

Oklahoma Innovations - OCAST's Official Newsletter

October 2014

MORE THAN 60 ATTEND SBIR ROADSHOW



Roadshow "Warriors" at recent Air Force SBIR/STTR training series are, from left, Laura Sohl-Smith and Casey Harness, both of OCAST; David Sikora, Air Force SBIR/STTR program manager and Rex Marshall, also of the Air Force SBIR/STTR program.

David Sikora, Air Force SBIR/STTR program manager, guided more than 60 Oklahoma small business representatives and university researchers through a three-day "Roadshow" designed to improve the state's chances of submitting successful program applications.

Small Business Innovation Research and Small Business Technology Transfer opportunities are available to researchers from 11 of the largest federal agencies. The October Roadshow featured the Air Force. Congress funds the SBIR/STTR program and requires participating federal agencies to designate a portion of their budgets for research opportunities.

Roadshow stops included the Meridian Technology Center in Stillwater on Oct. 21, the OU Radar Innovations Laboratory in Norman Oct. 22 and the OSU Helmerich Research Center in Tulsa on Oct. 23.

Laura Sohl-Smith and Casey Harness of OCAST organized and conducted the roadshow events. Sohl-Smith said OCAST's goal is to increase the number and quality of SBIR/STTR applications from Oklahoma. The long-term Congressional program has enjoyed a history of success in helping small businesses navigate the federal applications process.

For more information, contact Harness at casey.harness@ocast.ok.gov or Sohl-Smith at laura.sohl-smith@ocast.ok.gov.

EIGHT NORTHEAST COUNTIES SPONSOR REGIONAL INNOVATION FORUM IN BARTLESVILLE

A regional innovation forum was held September 30 at the Tri County Technology Center in Bartlesville for the counties in the northeast corner of the state. The forum was held to determine how energy, manufacturing and an educated workforce come together to ensure a bright economic future.

Counties represented at the forum were Osage, Washington, Rogers, Nowata, Craig, Ottawa, Mayes and Delaware.

Governor Fallin addressed the group applauding the efforts of bringing together business and community leaders and education leaders to discuss the importance of bolstering STEM communities in the state.

Leaders from manufacturing and energy companies such as Phillips 66, Public Service of Oklahoma, Grand River Dam Authority, Oklahoma Natural Gas, Cleanline, Pelco, Oklahoma Manufacturing Alliance and the New Product Development Center served as panelists in discussions on the challenges and strengths of how to grow their counties.

Dr. Stephen McKeever, secretary of science and technology, presented *OneOklahoma: A Strategic Plan for Science and Technology in Oklahoma*. The plan inventories Oklahoma's areas of excellence and identifies areas that need improvement. Others featured on the program include Lindel Fields, Tri County Technology Center superintendent; Dr. Larry Rice, Rogers State University president; and Dr. Marcie Mack, Oklahoma Department of Career Technology Education interim director.

Scott Meacham, i2E, and Michael Carolina, OCAST, discussed available state resources for emerging companies in the energy and manufacturing areas.

The event was presented by Tulsa Regional Chamber, Bartlesville Chamber of Commerce, Bartlesville Economic Development Authority, Miami Area Economic Development Service, Claremore Economic Development Authority, Claremore Industrial and Economic Development Authority, The State Chamber of Oklahoma, Oklahoma Department of Commerce, Pelco Structural, Clean Line Energy Partners, ABB Totalflow, Oklahoma Manufacturing Alliance, Siemens, Grand River Dam Authority, i2E, Public Service Company of Oklahoma and Tri County Technology Center.



Governor Mary Fallin with Cornell Cross at the Northeast Oklahoma Innovation Forum in Bartlesville. Cornell is the associate director of programs for OCAST and offices in Tulsa.

GOV. FALLIN AND LT. GOV. LAMB ATTEND MANUFACTURING CONFERENCE



Lieutenant Governor Todd Lamb, center, and Governor Mary Fallin (not shown) were guest speakers at the 2014 Oklahoma Conference on Manufacturing in Tulsa. Michael Carolina, left, executive director of OCAST, and Chuck Prucha, outgoing president of the Oklahoma Manufacturing Alliance, are shown with the lieutenant governor.

Oklahoma's two top political leaders addressed the 2014 Oklahoma Conference on Manufacturing October 1 at the Renaissance Hotel and Conference Center in Tulsa. An estimated 400 attended the two-day session that began September 30.

A special manufacturers' workshop was a key feature of the conference. The workshop was a three-hour intensive training session to help manufacturers identify processing waste, read operator balance charts, line balancing and other aspects of modern manufacturing.

