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CA Tech 100 Conference Introduction and Case Study

***A California Space Authority
WIRED Grant project 1.4***

Sustainable Entrepreneurship Training



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Introduction: CATech 100 Conference

California Space Authority WIRED Grant project 1.4
Sustainable Entrepreneurship Training

On April 24th and 25th of 2007, the California Space Authority (CSA) and its collaborative project partners, Chabin Concepts, San Diego East County Economic Development Council, Golden Capital Network, Los Angeles Economic Development Corporation, and San Diego Workforce Partnership, presented the **California Tech 100** Conference (CATech 100), a two-day event designed to recognize California's top technology companies and innovators as well as the State's contributions to innovation.

The CSA WIRED project team designed the CATech 100 to fulfill one of the California Innovation Corridor's WIRED 1.4 Project goals, to:

Design and deliver a demonstration project with entrepreneurial companies, including SBIR Phase II awardees, to identify best practices in helping innovative companies commercialize technology and create jobs.

This conference was designed as the kick-off event of the demonstration project, to highlight the project for community visibility, to identify prospective entrepreneurial companies that could be engaged under the overall 1,4 project, and to set the basis for obtaining benchmark data for the tracking of participant companies' growth and success throughout the scope of the project. This benchmark data would, in turn, support Economic Development and Workforce Investment Board (WIB) organizations in bringing the value of the innovation economy to policymakers and resource providers.

The CATech 100 Conference was originally envisioned and designed for the attraction of technology and entrepreneurial companies in sufficient numbers so 30 qualified candidates could be selected and engaged, to permit a viable tracking process for technology companies.

The original concept and outline of the Conference was designed around a standard, and well-proven one-day VC / Angel pitch competition event. The inclusion of two key components in such an event -- money and deal-flow -- would ensure that investors would attract qualified companies from which to choose. The possibility of qualified companies for deals would, in turn, attract Investors willing to sit on panels to listen and evaluate the companies' value propositions.

During the planning process, additional resources, organizations, and politics were interjected, transforming the shape and tenor of the conference from a one-day focused event into a full two-day event.

Drivers that influenced changes made to the original conference's format included:

- Inclusion of other organizations not originally included in the initial design, funding and sponsorship from sources that had criteria linked to their sponsorship and support
- Availability of invited speakers
- Time and venue constraints
- Time lags associated with internal and external key decision making



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- Required inclusion of key sponsors into the agenda
- Government agencies and high level executives that were included in the program's agenda
- Funding limitations and constrictions owing to weak sponsorship and the reallocation of internal support funds.

Funding came from a range of non-profit - organizations, Government Agencies, and Private Sector sources. Following Figure 1 provides an example proposal presented to a government agency for funding while Figure 2 shows an application used for organizational and private sector sponsorship for the CATech 100 Conference.

Figure 3, a Memorandum of Understanding between CSA and the WIRED partners, had been designed to allow organizations identifying and realizing event sponsors to collect finders fees that would be applied directly to their WIRED grant budgets. It was expected that this extra capital would be used to accomplish increased WIRED goals. Due to legal considerations, the MOU was never utilized.

Government Agency Letter

*Special Event Proposal to California Business, Transportation and Housing Agency **California's Public Investment in Innovation: Fostering the Golden State's Global Competitive Edge***

Host: California Business, Transportation and Housing Agency

When: Evening of April 24, 7:00-9:00 p.m.

Where: Orange County Hilton

What: Dinner program recognizing California's significant public investments in innovation – leveraging the substantial momentum surrounding the California Innovation Corridor's WIRED Kick-Off Event (***officially called California Tech 100***) scheduled for April 24-25. **The California Tech 100, and the Innovation All-Star ceremony on the afternoon of April 25, have been officially endorsed by the California Commission on Jobs and Economic Growth.**

Background:

The California Innovation Corridor (CIC), led by the California Space Authority and supported by Governor Arnold Schwarzenegger, was selected as one of 13 regions in the U.S. to receive a \$15 million U.S. Department of Labor grant through its Workforce Innovation in Regional Economic Development (WIRED) initiative. The WIRED grant brings together 60 industry, government, education, economic development, and workforce development entities within California's Innovation Corridor, a 13-county region ranging from San Diego County in the south to Alameda County in the north. The initiative focuses on three issues:

- Entrepreneur development
- Global competitiveness in manufacturing and the supply chain
- Creation of the next generation of innovators and technicians

On April 24-25 CIC partners are collaborating to bring a new, high profile annual event to California's innovation infrastructure. The **California Tech 100** event will highlight the State of California's – and other project partners – commitment to entrepreneurship, innovation and workforce competitiveness by showcasing and training innovation-based companies. The **California Tech 100** is a singular event, bringing together entrepreneurs; angel/venture capital investors; technology and industry executives; academia; statewide policy leaders; workforce development and economic development professionals. The event includes the following (**in addition to the proposed special session**).

- Two Technology Entrepreneur Boot Camps
- *Power of Angel Investing* Seminar (from the Kauffman Foundation for Entrepreneurial Leadership)
- Presentations by 48 Hot Start-Ups to 6 investor panels of in key innovation sectors



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- Ceremony honoring the California Tech 100, featuring the top 20 “Innovation All Stars” for 2007

Goals of the Proposed BT & H Special Event Dinner Program:

- Create additional awareness about the important link between California’s public investment in innovation and the State’s global competitive edge
- Honor institutions and individuals who have contributed greatly to innovation in California (particularly those where State investment has been instrumental)
- Create more positive view among the private sector (particularly among entrepreneurs, CEOs, private investors) about state government’s role in support of business and innovation

Proposed Agenda Items:

- Overview of Governor Schwarzenegger’s and California’s support of innovation through WIRED, San Joaquin Partnership Program, and other Recent Innovation-Related announcements (15 minutes)
- Panel: California Universities Commercialization Successes and Best Practices (45 minutes)
- Ceremony Honoring Nobel Laureates (one from each of the universities) – (15 minutes)

Potential Expenses: Speaker/Travel Fee; Promotion Costs (Direct Mail Piece, Ads, etc.); Program Materials; Production of Video(?); Enhanced A/V (if desired); Meals/Food/Drink

Organizational and Private Sector Sponsorship Application

THE 2007 CALIFORNIA INNOVATION CORRIDOR ENTREPRENEUR SUMMIT

SPONSORSHIP APPLICATION

_____ Title Sponsor	\$15,000
_____ All Star Ceremony and Networking Reception Sponsor	\$ 7,500
_____ Investor/University Dinner Sponsor	\$ 5,000
_____ Opening General Session and Cocktail Reception Sponsor	\$ 5,000
_____ Investor Roundtable Breakfast Sponsor	\$ 5,000
_____ Keynote Presentation Sponsor	\$ 5,000
_____ WIB/EDC Dinner Sponsor	\$ 5,000
_____ Entrepreneur Boot Camp Session Sponsor	\$ 2,500
_____ Power of Angel Investing Session Sponsor	\$ 2,500
_____ Deal Flow Presentation Session Sponsor	\$ 2,500
_____ Supporting Sponsor	\$ 1,250

Contact Name: _____

Company: _____



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Address: _____

City _____ State _____ Zip _____

Phone: _____

E-Mail: _____

Fax/E-Mail Completed Form to Raymond Wells (626) 440-0566

For more information on sponsorship opportunities please contact:
Ray Wells-California Space Authority
Phone: 626-440-0565
E-mail: Ray.Wells@CaliforniaSpaceAuthority.org

CA TECH 100: SPONSORSHIP OPPORTUNITIES

The 2007 California Innovation Corridor Entrepreneur Summit is ***the only event of its kind*** to bring together technology entrepreneurs; angel and venture capital investors; academia; technology and industry executives; state and federal policy leaders; and workforce and economic development professionals – all groups who share a commitment to the notion that innovation-based entrepreneurs are key economic drivers in today’s highly competitive global economy.

The 2007 California Innovation Corridor Entrepreneur Summit provides sponsors direct access to the event’s audience. Depending on the level of sponsorship, supporting firms will:

- Have a front row seat at the planning and execution of the forum – Entrepreneur Summit Steering Committee member
- Be actively involved in the Entrepreneur Summit screening and selection committee
- Opportunity to “rub elbows” with the California Innovation Corridor “Innovation All-Stars” – a group of 50 leading technology-based CEOs and other c-level executives – along with leading California and U.S. policymakers, and leaders within many of California’s elite universities
- Be actively involved as a mentor to presenting companies
- Receive valuable branding and recognition at the Entrepreneur Summit, in print and online
- Receive access to full attendee list

California Innovation Corridor sponsors will increase their visibility as recognized supporters of entrepreneurship and innovation while strengthening their relationship with technology companies, c-level executives, angel and venture capital investors, academia, senior government officials and leading California and Federal policymakers. The California Innovation Corridor Entrepreneur Summit provides high branding visibility throughout all pre-event and on-site marketing materials and media exposure at the Summit.

TITLE SPONSOR

Four (4) Available: \$15,000

Selected Title Sponsor(s) will be recognized as founding organizers of the California Innovation Corridor Entrepreneur Summit and will be provided with top level visibility and branding throughout the two-day event.

Benefits Include:



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- Entrepreneur Summit Steering Committee Member
- Participate in the presenter selection and coaching process
- Participate in the All-Star selection process
- Headline sponsor of one of the elite Entrepreneur Summit sessions (All-Star Ceremony and VIP Networking Reception, Investor Dinner, WIB/EDC Dinner, Boot Camp or SBIR track, Investor Roundtable Breakfast Sponsor, Keynote Presentation Sponsor, Opening General Session and Networking Reception Sponsor)
- Sit at Head Table During All-Star ceremony
- Opportunity to have “private label” e-invitations sent to all marketing databases with invitation message and logo from sponsor at top
- Photos taken with All-Star companies and dignitaries during recognition ceremony
- Multiple opportunities to serve on mandatory “virtual” coaching sessions with companies
- Multiple opportunities to serve as mentors to presenting companies
- Introduce your firm and welcome attendees during the opening general session on both day 1 and day 2
- Host Bootcamp workshop
- Access to full attendee list
- Highly prominent logo recognition on all pre-event and post-event marketing materials
- Highly prominent logo recognition on all on-site signage
- Highly prominent logo recognition of Entrepreneur Summit web site
- Highly prominent logo recognition on A/V rotation throughout the Entrepreneur Summit with multiple slides
- Opportunity to display a large banner in the general session room
- Full page advertisement in the event program
- 10 ft x 10 ft booth display
- 10 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

ALL-STAR CEREMONY AND VIP NETWORKING RECEPTION SPONSOR

One (1) Available - \$7,500

Benefits:

- Opportunity to provide introductory remarks during the All-Star ceremony and introduce the dignitaries presenting the awards
- Photos taken with All-Star companies and dignitaries during recognition ceremony
- Opportunity to make remarks at the VIP Networking Reception
- Preferred VIP seating during the All-Star Ceremony
- Prominent signage at VIP reception food and drink tables
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Ceremony and VIP Networking Reception
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

