

OSF INNOVATION STUDIO

INVENTOR'S
GUIDE



Learning Objectives:



1. Understand the 4 steps of the Innovation Studio Process
2. Understand and act on the responsibilities of an inventor.
3. Understand the responsibilities of Innovation Studio throughout the innovative process.
4. Understand basic innovation industry concepts - intellectual property, commercialization, revenue distribution, disclosures, .
5. Understand how to collaborate with Innovation Studio AND how to easily contact us.



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OSF INNOVATION STUDIO

ABOUT

OSF INNOVATION



About OSF Innovation



In 1877, The Sisters of the Third Order of St. Francis began serving communities with compassion and humility, unafraid of taking on the most difficult challenges to provide care to all those who needed it.

The same is true today. The rapid change of health care along with emerging technological and scientific advances have only spurred the Sisters to examine how we can leverage these developments for the benefit of our patients.

As a result, OSF HealthCare launched OSF Innovation in 2016 to embrace change and take on the largest health care challenges.

OSF INNOVATION STUDIO

INVENTOR'S GUIDE

INTRODUCTION



Inventor's Guide Introduction



Developing ideas to improve or transform health care is easy.

Translating discoveries into new or improved products and services that make a difference for the people we serve can be a challenging process. That's why we have created the Inventor's Guide to help you better understand some of the processes and terminology used in moving innovations from concept to market. The sections of this guide will explain many of the key steps, including:

- How do I know if my discovery is an invention
- Protecting your invention with Innovation Studio
- Your path to commercialization

OSF INNOVATION STUDIO

INNOVATION
STUDIO



Innovation Studio



We at Innovation Studio are dedicated to protecting your intellectual property throughout the conceptualization of your new invention. Intellectual Property (IP), refers to the exclusive rights given to the creator of a work that prevent others from using it without permission.

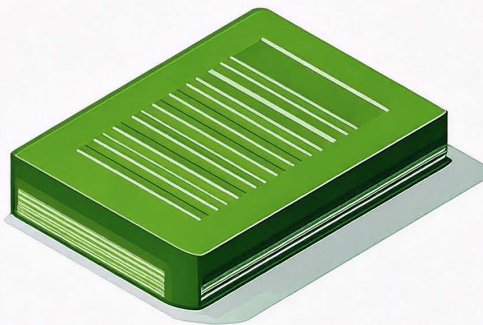
Innovation Studio serves as the hub of all intellectual property commercialization efforts at OSF HealthCare and ensures the IP generated by Mission Partners is protected; including research generated with academic collaborators.

The Innovation Studio is designed to help rapidly advance ideas from exploration to implementation, eventually putting your inventions into the hands of **real** customers.

OSF INNOVATION STUDIO

GETTING STARTED WITH

INVENTION & TECHNOLOGY DISCLOSURE



Getting Started With Invention and Technology Disclosure



Getting Started

Our strategic process to assess, validate, and commercialize your intellectual property starts with a disclosure form: a written description of your invention provided by Innovation Studio. Disclosure forms are completed by the inventor and help to begin the process of evaluating the potential of an invention.

Key elements necessary to complete the form include:

- 1 An overview of the problem, your invention, and its background.
- 2 A description of how the invention will be created and used.
- 3 Any funding sources
- 4 Visuals demonstrating the invention (process maps, system environments, sketches, etc.)
- 5 Other invention-specific disclosures (depending on the invention class, you may require specific additional disclosures).



What Are the Steps in the Process?

1. IDEA



Identify your novel idea, your potential customer(s), and the problem

2. VALIDATE



Conduct initial market analysis to assess the demand, competition and any potential barriers

3. BUILD



Transform the concept into a tangible solution by creating a Minimum Viable Product

4. LAUNCH



Your idea comes to life and we explore the appropriate path to market

OSF INNOVATION STUDIO

STEP 1.

IDEA





1. IDEA

During this stage, you have identified your novel idea, your potential customer(s), and the problem (i.e. pain) your idea is solving. As the first step in your journey, it is essential that you put in due diligence to ensure your idea offers a clear advantage over existing solutions. One of the tools you will complete is a Value Proposition Canvas. With the information you provide, this tool will show you how to visualize, design and test how your idea creates value for customers.

Value Proposition Canvas

Value Proposition Canvas is a tool for marketing experts, product owners, and value creators. This method from the bestselling innovation book Value Proposition Design is applied in leading organizations and start-ups worldwide.



**Value Proposition Canvas
Explained Video**



**Value Proposition
Canvas Template**

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STEP 2.

