



**22nd DoD Technology Transfer  
Training Workshop**  
**June 25-28, 2018    Striving for Excellence in T2**

**AGENDA SESSION DESCRIPTIONS**

**MONDAY, 25 JUNE 2018**

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**1530-1730 First-Timers' Orientation**

*Brett Cusker (Moderator), Associate Director, TechLink*  
*David Appler, T2 Support,*  
Office of the Under Secretary of Defense for Research and Engineering  
*Sylvia Jacobs, Manager, Technology Assessment and Applications,*  
ATSI Corporation  
*Dr. Austin Leach, Senior Technology Manager, TechLink*  
*Darin Oelkers, Senior Technology Manager, TechLink*  
*Dan Swanson, Senior T2 Manager, TechLink*  
*Dr. Will Swearingen, Executive Director, TechLink*

This orientation will provide an informative overview of T2, the workshop agenda, and provide an opportunity to network with fellow first-timers and key T2 personnel. This session will include:

- The goals of the workshop and what you can expect
- How T2 supports DoD priorities
- T2 history and legislation
- T2 mechanisms
- DoD PIA overview





**AGENDA SESSION DESCRIPTIONS**

**TUESDAY, 26 JUNE 2018**

**0815-0900**    **Keynote Speaker**  
*Peter Newell, Managing Partner, BMNT Partners*

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**0900-1000**    **Office of the Secretary of Defense Updates**  
*Darin Oelkers (Moderator), Senior Technology Manager, TechLink*  
*Dr. Jagadeesh Pamulapati, Director, Laboratories & STEM Development Office,*  
*Office of the Under Secretary of Defense for Research and Engineering*

Dr. Jagadeesh Pamulapati, Director of the Defense Laboratory Office, will join moderator, Darin Oelkers, for a conversation on national security, innovation, and T2. Discussion topics will range from OSD policy, legislation, and the role of T2 in the current Administration. A question and answer period will follow.

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**1030-1115**    **T2 Challenges and Solutions**  
*Quanita Bost (Moderator), T2 Program Manager,*  
*Defense Information Systems Agency*  
*Robert Charles, Chief, Medical Research Law,*  
*U.S. Army Medical Research and Materiel Command (MRMC)*  
*Gabriel Mounce, Innovation Lead, Air Force Research Laboratory/*  
*New Mexico Tech*

This session will discuss the challenges that create barriers to successful T2 and how the T2 program or legal office was able to overcome those barriers using innovative T2 mechanisms, tools, or processes or by leveraging T2 authorities. Speakers will discuss a specific challenge, what issue or barriers they faced, what solution(s) was put in place, and the outcome of the solution (examples of T2 success or positive impact to the labs mission).

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**1115-1145**    **Perils of Patent Licensing Agreements Addressing Public Health—  
The Zika Virus Crisis**  
*Elizabeth Arwine, Chief, IP Counsel & Patent Attorney, U.S. Army MRMC*  
*Robert Charles, Chief, Medical Research Law, U.S. Army MRMC*  
*Donald Townsend, Jr., Patent Attorney, U.S. Army MRMC*

This session addresses the history, process, law and political pressures surrounding the U.S. Army Medical Research & Materiel Command attempt to license a promising Zika virus vaccine to a major foreign pharmaceutical/vaccine company. The technology has been put back on the shelf and the prospective licensee has walked away. Find out why!

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AGENDA SESSION DESCRIPTIONS

**TUESDAY, 26 JUNE 2018 (continued)**

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**1300-1400 Partnership Intermediary Use**

*Cynthia Gonsalves (Moderator), Gonsalves Strategies & Solutions, LLC*  
*Laurie Moncrieff, Executive Director, DEFENSEWERX*  
*Dr. Peter Perna, Executive Director, FirePoint*  
*Al Deibert, Director, MilTech Program*

Partnership Intermediaries (and Partnership Intermediary Agreements (PIAs)) have been used in the Defense Department since 1999. Since that time, work accomplished by PIAs in support of the various components has increased in stature and scale. This panel will explore how broadly PIAs can be used within the various components and whether this is a good use for this type of technology transfer support.

