



Business Innovation Factory
60 Valley St., Unit 25
Providence, RI 02909
401.270.7906
www.businessinnovationfactory.com

Business Innovation Factory Elder Experience Lab Multi-Partner Collaboration Letter of Engagement

We have an exciting opportunity to collaborate in the BIF Elder Experience Lab to develop market-making opportunities to improve the experience of the aging at home elder. This Engagement Letter outlines how the Business Innovation Factory, referred to as BIF, will engage with organizations, referred to as “Partners,” that are participating in BIF’s Multi-Partner Collaboration in the Elder Experience Lab.

I. About BIF

BIF is an independent, non-profit 501(c)3 organization created in 2004 to enable collaborative innovation. BIF focuses on solving major problems in areas like healthcare, education and energy independence by creating a platform for partners to design and test new solutions in a real-world environment. BIF brings partners together to collaborate across traditional boundaries on experiments that deliver transformative, systems-level innovation and address the most pressing problems of our time. BIF pursues this public mission through programs and events that bring our community together and through projects in the BIF Experience Labs.

BIF launched its Elder Experience Lab in 2008 to mobilize system change by creating a platform where partners gather deep insights into the experience of older adults and leverage those insights to design, test and develop new products, services, and business models in a real-world laboratory.

II. Partnership Multi-Partner Collaboration in the Elder Experience Lab

BIF has proposed the creation of a **multi-partner collaboration**, referred to as the “Collaboration,” within the Elder Experience Lab that enables participants to gain deep insight into the experience of elders aging in place and uncover opportunities for developing transformative solutions that better meet the needs of aging-in-place elders.

We expect six to eight Partners to join the Collaboration, with a minimum of three required for launch. BIF reserves the right to bring additional Partners into the Collaboration.

Partners can identify the most significant corporate-level competitors who compete directly with the Partner’s interest in the aging-in-place market. BIF will not offer competitors identified through this process an opportunity to enter the Collaboration for as long as the initial Partner remains an active investor and Partner in the Collaboration.

III. Collaboration Approach

A. Building the Aging in Place Experience Map

BIF Elder Experience Lab is a sustainable platform creating “living experience maps” using visualization and storytelling tools to bring the elder experience to life. Experience maps are enabled by an ethnographic and observational design approach, and for this Collaboration, access a cohort of ~200 elders to observe and capture behaviors, attitudes and other human factors that define and drive the aging in place experience.

B. Building the Aging in Place Opportunity Map

Outputs from elder experience mapping will be organized in highly accessible and transferrable formats and in portable digital packaging. Storytelling techniques bring the aging in place experience to life for experts and

non-experts alike, and in a manner that makes opportunities for innovation more visible. From deep insights into the aging in place experience, the Lab will produce an “Opportunity Map” that presents a clear and prioritized list of developable opportunities that are strategically aligned to the capabilities and innovation agendas of the Partners.

C. Creating an Actionable Platform for Market-Making Solutions

BIF will enable collaborators to connect around aging in place opportunities where joint development may add value. Partners are invited to pursue design opportunities (outside of the scope and budget of this proposal) in the lab in both open and closed environments, including proprietary design and development studios. Only BIF Partners have access to BIFs Experience labs for proprietary design projects which are scoped and priced based on specific Partner’s project objectives.

IV. Partnership Benefits

Benefits to the Partners in the Collaboration include:

- Access to a connected consortium of partners from across industry sectors working together to understand and develop new market opportunities created through the national shift to in-home elder care environments.
- Deep insight via a multi-media map of the current “aging in place” experience across a variety of demographic personas.
- Prioritized list of opportunities for redesigning the aging in place experience, including solutions within and across industry boundaries.
- Cost-effective platform for designing and testing new models for delivering value to baby boomers seeking to age in place and a platform for shaping dialogue about the future of elder care.