VALIDATE





2. VALIDATE

During this stage, you have identified your novel idea, your potential customer(s), and the problem (i.e. pain) your idea is solving. As the first step in your journey, it is essential that you put in due diligence to ensure your idea offers a clear advantage over existing solutions.



One of the tools you will complete is a Value Proposition Canvas. With the information you provide, this tool will show you how to visualize, design and test how your idea creates value for customers.

Business Model Canvas

The Business Model Canvas is a strategic management and entrepreneurial tool. It allows you to describe, design, challenge, invent, and pivot your business model. This method from the bestselling management book Business Model Generation is applied in leading organizations and start-ups worldwide.



Business Model Canvas Explained Video



Business Model Canvas Template



Another essential component of this stage is conducting effective customer discovery to ensure the innovation being developed is viable and addresses a genuine problem.

Customer Discovery

Customer discovery is critical because it ensures that a proposed product or solution aligns with real market needs. This process involves

engaging with key stakeholders, including Subject Matter Experts (SMEs), potential users, and industry prospects, to validate core assumptions about the problem, target customer, and solution fit.

One of the tools that is recommended to sharpen your customer discovery skill is The Mom Test by Rob Fitzpatrick.



MOM Test Explanation

In this book, you will learn how interviewing can uncover what they are currently doing? What they've done in the past? What worked and what didn't?

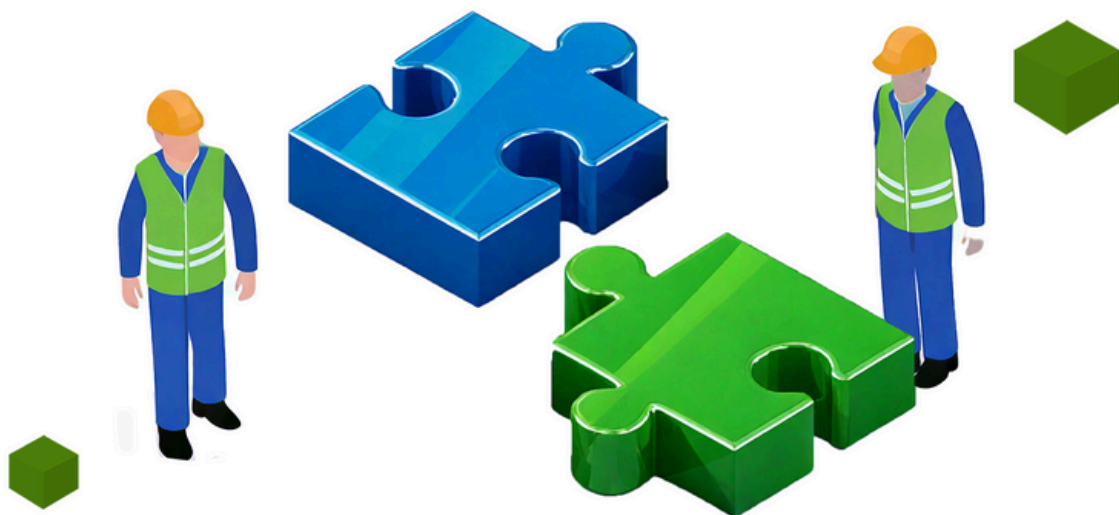
We want to learn as much as possible as it relates to your idea.

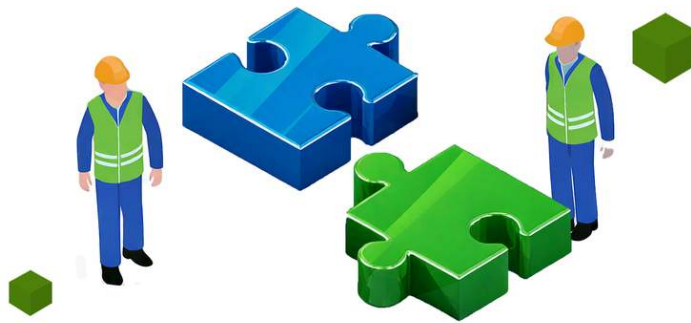


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STEP 3.

BUILD





3. Build

The build stage focuses on transforming the concept into a tangible solution by creating a Minimum Viable Product (MVP) that meets core functionality requirements. This is a highly collaborative process between you (the inventor) and Innovation Studio.



The MVP serves as a basis for testing key assumptions, through experiments, allowing for iterative feedback from ongoing customer discovery and validation of the product's value and market fit.