In addition to Gov. Fallin and Lt. Gov. Todd Lamb, speakers included outgoing OMA President Chuck Prucha, Mike Seney of The State Chamber and Phillip Singerman of NIST. Lt. Gov. Lamb assisted in recognizing the Governor's Manufacturing Leadership Award winners.

Breakout sessions featured discussions on workforce development, modern manufacturing and modern marketing, industrial solutions and disaster planning for manufacturers.

CHUCK PRUCHA STEPS DOWN FROM LEADERSHIP ROLE AT OMA

Chuck Prucha retires November 1 as president and CEO of the Oklahoma Manufacturing Alliance. He served in that capacity for nearly four years. John Lingenfelter, long time vice-president of the organization, will serve as interim president until the organization's board of directors completes a search for Prucha's replacement.

Prucha brought a wealth of manufacturing knowledge to the position. He was a manufacturing extension agent in southeastern Oklahoma from 2004 until he took the organization's reins in 2011. He previously was president and CEO, North American Operations for DISA, where he led a \$100 million division of the multinational corporation.

The outgoing president worked closely with manufacturing extension agents to assist Oklahoma manufacturing firms in adopting lean manufacturing practices, finding new products to manufacture in a globally competitive environment and solidifying the Oklahoma Manufacturing Alliance's position among the top five such programs in the nation.

Prucha was a strong advocate of the OMA's statewide network which partnered with CareerTech centers, higher education institutions, economic development groups and other state organizations. The Oklahoma Manufacturing Alliance also works closely with the Oklahoma Center for the Advancement of Science and Technology, the Oklahoma Department of Commerce and the National Institute of Standards and Technology.

I2E LEADS \$1.75 MILLION INVESTMENT IN WEGOLOOK

Posted on October 21, 2014

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Company

i2E Inc. recently closed on a \$1.75 million Series A equity investment in Oklahoma City-based WeGoLook LLC.

The investment was led by i2E with \$325,000 being invested from both the Oklahoma Seed Capital Fund and the OKAngel Sidecar Fund, each of which are investment funds managed by i2E. The Seedstep Angels, a group of individual angel investors also managed by i2E, invested an additional \$400,000.

In addition, company founders invested \$600,000 with another \$100,000 being invested by other Oklahoma investors.

Founded in 2010, WeGoLook provides verification for buyers of online products such as automobiles and heavy equipment, accident site inspection and document delivery services through a nationwide network of more than 15,000 field agents known as "Lookers."

"The majority of this investment is going to be used for technology development, which includes our mobile application, as well," said Mat Smith, who co-founded WeGoLook with his wife, Robin Smith, Karl Baldischwiler and Mark Caywood. "When we started this company we were primarily a Web-based service, and now we're a mobile technology company."

Through its new mobile application, WeGoLook's field agents are able to use a tablet or smart phone to take photos of property or an asset as they are inspecting it and upload the images immediately, along with reports for clients instead of waiting to return to an office.

The SeedStep Angels were founded by i2E in 2009 and is now the state's largest angel investment groups with more than 40 members and chapters in Oklahoma City, Tulsa, Ardmore and Muskogee.

The Oklahoma Seed Capital Fund is a state-appropriated investment fund through the Oklahoma Center for the Advancement of Science and Technology.

BERKUS INVESTS \$100,000 IN WEGOLOOK

i2E hosted national author and angel investor Dave Berkus October 17 at the Entrepreneurial Summit and "Who Wants to Be an Entrepreneur" workshop. The summit included a panel discussion that featured WeGoLook co-founder Mat Smith as one of the panelists.

Berkus was introduced to Smith and discovered that WeGoLook is growing rapidly nationwide by providing verification for buyers of online products such as automobiles and heavy equipment. Berkus has since invested \$100,000 in WeGoLook.

The OKAngel Sidecar Fund is one of three Accelerate Oklahoma! investment vehicles created in 2011 by i2E through a partnership with the Oklahoma Department of Commerce and the U.S. Treasury State Small Business Credit Initiative. The OKAngel Sidecar Fund specifically targets opportunities to invest alongside Oklahoma angel investors.

[Click here to read the article at newsok.com](#)

SBIR/STTR PRO TIP OF THE MONTH

Through the [OSCR](#) program, OCAST provides access to a suite of resources to help small businesses identify and successfully compete for federal Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) funding. This SBIR/STTR Pro Tip of the Month comes from nationally recognized SBIR/STTR expert BBC Entrepreneurial Training & Consulting.

