

AUTM Software CourseSM



Association of University Technology Managers®
Advancing Discoveries for a Better World®

June 2 – 3, 2016
Hyatt Regency Minneapolis
Minneapolis, MN USA

www.autm.net



AUTM 2016 Software Course Program Committee

Program Co-chairs:

Daniel Dardani, CLP,

Massachusetts Institute of Technology

Andrew Morrow,

University of Minnesota

Program Committee:

Drew Bennett,

University of Michigan

Tara Branstad,

Carnegie Mellon University

Laura Dorsey,

University of Washington CoMotion

Gail Dykstra,

University of Washington CoMotion

Chris Ghere,

University of Minnesota

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University of Minnesota

Lewis Humphreys,

University of Arizona

Imelda Oropeza,

Stanford University

Ning-Shiuan Snoeberger, PhD,

Massachusetts Institute of Technology

Charles Williams, JD, PhD,

University of Oregon

Robert Wooldridge, MBA, CLP,

Carnegie Mellon University

About AUTM

The Association of University Technology Managers (AUTM) is a nonprofit organization dedicated to bringing research to life by supporting and enhancing the global academic technology transfer profession through education, professional development, partnering and advocacy. AUTM's more than 3,300 members represent managers of intellectual property from more than 350 universities, research institutions and teaching hospitals around the world, as well as numerous businesses and government organizations.

AUTM Software Course is Paperless

The AUTM 2016 Software Course is paperless. Handouts will not be distributed at any educational session. All registrants can access handouts before, during and after the meeting. Visit www.autm.net, where all handouts submitted by speakers will be posted prior to the meeting.

MobCon Mobile App

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- View the conference agenda and edit your personal schedule
- View detailed information about sessions, including speaker bios and photos
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- Navigate the event using the conference map

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Technology Commercialization

UNIVERSITY OF MINNESOTA

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Meeting Agenda

Thursday, June 2

7 – 8 a.m. Location:	Continental Breakfast Greenway A-C
7 a.m. – 5 p.m. Location:	Registration Greenway Promenade
8 – 8:30 a.m. Location: Speakers:	Welcome and Introduction Regency Room Daniel Dardani, <i>Massachusetts Institute of Technology</i> Andrew Morrow, <i>University of Minnesota</i>

The 2016 AUTM Software Course chairs Daniel Dardani and Andrew Morrow welcome participants and kick things off with a brief overview of the two-day course and the AUTM organization.

8:30 – 10 a.m. Location: Moderator: Speakers:	Software Basics Regency Room Andrew Morrow, <i>University of Minnesota</i> Gregory Brown, <i>University of Minnesota General Counsel</i> Charles Macedo, <i>Amster, Rothstein & Ebenstein</i>
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Software is a product that is the subject of intellectual property protection. It is automatically protected as an unregistered, copyrighted work, and it may be patented. It is the only product that sits at the intersections of patent and copyright law and of contract and intellectual property law. In this session, we will discuss the identification, ownership, and protection issues at this complex legal crossroad. Following up on the pre-course webinar and providing an introduction to later sessions, we will review the difference between software as a good and end user licensing as well as the intellectual property rights in software, the factors that drive the selection of intellectual property protection, and the legal and business implications, opportunities and risks of treating software as a intangible asset. This session will provide a valuable overview of many concepts that will be discussed in more detail in this conference.

10 – 10:30 a.m. Location:	Networking Break Greenway Promenade
10:30 – Noon Location: Speakers:	Software Due Diligence and Evaluation Regency Room Drew Bennett, <i>University of Michigan</i> Svetlana Sowers, <i>University of Illinois, Urbana-Champaign</i>

The dynamic nature of software development poses unique challenges in determining value and technical strength. This session focuses on techniques to assess inventions disclosed from a technical maturity, management and value point of view as well as identifying the unique value proposition. Several diligence approaches will be discussed including basic inventory and audit processes as well as working with inventors and developers to determine the history of a given project. Additionally, methods will be reviewed to determine if your project is a feature, product or potential company. Mechanisms will be presented to determine basic value and starting price points.

Noon – 1 p.m. Location:	Lunch Greenway A-C
1 – 2 p.m. Location: Speaker:	Anatomy of a Software License Regency Room Wendy Zimbone, <i>Talem IP Law LLP</i>

Attend this session and become better equipped to draft and negotiate software licenses. “Anatomy” will examine the essentials of digital-based technology licensing. Attendees will take a deep dive into a software license template and explore best practices, useful and common terms, and other vital elements of a software license. Attendees will also learn how to handle a patent and software hybrid license directed to multiple intellectual properties.

2 – 3:15 p.m. Location: Moderator: Speakers:	Open Source: Inbound, Outbound and Sponsorship Obligations Regency Room Laura Dorsey, <i>University of Washington CoMotion</i> Chris Ghery, <i>University of Minnesota</i> Alexandra Hall, <i>University of Denver</i> Ning-Shiuan Snoeberger, <i>Massachusetts Institute of Technology</i> Svetlana Sowers, <i>University of Illinois, Urbana-Champaign</i>
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Open source distribution lowers barriers to access and changes the rules for licensing university technology. Open source and software development are often mentioned together and open source software is a key driver of software innovation worldwide. However, handling open source software properly is a challenge many technology transfer offices are facing today. This session will cover the basics of open source and the different types of open source licenses. We will discuss several software licenses types, compatibility considerations when university source code is linked to third-party open source software, and sponsorship obligations. The panel discussion will dive deeper into how different technology transfer offices handle their open source software — from what questions to ask on the disclosure form to how to manage and commercialize the software after it has been open sourced. You will leave this session with a good understanding of the appropriate open source license for your software and commercialization options.

