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Research • Funding • AI Strategy • Est. 2004
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Funding Pathway Selector

A practical worksheet for choosing the most appropriate funding routes for a commercialization idea, university spinout, startup, technical service, or innovation project.

Project / technology:	_____	**Prepared by:**	_____
Organization / team:	_____	**Date / version:**	_____
Current stage:	☐ Idea ☐ Prototype ☐ Pilot ☐ Launch ☐ Growth	**Primary sector:**	_____
Funding goal:	_____	**Target amount / range:**	$ _____ to $ _____

1. Purpose of This Tool

Use this selector to compare likely funding routes before spending time on a proposal, pitch, investor deck, grant application, or partnership outreach. The goal is to match the project stage, evidence base, budget need, timeline, risk profile, and commercialization path with the funding source most likely to make sense now.

2. Project and Funding Need Summary

Item	Prompt	Working answer
Core project objective	What must the funding enable? Example: prototype, validation study, market discovery, regulatory work, pilot, software build, manufacturing scale-up, commercialization launch.	
Funding amount needed	Estimate the minimum viable budget, ideal budget, and stretch budget.	Minimum: $____ Ideal: $____ Stretch: $____
Timeline pressure	When is funding needed and when must work begin?	
Type of work funded	R&D, commercialization planning, customer discovery, regulatory, manufacturing, clinical/scientific validation, pilot, sales/marketing, operations, hiring, or infrastructure.	
Acceptable tradeoffs	Can the team accept equity dilution, reporting burden, milestone controls, publication limits, IP restrictions, or procurement complexity?	

3. Funding Pathway Snapshot

Pathway	What it usually funds	Best-fit situation
SBIR/STTR	Non-dilutive federal R&D funding for small businesses with innovative	Strong fit if technical risk, R&D work, qualified team, and agency mission

Pathway	What it usually funds	Best-fit situation
	technology and commercialization potential.	alignment are clear.
Federal / state grants	Non-dilutive funding for research, public benefit, workforce, health, climate, education, or technology priorities.	Strong fit if the project aligns with a program purpose and can meet compliance/reporting requirements.
Foundation / nonprofit grants	Mission-aligned funding from foundations, associations, nonprofits, or philanthropic initiatives.	Strong fit if the project serves a public, patient, community, scientific, or social mission.
Contracts / procurement	Customer-funded work through government, institutional, or corporate purchasing channels.	Strong fit if a defined buyer has a procurement need and the team can deliver services or products under contract.
OTA / consortium opportunities	Flexible defense/health/technology prototype opportunities often run through consortia.	Strong fit if the project aligns with defense or federal prototype needs and can move quickly with technical credibility.
Strategic partnership	Funding, pilots, data access, distribution, validation, or co-development from a larger partner.	Strong fit if partner value is clear and the project benefits from channel access, validation, or infrastructure.
Licensing / university tech transfer	Commercialization through an existing company, startup license, sponsored research, or option agreement.	Strong fit when IP ownership, use rights, and commercialization partner roles are clear.
Angel / seed investment	Dilutive funding from individual investors, seed funds, or early venture sources.	Strong fit when the market story, growth potential, team, and investor return logic are credible.
Crowdfunding / community funding	Donation, reward, investment, or mission-based funding from a broad supporter base.	Strong fit when the project can be explained simply and has a compelling audience or community.
Revenue-funded / bootstrapped path	Growth funded by early customers, services, consulting, pilots, pre-sales, or internal cash flow.	Strong fit when the team can sell something useful before a large external raise.

4. Fast Screening Questions

Question / criterion	Status	Notes / evidence
Is the work primarily technical R&D with uncertainty that needs to be resolved?	☐ Yes ☐ Partial ☐ No	
Is there a clear public, scientific, health, defense, education, climate, or community benefit?	☐ Yes ☐ Partial ☐ No	
Is there already a buyer, institutional customer, or operational sponsor who wants this solved?	☐ Yes ☐ Partial ☐ No	
Does the project require customer	☐ Yes ☐ Partial ☐ No	

Question / criterion	Status	Notes / evidence
discovery, market validation, or commercialization planning before a larger build?		
Does the team have rights to use the intellectual property or technology?	☐ Yes ☐ Partial ☐ No	
Can the team support compliance, reporting, budgeting, and milestone tracking?	☐ Yes ☐ Partial ☐ No	
Would equity investment make sense given the market size and growth potential?	☐ Yes ☐ Partial ☐ No	
Would a strategic partner increase adoption, validation, data access, or distribution?	☐ Yes ☐ Partial ☐ No	
Can the project produce near-term revenue through pilots, services, pre-sales, or paid demonstrations?	☐ Yes ☐ Partial ☐ No	

5. Pathway Fit Scoring Matrix

Score each pathway from 1 to 5. A score of 1 means weak fit; 3 means possible fit with gaps; 5 means strong near-term fit. Use the notes column to identify what must be confirmed before moving forward.