INVESTOR/UNIVERSITY DINNER SPONSOR

One (1) Available - \$5,000

Benefits:

- Opportunity to provide introductory remarks during the Investor/University Dinner
- Preferred VIP seating during the Dinner and at the All-Star Ceremony



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- Prominent signage at the Dinner
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Investor/University Dinner
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

OPENING GENERAL SESSION AND COCKTAIL RECEPTION SPONSOR

One (1) Available - \$5,000

Benefits:

- Opportunity to provide introductory remarks during the Opening General Session and Cocktail Reception Sponsor
- Preferred VIP seating during the Dinner and at the All-Star Ceremony
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the opening general session/cocktail reception
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

INVESTOR ROUNDTABLE BREAKFAST SPONSOR

One (1) Available - \$5,000

Benefits:

- Opportunity to provide remarks during the Investor Roundtable session
- Preferred VIP seating during the Dinner and at the All-Star Ceremony
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Investor Roundtable/Breakfast segment
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

KEYNOTE PRESENTATION SPONSOR

One (1) Available - \$5,000



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Benefits:

- Opportunity to provide remarks and introduce the Summit keynote speaker
- Preferred VIP seating during the Dinner and at the All-Star Ceremony
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Keynote Presentation segment
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

WIB/EDC DINNER SPONSOR

One (1) Available - \$5,000

Benefits:

- Opportunity to provide introductory remarks to kick-off the dinner program
- Preferred VIP seating during the Dinner and at the All-Star Ceremony
- Opportunity to moderate the WIB/EDC immersion experiences during lunch on day 1 and day 2 at the Summit
- Access to attendance list of all WIB/EDC dinner attendees
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the WIB/EDC dinner segment
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP All-Star cocktail reception

KEYNOTE PRESENTATION SPONSOR

One (1) Available - \$5,000

Benefits:

- Opportunity to provide remarks and introduce the Summit keynote speaker
- Preferred VIP seating during the Dinner and at the All-Star Ceremony
- Opportunities to participate on mandatory “virtual” coaching sessions with companies
- Participate as mentors to presenting companies
- Logo recognition on all pre-event and post-event marketing materials
- Logo recognition on on-site signage
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Keynote Presentation segment
- Full page advertisement in the event program
- 6 ft x 3 ft table display
- 6 complimentary invitations to the Summit, including the VIP investor/university dinner, and the VIP All-Star cocktail reception

ENTREPRENEUR BOOT CAMP WORKSHOP SESSION SPONSOR



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Ten (10) Available - \$2,500

Benefits:

- Opportunity to present a workshop during the Technology Entrepreneur Boot Camp
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Keynote Presentation segment
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 4 complimentary invitations to the Summit

POWER OF ANGEL INVESTING SESSION SPONSOR

Five (5) Available - \$2,500

Benefits:

- Opportunity to participate on panel or moderate session during the Power of Angel Investing seminar
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Power of Angel Investing seminar
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 4 complimentary invitations to the Power of Angel Investing Seminar and the Summit, including the special Investor/University dinner

DEAL FLOW PRESENTATION SESSION SPONSOR

Six (6) Available - \$2,500

Benefits:

- Opportunity to moderate Deal Flow session panel (sectors chosen on first-come first served basis)
- Opportunity to participate on mandatory “virtual” coaching sessions with presenting companies
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Deal Flow panel
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 4 complimentary invitations to the Summit

DEAL FLOW PRESENTATION SESSION SPONSOR

Six (6) Available - \$2,500

Benefits:

- Opportunity to moderate Deal Flow session panel (sectors chosen on first-come first served basis)
- Opportunity to participate on mandatory “virtual” coaching sessions with presenting companies
- Logo recognition on Entrepreneur Summit web page
- Logo recognition on A/V rotation throughout the Entrepreneur Summit, with special recognition slide during the Deal Flow panel
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 4 complimentary invitations to the Summit



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SUPPORTING SPONSOR

Eight (8) Available - \$1,250

Benefits:

- Name recognition on Entrepreneur Summit web page
- Full page advertisement in the event program
- 6 ft. x 3 ft table display
- 2 complimentary invitations to the Summit

Partner Sponsorship Incentives

Memorandum of Understanding

To: California Innovation Corridor Partners

From: Jon Gregory, Golden Capital Network

Subject: Incentive Plan for Promotion of California Tech 100 Event on April 24-25 in Orange County

This Memorandum of Understanding sets out an incentive compensation structure for California Innovation Corridor partner organizations who agree to serve as outreach partners for the California Tech 100 event on April 24-25, 2007 at the Orange County Hilton.

Compensation to Partners:

The following monetary compensation opportunities exist:

- Sponsorships – 25% of revenue secured up to the \$15,000 objective; 50% for any sponsorship revenue generated above that total
- Presenting Companies - \$125 for each presenting company secured (that passes selection criteria) up to 5 presenters who pay full price; \$200 for each presenting company above that total
- General Attendance - \$50 per attendee secured up to 10 attendees for full conference registration; \$100 per attendee above that total

***Compensation pro-rated down in discount scenarios.

Partner Roles/Responsibilities:

- Actively recruit sponsors to obtain early commitments
- Outreach partners are to provide list of sponsor prospects on an ongoing basis to GCN so that GCN can maintain a repository to avoid duplication and confusion of outreach among multiple partners. In the event more than one organization identifies a sponsor prospect, the partner organization which first contacts GCN has the priority right to contact the sponsor.
- Proactive media outreach in your region
- Actively recruit presenting companies and attendees from your region

GCN and/or other 1.4 project team members will provide outreach partners with various templates, resources, links to web pages and messaging for conducting the outreach efforts.

GCN will keep a database of all presenting companies and attendee registrants which will be used as a tracking tool for determining payment to the outreach partners. Outreach partners should proactive contact GCN with names of presenting companies and attendees they believe likely will result from their outreach efforts and GCN will “tag” these entities in the database to assist in determining payments to partners. GCN will reconcile the event “books” within thirty



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days of completion of the event, and payment will be made to partners at that time. [Regulations governing the use of H1B funds require that CIC/WIRED funded partners reinvest any monies raised by participation in a WIRED activity back into their WIRED projects.](#)

To confirm your participation as an Outreach Partner, please sign and fax (530) 893-8927 or e-mail (jon@goldencapital.net) a signed version of this MOU to Jon Gregory, President/CEO of Golden Capital Network. GCN will then sign and provide a copy back to your office.

Insert Name of Organization

Insert Signature

Insert Fax # or Mailing Address

Initial Conference Planning:

Design and initial planning for the conference began in December of 2006. Planning over the holidays presented several challenges, and some unanticipated benefits.

Challenges Encountered:

- Organizations had already made commitments for coming years' schedules. Attempting to fit a conference between other group's conferences, meetings, etc. proved problematic. As a time frame was imposed for the project to begin in the Spring of 2007, a balance had to be reached between the best time for the event (Spring conference prime-times run from between late January to middle May), and a time that was acceptable to all parties engaged in the project.
 - A Conference generally should not be scheduled too close to the beginning of the year as any marketing prior to the event is lost over Holiday period noise. Many do not wish to attend events this close to the beginning of the year owing to funding restrictions of the Holidays, beginning new projects at work and catching up on projects and challenges not addressed over the Holidays, etc.
 - Too late in the cycle (last week of May), presents challenges as it is near Memorial day, graduations and vacation periods, and many attendees will not schedule traveling and conferences due to commitments.
- Starting late in December imposed time constraints for the creation of a program and the gathering of speakers so sponsors could be approached, marketing materials could be generated, databases could be obtained and leveraged (alliances formed with other organizations willing to send notifications to their membership), press releases generated, presenters identified, screened and prepped, panelists found, conference materials for outreach generated, etc.
- A venue needed to be identified which would accommodate the estimated event size, be situated in an easily accessible locale, be a good fit for the program, within close proximity to transportation (freeway and airport), was affordable (both for cost of venue, food, support, parking, and rooms for attendees), and available for the time frame.
- The time frame originally selected was deemed not acceptable. This necessitated moving the program date two weeks earlier than originally planned, limiting access to marketing time, speaker and panelist availability, venue availability, etc.



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- Funding originally anticipated and promised for internal conference support was foreshortened, and remaining monies were directed towards a specific deliverable for the project. These budget revisions necessitated identifying and raising sponsorship through other sources not originally anticipated.
- Internal and external discussions and response times associated with these discussions lengthened the decision-making process and compressed the time needed to complete key functions.
- As more organizations and personnel were included for tactical, strategic, political, and sponsorship reasons, it was necessary to rethink several previously made decisions, increasing the time required to develop materials, alter agendas, and revise plans, including on some tasks that were already in the implementation phase.
- As marketing time was attenuated, new elements were added and weaved into the event to bring prestige, assist in attracting qualified panelists, presenters, investors, and attendees.

Unanticipated benefits:

- Planning over the holidays allowed for a more concentrated focus by team members. No conferences were being attended, and fewer meetings scheduled, allowing the team to place greater focus on the event outline and initial planning. This was instrumental in the early stages of planning, as many of the partners had not had the opportunity to work together before this conference. This allowed for relationships to be built that, in turn, enabled teams to respond to the changes and challenges of conference, structure, content, and implementation.

Below is the final, delivered agenda for the CATech 100 two-day Conference. Following the agenda, each of the following points will be addressed within the framework of the numbered list, including a discussion of how and why strategies and tactics changed during the course of planning and execution.