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**1400-1430 Cyber Issues in T2**

*George Winborne, Patent Attorney, U.S. Army Materiel Command, HQ*

Cooperative interactions in early stage R&D, including T2, present opportunities for threat actors to obtain advanced U.S. technology and intelligence, and inject nefarious technologies into the DoD supply chain via cyber methodologies. T2 professionals accustomed to cooperative and sharing relationships with partners may not be as aware of cyber and supply chain concerns as cyber professionals coming from operational contexts. This presentation will use unclassified information to attempt to bridge some of that gap.



**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018**

***ORTA Track 1***

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**0800-0900    T2 Best Practices**

*Quanita Bost (Moderator), T2 Program Manager,  
Defense Information Systems Agency  
Kristen Schario, T2 Manager, Air Force Research Laboratory/  
Aerospace Systems Directorate  
Mark Surina, Lead Engineer, The MITRE Corporation  
AnnMarie Martin, T2 Team Lead, U.S. Army Research Laboratory*

This session will cover three best practices. Kristen Schario, T2 Program Manager at AFRL/Aerospace Systems Directorate will present a framework for improving and managing a T2 program from cradle to grave. Mark Surina, U.S. Transportation Command, will present best practices from a technology spin-in perspective, and AnnMarie Martin will discuss how to reduce the time for executing agreements.

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**0900-1000    How to Set Up a Virtual Industry Day**

*Todd Daniels, Senior Solutions Engineer, MilTech Program*

Come prepared to learn and discuss potential applications of the online technology transition tool, Virtual Industry Day (VID) ([www.virtualindustryday.org](http://www.virtualindustryday.org)). VID makes finding and vetting technology easier. Technologies are proactively scouted using proven processes in real time through networks such as the NIST Manufacturing Extension Partnership, SBIR, federal labs, industry consortia, academia, etc.

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**1030-1115    How the FLC Can Help ORTAs**

*John Dement, T2 Advocate, Naval Surface Warfare Center, Crane Division*

The FLC has services and products to help ORTAs, their partners, and even their labs. Come see the readily available tools and information that are accessible right now to promote, educate, and facilitate your T2 office. See where your IP, lab information, success stories, awards, and relevant T2 news already exist and are available to you and prospective partners.



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**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018 (continued)**

***ORTA Track 1 (continued)***

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**1115-1200 Express Licensing: Expand Your Technology Marketing Efforts**

*Darin Oelkers, Senior Technology Manager, TechLink*

*Michelle Miedzinski, Program Analyst,*

*Naval Air Warfare Center Aircraft Division, Patuxent River*

*AnnMarie Martin, T2 Team Lead, U.S. Army Research Laboratory*

*Dan Swanson, Senior T2 Manager, TechLink*

This session will examine the potential benefits that Express Licensing can bring to your lab, including enhanced market visibility for your technologies, a more streamlined licensing process, and new opportunities for your older patents. You will learn everything you need to determine if Express Licensing is a fit for your lab through an overview of the system's capabilities and the experiences of a panel of your peers and colleagues who have worked with the Express Licensing platform.





**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018**

**ORTA Track 2**

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**0800-0900    Successful Marketing and Business Development**  
*Brett Cusker (Moderator), Associate Director, TechLink*  
*Linda Burger, ORTA Director, National Security Agency*  
*Alexis Henderson, Marketing/Business Development Director,*  
*National Security Agency*  
*Dr. Austin Leach, Senior Technology Manager, TechLink*  
*Laci McDowell, Digital Marketing Manager, TechLink*  
*Troy Carter, Senior Writer, TechLink*

In this session, the National Security Agency (NSA) and TechLink will partner to present successful internal T2 engagement strategies and discuss how these efforts provide a springboard for external marketing and T2 success. In 2017, the NSA T2 Program (TTP) launched a low cost, internal marketing effort to thank the brilliant innovators who contribute to T2 activities at the Agency. The tremendous goodwill generated by this effort exceeded expectations and has led to increased awareness of the NSA TTP. The NSA technology portfolio has greatly benefited from this effort and in partnership with TechLink, NSA's vibrant portfolio is being actively marketed to a national audience. In part two of this session, TechLink will discuss external marketing efforts designed to generate high-value licensing agreements that lead to successful commercialization, transition and return on investment to the NSA, DoD, and the U.S. national economy. Time for questions and answers from the audience will be reserved.

