

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 Business Acceleration Grant funding

4 months after winning Phase I

KW supplies Phase II template

Company begins drafting Phase II – emphasis on work plan, 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 (SAM and grants.gov)

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 contracting officer and certified technical training instructor, she has developed SBIR/STTR proposal writing courses and routinely gives SBIR/STTR workshop presentations.

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Founded in 2001 by **Jane John**, *On Point Research* helps companies find the business and technical information they need to define market opportunities, discover customers, and commercialize their technology products and services. Ms. John has assisted over one hundred small Maine companies in assessing potential markets. The company's clients also include national firms that want to explore new markets or product ideas. Ms. John has a Masters in Library and Information Science from Denver University and twenty-five years of experience in the information field. She is a past president of the Association of Independent Information Professionals. She is also a member of the Special Libraries Association (Engineering Division), and the Association of Consulting Expertise (A.C.E.) in Maine.

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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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