- 1) Lessons learned from the event, including things that would be done again, those that would be changed but still attempted, and things that would be avoided
- 2) Results achieved from the event
- 3) What can be replicated in the California Innovation Corridor Sub-Regions, in California, and Nationally

California Tech 100 Agenda

April 24-25, 2007
Orange County Hilton

Pre-Conference Power of Angel Investing Seminar (April 24)

Sponsor: Tech Coast Angels
 Faculty: Bill Payne, Vegas Valley Angels
 Paul DeRidder, Tech Coast Angels
 Luis Villalabos, Tech Coat Angels
 Raulee Marcus, Tech Coast Angels
 Steve Block, Tech Coast Angels
 Sid Mohasseb, Tech Coast Angels
 Frank Peters, Tech Coast Angels
 Frank Singer, Tech Coast Angels

7:30- 8:10	Registration and Network
8:10- 8:25	Welcome and Opening Remarks
8:25- 9:00	How Angel Financing Fits In



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9:00- 9:25	Panel 1 – Is Angel Investing Right For You
9:25- 9:55	Panel 2 – Angel Portfolio Strategy
9:55-10:15	Break and Networking
10:15-10:40	Overview of Due Diligence
10:40-11:10	Panel 3 – Discussion of Due Diligence
11:10-12:00	Panel 4 – Structuring the Deal
12:00- 1:00	Networking Lunch
1:00- 1:30	Valuation Methodologies
1:30- 2:50	Break-Out Case Study Discussions on Valuation
2:50- 3:10	Presentations by Break-Out Groups
3:10- 3:30	Panel 5 – Discussions of Case Studies and Valuation
3:30- 3:45	Break
3:45- 4:00	Overview – The Post Investment Relationship
4:00- 4:45	Panel 6 – The Post Investment Relationship
4:45- 5:00	Closing Comments
5:00	Join Opening Session of California Tech 100

Pre-Conference Entrepreneur Boot Camp (April 24)

7:30-8:10 a.m.	Registration and Continental Breakfast
8:10-8:15 a.m.	Welcome and Opening Remarks Sponsor: <i>California Space Authority</i> Speaker: Ray Wells, California Space Authority
8:15-10:45 a.m.	Morning Mini-Boot Camp: Leveraging Government R&D Investment Resources to Grow Your Ventures Sponsor: <i>Connectory</i> Moderator: Jo Marie Diamond, East County EDC
8:15-8:40 a.m.	SBIR Grants and Contracts: How You Can Gain Access to the Largest Source of Early Stage/High Risk R&D Funding Speaker: Rick Shindell, President, Zyn Systems/SBIR Gateway
8:40-9:05 a.m.	Accessing Government IP for Innovation Speaker: Dr. Stephen Lieberman, Ph.D., Space and Naval Warfare Systems Center, San Diego
9:05-9:30 a.m.	Intellectual Property Rights: Making Sure You Own What You Think You Own! Speaker: Michael Shimokaji, Intellectual Property Attorney, Shimokaji & Associates, P.C.
9:30-9:50 a.m.	Networking Break Sponsor: California Labor and Workforce Development Agency
9:50-10:15 a.m.	Accounting Requirements for Innovators Accessing Government Funding for R&D Speakers: Jill Haynie, Senior Consultant, Mensch & Associates, CPAs Diane Peluso, DPM Consulting
10:15-10:40 a.m.	Navigating SBA Funding Speaker: Dr. Joseph Greco, Director, Center for the Study of Emerging Markets
10:40-11:00 a.m.	Networking Break Sponsor: Tech Coast Venture Network



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- 11:00-12:00 p.m.** **Workshop: Negotiating the Preferred Stock Term Sheet**
 Sponsor: *Manatt, Phelps & Phillips*
 Speaker: Bart Greenberg, Partner, Manatt, Phelps & Phillips
- 12:00-1:15 p.m.** **Working Lunch: "Perfecting Your Pitch"**
 Lunch Sponsor: *Orange County Workforce Investment Board*
 Program Sponsor: *Speaking Success International*
 Speaker: Dianne Legro, President & Founder, Speaking Success International
- 1:15-4:45 p.m.** **Afternoon Mini-Boot Camp: Entrepreneur's Guide to Angling for Angel Investors and Venture Capitalists**
 Sponsors: *Amplify Software*
 El Dorado Hills Technology Incubator
 Introducer: Jon Gregory, Golden Capital Network
 Speakers: Jim Schraith, Private Investor and Venture Partner, DFJ Frontier
 Dr. Mark Zetter, Amplify Software
- 1:15-2:05 p.m.** **Finding the Right Investor for Your Company**
- 2:05-2:55 p.m.** **Golden Rules for Maximizing Your Fundraising Efforts**
- 2:55-3:05 p.m.** **Break**
- 3:05-3:55 p.m.** **Valuation: Real-World Tips for Your Term Sheet Negotiations**
- 3:55-4:45 p.m.** **Taking the Money: How to Do It – Minimize Mistakes by Doing it Right Up Front!**
- 4:45-5:00 p.m.** **Break**
- 5:00 p.m.** **Transition to Start of California Tech 100**

California Tech 100 Agenda

April 24, 2007

- 3:15-5:00 p.m.-** **Registration and Exhibitor Table Setup for California Tech 100 Begins**
- 5:00-6:00 p.m.** **Opening General Session**
 Sponsor: Macias Gini & O'Connell LLP
- 5:00-5:05 p.m.** **Event Overview/Welcoming Remarks**
 Speaker: Jon Gregory, President/CEO, Golden Capital Network
- 5:05-5:15 p.m.** **California's Workforce: Successfully Competing in Today's Global Economy**
 Sponsor: **California Labor and Workforce Development Agency**
 Speaker: Victoria Bradshaw, Secretary, California Labor and Workforce Development Agency
- 5:15-6:00 p.m.** **The Ballroom Blitz: One-Minute Power Intros by Presenting Companies**
 Sponsor: Macias Gini & O'Connell LLP
 Moderator: Scott Hammon, Macias Gini & O'Connell
- 6:00-7:00 p.m.** **No-Host Networking Reception**
 Sponsor: LearningChange
- 7:00-9:00 p.m.** **California Public Investments in Innovation Dinner**
 Sponsor: California Business Transportation and Housing Agency



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- 7:15-7:25 p.m.** **Opening Remarks**
 Speaker: Dale E. Bonner, Secretary, California Business Transportation and Housing Agency
- 7:25-8:00 p.m.** **The 2007 State New Economy Index**
 Sponsor: California Space Authority
 Introducer: The Honorable Andrea Seastrand, Executive Director, California Space Authority
Speaker: Dr. Robert Atkinson, President of the Information Technology and Innovation Foundation
- 8:00-8:30 p.m.** **The State of Cleantech**
 Sponsor: Pacific Gas and Electric Company
 Speaker: Ira Ehrenpreis, Partner, Technology Partners

- 8:30-8:40 p.m.** **Video Premier: California's Public Investments in Innovation**
 Sponsor: **California Business Transportation and Housing Agency**
 Introduction: Steve Nilan, Founder/CEO, Startup TV Network

9:00 p.m. **Adjourn**

April 25, 2007

- 7:15-8:15 a.m.** **Registration, Continental Breakfast and Networking**
 Sponsor: Irvine Chamber of Commerce

8:15-9:35 a.m. **Opening General Session**

- 8:15-8:20 a.m.** **Overview of The Day**
 Speakers: Jon Gregory, Golden Capital Network
 Steve Nilan, Startup TV Network

- 8:20-8:40 a.m.** **An Intellectual Property Primer**
 Sponsor: Knobbe Martens Olsen & Bear LLP
 Speaker: Doug Muehlhauser, Partner, Knobbe Martens Olsen & Bear LLP

- 8:40-9:10 a.m.** **Keynote Presentation: Building Marking Leading Companies in Today's Global Economy**
 Sponsor: **El Dorado Hills Technology Incubator**
 Introducer: Jim Schraith, Private Investor and Venture Partner, DFJ Frontier
 Keynote Speaker: Safi Qureshey, Chairman and CEO – Quartics, Irvine CA, and Former CEO, AST Research

- 9:10-9:35 a.m.** **The State of the Venture Economy in the California Innovation Corridor**
 Sponsor: **California Space Authority**
 Introducer: Ray Wells, California Space Authority
 Speaker: Randy Churchill, PricewaterhouseCoopers

- 9:35-10:00 a.m.** **Networking Break**
 Sponsor: DLA Piper

- 10:00-11:45 a.m.** **Concurrent Panel: Emerging Technologies #1**
 Sponsor: Macias Gini & O'Connell LLP
 Session: Up to seven companies present to a panel of accredited angel investors and venture funds
 Moderator: Scott Hammon, Macias Gini & O'Connell LLP



Investor Panelists: Rahul Banta, Times Ten Ventures, Cheryl Beninga, American River Ventures, Craig Sultan, ThomasLloyd Capital LLC, Bryant Tong, Nth Power, Greg Wendt, California Capital Partners

10:00-11:45 a.m.

Concurrent Panel: Software/IT

Sponsor: OpSource, Inc.

Session: Up to seven companies present to a panel of accredited angel investors and venture funds

Moderator: Jon Beck, SVP Sales and Channels, OpSource, Inc.

Investor Panelists: David Blumberg, Blumberg Capital, Damon Danielson, Private Investor, Sid Mohasseb, VentureFarm, John Nelson, California Capital Partners, Pete Sinclair, Leapfrog Ventures

11:45 -1:00 p.m.

Boxed Lunch and Networking

Sponsor: Orange County Workforce Investment Board

1:00-2:45 p.m. Concurrent Panel: Life Sciences – Biotech/Pharma and Medical Devices

Sponsor: Tech Coast Angels

Session: Up to seven companies seeking seed and angel investment will present their companies to a panel of seed and angel investors

Investor Panelists: Paul DeRidder, Tech Coast Angels, Brian Frenzel, Band of Angels, Dave Holder, Holder Capital Partners, Richard Rose, California Capital Partners, Brad Webb, Claremont Creek Ventures, Steve Weiss, Coachella Valley Angel Network, North Bay Angels

1:00-2:45 p.m. Concurrent Panel: Emerging Technologies #2

Sponsor: Connectory

Session: Up to seven companies seeking seed and angel investment will present their companies to a panel of seed and angel investors

Moderator: Jo Marie Diamond, East County EDC

Investor Panelists: Ric Cesped, Sierra Angels, Jim Kitchel, Newcastle Capital and Sacramento Angels, Matt Lawson, Ventana Ventures, Daniel Lehman, Pacific Coast Ventures, Jim Schraith, DFJ Frontier

2:45-3:15 p.m. NETWORKING BREAK

Sponsor: U.S. Department of Labor WIRED Program

3:15-5:00 p.m.

Concurrent Panel: Communications Technologies – Semiconductors, Wireless, ICs

Sponsor: VenCore Solutions

Session: Up to seven company presentations to accredited investors and funds

Moderator: John Pritchard, Managing Director, VenCore Solutions

Investor Panelists: Bob Barron, ComVentures, Clint Chao, Formative Ventures, Paulo de Rezende, Zone Ventures, Steve Foster, TPG Ventures, Alex Kurosawa, Start-Up 101 Ventures

3:15-5:00 p.m. Concurrent Panel: New Media/Web Internet Content

Sponsor: Manatt Phelps & Phillips LLP

Session: Up to seven company presentations to accredited investors and funds

Moderator: Bart Greenberg, Manatt, Phelps & Phillips LLP

Investor Panelists: Jim Butz, California Capital Partners, avid Cremin, DFJ Frontier, Larry Kubal, Labrador Ventures, Stuart MacFarlane, Momentum Venture Management, John Matise, Stone Canyon Venture Partners

5:00-5:15 p.m. Networking Break

Sponsor: SMUD



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5:15-6:00 p.m.

California Innovation All Stars Ceremony – 15 California Companies Receive “California Innovation Awards” for Their Contributions to the State’s Economy in 2006
Sponsors: Golden Capital Network and Chabin Concepts
Preview/ Process: Jon Gregory, President/CEO, Golden Capital Network, Audrey Taylor, President, Chabin Concepts
Award Presenters: Mark Mosher, Executive Director, California Commission on Jobs and Economic Growth
Duane Roth, Member, Governor’s Commission on Jobs and Economic Growth
Honorable Andrea Seastrand, Executive Director, California Space Authority

6:00-7:00 p.m.

