounting systems and reporting requirements dictated by the US government and was intimately involved with audits conducted by the EPA and Defense Contract Audit Agency (DCAA). Since going into the consulting business, not only does Stan perform CPA work and tax services but he also works with several Maine companies which are performing on contracts with the Federal government. In addition, he has worked closely with the many companies supported by MTI in their pursuit of funding through the SBIR and STTR programs.

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Suzanne Hamlin, principal of *Transformative Knowledge Group*, is a business strategy and marketing consultant with a special interest in business transition and transformation. She has been a member of MTI's SBIR/STTR TAP team since 2004 and has served as an SBIR grant application reviewer for both NSF and USDA. She has extensive experience leading teams and companies through organizational change, planning for new product commercialization, and applying new and emerging technologies for revenue growth and streamlining of work processes.

Suzanne's operating experience in both large and small organizations in a variety of functional roles including marketing, product management, business process redesign, and integrating Internet and E-Commerce technologies. Her direct industry experience includes retail, direct marketing, medical products, manufacturing, banking, and insurance, as well as a broad range of non-profits, and she has consulted heavily in all seven of Maine's target technology sectors. She has served on boards of a number of high tech and community service organizations.

Suzanne holds a BSE in Computer Science from Princeton University, with honors, and an MBA from Harvard Business School.

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