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Transition from corporate relations to corporate engagement requires teamwork, training

As universities restructure, reconfigure and refocus their interactions with industry partners -- with an increasing emphasis on maximizing company touch points -- the corporate relations function in particular finds itself in a state of considerable flux.

One need only look at the spate of recent reorgs and re-namings of corporate relations offices to know that there is a significant shift under way. For example, Princeton University’s Office of the Dean for Research “revised the name from Corporate Relations to Corporate Engagement in 2016,” reports corporate engagement officer Spencer J. Reynolds Jr., “to more accurately reflect that Princeton wants to be engaged with companies in a comprehensive way, such as through research collaborations, student recruiting and other intellectual interactions.” And that name change came after the school had “moved the corporate relations office out of the development office and into the Dean for Research function when [that office] was first established nearly 10 years ago,” he adds.

Under a recent restructuring at Indiana University, Bloomington, “the team dedicated to corporate and foundation relations, formerly at the IU Foundation, has become part of the Office of the Vice President for Research, as well as restructured and expanded,” a recent statement from the OVPR notes. “It has been a pleasure to welcome these colleagues into the research office,” the statement says, “and to work with them to ensure that we strengthen the connection between research and the communities we serve.”

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13 Indiana U, OrthoWorx partner on start-ups and sponsored research
A new collaboration between Indiana University’s recently spun out start-up shop and a regional not-for-profit’s just-launched accelerator is mainly aimed at start-ups and licensing, but it could lead to sponsored research opportunities as well, focused on new or more cost-effective therapies for musculoskeletal injuries and diseases.
The latest research enterprise annual report at James Madison University, Harrisonburg VA, notes that “since the arrival of a new Corporate and Foundation Relations director, the Office of Sponsored Programs has consistently shared institutional knowledge, reports and funding opportunities to advance both areas’ field of influence; monthly meetings yield a cross-pollination of information about researchers’ interests and activities and allow for close coordination of applications to private sponsors” -- and that “provides faculty and staff with a cohesive overview and approach to seeking and managing funding.”

More holistic engagement

Curtis Hadley, associate director in the Office of Corporate Relations at the University of Illinois at Urbana-Champaign, says the key to the evolution of the corporate relations function is this: “For the universities that listen well to their corporate partners, it is becoming a more holistic engagement with a single point of contact to manage and guide the relationship. Is there more overlap with the sponsored research and technology transfer functions? At the universities that value this model, yes.”

Coleen Burrus, director of the Office of Corporate Engagement and Foundation Relations at Princeton, agrees that “corporate engagement offices will continue to think of themselves in a more comprehensive way, focusing on research collaborations with industry but also seeing themselves as hubs or gateways to help companies navigate technology transfer, career services, sponsored research and advisory boards, for example.”

Reynolds adds that, at Princeton, the key functions of technology licensing and sponsored research administration are handled by sister offices, also within DFR. “We interact with them daily or almost daily,” he says. “Our work with the Office of Technology Licensing is usually about coordinating interactions with certain companies on the front end of the interactions. With sponsored research -- at Princeton, that’s handled by the Office of Research Project Administration -- we usually work with ORPA on the back end, once a company has decided it wants to work with a faculty member.”

Canada’s University of Waterloo “has had industry liaison officer positions in place for about the last five years,” reports Michael G. Szarka, PhD, director of research partnerships in the Office of Research. “We recently retitled the positions as ‘manager, corporate research partnerships,’ which we thought was more descriptive and sounded better.”

Initially it was a one-person function; now there are 3.5 FTEs. The team is organized “primarily by technology area -- information technology and communications, manufacturing and transportation, science and the environment and social sciences,” he reports, noting that “these industry focus areas correspond roughly -- although imperfectly -- to specific faculties and departments, and each member of the partnerships team has regular meetings with specific administrative points of contact.”