Networking Reception and All Star Recognition!
Sponsor: Morgan Dorado Public Relations

Description of Tasks Leading to the Event:

1. Early December 2006 – Initial planning committee organized. A committee composed of three of the eight of the partners in project 1.4 of the WIRED grant. (Chabin Concepts, East Coast Economic Development Council, Golden Capital Network, along with the California Space Authority)
2. A basic framework was established for the conference. Initially, it was envisioned to be a one day conference, focused on the VC / Angel investor pitch model. If the reader is not familiar with an event of this type, the premise is straight forward. Entrepreneurial companies and startup ventures are almost always in the mode of seeking investment capital to drive their venture forward. Investors are continually searching for qualified deals (businesses) in which to invest. Having a conference where investors are present will attract those seeking capital, and vice versa. The challenge is to convince investors that as a conference, you can attract enough qualified deals to make it worth their effort to attend. Later in this summary report, a description of the process of attracting, screening, prepping companies, etc. is provided.
3. Based on the initial conference outline, work on selecting an event venue began. Several discussions ensued about where in the Corridor the event should take place (Northern, Central South/Central, or Southern California). Orange County was eventually agreed upon due to its proximity to airports, transportation, availability of investors for the panels, and qualified companies to present.
4. The team created of mock web pages, preliminarily conference outlines, rough agendas, etc.
5. As the outline of the conference solidified, “Event Image” and “e-marketing” information was created for distribution by WIRED partners, collaborators, and other organizations.
6. As an agenda was roughed out, venue details were defined. Main rooms and breakout rooms needed to be identified. Food, beverages, layouts, logistics, sound and AV requirements, podiums, platforms, screens, draping, etc, needed to be outlined based on a preliminary agenda.
7. As an agenda was roughed out, venue details were defined. Main rooms and breakout rooms needed to be identified. Food, beverages, layouts, logistics, sound and AV requirements, podiums, platforms, screens, draping, etc, needed to be outlined based on a preliminary agenda.



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California Tech 100 Event



A Business / Technology / Entrepreneurship Funding Event

Endorsed by
Governor
Schwarzenegger's



Sponsored By:



On April 24th and 25th, the **California Tech 100 Event** will be held in Irvine, California. This once-a year, Two Day Premier Networking Event will take place at the Irvine Hilton, across from the John Wayne Airport and will present an opportunity to meet and network with Angel investors and Venture Capitalists, established Technology Companies and Industry Leaders, and Entrepreneurs.

This event will consist of two tracks on Day One:

Day One / Track One - is designed for individuals who may be interested in becoming Angel Investors. **The POWER of ANGEL INVESTING** is developed by the Ewing Marion Kauffman Foundation and is sponsored by the Tech Coast Angels, the largest Angel Investment group in the United States. This day-long-event provides a comprehensive overview of the angel investing process and knowledge for entrepreneurial support professionals, university faculty, and policy makers to assist client entrepreneurs in the Equity investing process. This seminar is a balance of expert presentations, panel discussions and small group case studies.

Registration will be limited to 50 individuals. To view Agenda:

http://www.goldencapital.net/Events/OC_Power_of_Angel_Investing_Agenda.asp

Day One / Track Two – is designed for Technology Businesses, Entrepreneurs, and Economic and Business Development Professionals. This full-day-event will consist of several tracks focused on identifying and pitching to Venture Capitalists and Angel Investors, Federal funding and IP rights, Term sheet development, and more. To view Agenda:

http://www.goldencapital.net/Events/OC_Entrepreneur_Bootcamp_Agenda.asp

Day Two of the conference:

The TECHNOLOGY INNOVATION SHOWCASE - will focus on:

48 Hot-Startup Technology companies who will be given the chance to present their businesses and propositions to one of six different investment panels consisting of Angel, Venture Capital and other investors. For these selected companies, this will be a chance to gain exposure to investors, to network, and to receive local and statewide recognition and publicity. For the audience, it will provide a chance to learn what investors are looking for, what hot sectors are generating interest within the California investment community, and how different and various presentations and value propositions are received within the funding community. In the evening, 20 of the top nominated and selected California All-Stars will receive the State's California Innovation Award and be recognized for their accomplishments and contributions to technology in the State of California. To view Agenda:

http://www.goldencapital.net/Events/OC_Tech_100_Agenda.asp

If you have a technology company and are interested in funding, are an Economic or Business Development professional interested in information and networking, or an entrepreneur looking for the "right-kind-of-information", this is an event you should attend.

Register Now

Register Now at

through **AMPLIFY**

or, for more information and agendas, please visit http://www.goldencapital.net/Events/California_Tech_100.asp

8. As materials were being outlined and developed, it was agreed upon by team members that the original one day conference agenda needed additional differentiation from other similar events in the region. The conference transitioned from a one-day-event to a two and a half day event. Included would be training for Work Force Investment Board representatives (fulfilling another WIRED commitment), recognition of 15 of California's top Innovation Companies and recognition of California's top 60 Innovation All-Stars (those that were on the fast track to being in the top 15), presenting a Governors Award (creating the award and getting the State to support it), and recognizing Nobel Laureate winners in California that contributed to the State's growth in the technology sector. Additionally, an Angel Investing Seminar on the day before the conference was added as a way to ensure that enough qualified investors would attend the event. This would have a two-fold impact by having attendees possibly stay over for the event while also obtaining qualified companies to present along with qualified coaches to work with the potential presenting companies.
9. Inclusion of a State award would accomplish several objectives for the conference.
 - a. An award would provide a way to differentiate the program from others put on by seasoned venture event organizers (of which included investor offered similar conferences and pitch events).
 - b. If the State were involved, it would be easier to get press releases picked up and to obtain coverage of the event.
 - c. Fund raising and sponsorship development for the event would be easier.
 - d. By having larger companies involved for awards, it would be easier to attract other high-level companies to attend the conference, and to attract presenters for the Investor Panels.
 - e. It would fulfill other programmatic needs, both internally and externally for partners and supporting organizations.
10. Contact was initiated with the Governor's office for support. Involvement by the Governor's California Commission on Jobs and Economic Growth was obtained, which represented the State's (Governor's) agenda for technology development and job creation. This was not an easy talk, but was accomplished through pre-existing relationships with the Executive Director.



March 10, 2007

Victoria Bradshaw
Secretary, California Labor and Workforce Development Agency
801 K Street, #2101
Sacramento, CA 95814

Re: Honoring California's Innovation All-Stars and Acknowledging the California Innovation Corridor Entrepreneurship Summit



www.InnovateCalifornia.net



Dear Secretary Bradshaw:

This letter is a request for your participation at the California Innovation Corridor Entrepreneurship Summit - specifically we would like you to be part of the Welcoming Remarks on **Tuesday April 24, 4:00 pm** before The Ballroom Biltz which is the one-minute power introduction by the California Technology presenting companies, and also stay for the **Public Investment in Innovation** dinner. This event will take place on April 24-25 at the Irvine Hilton in Orange County.

As you know, earlier this year the California Innovation Corridor (CIC), led by the California Space Authority and supported by the State of California, was selected as one of 13 regions in the country to receive a \$15 million federal U.S. Department of Labor grant through its Workforce Innovation in Regional Economic Development (WIRED) initiative. The WIRED grant brings together 60 industry, government, education, economic development and workforce development entities within California's Innovation Corridor. There are 13 counties represented from San Diego County in the south to Alameda County in the north.

This conference will focus on Innovation and Technology in California within nine different technology sectors. Key note speakers and highlights will include:

- Robert D. Atkinson, Ph.D., President - Information Technology and Innovation Foundation - Author of The Past and Future of America's Economy: Long Waves of Innovation that Drive Cycles of Growth (Edward Elgar, 2005).
- Ira Ehrenpreis – Tech Partners – Ira is the leading authority of Clean Tech Investment
- Power of Angel Investing Seminar – sponsored by the Tech Coast Angels, the largest Angel investing group in the United States
- Dinner April 24 for Investors and Technology companies with a Video sponsored by BTH “Public Investment in Innovation”
- Apr 25 – California Innovation Awards Ceremony
- Sponsored by the California Jobs Commission

We would be honored by your attendance, as your presence would greatly complement the Investors and Technology companies who will be highlighted at this event. Please let us know about your availability at your earliest convenience. If you have any additional questions, please do not hesitate to contact Judy Turner, the CIC project manager, at 626-440-0565, ext. 107.

Sincerely,

Andrea Seastrand, Executive Director
California Space Authority Enclosure

11. To support this new Conference segment, new marketing outreach materials, event-image materials, applications for participant start up companies and established technology companies, nomination forms to be utilized as “applications” by economic development professionals and WIRED partners for start up and established companies, screening processes, approval processes, acceptance letters, outreach letters to partners and supporting organizations, and support and service processes needed to be developed or reworked.



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California Tech 100 Event



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On April 24th and 25th, the **California Tech 100 Event** will be held in Irvine, California. This once-a year, Two Day Premier Networking Event will take place at the Irvine Hilton, across from the John Wayne Airport and will present an opportunity to meet and network with Angel investors and Venture Capitalists, established Technology Companies and Industry Leaders, and Entrepreneurs.

This event will consist of two tracks on Day One:

Day One / Track One - is designed for individuals who may be interested in becoming Angel Investors. **The POWER of ANGEL INVESTING** is developed by the Ewing Marion Kauffman Foundation and is sponsored by the Tech Coast Angels, the largest Angel Investment group in the United States. This day-long-event provides a comprehensive overview of the Angel investing process and knowledge for entrepreneurial support professionals, university faculty, and policy makers to assist client entrepreneurs in the equity investing process. This seminar is a balance of expert presentations, panel discussions and small group case studies.

Registration will be limited to 50 individuals. To view Agenda:

[http://www.goldencapital.net/Events/OC Power of Angel Investing Agenda.asp](http://www.goldencapital.net/Events/OC_Power_of_Angel_Investing_Agenda.asp)

Day One / Track Two – This **Full Day BootCamp** is designed for Technology Businesses, Entrepreneurs, and Economic and Business Development Professionals. This full-day-event will consist of several tracks focused on identifying and pitching to Venture Capitalists and Angel Investors, Federal

funding and IP rights, Term sheet development, and more. To view Agenda:

[http://www.goldencapital.net/Events/OC Entrepreneur Bootcamp Agenda.asp](http://www.goldencapital.net/Events/OC_Entrepreneur_Bootcamp_Agenda.asp)

Day Two of the conference:

The TECHNOLOGY INNOVATION SHOWCASE - will focus on:

48 Hot-Startup Technology companies who will be given the chance to present their businesses and propositions to one of six different investment panels consisting of Angel, Venture Capital and other investors. For these selected companies, this will be a chance to gain exposure to investors, to network, and to receive local and statewide recognition and publicity. For the audience, it will provide a chance to learn what investors are looking for, what hot sectors are generating interest within the California investment community, and how different and various presentations and value propositions are received within the funding community. In the evening, 20 of the top nominated and selected California All-Stars will receive the State's California Innovation Award and be recognized for their accomplishments and contributions to technology in the State of California. To view Agenda:

[http://www.goldencapital.net/Events/OC Tech 100 Agenda.asp](http://www.goldencapital.net/Events/OC_Tech_100_Agenda.asp)

If you have a technology company and are interested in funding, are an Economic or Business Development professional interested in information and networking, or an entrepreneur looking for the "right-kind-of-information", this is an event you should attend.

