

# RDBASE project template for claiming tax credits



## I PROJECT OBJECTIVE BEYOND STANDARD PRACTICE:

**GOAL is to prove to Government (CRA, IRS, etc.):**

### i) State of Existing technology: Benchmarking methods & sources

*Technology limits of "readily available" information to someone "skilled in the art."*

	<u>Number (#) of</u>	
i	Internet / Google Searches	internet sites
ii	Articles	articles
iii	Patent searches	patents
iv	Competitive methods	products / processes
v	In-house technologies	products / processes
vi	Potential components	products
vii	Queries to experts	responses
viii	Other	

### ii) Objective(s)

Performance benchmarks (top 5)\*  
Benchmark 1      Benchmark 2

*Quantifiable Objectives beyond known limits*

i	Existing benchmark	_____	_____
ii	Units of measure	_____	_____
iii	Performance objective	_____	_____
iv	Result (III below)*	_____	_____

## II TECHNOLOGICAL UNCERTAINTIES

*Using "science" to formulate hypotheses & experiments*

Variables for experimentation (top 5)\*\*  
Variable 1      Variable 2

Name of variable      \_\_\_\_\_

## III EXPERIMENTAL ACTIVITY

*Defined by tax year\**

### i) Experimentation method

Number of

*Justify sample sizes via "variables"*

i	Analysis / simulation	_____	alternatives	<i>Quickest</i>
ii	Process trials	_____	runs / samples	<i>Longer</i>
iii	Prototypes	_____	samples	<i>Longest</i>
iv	Software	_____	lines of code	
v	Other methods	_____	revisions	

### ii) Analysis

i	Results	_____	* vs. Objectives I	<i>Identify the unexpected</i>
ii	Conclusions	_____	** on Variables II	<i>Attempt understand "why?"</i>
iii	Documentation	_____	Experiments/Analysis	<i>Proof experiments &amp; costs</i>

### iii) Direct Costs

i	Wages	_____	Hours / Employee	<i>* PROJECTS span multiple years but ACTIVITIES match tax years.</i>
ii	Contractors	_____	Labour \$ / Contractor	
iii	Materials	_____	Consumed/transformed	