At the University of Washington, Seattle, technical expertise plays a role, too, even if it’s not specifically noted on practitioners’ business cards. “Everyone who works with companies at least 50% of the time has ‘corporate relations’ in their titles,” explains Todd A. Cleland, PhD, director of industry relations. “For a while, we had different titles for those of us who did research-oriented partnerships, but there was concern that it was creating confusion, so we standardized the title.” He notes that probably 25 people across the UW system have a
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corporate relations title; some without research experience “came out of traditional university development backgrounds,” he explains. “Many of them were individual gift officers who moved into corporate fundraising, and some of those people have been able to adapt.”

The “trend toward more transactional relationships with companies” that’s driving the changes in corporate relations “typically means more sponsored research and less philanthropy,” Cleland adds. Most schools are seeing that trend, and at UW, he notes, total support last year was about $90 million in sponsored research, including clinical trials, and $50 million in gift support.

In 2010, he adds, as that trend was beginning, “we did a cluster of three hires of people with technical backgrounds or industry experience who could help build research-focused partnerships.” Indeed, he points out, “we’re seeing more people coming onto this growing field who have technical and industry experience.”

He adds: “Those of us in the corporate relations world who have the technical background also often have experience with contracts and intellectual property, so we work with those units on campus. A lot of faculty know we have more expertise in that area, so those of us with additional experience are sought out for engagements that are more complicated or have detailed contract issues.”

For others, keeping up with the shift toward engagement has taken some extra work. Those

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As corporate engagement role shifts, so do personnel characteristics

As corporate relations changes, so does the type person who makes the best hire for an industry-facing position, according to a number of research leaders.

“Technical expertise is useful,” says Michael G. Szarka, PhD, director of research partnerships in the University of Waterloo’s Office of Research, “but soft skills are overall more important. There’s a slightly different balance here from a tech transfer person who has to dig deeper into a specific technology.”

Sales skills are useful, he adds, “but it’s a completely unique environment. As my team is fond of pointing out, in a widget factory, the widgets don’t decide whether or not they want to be sold. In a university you’re selling the partnership opportunity in both directions.” The skill set is different from traditional corporate relations, he emphasizes, “because you have to have a deep understanding of the research enterprise and the opportunities to leverage funding. The liaison team will engage in high-level discussions on issues such as intellectual property or publication rights, but will generally leave the details to the contracts team.”

For Spencer J. Reynolds Jr., corporate engagement officer in Princeton University’s Office of Corporate Engagement and Foundation Relations, “industry experience with a modicum of technical expertise is valuable in this role, because speaking the language of our industry counterparts helps us to better understand their motivations and drivers. We have to know which companies have intersecting interests with faculty research, and then plan and build relationships.”

The ideal candidate 10 years ago likely wouldn’t make the final cut today, adds Todd A. Cleland, PhD, director of industry relations at the University of Washington, Seattle. “Now we’re probably looking more for people with some technical background and certainly business development experience,” he says, along with “some evidence you’ve been in a role where you have to do sales work and think about companies as customers, focusing on a high level of customer service.” He adds: “Obviously, it’s ideal if you can find someone with corporate relations experience, perhaps at a smaller institution, who can scale up what they’re doing.”

Along with a shift in role, today’s new hires in corporate engagement will likely see a different salary and incentive structure than in years past.

“At this point, we use straight salary with an annual merit raise opportunity based on performance,” Cleland comments. “Our metrics are pretty simple. The main thing is money in the door. That’s the endpoint metric that everyone cares the most about. Are we bringing in funding to the university?” He also uses effort metrics — such as number of proposals, tracking whether the proposals are denied or funded, and “the usual contact-facing metrics, such as how many companies each manager talked to.”

There are other metrics his shop “thought about but eliminated,” he adds. “We’re using an older database to track engagements that’s not true customer relationship management, and that influences your metrics. If we had a more sophisticated tool, like SalesForce, we could track more than proposals, contacts and funding.”