For more information on this event and for agendas, please visit:

http://www.goldencapital.net/Events/California_Tech_100.asp



California Tech 100 Event



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CA Tech 100

Hilton Irvine/Orange County Airport
18800 MacArthur Blvd., Irvine, California, United States 92612
Tel: 1-949-833-9999
Fax: 1-949-833-3317

BOOK YOUR HOTEL ROOM AT IRVINE/ORANGE COUNTY AIRPORT HILTON NOW. **DEADLINE IS APRIL 13!** Call 1-800-445-8667 and identify yourself as an attendee of the California Tech 100. Conference room rate is \$175.00/night.

For more information, visit: http://www.goldencapital.net/Events/California_Tech_100.asp

Basic Agenda:

The California Tech 100 is a two-day conference for entrepreneurs, angel and venture capital investors, university and public policy leaders, workforce and economic development professionals, and others interested in nurturing and promoting innovation. The conference consists of the following segments:

1. **Entrepreneur BootCamp** featuring the "Entrepreneurs' Guide to Angling for Angels and VCs" and seminars on Federal government technology investment (April 24, full day program - cost \$155).
2. **Power of Angel Investing** (April 24, full day program - cost \$155)
3. **Innovation Showcase** forum featuring up to 48 Hot Start-Ups and angel/VC investor panels on Life Sciences, Software, Clean Tech, New Media, Defense/Security, & Communications (April 25, full day program - cost \$275).
4. **Opening Reception Ballroom Blitz** featuring Hot Start-Ups making 1-minute introductions (April 24 at 5 pm)
5. **California Public Investments in Innovation Dinner** with keynote speakers Dr. Roger Atkinson on "The 2007 State New Economy Index" and Ira Ehrenpreis on "State of Clean Tech" (April 24, follows opening reception - cost \$55)
6. **Innovation All-Star Award Ceremony and Reception** recognizing top "Innovation All-Stars" and "Companies to Watch" sponsored by California Commission for Jobs & Economic Growth (April 25, 5:15-7 pm - no cost)

The entire two-day conference costs \$95 for Wired Partners and Affiliates. Register here: [http://www.amplifyllc.com/in-tel/Regform.cfm?D=qlmh\\$ro0\\$3VOZ&SC=vbKKHCej](http://www.amplifyllc.com/in-tel/Regform.cfm?D=qlmh$ro0$3VOZ&SC=vbKKHCej)

The California Tech 100 highlights also include:

- **"State of Clean Tech" Keynote Presentation by Ira Ehrenpreis, General Partner of Technology Partners**
- **"Building Leading Companies in Today's Economy" by Safi Qureshey, Chairman/CEO of Quartics**
- **Dr. Robert Atkinson to Deliver Featured Presentation on "The 2007 State New Economy Index"**
- **State of the Venture Economy in the California Innovation Corridor Presentation by Randy Churchill, Director of Business Development, PricewaterhouseCoopers' Southern California Technology Practice**
- **New Video Highlighting California's Innovation Leadership**

12. Event news releases were developed for event promotion. These were circulated through relationships at newspapers and other media sources and heavily promoted through viral marketing on the web and through partner and alliance relationships. (The All-Stars aspect of the conference received particular extended media attention through viral and web marketing).

For Immediate Release

Contact:

RECOMMEND CALIFORNIA SPACE AUTHORITY CONTACT

California Tech 100— 21st Century Ideas, Innovation and Investment Event Draws Statewide Response

One Hundred California Companies Showcase Cutting-Edge
Technologies, Products, and Services

Sacramento, Calif. (February 9, 2007)

The California Space Authority (CSA) announced today the upcoming California Tech 100 event, the most concerted effort in recent state history involving numerous state businesses, educators, labor boards, research labs, manufacturers, angels, investor capitalists, and government agencies committed to cultivating California's competitive edge in the global economy. Scheduled for April 24-25 at the Orange County Hilton in Irvine, the California Tech 100's broad representation of California industries, agencies, and leaders promises to discover and support innovative ideas, products and services created in the heart of the California Innovation Corridor—a swathe of 13 counties ranging from San Diego in the south to Alameda in the north.

“We want to honor and showcase the very best technology companies from the California Innovation Corridor region,” said Andrea Seastrand, Executive Director of CSA. “Our goal in hosting the California Tech 100 is to create new and enhanced relationships between workforce and economic development agencies and the private sector innovators who drive California’s economic growth.”

The California Tech 100 event will have several tracks including:

- California Innovation Awards recognizing 100 companies in California that have made a difference and those that may in the future;
- Power of Angel Investing workshop and seminar;
- Technology entrepreneur boot camp covering marketing, legal, and fundraising issues faced by executives of early stage companies; and a
- Dinner program focusing on California’s Public Investment in Innovation: Fostering the Golden State’s Competitive Edge (featuring major accomplishments by several of the State’s leading universities and highlighting many of California’s innovation-based initiatives).

The California Innovation Awards will recognize 52 “Innovation All-Stars” and 48 “Hot Start-Ups” who will make up the “California Tech 100,” representing nine different technology clusters:

- Life Sciences;
- Alternative Fuels/Clean Tech;
- Software/Information Technology/Web Internet Content;
- Medical Devices;
- Advance Materials;
- Defense/Security;
- Advanced Electronics/Semiconductors/ICs;
- Telecommunications/Wireless Communications; and
- New Media.



www.InnovateCalifornia.net



Complete information on eligibility requirements and company nominations for both ‘Innovation All-Stars’ and ‘Hot Start-ups’ are available at:
http://www.goldencapital.net/Events/California_Tech_100.asp.

Event co-hosts include the California Commission on Jobs and Economic Growth, California Space Authority, Tech Coast Angels, Chabin Concepts, East County EDC and Golden Capital Network.

About the California Innovation Corridor

The California Innovation Corridor, led by the CSA and supported by Governor Arnold Schwarzenegger and the Labor and Workforce Development Agency, was selected as one of 13 regions in the country to receive a \$15 million federal U.S. Department of Labor (DOL) grant through its Workforce Innovation in Regional Economic Development (WIRED) initiative. The WIRED grant brings together 60-plus industry, government, education, economic development, and workforce development entities within California’s Innovation Corridor.

- Entrepreneur development;
- Global competitiveness in manufacturing and the supply chain; and
- Creation of the next generation of innovators and technicians

California Tech 100 highlights the State of California’s—and other project partners—commitment to entrepreneurship, innovation, and workforce competitiveness by showcasing and training innovation-based companies.

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PRESS RELEASE

Governor’s Commission for Jobs and Economic Growth Lauds [Company X] as “Innovation All-Star”

California Tech 100 Event Draws the Best of the Best in Unprecedented Style

XXXXX, CA (April 9, 2007) – Governor Schwarzenegger’s California Commission for Jobs and Economic Growth recognized [Company X] today as one of California’s **Innovation All-Stars**—a prestigious recognition that includes more than 50 companies throughout the State of California. The select group was chosen from over 350 nominations submitted for California Tech 100—an unprecedented two-day event endorsed by the Governor that is drawing a broad array of angels, venture capitalists, educators, manufacturers, government agencies, and workforce talent boards seeking to aid the most innovative companies for the future.

“My administration is committed to ensuring that California continues as a powerful job-creating machine,” said Governor Schwarzenegger. “These Innovation All-Stars clearly demonstrate that California is open for business. I applaud their achievements and future success in creating high quality jobs.”

[Company X was chosen for its...]



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“The Innovation All-Stars represent the best of California” said Andrea Seastrand, Executive Director of the California Space Authority (CSA), the leading nonprofit organization that co-hosts and co-organizes the California Tech 100 event.

“We believe innovation and entrepreneurship are the drivers of economic growth in California” added Mark Mosher, Executive Director for the California Commission for Jobs and Economic Growth—a nonprofit corporation whose members are chosen by the Governor to advise him on how to expand jobs and economic growth in the state, “and these Innovation All-Stars are models for our state.” The Commission includes prominent San Francisco financier Warren Hellman, and RAND Corporation Chairman Ron Olson.

The criteria for selection into the final 50 includes: uniqueness of a company's innovation, competitive advantages, and the job and economic impact on California's economy now and into the future. The awards ceremony scheduled for Wednesday, April 25 beginning at 5:15 p.m. at the Orange County Hilton in Irvine, has drawn notable speakers on the forefront of innovation today. Featured presentation is being delivered by Dr. Robert D. Atkinson, President of the Information Technology and Innovation Foundation (ITIF), on “The 2007 State New Economy Index.” The keynote address will be by Ira Ehrenpreis, General Partner for Technology Partners, on “State of Clean Tech Sector.”

The California Tech 100 is produced by the partners of the California Innovation Corridor—a region of 13 counties ranging from Alameda in the north, San Diego in the south, and the Inland Empire in the east. Led by the California Space Authority and supported by Governor Arnold Schwarzenegger and the Labor and Workforce Development Agency, the California Innovation Corridor was selected as one of 13 regions in the country to receive \$15 million over three years from the U.S. Department of Labor Workforce Innovation in Regional Economic Development (WIRED) grant initiative. The initiative focuses on three issues: Entrepreneur development; Global competitiveness in manufacturing and the supply chain; and, creation of the next generation of innovators and technicians



Press Contacts:

[Company X]:

California Commission for Jobs and Economic Growth:
Mark Mosher, 916-325-8605
Mark_Mosher@4cjobs.com

California Tech 100
California Innovation Corridor
Jon Gregory, 530-828-3228
jon@goldencapital.net

California Space Authority
California Innovation Corridor
Wil Simon, 805-349-2633 x111
William.Simon@CaliforniaSpaceAuthority.org



www.InnovateCalifornia.net





FOR IMMEDIATE RELEASE

Wil Simon, Media Mgr., California Space Authority

805-349-2633 x111; William.Simon@CaliforniaSpaceAuthority.org

California Innovation Corridor Recognizes 100 Companies at Statewide Event Governor's Commission for Jobs and Economic Growth Provides California Innovation Awards Honoring Top Businesses

Los Angeles, CA (April 13, 2007) – California Innovation Corridor partners announced 75 “Innovation All-Stars” today who will be honored at the two-day California Tech 100 conference, April 24-25, at the Irvine Hilton/Orange County Airport. Twenty-five additional companies coined as “Hot Start Ups” will also be showcased during this “first of its kind” event bringing together public and private sector leaders to celebrate the Golden State's ongoing global innovation advantage.

The California Tech 100 is endorsed by the California Commission for Jobs and Economic Growth who will honor the top 15 “Innovation All-Stars” with the California Innovation Award for outstanding leadership in innovation during a special late afternoon ceremony on April 25. “We believe innovation and entrepreneurship are the drivers of economic growth in California,” added Mark Mosher, Executive Director for the California Commission for Jobs and Economic Growth—a nonprofit corporation whose members are chosen by the Governor to advise him on how to expand jobs and economic growth in the state. “These Innovation All-Stars are models for our state.”