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**0900-0930    FedTech and MD5 Update**  
*Ben Solomon, Commercialization Consultant,*  
*MD5 National Security Technology Accelerator*

FedTech pairs highly qualified entrepreneurs with cutting edge inventions from the U.S. federal lab system to conduct customer discovery and build business models around emerging technologies. MD5 is a public-private partnership between the National Defense University, New York University, and a network of national research universities that seeks to reinvigorate civil-military technology collaboration and value creation through the development of a National Security Innovation Corps - entrepreneurs and intrapreneurs solving high tech problems in the interest of national security.



**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018 (continued)**

***ORTA Track 2 (continued)***

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**0930-1000    A New DoD T2 Strategic Plan**

*David Appler, T2 Support,*

*Office of the Under Secretary of Defense for Research and Engineering*

This presentation of the new draft DoD Strategic Plan will cover the goals and objectives of the new strategy along with a discussion of some of the outcomes we are trying to stimulate.

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**1030-1115    Strategic Use of Patent Analytics: Accelerating Technology to the Warfighter**

*Dr. Peter Perna, Executive Director, FirePoint*

Availability of automated software IP analytics tools has enhanced our ability to manage IP portfolios and make better decisions about what technologies to patent, what patents to maintain, what patents to pool, and what companies to reach out to as prospective licensees. However, more important, is the use of these tools and T2 approaches to enable expanded industry and university partnerships and collaborations to accelerate the development and delivery of new technologies to the warfighter. As our military faces new challenges to defend against and respond to peer and near-peer threats, the DoD T2 community plays an important role in helping to address these challenges.

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**1115-1200    Prioritizing Your Technology Portfolio Based on Technology Trends**

*Jake Kramer, Managing Partner, Fed Tech*

This session will cover the following key issues:

- Identifying growth industries in commercial markets via open source research
- Identifying alternate DoD users in other services
- Understanding and mapping investment trends for emerging technologies from the angel investment, venture capital and private equity communities
- "Racking and stacking" your portfolio based on the above trends
- Developing a value proposition for your technology that resonates with industry



**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018**

***ORTA Track 1 and 2***

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**1300-1400    Universities and T2**

*Christopher Root (Moderator), ORTA, Fleet Readiness Center Southwest  
Brian Suh, Director, Office of Technology Commercialization,  
University of California Riverside Research and Economic Development  
Dr. Rubén Flores-Saaib, Director of Commercialization,  
University of California, San Diego  
Dan Davis, Cryptologic Specialty, HPC-Education and Consulting*

This panel will discuss best practices, programs, and approaches for commercialization which might be adopted by the DoD T2 community.

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**1400-1430    Other Transaction Authorities**

*Denise Scott, Chief, Legal Office,  
U.S. Army Armament Research, Development and Engineering Center*

What is a prototype OTA and how can it be used? This session will describe the basics of prototype OTAs and how they can be used to bring nontraditional contractors and innovative technology to the DOD. The presentation will concentrate on the statutory requirements that must be met in order to use a prototype OTA. We will cover the definition of a nontraditional contractor, the nature of a prototype project and how to transition to production if the prototype is a success. We will discuss some examples of how to competitively solicit for and award a prototype OTA.

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**1430-1500    Assistive T2**

*Barry Datlof, Chief, Business Development, U.S. Army MPMC  
Blake Sajonia, T2 Professional,  
U.S. Army Edgewood Chemical Biological Center*

Assistive technology transfer (AT2) leverages multiple Army programs upstream and downstream of traditional technology transfer (e.g., functional mockups, test and evaluation, and clinical regulatory guidance, entrepreneur sabbaticals, etc.) to de-risk Army-owned inventions and make them more attractive and likely to be fully developed and licensed by commercial partners, and hence more quickly available for sale back to the government to benefit the warfighter. The SHRAIL™, a medical equipment holding rail system attached to a NATO litter, will be highlighted as an example of AT2.