At U Waterloo, “compensation and evaluation is currently under review,” Szarka reports. While he can’t offer details, he notes that “the primary focus of evaluation has generally been total research dollars, pro-rated by how much impact the person had on a particular file.” There’s no local preference metric, he adds, because “we don’t have an economic development mandate in this office, so there is no special focus on local companies.” The school gets matching dollars from the government for projects involving companies with operations in Canada, though, “so there is a preference in that respect,” he adds.
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who have been able to pick up the right skills to make the transition from gift officer to corporate relations “obviously aren’t going back and getting a Master’s in engineering,” Cleland says. “They are building relationships with chairs and lead faculty to fill in any gaps where they don’t have the technical expertise. With the right soft skills and company service focus, they can be successful even without extensive technical experience.” (See sidebar on shifting personnel characteristics, page 3.)

He adds: “It can be hard for an outside company to navigate a large university, so you need to make sure everyone who works in corporate relations has enough basic technical understanding to handle their requests and direct them to the right place. We want every door to be the right door -- and we want the company’s engagement experience to be as seamless as possible.”

Faculty ‘in-reach’ eases transition

Staffers are not the only ones who need to adapt to a shifting corporate relations landscape. The holistic engagement approach that is driving the evolution in corporate relations is new to many faculty members -- especially early-career faculty -- and they require guidance on how best to interact with industry to build research relationships, Szarka points out.

“In a lot of cases, once professors have been introduced to companies, they want to continue on their own,” Szarka notes. “But this varies a lot with their level of experience working with industry. Once the project is underway, we only hear about it if there’s a problem to fix.”

That’s why “pre-qualifying companies is very important,” he adds, pointing out that “it involves some intuition on the part of the partnerships manager. If we introduce a company to a half-dozen pros, and one of them gets a project, that’s okay. If none of them get a project, there’s a sense of wasted time, and that reflects on us.”

That means, he emphasizes, “we need to figure out who actually has the capacity to fund a project and who is a tire-kicker only interested in gathering data on emerging technologies at our expense. The faculty are incredibly busy, so the extent to which we treat their time as a precious commodity is a key to maintaining a solid relationship.”

Indeed, he adds, “faculty relationship-building is a key function, and everyone on his staff has ‘in-reach’ responsibilities to take time getting to know more faculty members and building relationships with them. Being in the job for more than a couple

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NACRO examines institutional efforts required for effective corporate relations

The evolution of corporate relations is already under study. In Elevating Corporate Relations through Institutional Commitment, the Network of Academic Corporate Relations Officers (NACRO) Benchmarking Committee “explores how to streamline processes and workflow across multiple university functions that engage industry” and “provides recommendations for effective engagement and solutions to elevate strategic university and industry partnerships.” Here are highlights from the position paper:

• University commitments needed to facilitate effective corporate engagement include allocating resources and ensuring a continued place at the table for strategic planning related to industry activities.
• Leadership commitment is needed to build the framework, systems, and tools for the community and alumni to develop strategic partnership strategies with industry.
• Changing the culture of a university towards embracing the comprehensive corporate relations process and methods demands extensive communication about the benefits and positive outcomes of such a shift.
• The evolution of corporate relations needs to include an increase in sophistication of the methods and tools for collaboration and team-building.

• A successful path to improved corporate engagement requires a database to track progress and milestones, identify project leads and staff with assigned responsibilities, and provide sufficient time and resources for information integration and appropriate communication to team members.

The paper also calls on corporate engagement leaders to “assess authentic strengths of interest to industry” by “analyzing, identifying and prioritizing genuine assets and strengths” and by “identifying and supporting faculty who engage with companies.” NACRO also recommends “providing training and mentoring to researchers to deepen long-term partnerships.”

In addition, corporate engagement leaders should “devise a decision making model for campus-wide corporate relations to manage partnerships, including setting priorities with strategic companies, managing transactions and communicating outcomes” to stakeholders.

Visit NACRO at http://nacrocon.org/.
of years makes a big difference, since there are too
many faculty to meet all at once, and the in-reach
activities are time-consuming and difficult to make
a priority when there is always something more
urgent going on.”