V. Partnership Deliverables

Tailored annual objectives will be co-developed with each partner. Deliverables for year one of the Collaboration include:

1. Priority access to qualitative research on the aging in place experience and full access to the Lab design team.
2. Customized interim reports that reveal ongoing insights and outcomes from Lab Activity.
3. Customized annual report that includes portfolio of primary research findings, organized as video vignettes, animations, photos, and narratives that illuminate the aging in place experience.
4. Prioritized map of development opportunities aligned to Partner’s R&D strategies and objectives.
5. Opportunity to conduct proprietary design studios in the Elder Experience Lab.

VI. Partnership Investment

Partners will contribute \$100,000 annually to the Collaboration. Initial payment will be made upon signing a Partner Agreement. To ensure sustainability of the program, we ask all Partners to commit to a three year engagement. At the conclusion of each year, BIF and lab Partners will engage in an annual review process to ensure that all commitments have been met and that all parties have received agreed upon value from participation in the Collaboration. Both BIF and the Partner reserve the right to terminate the Partnership agreement following completion of each annual review.

VII. Confidentiality

To receive the greatest customized benefit from engagement in the Collaboration, we expect Partners will share candid information about their strategic plans and objectives as they relate to the elder care market. To encourage deep and honest dialogue, BIF will engage in non-disclosure agreements as they relate to confidential company information and protected information about a Partner’s strategic plans and objectives.

Partner’s participation in the Collaboration will not be deemed confidential. Names of Partners engaged in the Collaboration and the general nature of participation will be considered public information.

Work related to the Collaboration’s collective activity will not be considered confidential and BIF will communicate actively about this activity.

VIII. Intellectual Property Ownership

Regarding Intellectual Property, referred to as IP, the BIF policy is as follows:

1. IP brought into the Collaboration remains with the originator.
2. New IP created through the collaboration, including but not limited to data on the aging-in-place experience and opportunities for systems-level innovation in elder care, will be made available to the public under BIF's domain and in keeping with BIF's non-profit mission and commitment to open innovation. All Partners are free to use and leverage content, publicly or privately.
3. In addition to engagement in the Collaboration, Partners may elect to participate in specifically contracted and scoped proprietary design studios within the Elder Experience Lab. IP brought into these studios and IP created within is owned solely by the investing Partner or Partners.

IX. Communications

BIF puts a high priority on communicating about its activities and leverages its storytelling capacity to bring visibility to work in the BIF Experience Labs.

Collaboration's Partners will receive ongoing customized communications about the data and insights uncovered through the Elder Experience Lab.

BIF reserves the right to use the Partner's name and logo on print and electronic communication related to the Collaboration. BIF will work with the appropriate public relations / marketing representative at each Partner organization to ensure adherence to all relevant brand usage guidelines (logo, typeface, naming convention, etc).

BIF is responsible for all communications activity related to the Collaboration and reserves the right to discuss the Collaboration in all forums, including but not limited to print, electronic, broadcast and radio.

It is our hope and expectation that Partners will find value in maximizing our communications efforts and BIF will work with Partners on joint releases, media opportunities, etc.

X. Leadership

The BIF team, accountable to the BIF Board of Directors will oversee day-to-day operations of the Collaboration. BIF will establish an advisory council comprised of a representative from each Partner organization. BIF will provide this group with regular updates and solicit feedback on lab activity.

XI. Timing

The Collaboration seeks to launch at the Business Innovation Factory's BIF-5 Collaborative Innovation Summit on October 7-8, 2009. This gathering of BIF's national community of innovators offers the Collaboration an ideal venue to announce the Collaboration and gain maximum exposure for the project. Work will begin immediately following.

Please don't hesitate to call with any questions. We are excited about the opportunity to develop market-making opportunities to improve the aging at home elder experience. Our collaboration will be stronger with your participation. I hope you will join us.

Saul Kaplan
Founder and Chairman of the Board
Business Innovation Factory
401-270-7906
skap@businessinnovationfactory.com