3:15 – 3:30 p.m. Location:	Networking Break Greenway Promenade
3:30 – 4:30 p.m. Location: Speakers:	Federal Sponsorship and Open Source Regency Room Michael Waring, <i>University of Michigan</i> Charles Williams, <i>University of Oregon</i>

The federal government is committed to open access and open source as consistent with a long-standing policy of ensuring that “Federal investments in information technology are merit-based, improve the performance of our Government, and create value for the American people” as stated in the Federal Source Code Policy. Recent rules from the Department of Education envision a requirement for federally funded projects to disseminate the output via Creative Commons. How will this affect software and digital media projects at universities? Learn about the outcome of recent federal initiatives at this session from those who have participated in responses from the University of Oregon and from the perspective of national organizations including AUTM, COGR and AAU.

Meeting Agenda

Thursday, June 2

4:30 – 5:30 p.m. **Strategies and Innovations in Software Commercialization**

Location: **Regency Room**

Speakers: **Software Course Committee**

In this novel session, the Software Course Committee will share innovations from their schools. We will also ask registrants who would like to share their own innovations to submit them in advance and be prepared to share them during the session. Schools with representation on this year's Software Course Committee include: Arizona, Carnegie Mellon, Illinois, Michigan, Minnesota, MIT, Stanford and Washington.

5:30 – 7:30 p.m. **"Yes, And!" Applying the Fundamentals of Improvisational Theater to Business Communications**

Sponsored by  **VALAUSKAS CORDER LLC**

Location: **Regency Room**

Facilitator: **Linda S. Kawano, GroupOptima**

This session will introduce the audience to the fundamental concepts of any improv ensemble, beginning with a 15-20 minute presentation, which will frame the topic as it relates to business communications, followed by a highly interactive session of a classic beginner's improv game involving all participants.

6 – 7:30 p.m. **Networking Reception**

Location: **Greenway A-C**

Friday, June 3

7 – 8 a.m. **Continental Breakfast**

Location: **Greenway A-C**

7 a.m. – 3 p.m. **Registration**

Location: **Greenway Promenade**

8 – 9:15 a.m. **Startups and Investors**

Location: **Regency Room**

Speaker: **Chris Ghere, University of Minnesota**

Often high-value software technologies are commercialized via startup companies. This session will give an overview of software startup ecosystems, the intellectual property a startup needs to raise money and potential terms that may come up in a licensing negotiation. Following the presentation portion of this session there will be a faculty, CEO and investor panel discussion.

9:15 – 9:30 a.m. **Networking Break**

Location: **Greenway Promenade**

9:30 – 11 a.m.

Location:

Moderator:

Speakers:

Managing Mobile Technologies

Regency Room

Lewis Humphreys, University of Arizona

Drew Bennett, University of Michigan

Svetlana Sowers,

University of Illinois, Urbana-Champaign

More and more schools are developing approaches for managing mobile apps as these technologies proliferate. This session, relevant to all levels of expertise, will feature a discussion of some of the leading practices from across the country and help attendees understand key issues to be considered. The 90 minutes will be divided into three sections: How to Manage App Development; Licensing Practices; and Looking Forward: What to Expect in the Coming Years.

11 – Noon

Branding: University Trademarks/Logos and Apps Built for Healthcare

Regency Room

Gail Dykstra,

University of Washington CoMotion

Speakers:

Drew Bennett, University of Michigan

Barbara Keller, Mayo Clinic Ventures

Charles C. Valauskas, Valuskas Corder, LLC

What do you need to know before adding your trademark to healthcare apps? This panel will include an overview of the framework related to use of trademarks and logos, as well as insights from technology managers of institutions with branded healthcare applications.

Noon – 1 p.m.

Lunch

Location:

Greenway A-C

1 – 2:30 p.m.

Advanced Licensing and Negotiation

Location:

Regency Room

Speakers:

Tara Branstand, Carnegie Mellon University

Imelda Oropeza, Stanford University

In the first half of this session we will examine valuation and economic models for licensing software from universities. In the second half of the session we will address specific issues that arise in software license negotiations in a panel format. Topics will be drawn from suggestions by committee members and attendees.

2:30 – 3 p.m.

Networking Break

Location:

Greenway Promenade

3 – 4:30 p.m.

Advanced Software Patents/Portfolios & Litigation

Location:

Regency Room

Moderator:

Dale Nugent,

University of Minnesota Venture Center

Speakers:

Michael Garwood,

University of Minnesota

Kevin Nickels, University of Minnesota TTO

Eric Olson, University of Minnesota TTO

Kent Sieffert, Shimaker and Sieffert P.A.

This moderated panel will explore the lifecycle of a software portfolio. You'll hear from our faculty inventor, two technology transfer office representatives, and outside patent counsel. The panel will explore the nuances of portfolio building inside a technology transfer office; software patent licensing to a startup; the transfer of the startup license to a strategic acquirer; and follow-on licensing efforts after the failure of the startup. Sit back and enjoy the roller-coaster ride on this decade-long journey through apparent successes and tough conversion decisions!

4:30 p.m.

Course Adjourns