**Coordinating many contact points**

At U Waterloo, the outreach efforts from the
commercialization office and the partnerships office
have some overlap, Szarka says. “However, the
technology transfer office personnel are usually
looking for a receptor for a specific technology.”
The partnerships team, on the other hand, “deals
with a lot of inbound requests looking for expertise
in a specific area, so there is a ‘dating service’
aspect,” he adds. “The partnerships team has to
have a more encyclopedic knowledge of faculty
capabilities and interests, and they have to be very
protective of the time of the faculty members, to
know what sorts of partnerships are likely to be of
interest and to avoid company ‘fishing expeditions’
and other time-wasters.”

He adds: “We work hard to coordinate out-
reach to industry, but in reality there are so many
potential points of contact with industry -- the
Office of Research, individual professors, staff from
Co-operative Education & Career Action, the Office
of Advancement, faculty offices, Institutes, incuba-
tors, the [technology park] -- it’s impossible to know
who is talking to whom all the time. But we run bi-
weekly calls to try to keep people in the loop.”

U Waterloo isn’t alone in struggling with coordi-
nation of so many points of contact. “Certainly, the
connection between corporate engagement and tech
transfer is very close,” Burrus comments. “But uni-
versities need to create a coordinated relationship
across the spectrum of interactions with companies,”
she emphasizes. “A really deep relationship doesn’t
have one touch point, it has multiple touch points.
We don’t have one connection with a company, we
have multiple connections. The university could be
working with the R&D department or with the talent

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**U New Mexico benchmarking report maps out corporate
engagement improvement strategy**

A benchmarking report from the University of New
Mexico called Research Strategic Plan: Final Working
Group Report on Corporate Relations aimed to “examine
the range of industrial interactions nationally and at selected
exemplar institutions and propose new ways in which UNM
can dramatically increase corporate-sponsored research.”

The study group “focused specifically on enhancing
sponsored research agreements and gifts directly from
corporate partners” by “reviewing the institutional infra-
structure -- specifically the Office of the Vice President for
Research, STC.UNM [the school’s commercialization arm],
the UNM Foundation and the Offices of Sponsored
Projects, University Counsel, Career Services and Student
Affairs -- for effectively engaging with corporate sponsors
of research.” The report’s goal: “identifying best practices
for approaching corporations, intellectual property agree-
ments, publication agreements and contracting.”

Some areas of weakness for UNM can’t be overcome
-- particularly its relative lack of industry compared to
many larger population centers. That may explain why the
university does not have a specific office or individual ded-
icated to developing relationships with corporations, which
limits UNM’s ability to attract corporate sponsors. Because
the New Mexico industrial base is relatively small, reliance
on chance encounters between investigators and potential
corporate sponsors is of limited effectiveness.

Another weakness is that processes and services for
funded research are largely focused on the federal govern-
ment; resources have not been well developed for working
with corporations.

Nonetheless, the report found that there is substi-
tual untapped potential for OVPR to work more effectively
with STC.UNM and the UNM Foundation, as well as OSP,
OUC and OCS, to provide a facile full-service interface
between investigators and potential corporate funders in a
manner that is efficient and optimally responsive.

The benchmark data suggest that other universities are
attracting much higher levels of corporate-funded research,
possibly due to UNM’s lack of dedicated personnel.

Because the majority of OSP’s business is with gov-
ernment, its staff tends to focus on building that expertise.
OSP could enhance UNM’s ability to work with corporate
sponsors by making sure at least some personnel develop
expertise in engaging businesses in a streamlined fashion;
the “corporate interaction-trained” personnel should be avail-
able to all units as the need arises, the report advises.

**Report urges dedicated office**

The report’s final recommendation for maximizing the
corporate relations function advises filling the hole in the
school’s corporate relations structure. “UNM should estab-
lish an Office of Corporate-Sponsored Research with per-

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recruitment folks, or we could have a C-Suite connection. That robust relationship is extremely important, and the most important piece of it is communications and sharing information. That helps both sides, the university and the corporate partner.”

Coordinating rather than gatekeeping

The first step to better-coordinated corporate engagement is “an honest assessment of the strengths of the university that align with industry interests,” Burrus advises. “Work with your colleagues to map industry connections on campus, then convene your colleagues to develop coordinat-
ed engagement strategies. It is vital to have internal mechanisms working seamlessly.” To make that happen, she stresses, “don’t engage in turf battles between offices. In the end, no one wins.” At Princeton, she reports, “it really is a collaborative effort to work with industry partners. We all want the best outcome for both the companies and the university.”