Experiments are structured tests that help de-risk commercialization by providing real-world insights into product performance, customer demand, and business feasibility. These experiments help to gather evidence to test your assumptions from a range of actual users, and improve your odds of success.



The Experimentation Field Book

With insights gained from **MVP testing**, development progresses to refine and scale the solution into a full commercial product, optimized and prepared for market entry.

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STEP 4.

LAUNCH





4. LAUNCH

The final step is launch. This is where your idea comes to life and we explore the appropriate path to market.

This can go a variety of directions, and in the “Options for Commercialization” section, we will discuss the main commercialization strategies to launch your idea.

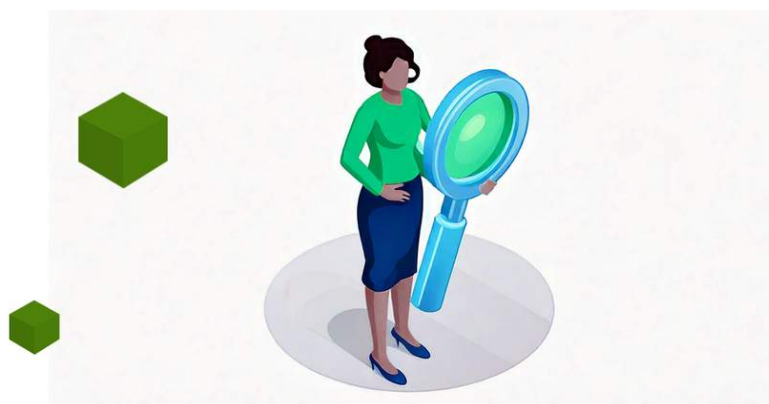


OSF INNOVATION STUDIO

INTELLECTUAL
PROPERTY
POLICY



Intellectual Property Policy

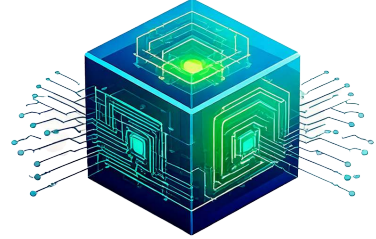


The Intellectual Property (IP) policy for OSF establishes the rights and responsibilities related to innovations and inventions developed within the organization.

Its purpose is twofold:

- OSF HealthCare System (OSF) and each of its OSF Affiliates (each an OSF Entity and collectively the OSF Entities) are dedicated to serving in the spirit of Christ and the example of Francis of Assisi with the greatest care and love in a community that celebrates the gift of life. In pursuit of this mission, new inventions and creative works may be eligible for intellectual property protection and commercialization.

- To define the OSF Entities' policy with respect to research and development and protection and commercialization of new inventions and creative works that encourage and foster an innovative environment to serve OSF's mission.



Assigned Intellectual Property

Any invention, whether or not patentable or registrable under copyright or similar laws, and all associated intellectual property rights, including, without limitation, all copyrights, know-how, patent rights and trademarks, which are solely or jointly authored, conceived, invented, made or reduced to practice, or caused to be authored, conceived, made or reduced to practice, by i) an OSF Employee or Non-OSF Employee within the scope of his/her employment , engagement or duties on behalf of an OSF Entity and/or (ii) an OSF Employee or a Non-OSF Employee with more than incidental use of OSF Resources.



IP policy

Summary of IP Policy

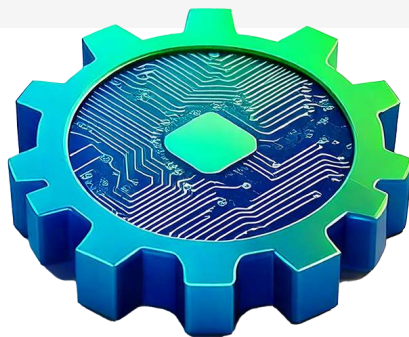
Unless explicitly exempted by other provisions, OSF retains all rights, title, and interest in and to any and all assigned intellectual property. Creators (inventors) retain all rights, titles, and interests in and to any and all inventions that do not fall within the scope of assigned intellectual property.

Revenue Distribution/Royalties

Net cash royalties, after the Innovation Studio is reimbursed for all expenses, will be allocated on a percentage basis among OSF, Creators and OSF HealthCare Foundation, as determined by the Innovation Studio.



The baseline framework for the percentage allocation, which is subject to change in the Innovation Studio's sole discretion, is forty percent (40%) to OSF, forty percent (40%) to the Creators (inventors), and twenty percent (20%) to OSF HealthCare Foundation. The OSF Invention Disclosure and Assignment Form [OIM 3](#) requests that the Creator indicate the OSF Entity or Entities that supported the development of the Invention.