Policies & Procedures are a Must, So Buckle Down and Get it Done

by Kris Bergman, BBCetc's Grants & Contracts Management Guru

Most Policies & Procedures (P&P) manuals sit in a corner collecting dust and are pulled out only as a reference of last resort. But take note, SBIR/STTR applicants and awardees, agencies expect you to have P&Ps in place to serve as your bible for managing your funds and activities. And practically speaking, if you ever need to defend an action, behavior or practice, "If it isn't written, it didn't happen!"

So how do you get started drafting your P&P? Like most things, it's best to start with the basics. Get your goal/mission down in writing and list the roles and responsibilities of each employee of your company. Then outline the possible sections of your P&P manual; things like:

- Accounting – Describe the various aspects of your accounting system and how each will be handled. This includes things like cost types and monitoring, financial capabilities and reporting, procurement, payroll, accounts receivable and payable, etc.
- Labor – How are timesheets prepared and reviewed? Who explains time keeping to new employees? Who prepares payroll?
- Employee Leave – What is your policy on paid time off, holidays, vacation and sick leave? Is vacation accrued, use it or lose it, paid upon termination?
- Travel – How is company travel managed? What is the mileage rate for use of personal vehicles? Do you have company credit cards? What is your policy on flight allowances and rental car use?
- Misconduct – Describe your company's policy on confidentiality and how to go about reporting breaches, steps for handling and resolving allegations, as well as reporting to the Office of Research Integrity.

You will also need policies on contract management, emergencies, security, research protection (use of animals and humans), etc.

Clearly written and reasonable policies and procedures help management:

- Define required steps to achieve a goal
- Measure employee/company performance
- Train new employees
- Avoid misunderstandings and confrontation
- Provide confidence to staff and agencies that you know what you are doing
- Provide consistency and accountability
- Lay a foundation for improvement

Just going through the process of thinking through the issues involved in each section of your P&P is immensely informative, so write, edit and re-write until you have a comprehensive document with the flexibility to change based on lessons learned. Then distribute it to your employees, implement and practice it!

www.bbcetc.com/policies-procedures-are-a-must-so-buckle-down-and-get-it-done

NEW REQUEST FOR PAYMENT FORM AVAILABLE

For OCAST projects that are currently managed on paper, a new PDF form for the request for payment (RFP) has been uploaded onto the OCAST website www.ok.gov/ocast/documents/Post_Award_REQ-payment.pdf. For more information, contact chelsea.smith@ocast.ok.gov.

OCAST PROGRAMS CALENDAR

FY15.1 Intern awards announced: November 18, 2014

FY15 OARS solicitation opens: January 21, 2015

FY15 Health solicitation opens: February 2, 2015

OARS application deadline: March 4, 2015

FY15.2 Intern application deadline: March 4, 2015

SBIR/STTR CALENDAR

[National Institutes of Health/Centers for Disease Control](http://www.nih.gov): November 5, 2014

[National Science Foundation](http://www.nsf.gov): December 2, 2014

[National Institutes of Health](http://www.nih.gov): December 5, 2014

[Department of Defense](http://www.dod.mil): Pre-Release - December 12, 2014; Open - January 12, 2015; Close - February 18, 2015

[Department of Energy \(Phase I / Phase II\)](http://www.doe.gov): February 3, 2015

Health application deadline: March 25, 2015

Health, OARS, FY15.2 Intern awards
announced: June 16, 2015

OKLAHOMA INNOVATIONS RADIO PROGRAM

Students enrolled in the University of Oklahoma honors class, Careers in Entrepreneurship, have the opportunity this semester to participate in a new internship program managed by i2E. The students are working at client companies for four hours per week which allows them to get a taste of working for a small business while staying respectful of their other commitments as full-time students.

[Listen to the show.](#)

Planned as a business and educator forum to advance science, technology, engineering and mathematics (STEM) in Oklahoma, the recent Governor's STEM Summit highlighted the importance of implementing STEM initiatives across the state.

[Listen to the show.](#)

The 2014 Oklahoma Conference on Manufacturing delivered a great informational and educational program. As the state's most important gathering of manufacturing professionals, it provided attendees a chance to learn from one another and set the agenda for economic growth and development. The schedule included nationally-recognized speakers and an abundance of informative workshops.

[Listen to the show.](#)

Manufacturing requires both energy and an educated workforce. The 2014 Regional Innovation Forum in Bartlesville was designed to help determine how energy, manufacturing and an educated workforce join forces for a bright economic future in the northeast region of Oklahoma.

[Listen to the show.](#)