## Critical Element: Leadership, Teamwork, and Communication

* Avoids delays and duplication of effort by consistently coordinating and consulting with appropriate office members, other IC and NIH staff
* Communicates concerns in a constructive and non-defensive manner and offers recommendations for resolution
* Identifies opportunities for improvement of technology transfer functions and office operations, offers suggestions for achieving the improvements, and leads efforts to achieve the improvements as appropriate
* Supports program planning and policy development efforts by suggesting and implementing strategies to attain goals for the technology transfer program.
* Evaluates the effectiveness of the office’s operations by initiating and/or developing performance standards and compiling metrics as needed to achieve leadership goals.
* Supports the effective management of intellectual property activities by assisting and guiding the administrative staff in the timely updating of documents from the TDC mailbox and the communication of action items to the TDS by the appropriate staff. This includes developing and overseeing the implementation by administrative staff of Standard Operating Procedures related to intellectual property correspondence and documentation.
* Contributes to the modification and maintenance of the Tech Transfer SharePoint site by suggesting enhancements and working with consultants and staff as appropriate.
* Reviews, modifies and drafts appropriate Standard Operating Procedures as required based upon changes in regulations, policies or staff needs.
* Mentors, coaches, or trains junior staff as appropriate.
* Effectively selects and uses methods of communication, such as verbal or written, and communication tools, such as phone, e-mail or face-to-face meeting, appropriate to the audience and the information to be conveyed or discussed
* Provides responses to e-mails, voice mails and other inquiries in a timely manner, and if delays in providing responses are expected, notifies relevant parties appropriately and courteously when delay becomes anticipated
* Keeps supervisor, colleagues, and subordinates informed of all relevant matters, when and as appropriate

## Critical Element: Relationship and Partnership Management

Facilitates access by the institute to other organizations’ technology and research materials and develops partnerships with such organizations to further the institute’s mission and programmatic goals as demonstrated by activities that include but are not necessarily limited to the following:

* Ensures the timely development and negotiation of agreements between the IC and industry, academia and other Federal laboratories, which are consistent with relevant laws, regulations, policies and procedures
* Ensures appropriate office and institute review to ensure that all agreements reflect an appropriate technology transfer strategy for Institute projects and advance the IC’s specific programmatic mission and goals
* Ensures development and negotiation of complex agreements which permit the exchange of data, information and materials and occasionally scientific and technical personnel, the appropriate acceptance of funding by the IC, and the disposition of various parties’ rights to intellectual property
* Participates in trans-governmental and trans-NIH activities such as the Federal Laboratory Consortium (FLC) that provide insight into “best practices” for technology development
* Support Technology Development Specialists in their partnership development activities. This may include assisting them to identify technology that may benefit from increased marketing efforts, assisting them to identify companies that might be interested in specific technology, drafting advertisements, etc.
* Meets or Teleconferences with every client at least once per year to review the client's portfolio of agreements, inventions and short-term and long-term research goals.
* Maintains effective professional relationships with OTT LPMs who manage inventions within their assigned portfolio
* Develops network of contacts in industry to promote the commercialization of the Institute’s biomedical innovations and adds all contact information for entries worked on into SOPHIA.
* Maintains effective professional relationships within the IC and NIH.

## Critical Element: Portfolio Management

* Enters all agreement records into SOPHIA in accordance with established guidelines.
* Maintains agreement portfolio in SOPHIA in accordance with established guidelines.
* Provides an annual report of active agreements during the calendar year as agreed upon with the Branch Chief.
* Presents at least one major agreement (MCRADA, CRADA, RCA, CTA or GIFT) at a group meeting.
* Delivers agreement-related work products appropriate for grade level and in a timely manner.
* Enters all invention records into SOPHIA in accordance with established guidelines.
* Maintains inventions portfolio in accordance with established guidelines.
* Provides an annual inventions portfolio report as agreed upon with the Branch Chief.
* Tracks prosecution of active patent applications to help ensure acquisition of IP consistent with the Institute mission.
* Culls patent applications and patents that are not commercially viable.
* Delivers inventions work product appropriate for grade level and in a timely manner.

## Critical Element: Promotes Commercialization of Biomedical Inventions

Success of this element will be based on the amount of effort of the activities that the specialist undertakes to promote Institute technology, not on the quality of the science.

* For at least two technologies (new EIRs, technology already filed on, services that a lab can provide, etc.), assigns a Technology Readiness Level (TRL).
* If any new Employee Invention Reports (EIRs) are received during the calendar year, assigns a TRL to the newly reported technology.
* For each technology assigned a TRL level, discusses the technology with the appropriate investigator to determine their needs and level of engagement. Drafts a development plan outlining the next step(s) that may be undertaken to move the technology to the next TRL level and the entity expected to undertake the next step (i.e. the NIH investigator, an extramural collaborator, a CRADA collaborator, etc.).
* Undertakes activities to promote the advancement of the technology to the next TRL level (e.g., advertise the technology, make contacts with outside parties, make a YouTube video). Modifies the development plan as needed to accommodate more viable options as they may arise.
* Delivers written updates on all product development efforts as agreed upon by the Team Lead or Branch Chief.