OSF INNOVATION STUDIO

PATENT

MANAGEMENT



Patent Management



Commercialization is the license or sale of Assigned Intellectual Property to a third party, **NOT** the use of Assigned Intellectual Property by an OSF Entity in the course of that OSF Entity's ordinary course of business.

What is a Patent?

A patent is a legal document granted by a government that gives an inventor exclusive rights to make, use, sell, and distribute their invention for a certain period of time. In exchange, the inventor publicly discloses the details of the invention. This protection prevents others from

exploiting the invention without permission, encouraging innovation and investment in new technologies.



Who is responsible for Patenting?

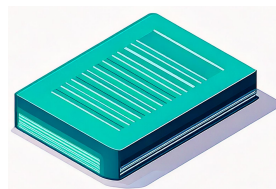
Innovation Studio will work with the inventor and patent attorneys to navigate the complex legal and procedural aspects of the patent application process.



From Provisional to Non-Provisional

A **provisional patent** is a temporary patent application filed with the United States Patent and Trademark Office (USPTO) that establishes an early priority date for an invention but does not grant patent rights on its own. It allows inventors to secure a 12-month window to further develop the invention, seek funding, or test market viability before filing a **non-provisional patent application**.

A **non-provisional patent** is a formal patent application filed with the USPTO that, if granted, provides an inventor with full patent rights for a specified period (typically 20 years from the filing date for utility patents). Filing a non-provisional patent is the necessary step to securing full legal protection for an invention, ensuring enforceable rights against infringement.



Other Types of Patents:

Design Patent - protects the design or exterior look of an invention

Utility Patent - protects inventions such as machines, processes, or systems.



What is the Patenting Process?

The patenting process typically involves several key steps:

- **Idea Conception and Documentation:** Document your invention thoroughly, including how it works, its unique features, and how it is different from existing technologies.
- **Patent Search:** Conduct a patent search to ensure your invention is novel and has not been patented before. This can be done through databases like the United States Patent and Trademark Office (USPTO) or World Intellectual Property Organization (WIPO).
- **Patent Application Preparation:** Prepare a patent application, which includes:
 - **Title and Abstract:** A brief summary of the invention.
 - **Background:** The context and problem addressed by the invention.
 - **Description:** Detailed explanation of the invention with drawings if necessary.

- **Claims:** Legal statements defining the scope of protection sought.
- **Filing the Application:** Submit your application to the relevant patent office. This can be done electronically or via mail.
- **Examination:** The patent office reviews the application to ensure it meets all legal requirements. This may involve communication between the examiner and the applicant to address any issues or questions.
- **Publication:** After a set period, usually 18 months from the filing date, the application is published, making it publicly accessible.
- **Grant or Rejection:** If the application meets all criteria, the patent is granted. If not, the application is rejected, but there is often an opportunity to amend and resubmit.

Timeline of the Patenting Process

A patent in the United States typically takes 2-5 years from filing to issuance. Your invention is protected for a certain amount of time, depending on your patent type.

- **Utility Patents:** Generally 20 years from filing date
- **Design Patents:** Generally 15 years from the grant



OSF INNOVATION STUDIO

OPTIONS FOR COMMERCIALIZATION



Options for Commercialization



Innovations can be taken to market in multiple ways. Some of the decision factors will depend on the availability of potential industry partners, the innovators interest and the market-readiness of the innovation. A preferred path to market may be clear from the onset based on the innovator's personal objectives or may be determined through the course of the commercialization process.

Licensing the Technology

If an appropriate and interested existing company is selected as a potential licensee, Innovation Studio will work with that potential licensee to develop the appropriate financial and diligence terms for a license agreement that can fully commercialize the technology.

Partner

Forming a partnership involves collaborating with another organization to co-develop, manufacture or market the innovation.



Create A Startup Company

A startup company is created to independently develop, market and sell their innovation.

Sell(ing Directly)

This involves the inventor handling the manufacturing, marketing, and sales of the product directly to customers.

How long does the innovation commercialization process take?

The process of protecting a technology and finding the right licensing partner may take months or even years to complete, depending on the technology's development stage, the market for the technology, competing technologies, the amount of work needed to bring a new concept to market-ready status, and the resources and willingness of the licensees and the inventors.



OSF INNOVATION STUDIO

WHO CAN /
CONTACT ?



Who can I Contact?



Innovation Studio is available to assist all innovators.