And industry will appreciate those coordina-
tion efforts, she says. “What we’re seeing is industry is really delighted that we are being more coordinated on the university side because it makes it easier for them. We’ve lowered the barriers to collaboration by having a group of people coordinating their efforts. Providing a welcome environment for industry partners is extremely important, so they don’t have to call five different offices to figure out whom to talk to. They can call one office that helps them coordinate all their contacts. We’re not a gatekeeper, but a coordinator.”

Cleland adds: “Every company contact is an opportunity to make a positive impression. If it doesn’t lead directly to funding, hopefully the whole experience was viewed by the company as highly professional -- and they got what they needed. Over time that builds your reputation and your brand. Maybe they’ll come back later with a bigger sponsored research budget.”

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rus@princeton.edu; Szarka at 519-888-4567, ext. 33948 or mszarka@uwaterloo.ca; and Cleland at 206-543-9852 or tcleland@uw.edu.

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manent staff dedicated to maintaining and strengthening productive relationships with industry as well as working strategically with other stakeholders on campus to establish new corporate relationships.”

That hasn’t happened yet, but some of the steps leading to it are under way, according to the report.

In the past, OVPR maintained a web infrastructure that targeted industries interested in “Doing Business with UNM.” That portal should be reinstated and linked to all units that engage corporations and provide a guide to particular expertise of faculty members likely to attract industry business, the report states.

That website can become essentially a virtual UNM Office of Corporate-Sponsored Research until a bricks and mortar version can be created. The homepage will provide a comprehensive compendium of possible UNM-corporate interactions and a means to facilitate the spectrum of such interactions, including links to the appropriate UNM resources, as well as an updated list of current and past corporate partners, so that potential sponsors, especially big corporations, can gain confidence in UNM as a productive partner.

The web portal will detail UNM policies to give industry sponsors easy access to the basic conditions under which UNM can engage in sponsored research.

Another step under way to “maximize the effectiveness of corporate relations” is establishing a cross-campus Corporate Research Roundtable as a “forum for informa-
tional exchange regarding corporate relations.” The body meets regularly; membership includes OVPR, STC.UNM, the UNM Foundation, OUC, OSP, OCS and the associate deans for research at the relevant colleges. To keep operat-
ing, the Roundtable is expected to increase corporate-spon-
sored research an average of 10% annually over the next four years. Its initial performance evaluation is this summer.

The plan is for the Roundtable to “transition into a formal Internal Advisory Committee for the virtual OCSR” that sprang from the website. The virtual office will be led by a director chosen by the Roundtable and traffic to the virtual OCSR will be “monitored for potential correlations to increases in corpo-
rate-sponsored research.” Once operational, the report explains, “the Roundtable/IAC will work with OSP to identify:

• staffers in the Contract and Grant Accounting
Department who are or can be trained to become expert in engaging with industry and negotiating corporate-fund-
ed research contracts across the main campus, including interfacing with OUC as necessary on complex contract negotiations, and

• contract fiscal monitors who are expert in regula-
tions regarding corporate-sponsored research who will interface with the Purchasing Department, the Human Resources Department and other UNM departments as necessary to implement nonstandard contracts.”

The web portal and the virtual OCSR will be in place and fully operational by the end of June, according to the report, and will operate until funding for a non-virtual version is secured.
USF opens ‘unique’ new Office of Corporate Partnership

The University of South Florida opted for a “unique” structure when it recently refined the way the school interacts with the private sector. The brand-new Office of Corporate Partnership, which provides a single point of entry for industry partners to access the school’s “vast resources to accelerate their business goals,” reports up to both the existing tech transfer administration and the existing philanthropy operations. But while the design may be novel, the goals are quite traditional: build out a successful effort to expand commercialization activity and forge closer ties to industry partners.