Managed by the California Space Authority (CSA), and administered through the California Labor & Workforce Agency (LWDA), the California Innovation Corridor is one of the state's initiatives to foster innovation and includes 60 partner organizations throughout 13 counties. It was Corridor partners that reviewed nearly 300 nominees before reducing the list to the next round of finalists—75 companies—that included notable names like Qualcomm, NVIDIA Corporation, and Symantec. Visit http://www.goldencapital.net/Events/OC_AllStarList.asp for a full roster of All-Star companies.

“We want to honor these great companies,” noted Andrea Seastrand, Executive Director of CSA. “Corridor partners have collaborated to create this opportunity to recognize and encourage these companies, because companies on the frontier of new technologies and ideas make us globally competitive.”

“As a true public/private partnership, efforts such as these create and bolster opportunities for business growth, while also driving talent development for our workforce needs,” said LWDA Secretary Victoria Bradshaw. High growth technology sectors help propel California’s economic engine with jobs and entrepreneurial achievements that continue to make California the center of innovation.”

Each Innovation All-Star must have a headquarters or significant presence in the California Innovation Corridor—a region ranging from Alameda in the north, San Diego in the south, and the Inland Empire in the east. “The Corridor is full of innovative companies that often do not get the recognition needed,” added Seastrand. “Their innovation drives the economy and guarantees our children a better life for tomorrow.” Innovation All-Stars were selected based on several factors, including the uniqueness of their innovation, competitive advantages, and the economic impact on jobs for California today and in the future.

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PRESS RELEASE

[Company X] Wins Governor's Award!

Ten Companies at California Tech 100 Conference Seen as the Best of the Best in Innovation

XXXXX, CA (April 26, 2007) – [Company X] was among the top 10 companies, among more than 350 nominated, to win the coveted statewide honor as a California Innovation Award winner from Governor Arnold Schwarzenegger's California Commission for Jobs and Economic Growth. The California Commission for Jobs and Economic Growth, co-chaired by San Francisco financier Warren Hellman and RAND Corp. Chairman Ron Olson, selected the California Innovation Award winners.

“My administration is committed to ensuring that California continues as a powerful job-creating machine,” said Governor Schwarzenegger. “These Innovation All-Stars clearly demonstrate that California is open for business. I applaud their achievements and future success in creating high quality jobs.”

[Insert Quote from Company X Representative]

“These top ten companies are innovation pioneers,” said Andrea Seastrand, Executive Director of the California Space Authority (CSA), a nonprofit, statewide organization that co-hosts the California Tech 100 event and has been involved from the outset. “Such companies keep California and America globally competitive.”

Award winners gathered in Irvine on Wednesday evening as part of the ceremony to receive recognition at the two-day inaugural of California Tech 100. The conference drew investors, educators, manufacturers, government leaders, and workforce professionals from around the state unlike any business-investor matchmaking event of its kind. [Company X] was chosen for its market leadership, innovation, competitive advantages, and job and economic impact on California's economy

The California Tech 100 is produced by the partners of the California Innovation Corridor—a region of 13 counties ranging from Alameda in the north, San Diego in the south, and the Inland Empire in the east. Led by the California Space Authority and supported by Governor Arnold Schwarzenegger and the Labor and Workforce Development Agency, the California Innovation Corridor was selected as one of 13 regions in the country to receive \$15 million over three years from the U.S. Department of Labor Workforce Innovation in Regional Economic Development (WIRED) grant initiative. The initiative focuses on three issues: Entrepreneur development; Global competitiveness in manufacturing and the supply chain; and, creation of the next generation of innovators and technicians



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FOR IMMEDIATE RELEASE

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TOP 15 COMPANIES WIN

CALIFORNIA INNOVATION AWARD

California Tech 100 Conference Becomes Statewide Venue for Honoring State's Leading Creative Businesses

Los Angeles, CA (April 25, 2007) – California Innovation Corridor partners selected the best innovative companies in the State today from more than 75 All-Star candidates originating from hundreds of initial nominations. The California Commission for Jobs and Economic Growth, a nonprofit corporation whose members are chosen by the Governor to advise him on how to expand job and economic growth, will be presenting the awards tonight at the Irvine Hilton/Orange County Airport.

The award recipients include Autobyte, Inc. in Irvine, DJO Inc. in Vista, FormFactor, Inc. in Livermore, Symantec in Cupertino, QAD in Carpinteria, Kintera, Inc. and QUALCOMM in San Diego, IXYS Corporation and Netgear in Santa Clara, and Callidus Software and Covad Communications Group, Inc. in San Jose. The city of Sunnyvale was the big winner though with four local companies winning the award: Kyphon, Juniper Networks, Network Appliance, Inc., and Trimble.

The awards cap off the California Tech 100 event—the “first-of-its-kind” statewide conference that has brought together a unique ensemble of angel investors, venture capitalists, CEOs, educators, and workforce talent professionals focused on celebrating the Golden State's success as an innovation hotbed. State Secretaries Victoria Bradshaw of the Labor Workforce Development Agency (LWDA) and Dale Bonner of Business, Transportation and Housing (BTH) both spoke before enthusiastic audiences yesterday.

The California Innovation Corridor partners, managed by the California Space Authority (CSA), a statewide nonprofit organization, and administered through the Labor Workforce Development Agency (LWDA), chose the final recipients based on market leadership within their industry, employment figures, continuous innovation of products and services, contribution to the California economy, and significant accomplishments in 2006.



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“These innovative companies” added CSA Executive Director Andrea Seastrand, “give people hope and dreams. They make us globally competitive and proud of our heritage as a nation of inventors, creators, and thinkers.” The California Innovation Corridor is a region spanning the length of the state from Alameda county in the north to San Diego county in the south, and eastward into the Inland Empire.

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13. Sponsors were pursued and secured to cover direct expenses of the event and its operations. Sponsorship came through several sources, though not without cost in time, planning, and re-planning. Changes in and the addition of sponsors along the way resulted in the need to rework of marketing and outreach materials, forms and documents, agendas, and required the addition of days to the conference that were not originally envisioned or planned. Several organizations stepped up for sponsorship and support; with each having criteria linked to their sponsorship that needed to be addressed and fulfilled. Focuses of several event sponsors included: Sponsorship of a lunch with training for State Workforce professionals. The generation of a 10-minute video, to be highlighted at the event and showcasing California as a premiere place for business and technology. The sponsorship for training of entrepreneurs, only if this included startups and very early stage ventures. Sponsorship of specific conference segments, dependant upon the ability to deliver opening remarks and the chairing of specific panels within the event.
14. The process of event coordination continued from early January through mid April with:
 - a. Setting and resetting agendas
 - b. Engaging keynote speakers
 - c. Identifying and locking down panelists for VC and Angel presentation panels
 - d. Producing a script and a video
 - e. Obtaining sponsorships
 - f. Producing outreach materials
 - g. Reaching out to partners to promote the event
 - h. Obtaining qualified presenters and qualified companies for consideration for the Governor’s award
 - i. Identifying and obtaining presenting companies
 - j. Identifying and engaging volunteer coaches for the presenting companies

During this process, each of the technology companies selected to present in front of the VC and Angel panels had to undergo coaching in advance of the event to enhance the quality of their PowerPoint presentations and the delivery of their value proposition pitch. As each company was identified, schedules were set to review their business plans and presentations. Each submitted PowerPoint presentation needed to address specific criteria looked for by investors, as did their accompanying verbal presentations. These were presented by the companies via a webinar with three to five Coaches present on each coaching session. Coaches provided feedback and guidance and companies were scheduled for another presentation after changes were made in order to judge the reworked presentation’s effectiveness. Companies were coached and assisted from two to six times each. Finally, the reviewers and coaches selected companies to present in front of six investor panels composed of 32 VC and Angel investors. This process ran from early March to late April, immediately before the event.

15. Online site registration was developed and managed. All materials used for outreach were updated. Various links were created by partners and affiliates to the registration site.
16. As agendas were finalized, speakers, panelists and keynotes were identified and committed, MOUs and agreements designed, run through Counsel, and signed. Presenting companies were finalized and sponsors were locked in. Layout of conference materials began. (A high quality



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glossy spiral bound book with agendas, keynote bios, sponsorship write-ups, presenting company write ups, and speaker and panelist bios was created). In addition, a “California Innovation All-Stars Award Ceremony & Reception” (names and descriptions of all winners and runners-ups with a description of each company) booklet, to be used for the last night of the event, was created. In addition, a specialized booklet entitled “How to be an Angel Investor without Losing Your Wings” was created for the opening day’s training seminar for potential Angel investors.

17. During the last five weeks of the process (mid-March to the day prior to the event – April 24th), a video company was interviewed and a contract was signed, a script written and reviewed, interviewees were identified and live footage shot and stock footage obtained. The video was rough edited and a soundtrack added. The video was reviewed, refined, finalized and delivered the day of the event).
18. A decision to have additional filming was made in order to capture keynote speakers and conference details. A videographer was interviewed and engaged to capture the event. (This proved unnecessary in retrospect and was an expense that could have been avoided. Raw footage was not utilized, though several partners supported this option during the decision making process.
19. The All-Stars, the top fifteen ranked companies that were nominated by partners and economic development and business professionals from across the state, needed to be screened, selected by committee, and notified. Letters of congratulations needed to be designed and sent. RSVPs along with details and maps were additionally sent. Names of the accepting parties for the companies were collected for inclusion in the final brochures prior to their printing. Certificates that reflected the State’s involvement were designed and sent to the appropriate State representative for signature. Since all such requests for State Administration endorsement require a multi-step routing and approval process, this evaluation process took significant time and was not completed until just before the event, resulting in increased stress.

April 24, 2007

CONGRATULATIONS FROM THE GOVERNOR

As Governor of the State of California, it is my pleasure to welcome you to Orange County for the 2007 California Innovation Corridor Entrepreneur Summit. The Summit brings together entrepreneurs; private equity investors; business, industry and technology executives; academia and statewide policy leaders; and workforce development and economic development professionals who share a commitment to the notion that innovation-based entrepreneurship is the key economic driver in today’s global economy.

To that end, it is also my pleasure to acknowledge the 50 **California Innovation Corridor “Innovation All-Stars”** who will be honored during a special ceremony at this important event. These “Innovation All-Stars” were selected based on the following criteria:

- Market leading company (or on a fast track to become one) in business for at least 2 years, and generating revenue
- The Uniqueness/viability of the company’s innovation
- Demonstration of competitive advantage (through intellectual property, business processes, exclusive deals, etc.)



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- The company is doing business in a large and growing national or global market
- The company is located in, or has a substantial presence in, the 13-county California Innovation Corridor

Collectively, these innovative businesses have a substantial positive impact on California's economy, and are critical to maintaining our Golden State's economic competitiveness.