**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018**

**Legal Track**

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**0800-0900 Cyber Security: Supply Chain Issues**

*Vicki Allums, Associate General Counsel, IP & Information Law,  
Defense Information Systems Agency*  
*George Winborne, Patent Attorney, U.S. Army Materiel Command, HQ*

T2 provides program managers with the opportunity to partner with industry and academia to research and develop cutting-edge technologies to tackle various problems. This panel will build on the plenary cyber presentation and discuss supply chain risk management concerns and policy that apply to acquisition programs and should be considered as well in CRADAs, especially those concerning development of cybersecurity tools. This panel discusses some of the challenges of negotiating the legal, business and policy issues that may surface during these projects.

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**0900-1000 Other Transaction Authority and T2: Introduction, Guidance, Intellectual Property, and Related Issues**

*Larry Brantley, Intellectual Property Counsel,  
Headquarters, U.S. Army Materiel Command*

This session will provide an introduction to other transaction agreements (OTAs) and discuss the role they play in T2. Topics covered will include OTA statutory authority; delegation of OTA authority; agreements officers; research and prototype project OTAs; DoD guidance on OTAs; technology investment agreements; the civil-military integration policy; recovery of funds; cost sharing; and ownership, marking, and licensing of intellectual property developed under OTAs.

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**1030-1100 CRADA Debt Collection; What to Do When Your Partners Do Not Pay License Fees**

*David Ruddy, Associate General Counsel,  
Air Force Office of the General Counsel, Acquisition Law Division*

This topic will provide a review of the various legal and business practices to consider in managing and resolving a debt incurred by a CRADA partner. Considerations will run the gambit from amicable resolution, agreement modification solutions, the potential for alternative dispute resolution, the potential for engaging the Department of Justice, and partnering with collection programs managed by the Treasury department.



AGENDA SESSION DESCRIPTIONS

**WEDNESDAY, 27 JUNE 2018 (continued)**

***Legal Track (continued)***

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**1100-1200    Year in Review: Look Back at 1498 and 271 Cases from the Federal Circuit Court and Other Tribunals**

*David Ruddy, Associate General Counsel,  
Air Force Office of the General Counsel, Acquisition Law Division*  
*Larry Brantley, Intellectual Property Counsel,  
Headquarters, U.S. Army Materiel Command*

This topic will provide a review of the major developments in patent law over the past year as it relates to, or may impact, the DoD. Topics include constitutionality of Inter Parties Review at the Supreme Court, developments in the law of patentable subject matter eligibility (35 USC 101), and On-Sale bar under the AIA, changes in discovery rules and their impact on agency counsel/programs, and representative cases and trends in preparing for and managing electronic discovery.

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**1300-1400    CRADA Negotiations and Pitfalls and How to Overcome Them,**

*John Karasek, Supervisory Intellectual Property Counsel,  
Office of Naval Research*

Sometimes unusual and problematic requests arise in the course of CRADA negotiations. This session will look at some of the requests from prospective CRADA participants and how these requests were resolved in ways that met the needs of all the parties.

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**1400-1500    Case Study: IP Rights in Foreign Agreements including Employee Exchanges**

*Mark Borowski, Associate General Counsel  
Air Force Office of the General Counsel, Acquisition Law Division*  
*Nancy Kremers, Associate General Counsel (IP),  
U.S. Air Force General Counsel, Acquisitions (SAF/GCO)*

This session will be a discussion of issues involved in negotiating and perfecting patent and patent licensing rights when inventors include U.S. and foreign government employees. One or more case studies will be used to illustrate the types of legal considerations that may arise under intergovernmental agreements and MOUs, U.S. government agency interests and necessary participants, and licensing and technology transfer concerns when different, and sometimes conflicting, national policy and legal interests are at play.