Please contact Meghan Genzel with any questions:

meghan.genzel@osfhealthcare.org



Intake Form

OSF INNOVATION STUDIO



APPENDIX



Appendix

Disclosure —

A written statement outlining the details of a new invention. The disclosure form helps Innovation Studio begin the process evaluating and protecting the Intellectual Property. Submitting a disclosure form to Innovation Studio does not by itself protect the intellectual property.

Patent —

An exclusive right granted for an invention. For an invention to be patentable, it must meet the following criteria for patentability: New or novel, useful, non-obvious. The invention must be different from all known inventions, products and published ideas.

Licensing —

A license is the agreement granting some of OSF's rights as owner of an intellectual property (licensor) to a company who has agreed to certain obligations and responsibilities to commercialize the intellectual property (licensee).

Open Source —

Often used for software; makes source code freely available for commercial and non-commercial use. Open source licenses are based on the principles of transparency, collaboration, and community-driven development.

Other Intellectual Property Terms:

Copyright —

Copyright is a form of legal protection granted to the creators of original works of authorship, such as literary, dramatic, musical, and artistic works. This includes books, music, paintings, films, computer software, and more. Copyright protection is automatically conferred upon the creation of a work, provided it meets the criteria of originality and is fixed in a tangible medium of expression.

Trademark —

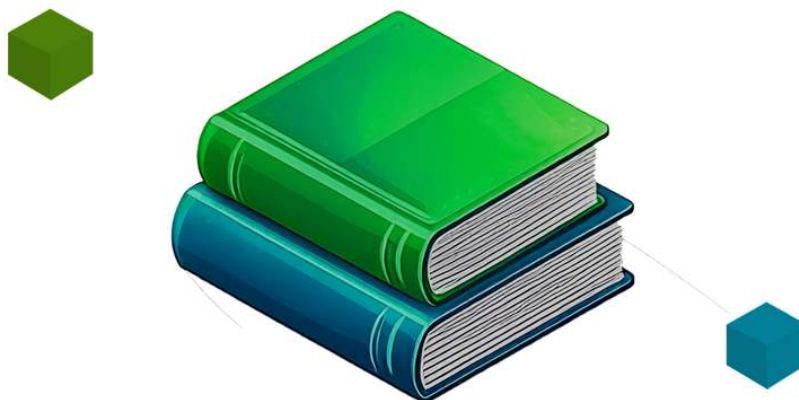
A trademark is a recognizable sign, design, word, or expression that identifies and distinguishes products or services of a particular source from those of others. Trademarks can include brand names, logos, slogans, and even distinctive packaging or colors.

Start-Up —

A start-up company is a new business entity created to market a specific invention. It is an alternative to licensing an invention to another already existing company.

Directed Work —

[A] “directed work effort” includes any developments made at the direction of and/or within the scope of a Creator’s engagement by an OSF Entity. - Intellectual Property and Technology Transfer Policy (OIM-1), PolicyStat ID 11862647, Process, Equity Interests, Item 10



OSF INNOVATION STUDIO



FAQ



Frequently Asked Questions (FAQs)

What Makes My Idea an Invention? AKA - We gotta be able to sell it.

According to the Intellectual Property and Technology Transfer Policy, an invention is defined as “any creation, discovery, improvement, innovation, trade secret, work of authorship or product resulting therefrom.” More simply put, an invention must be a product that ultimately could be sold or licensed for sale in the marketplace.

What are the steps I should take to protect my IP?

The first step in protecting and licensing your discovery is to communicate your invention to the Innovation Studio by completing a disclosure. With the information you provide, we can begin the process of evaluating the impact potential of your innovation.

Who can help me with the Invention Disclosure form?

The Innovation Studio team can help you with the **Invention Disclosure form**:



You can contact the Studio team by emailing: Meghan Genzel

meghan.genzel@osfhealthcare.org

What if I have already talked about the invention before submitting the invention disclosure?

It is very important to understand that any publication or verbal public disclosure that describes your invention prior to filing a patent application may preclude patenting. If you plan to submit an invention disclosure, please do so before public presentation.

Do I need to notify my leader about my invention?

Yes, leaders will need to confirm that the intellectual property developed was outside of the scope of the job description by completing a Directed Work Assessment.

What happens after I submit an idea?

Your idea will progress through several key stages, starting with an **Intake Call**—a brief 30-minute conversation with members of the Innovation Studio Team to discuss and understand your concept. Following this, your idea will be evaluated using a formal review process conducted by the Innovation Studio Team to assess its potential and determine whether it should advance to the next phase in the process.