Again, welcome to the 2007 California Innovation Corridor Entrepreneur Summit!

Sincerely,

ARNOLD SCHWARZENEGGER
Governor

May 7, 2007

First Last
Title
Company
Address
City, CA Zip

Dear Title Last:

The California Space Authority would like to formally congratulate you on being nominated as one of the top ranking Innovation Companies that represent the State of California. Nearly 300 companies were nominated by local and regional partners of the California Innovation Corridor, which represents the most innovative companies in the State of California and the World.

From these nominations, 75 companies were designated Innovation All-Stars and fifteen of these 75 companies were selected California Innovation Award recipients based on market leadership in their industry, employment figures, continuous innovation of products and services, contribution to the California economy, and their significant accomplishments in 2006. (Company name) represented one of the top 75 companies that were designated innovation All-Stars, and represent the best of the best the State of California and the United States has to offer.

Awards for the Innovation All-Stars were presented on April 25th, 2007 to the top 15 selected companies, and were presented by Mark Mosher, Executive Director of The California Commission for Jobs and Economic Growth, which is a nonprofit corporation whose members are chosen by the Governor to advise him on how to expand jobs and economic growth in the state, by Duane Roth, Commission Member, CEO of CONNECT, and Chairman of Alliance Pharmaceutical Corporation, and by the Honorable Andrea Seastrand, Executive Director of the California Space Authority.



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(Company) was recognized as one of the top companies in the California Tech 100 awards, and we are proud and honored to have you in the State of California. Enclosed in a certificate, which was presented to the attendees of the top selected 75 innovation companies.

Congratulations on being among the top innovators in your State, and we are pleased to present you with this certificate.

Sincerely,

The Honorable Andrea Seastrand
Executive Director of the California Space Authority

20. Awards for the All-Stars award needed to be selected, ordered, engraved, and shipped to the event. The awards did not arrive until the morning of the event.

Description of how and why strategies and tactics changed during the course of the conference's planning and execution.

Initially, the conference agenda was planned as a one day event designed to fulfill a grant initiative. The CATech 100 conference would be a demonstration project with entrepreneurial companies, including SBIR Phase II awardees, to identify best practices in helping innovative companies commercialize technology, and create jobs. The event would be patterned after an Investor pitch - VC / Angel pitch model. It would be designed to attract technology and entrepreneurial companies in sufficient numbers so that 30 qualified candidates could be selected and engaged to enable the tracking process to be viable under our grant objectives.

With the inclusion of various partners, sponsorship requirements, and political and strategic imperatives, the focus shifted from a one-day, one-on-one training and hosting event into providing training for several combined groups, political outreach, and entitlements. This expanded agenda required the addition of other program elements not originally envisioned in order to support the additional requirements. The "All-Star" element was included to bring the State powers, name branding, and prestige to the event, that added an increased burden of an awards ceremony. This was done to enable large companies to attend and for them to be a draw for smaller entities that wished to make strategic contacts with some of the larger players. It was also envisioned that inclusion of larger players would assist in drawing out qualified startups to participate in the event.

As the event progressed, more input from more individuals with agendas was received. Sponsorships that needed to be accommodated required changes in the planning process, not once,



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but multiple times. The All-Stars Award was conceived, recognizing the top 15 innovative companies in California. Later it was broadened to include recognizing the next top 60 "Innovation All-Stars". This would bring the total of companies recognized up to 75, and with the inclusion of the presenting companies the event could now be called the CATech 100. This title was deemed more impressive than the CATech Innovation Awards. During this iterative planning cycle, the idea of including California Nobel Prize winners - in the awards ceremony was broached. This proved immensely problematic in that names of these laureates, their contact information, etc. was hard to identify, and the real reason to include them in the event was tenuous. Despite the effort undertaken, time constraints eventually precluded the Nobel Prize winners from the agenda.

Sponsorship and support proved challenging, not only in identifying and obtaining, but in fulfilling the requirements of the sponsors stipulated as conditions of their contributions. By starting the planning process in late December, many dollars that could have been available for sponsorship during the conference period had already been earmarked for other projects, and available funding for the event came in smaller amounts. If the planning process could have been started in the Fall of 2006, the sponsorship shortfall could have been avoided. Holding the event in April did not allow for the reaching out to enough individuals to interest many sponsors, and those that were interested had specific criteria tied to their support. One sponsorship source originally promised for event logistics, and that was used for the initial planning of the agenda, was decreased 75% and reallocated to the production of a video. This process happened without discussion with the planning committee and led to intense reformatting and planning changes to all aspects of the conference.

Because the effort was primarily underwritten by the WIRED grant, it was necessary to try to include the Economic Development (ED) and Workforce communities in the planning and implementation of the CA Tech 100 event. It was believed that the event could provide a training venue for ED/Workforce professionals by immersing them in the innovation entrepreneur/venture investor environment. Based on this assumption, training sessions, support materials and outreach materials were developed. Near the end of the process, it was recognized that the target market was not amenable to this training. The team recognized a need for these groups - Workforce Investment Boards (WIBs) to learn and implement tactics for working with high tech companies. The recipients pushed back and were not interested in embracing these concepts. Later, the team learned that the data about and processes for working with high tech companies was both useful and needed, were not part of WIB metrics or reporting criteria. As they would not be evaluated on any of the outcomes, the argument for not attending or embracing it was, "We are busy. We cannot justify the expenditure of attending a conference to learn something that may be needed but that will not have any impact on our reportable metrics and that will be questioned as to why we decided to go down this path as it is not in our charter." This stand of the WIBS required changes to agendas, planned training sessions, break out sessions, speakers, and sponsorship criteria at the last minute due to lack of interest on part of the WIBs.



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Lessons learned form the event, including:

- ***Things that would be done again***
- ***Those that would be changed but still attempted***
- ***Things that would be avoided***

Event timing:

Several lessons learned from the event concerned issues of timing. This project started off late in the cycle due to staffing issues. When staff was allocated to oversee and engage grant partners and initiate the event, it was during the Holiday Season. This proved problematic across several fronts due to partners' schedules, vacations, end-of-year commitments, and travel schedules. Many decision makers needed for planning and event idea feedback could not be contacted during the month of December. Additionally, the first several weeks of January proved problematic due to individuals, groups and organizations ramping up in the New Year and engaging in internal planning sessions. Rough agendas were drawn up; however, because it was not possible to vet these agenda assumptions with the larger group, lack of information led to iterative changes to planning steps, agendas, and implementation. Initiation of planning this late in the season also injected a challenge in venue selection. Many venues were already booked for dates identified as the prime times for this event. The challenge was that there needed to be enough time to design, find sponsorship for, market, coordinate, and print materials for the event. Many venues were booked during our selected times. Additionally, two prime times that were available that would have made the event later in the Spring (early to mid May) were overruled owing to internal programmatic conflicts. This led to accepting a venue that was not ideal and an event planning schedule that was severely constrained.

Due to event timing, marketing and organizational outreach was very short. To make an unsolicited impression on potential attendees, at least five to seven mail or email presences must be made. By the time concepts were consolidated and agendas and marketing materials were developed, there was scant time to develop and or obtain qualified databases from which to reach out. Additionally, due to time constraints and perceived spamming criteria and not having control over email options internally, not enough emails could be sent to potential attendees to generate interest to the level that was anticipated. This additionally made it difficult to identify qualified entrepreneurs to pitch to investors and placed an increased strain on event coordinators and their vested partners.

Lesson learned:

To generate success and mitigate inherent stress associated with an event, the planning process should have begun in the previous summer. By mid-Fall, a venue should have been selected and locked in. Sponsors should have been contacted during the beginning of the preceding Fall when their budgets for the next year were not yet allocated. This would have resulted in fuller funding and enabled building of sponsorship criteria into the agenda. It also would have enabled a more strategic selection of sponsors and the identification and selection of a centrally located, easily accessible, affordable venue with good negotiated rates.

If agenda design and planning was initiated in the Fall, strategic relationships could have been forged with organizations for outreach and event assistance. Marketing



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material could have been developed and outreach and circulation could have begun before the holiday season. Marketing at this time would have allowed an impression on potential attendees and presenters, and allowed for the input into their calendars as an event worthy of attendance or participation. Additionally, it would have set the stage for providing early-bird registration. By offering a break on registration prices, the conference could have been partially filled well in advance of the event. Costs could have been covered before the event by pre-registration, and pre-registration would have provided a good indicator of possible interest and attendance.

If outreach had been possible earlier in event design and development, the process of identifying, selecting and working with presenters and identifying and locking in panelists and keynote speakers would have been far easier.

Agendas:

Initially, the conference was envisioned to be a one-day, investor pitch conference. This assumption was the founding rationale for the identification, engagement and tracking of selected technology companies meant to fulfill a deliverable under an existing grant. As selected partners and feedback from internal personnel grew, the conference agenda grew from a one-day, focused event, into a two-and-a-half day conference, then down to a two-day event. This agenda encompassed a multitude of mini agendas, ranging from the initial concept to specialized training for the presenters, training for Workforce professionals, specialized panels for sponsors, unique slots for keynotes meant to act as marketing tools to compensate for the late date of planning and early date of delivery, and criteria to use specialized funds not originally earmarked for this event but that needed to be utilized to fulfill internal commitments.

Agendas expanded and contracted several times, depending on sponsors, partners, and internal objectives. Several of these reshaping were due to unplanned external forces, though many were due to poor planning equated with too-little-time, internal and external politics within and across partners, and ancillary agendas not associated directly with the event. The event became overcomplicated with multiple activities (several keynotes, an awards ceremony, video rollout, boot camps, Angel Seminar, All-Star competition, dinner program, presenters for investment panels, and political attendees). It became increasingly difficult to draft a concise marketing message, or to identify and reach a defined, targeted database. There were too many things happening for too many attendees. For such a short lead time, this may have assisted in attracting attendees. As a focused marketing message and attendee list could not be developed, any list that was available and any organization that would agree to market for the event was acceptable since there was a little of something for everyone.

Lessons Learned:

If more time was available, a more focused agenda would have been developed. Input from multiple partners and sources would have been attenuated, and kept to only key team members, (specifically those involved with actually executing on the initiatives and ideas). Criteria would have been devised to identify and close strategic sponsors earlier in the process, eliminating several agenda alterations and additions. This would have enabled a shorter, more focused, easier to coordinate, fund, and execute event.



One area that would be severely curtailed or avoided would be the inclusion of political figures in the agenda. This aspect was included due to the compressed time available for event development, marketing and delivery. The reasoning for and inclusion of political figures in the event was multifold. By the creation of a “State” technology award solely for this event, it was reasoned that it would be easier to obtain sponsorship and organizational participation, and it would be easier to create outreach and marketing materials that would attract attendees. The challenge was that with the inclusion of political figures came the challenge of coordinating their schedules. There was always a question of their attendance, depending on other meetings and more pressing or visible imperatives in their schedules. Additionally, special slots needed to be created for their speeches and consideration as to protocol of introduction. The problem of who would introduce whom and what would be said, etc, became increasingly challenging as event time drew closer. Assured commitments were not forthcoming, up to the last day of the event. The benefit of a gain in marketing leverage was off-set due to the challenges imposed by the multiple contacts and follow up needed in coordinating the agendas of the political figures. Personalized invitation letters were designed, screened and sent. Multiple descriptions of the event needed to be sent and multiple calls were placed. Not knowing up to the last minute whether a specific person would be on the agenda imposed challenges as to who to put into what slots, how long they had to speak, who would be introducing whom, and the finalizing and printing of materials. If more time had been available, this would not have been considered as an option, though with the shortened time allotted, the inclusion of the political entities was one of the strongest of only a few options available.