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**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018**

**Medical Track**

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**0800-0900    T2 Activities Being Developed at the Defense Health Agency**  
*Dr. Sally Hu, T2 Director, Defense Health Agency*

This session will introduce the newly established T2 office of the Defense Health Agency (DHA). The DHA T2 office aims to transit technologies/products and to disseminate knowledge to the warfighter/other stakeholders for public/commercial applications by developing the best T2 practices (such as standardizing T2 processes, limiting variation, driving efficiencies) and delivering value (such as generating savings and maximizing the return of investment) across all DHA laboratories including Military Treatment Facilities (MTFs).

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**0900-1000    The OREIN Consortium, a Primer for DoD MTFs**  
*Martin Hindel, Attorney-Advisor, Walter Reed National Military Medical Center*

This presentation will focus on the Oncology Research Information Exchange Network (ORIEN) Consortium and the WRNMMC T2 Office's role in facilitating our Murtha Cancer Center's participation in that Consortium. From the medical standpoint, WRNMMC's membership in ORIEN gives our cancer researchers significantly increased access to valuable nationwide cancer study data. From the legal standpoint, we had to do some creative lawyering to fit WRNMMC's membership within the four corners of the CRADA statute.

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**1030-1115    Barriers to Pharmaceutical Patent Protection in Foreign Jurisdictions, and Implications for U.S. Government Patent Practice**  
*Donald Townsend, Jr., Patent Attorney, U.S. Army MRMC*

Patent procurement and enforcement environments, and barriers to same, differ significantly throughout the world, particularly in the field of medicine. An overview of the issues facing pharmaceutical IP stakeholders when filing abroad will be discussed, with a focus on compulsory licensing. A discussion of the effect of these issues/barriers on global patent filing strategy shall round out the discussion.



**AGENDA SESSION DESCRIPTIONS**

**WEDNESDAY, 27 JUNE 2018 (continued)**

**Medical Track (continued)**

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**1115-1200    FDA Essentials, Emergency Use Authorizations, and the Creation of the Office of Research Administration at USAMRMC**

*Jeremiah Kelly, Attorney, U.S. Army MPMC*

The FDA's regulation of drugs, biologics, and medical devices is built upon a complex statutory and regulatory regime that is evolving rapidly. This session will provide the legal overview of how the FDA regulates the development and marketing of drugs, biologics, and medical devices and will provide important updates on the significant changes in law, as a result of the 21st Century Cures Act and Public Law 115-92, that will impact DoD medical product development. Among the key topics covered in this session are the expanded emergency use authorization authority for the DoD, a new DoD expedited approval mechanism, and new Congressionally-directed DoD-FDA interactions. This session will also highlight new incentives, like the priority review voucher, to spur innovation and collaboration with DoD medical product development.

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**1300-1400    Quantifying Challenges and Factors that Affect CRADA Execution**

*Dr. Geoffrey Ravillious, T2 Specialist, Naval Medical Research Center*

This presentation will address how various factors, mostly external (e.g., the number of parties, entity type, FOCI, funding, etc.), but, also some internal (e.g., centralized governance, one-size-fits-all template, etc.) can affect CRADA transactional efficiency.

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**1400-1500    Modernizing Federal Technology Transfer Metrics**

*Dr. Vidita Choudhry, T2 Specialist, Naval Medical Research Center*

This presentation will address how to measure federal T2 effectiveness; going well beyond the original measures described nearly 40 years ago in 15 USC 3710, and specifically drawing from the academic literature and executive guidance.



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**THURSDAY, 28 JUNE 2018**

**0800-0830 How Can T2 Leverage CyberWorx?**

*Lt. Col. Douglas Howe, Acquisition Program Manager, CyberWorx*

“Innovation by Design:” Air Force CyberWorx is an innovative program established at the United States Air Force Academy (USAFA) in the fall of 2016. CyberWorx leverages teams of airmen (operators and cadets), industry, and academic partners to solve cyber problems for the Air Force. Projects with operational impact are selected for human-centered design activities to deliver solutions that improve the lives and agility of our Air Force operators. CyberWorx partners with C-TRAC through a Partnership Intermediary Agreement to increase our impact, broaden our reach of industry partnerships, and transition solutions to the commercial sector where appropriate.