Funding pathway	Mission / buyer fit	Stage fit	Evidence fit	Budget fit	Timeline fit	Total	Notes / gaps
SBIR/STTR	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Federal or state grant	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Foundation grant	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Contract / procurement	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
OTA / consortium	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Strategic partnership	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Licensing / tech transfer	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Angel / seed investment	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Crowdfunding	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	
Revenue-funded / bootstrapped	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	____ /25	

6. Evidence Requirements by Pathway

Pathway	Minimum evidence to assemble	Current evidence / gaps
SBIR/STTR	Technical innovation, R&D plan, qualified team, agency fit, commercialization potential, small business eligibility, work plan and budget.	
Federal/state grant	Program alignment, need statement, measurable outcomes, implementation plan, budget justification, compliance readiness.	
Foundation grant	Mission alignment, beneficiary need, impact logic, partnership credibility, sustainability plan, evaluation plan.	
Contract/procurement	Defined buyer need, scope of work, pricing, delivery capability, past performance, procurement pathway.	
OTA/consortium	Prototype relevance, technical team, rapid delivery capability, defense/agency alignment, consortium membership if required.	
Strategic partnership	Partner value proposition, IP/ownership clarity, pilot concept, mutual incentives, integration/data requirements.	
Investment	Market size, growth model, traction, defensibility, team, investor return logic, use of funds, exit or scale potential.	

7. Funding Amount and Timing Fit

Funding need	Typical range	Likely pathways to test	Best current option
Immediate small need	$5K-$50K	Customer discovery, consulting revenue, pilot sponsor, foundation micro-grant, TABA if eligible, internal funds.	
Early validation need	$50K-$300K	SBIR/STTR Phase I, state innovation grants, foundation grants, angel bridge, paid pilots.	
Major R&D / build need	$300K-$2M+	SBIR/STTR Phase II, strategic partner, seed investment, federal contracts, OTA prototype awards.	

Funding need	Typical range	Likely pathways to test	Best current option
Commercial launch / scale	$500K-$5M+	Investment, strategic partnership, revenue financing, procurement contracts, later-stage grants where available.	

8. Pathway Decision Tree

Question	If answer is...	Likely next funding pathway
Is the work technical R&D with meaningful uncertainty?	Yes	Test SBIR/STTR, federal R&D grants, OTA/prototype, strategic technical partner.
Is the project primarily a public-benefit or mission-driven program?	Yes	Test foundation grants, state/federal grants, nonprofit partnerships, public agency programs.
Is there already a clearly identifiable buyer?	Yes	Test contracts, pilots, procurement, revenue-funded approach, strategic partnerships.
Is the project built around university IP?	Yes	Test licensing, option agreement, sponsored research, spinout formation, SBIR/STTR if small business path is viable.
Is rapid growth and a large addressable market central to the opportunity?	Yes	Test angel/seed investment, strategic investment, venture-friendly grants, accelerators.
Is the team not yet ready for a proposal or investor raise?	Yes	Prioritize customer discovery, market evidence, readiness work, technical milestones, and a smaller validation budget.

9. Key Assumptions to Validate Before Committing

Assumption	What must be true	Status
Eligibility	The team, entity type, ownership, IP rights, and project activities meet funding rules.	☐ Confirmed ☐ Needs review
Program fit	The opportunity aligns with the funder, agency, buyer, investor, or partner priorities.	☐ Confirmed ☐ Needs review
Budget fit	The requested amount can realistically cover the work and is appropriate for the pathway.	☐ Confirmed ☐ Needs review
Timeline fit	Submission deadlines, award timing, review cycles, procurement cycles, or investor timing match project needs.	☐ Confirmed ☐ Needs review

Assumption	What must be true	Status
Evidence fit	The team has enough technical, market, financial, or stakeholder evidence to be credible.	☐ Confirmed ☐ Needs review
Commercialization fit	The path supports the long-term business model, licensing model, service model, or market-entry plan.	☐ Confirmed ☐ Needs review

10. Recommended Pathway Summary

Decision item	Working answer
Primary funding pathway to pursue first	
Secondary pathway to prepare in parallel	
Pathway to defer for now	
Main reason for this recommendation	
Biggest readiness gap	
Most important evidence to collect next	
Decision owner	
Target decision date	

11. Next-Step Action Plan

#	Action	Owner	Timing	Status
1			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done
2			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done
3			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done
4			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done
5			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done
6			☐ This week ☐ 30 days ☐ 60 days	☐ Not started ☐ In progress ☐ Done

Notes: capture unresolved questions, funder names, deadlines, potential partners, or documents to assemble.

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12. ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization. We help teams evaluate funding fit, prepare proposals, develop commercialization plans, organize evidence, and build practical next-step strategies for research-driven and technology-driven projects.