Despite aggressive outreach and follow up, it was extremely challenging to engage many of the Workforce Investment Boards (WIBs), economic development groups, and universities. The initial agenda envisioned bringing together these groups to effect change within California and to enable these groups to interface and form relationships. Internally, it was deemed important for this process to happen under the grant; however, these groups did not participate as they were either insular or parochial in their perspective, or did not see benefit to the process as any outcomes produced would not be beneficial to their metrics and reporting. Several key organizations from these groups did participate, although these were already engaged in the process of the event. Before planning agendas that would have included these groups, a poll should have been conducted to gauge their interest and support. Time did not allow for this, resulting in wasted effort and time. Due to the change in agenda, a key outcome planned from the event: “Engage and energize Transformational Impact on WIBs / EDs / Innovation Support Resources” was not realized.

Decision makers:

Several areas were time critical and dependant on other’s decisions. Many of these decisions were sought from those not directly involved with the design, coordination, funding, or execution of the event.

Lessons Learned:

Try to eliminate any areas that you do not have direct power or authority to control or direct. Build only areas that you can control into the event and its agenda. This will greatly improve response time. Improvements would include finalizing of out-reach materials, relationship building with other organizations, agreement finalization, contract



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finalizing, logistics decisions, sponsorship decisions, inclusion of personnel (for other's tactical and strategic plans – not for the betterment of the event), decisions on keynotes, etc. The more decisions that can be kept to one or two key individuals, the faster and smoother an event will progress and run.

Press, Outreach and Marketing: The team experimented with several outreach and marketing techniques and used several of them. Each had had successes under different circumstances in the past, and under this event's compressed time frame, each recognized differing levels of success.

The first method utilized was leveraging the databases of the Corridor partners on the projects and of internal databases. Each partner had a database exclusive to their organization and focused on their particular niche client or membership. Marketing materials were sent out through these partners with varying levels of response. Database sizes varied from several hundred to several thousand. Most interest was generated by databases focused on entrepreneurial development and small business interests. There were organizational concerns of appearing to spam one's membership, and limited amounts of email were sent. This outcome was reflected in the second method, though to a much greater extent.

The second method utilized for outreach and marketing was creating alliances with organizations that had a vested interest in the event, either since they wished to have one of their clients as a presenter, they wished for the visibility of having their name and or logo on the conference book, or they wanted free tickets to the event for being an event sponsor. The challenge with this approach is that it was never clear when or if the materials were sent out. There was no way of verifying. When organizations did forward materials to their membership, materials were not emailed as often or during the time frames needed, or at times that were optimal for the event. When organizations did send out materials, it was to ensure that it would not cannibalize any internal projects or events that they had.

A third method utilized to generate interest was press releases and contacts with key newspaper reporters. This outreach was very sporadic. Only two press releases were picked up with no discernable impact, however, several reporter relationships yielded results. These relationships generated pre and post event articles, though the impact of the written media seemed to have minimal effect on the event.

A fourth method that generated significant response for visibility and, that was unforeseen, was viral marketing. This was done by providing press releases to each of the award winners with a description of the event and highlighting each company and their involvement. As each company received their release, they contacted their media relationship groups and posted their information through multiple web sources. Each company had their own PR process and this multiplied internal efforts significantly. It was noticed that press was picking up the event in sectors that were not anticipated.

A fifth method used for outreach and marketing was through personal relationships. Many organizations, sponsors and potential sponsors were contacted through personal relationships and one-on-one outreach. Law firms were contacted who might have clients interested in potentially presenting their idea to investors. Banks were included, along with Federal Labs, ED professionals, SBA Small Business Development Centers, Incubators, and others.



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Lessons Learned:

Outreach, marketing and publicity are many times intermingled, though each has its own process and unique outcomes and impact upon an event. Marketing and outreach need to start very early. The key is the number of presences in front of potential attendees. This process should start early, and be consistent. It was unclear whether many of the requests for organizations to send information to their members resulted in any emails at all, or if they did, not many went out. One method to incentivize organizations to market to their member and client lists would be to provide reverse sponsorship. (The organization would receive a percentage of whoever registers coming through them, or they receive a certain number of free tickets, etc.). This would have been a possibility had an agenda been finalized earlier in the process and marketing materials generated by a date where this would have been useful.

Press releases and press contacts proved enigmatic at best. The pickup of releases along with brief mentions in printed material had no clear benefit to the event. Press articles had the same narrow impact. The only thing accomplished or recognized through these efforts was internal excitement and false anticipation that “if they print it, they will come.” No increased, track-able attendance resulted from any efforts expended in preparing pre and post conference releases, or support materials for news media.

Viral marketing proved to be the largest surprise of the conference. This was arguably one of the easiest and most effective tools used, and was the largest surprise as it was not planned or envisioned. It happened as a marketing tool that was used to interest the companies that had been selected as award winners. The press release was to generate interest in their upper level management so a high level employee would attend. Their PR departments picked this up and used it for self promotion, ultimately marketing the event as an ancillary result.

Web design

One key area where sufficient time was not available to address was the building of a dedicated site and url for conference information, updates and registration. A site for registration was eventually designed, though many registrations were manually accepted and input. There was not sufficient time for a site to be designed to any extent. This was an area that needed attention and that became a priority only when registrations became unwieldy. Unfortunately, this process was well into the fourth quarter of the time allocated to designing and delivering the conference.

Lessons learned:

If the required bandwidth had been available earlier in the planning and initiation process, a web design would have been co-developed simultaneously with a finalized agenda. Integrated into the web design would be web evaluation data tracking, including: how many hits the site received, from whom, number of unique visits, length of time visited on each page, number of click-throughs, return visits, an opt-in function to receive info on other events, and dates and times of the day visited. This information would have been invaluable for email evaluation and impact and for judging the performance of partners and organizations email promises. None of these were available, either internally, or through the final registration page when it was developed.



Ancillary Tasks

During conference design, planning and implementation, several ancillary tasks and projects were discussed that were not core to the event. Many were discussed and several implemented. One was tied to the video documentation of keynote speakers and the event. This process resulted in a videographer being interviewed, agreements drafted, reviewed by counsel, accounts set up for payment, signed contracts being delivered, etc. Coordination between the videographer and staff consumed time immediately prior to the event that could have been more productively spent marketing the event and addressing other pressing implementation issues. The outcome of the video was the raw unedited footage of speakers and the event that has not been utilized to date and which most probably will never be used or viewed.

A still photographer was retained to capture images of the event, including stills of presenters, panelists, keynote speakers, political invitees, and general attendees. Two days before the event, the engaged photographer backed out. This presented a void that had to be filled internally. This led to a key staff member pulling double duty as photographer and coordinating the event. Captured images from the event were archived, though will most probably never be utilized. Copies were sent out to political attendees, panelists, presenters and award recipients, though this most probably could have been eliminated, saving time and expense.

Lessons Learned:

Stay focused on core outcomes. Spend time and capital only on those things that lead directly to a successful event. Post production of any materials after an event will most likely be forgotten or ignored as post-event cleanup of thank you notes, billing, invoicing, etc. will consume whatever energies are left of involved staff. Volunteers are hard to keep focused prior to and during an event. After an event, it is challenging to get pro bono work and hard to justify expenditures for post production. Unless the work can be leveraged for another event, its priority will be eclipsed with other items that were put on hold during the event which need to be immediately addressed. The video captured from the event was not useful and presented a loss of capital and time. This video will most likely never be utilized. Images, though more useful than video, additionally represented a poor return on time and investment. Sending images and thank you letters to attending officials, panel members, and award winners after the event represented a nice touch, though most likely did not curry any additional favor or mileage that could be capitalized on for future efforts. Additionally, having two days of event images was not very effective as only one image was used for a follow up story in an internally generated newsletter.

Event

General Challenges

The level of effort (LOE) anticipated for the planning/implementing the event was greatly underestimated given the amount of effort required to organize and implement the event. Many factors contributed to this underestimated LOE. The two most significant areas were: 1) The assistance of many partners was key to the development and successful offering of the event, however, coordinating organizations and groups with varying schedules, agendas and viewpoints added increased upfront and planning/re-planning to an already constricted timeframe. 2) One key individual was not directly empowered as the final decision maker.



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Many decisions were made internally or by committee, absent the best intentions for the event. These were due to other agendas that did not necessarily complement the event itself and its objectives.

Lessons Learned:

Empower one individual, whose focus is only on the event, with the power and authority to make decisions based on agendas, budgets, and the event's best interest. Additionally, cut back or eliminate any political figures in an event. The commitment cycle is too long. Inclusion of political figures in an event does not provide any draw or value-added to attendees, and agendas are hard to finalize, due to political figures' agendas.

Results Realized from the Event

- Several entrepreneurial companies that attended the event were invited to join the Governor's trade mission to Canada to represent technology companies in the United States.
- Relationships with prominent technology companies within the California Innovation Corridor were established.
- The opportunity now exists to enhance the relationship with the top 100 companies by surveying them each year to track progress, growth, successes, fulfilling several aspects of the grant.
- The event broke even for all partners concerned.
- Relationships between partners and organizations that had not previously existed were formed up and down the Coast of California. This has led to several advancements for the creation and support of other products and services to support Economic Development professionals, select Workforce Investment Boards, and has allowed groups and organizations who have not previously worked together to form bonds for future collaboration. These relationships are, in fact, a cornerstone of an innovation entrepreneur support system and absent any future event of this type, are of significant value to the California Innovation Corridor.

Note:

This is in hindsight. The event was a success and accomplished many of the goals needed and anticipated, as well as several that were not anticipated. This intense level of effort, however, took a tremendous toll on staff, partners and volunteers. Key team members clocked weekly hours in excess of 90+ for extended periods of time over a four and a half month period. In addition, each of the most active team members had other projects that demanded their attention during this period. Additionally, non-project related activities, including internal and external meetings, conferences, etc., had an adverse impact on the timely execution for many critical event tasks and severely limited event interaction time and success.

What can be replicated in the California Innovation Corridor Sub-Regions, in California, and Nationally

- Organization of events that are highly compelling to entrepreneurs, technology companies and private investors.



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- Creating an All-Star program that showcases the best or highest visibility technology in a sector, region or State.
- Securing highly compelling content that addresses both public resources and private resources that can be of value to entrepreneurs and ED and WIB professionals.
- Increase the time between any statewide awards to increase the value of and anticipation for the award.



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