**0830-0900 AFWERX**

*Mark Ingram, AFWERX Program Manager,  
Air Force Strategic Development - Planning & Experimentation*

This presentation will provide an overview of the Air Force's newest innovation project - AFWERX. AFWERX is creating nodes of innovation to better connect Air Force users with industry and academic thought leaders. Three facilities are opening and running in Las Vegas, NV; Austin, TX; and Washington, DC to work closely with the best and the brightest.

**0900-1000 CRADA to Acquisition: What Could Go Wrong?**

*Vicki Allums (Moderator), Associate General Counsel, IP & Information Law,  
Defense Information Systems Agency  
Christina Degnore, Chief, IP Law Division, U.S. Army RDECOM/TARDEC/  
National Automotive Center  
Tim Ryan, Chief, Technology Transfer & International Cooperation,  
U.S. Army Armament Research, Development and Engineering Center  
Lisa Wang, Patent Attorney,  
U.S. Army Armament Research, Development and Engineering Center*

How do program offices and contracting staff avoid conflicts of interest, unfair advantage and other legal pitfalls in moving from a CRADA to an acquisition contract? In addition to discussing these issues, the panel will also address: (a) standard and tailored IP provisions for transitioning a subject technology from a CRADA to an acquisition program; (b) expectations of the government acquisition authority and requiring activity (e.g., PEO/PM) to transition the CRADA results; (c) maintaining procurement integrity; and (d) origin of the background IP and associated rights.



**AGENDA SESSION DESCRIPTIONS**

**THURSDAY, 28 JUNE 2018 (continued)**

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- 1030-1200    Export Control and Technology Transfer**  
*Aleacia Chinkhota*, Assistant Counsel, Naval Research Laboratory  
*Timothy Schimpp*, Security Assistance Specialist,  
ODASA for Defense Exports and Cooperation  
*Marc Sukolsky*, Chief of Air Force Foreign Disclosure & T2 Office,  
Deputy Under Secretary of the Air Force International Affairs  
*Clayton Wright*, Supervisory Special Agent,  
Homeland Security Investigations Cyber Crimes Investigations Center

A summary of issues surrounding export controls, including International Traffic in Arms Regulations (ITAR). An emphasis will be placed on how these related laws, regulations and procedures may affect DoD Labs exercising Technology Transfer authorities such as CRADAs.

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- 1300-1400    Partnership Intermediary Agreements (PIAs)—Do's and Don'ts**  
*John Karasek*, Supervisory Intellectual Property Counsel,  
Office of Naval Research  
*Brian Jones*, Intellectual Property Counsel, U.S. Army Corps of Engineers  
*Nancy Kremers*, Associate General Counsel (IP),  
U.S. Air Force General Counsel, Acquisitions (SAF/GCO)

This panel discussion will be addressing Army, Navy, and Air Force experiences with using partnership intermediary agreements. Panelists will discuss statutory elements for PIAs and the need to consult with legal counsel to ensure proper compliance; common pitfalls in using the agreements; the need for oversight to ensure members of the public can distinguish between the partnership intermediary and the government in identifying employees, presentation materials, communications, etc.



AGENDA SESSION DESCRIPTIONS

**THURSDAY, 28 JUNE 2018 (continued)**

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**1400-1500    Fiscal Law/Financial Questions**

*Joel Cummings, Fiscal Law Attorney, Defense Information Systems Agency*

This fiscal law presentation will review the legal foundation for appropriations law in the U.S. Constitution, statutes, and GAO opinions which result in the Purpose, Time and Amount of framework analysis. The session's focus will be on the fiscal law principles involved when a government entity performs reimbursable work for a differently funded entity. In other words, it is a legal discussion about doing other people's work with other people's money.

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**1530-1600    Legislative Updates**

*George Winborne, Patent Attorney, U.S. Army Materiel Command, HQ*

The Legislative Update this year will review the 2018 NIST Document on Federally Funded Inventions and Licensing of Government Owned Inventions, 37 C.F.R. 401 and 404. The most recent SBIR Memo addressing data rights will be reviewed and an update on the preparation of the Additive Manufacturing Contract Guidebook.