In preparing to create the new office, “we looked at a number of other offices at other universities, as well as what they were doing,” says Paul R. Sanberg, USF’s senior vice president for research, innovation and knowledge enterprise. “Most were related to research or related to community engagement, but we felt strongly that the office we formed should be unique. My counterpart is the USF Foundation, the philanthropy organization, and I believe that one of our advantages moving forward in diversifying our research base and our corporate philanthropy is having an office that reports [both] to the head of the foundation and the head of the USF Office of Research & Innovation.”

‘Relationship-Building Office’

Indeed, the OCP is considered “a joint effort” of the two offices; it’s led by senior director Michael Bloom, PhD, and director Morgan Holmes, JD. “It’s a dual reporting role for Michael,” Sanberg says. “It requires the right kind of personality and leaders who can work together, and we have a good relationship between the two units. That helps.” But he cautions colleagues who want to replicate the unique reporting structure that they’ll need good fortune. “When you create an office, the people you hire are critical, because it’s a relationship-building office,” he explains. “We lucked out getting Michael and Morgan.”

Their new office is set up to assist “businesses seeking to collaborate on research, talent pipeline or philanthropic efforts,” the school says. The new office “expands on USF’s history of partnering with employers to advance the economy.” Those employ-ers, according to the OCP, “increasingly look to higher education institutions for a wide range of mutual benefits,” sponsored research collaborations being one of them. “Corporate partnerships,” Sanberg says, “leverage the positive effects of a productive research university in a thriving metropolitan region to create even greater economic and societal value.”

Corporate partnerships also help universities address one of their most vexing research dilemmas. “A common problem that most universities face is we’re all trying to increase our R&D and diversity our base and not just be reliant on federal dollars,” Sanberg notes. “We also work with corporations. We feel a responsibility to work with companies in a growing city like Tampa Bay, because we’re a major population area’s research university. But we realized we didn’t have a front door per se for companies to come [into and] let us know what they’re interested in. They may have to go to different colleges and different offices.”

That’s why the OCP was created. “We wanted to have an outward-facing office and not just react to people who ‘come to the Ivory Tower,’” Sanberg adds. “We wanted to be out there meeting companies, letting them know who we are and the opportunities we can help them with,” including not just research but also internships and other means of accessing the school’s talent pipeline.

The corporate relations team, he notes, was “looking at opportunities to not just make this R&D-related, but to provide a service to the community -- and the corporate community,” he says.

The technology transfer operations, patent and licensing and corporate philanthropy operations haven’t changed. “We haven’t reconfigured those offices or changed how they do their jobs,” he says. “But they’ve gained a single point of contact for corporations to interact with the university. We looked at the process of how companies first encountered USF and made it easier for more of them to interact with us more quickly and easily -- as well as making engagement more proactive with Morgan and Michael out in the business community.”

The OCP’s duality allows USF to “take corporate partners through a process with USF,” Sanberg adds, “where one type of connection may lead to another. Depending on how well you work with a partner, the company may want to be involved with education and internships first, which might lead to sponsored research, which might lead to philan- continued on page 8
**Office springs from self-assessment**

The OCP’s design sprang from a structured self-examination USF underwent for its 2015 Association of Public and Land-Grant Universities “Innovation and Economic Prosperity University” designation. “We went through a process of self-assessment, meeting with the community, looking at ourselves,” Sanberg says. Calling USF “an economic driver for Tampa Bay and the state of Florida,” the APLU lauded the school’s “strong commitment to economic engagement, including innovation and entrepreneurship, technology transfer, talent and workforce development and community development.”

The designation “acknowledges universities working with public and private sector partners in their states and regions to support economic development through a variety of activities.”

“Yes, we did talk to corporations and the community” about the new office, Sanberg adds. “We hold an innovation summit once a year,” he says. “The community comes in, and we look at a lot of different issues we can help with. They get to know us, and we find out what they need in the community. We’ve done that for a few years.”

One of the issues that came up, he says, was “they didn’t know a lot about USF, and we weren’t as proactive about the situation as they’d like us to be. That helped lead to the OCP.” The summit still occurs once a year, and OCP staffers “interact day-to-day,” he notes, “keeping it going on a one-to-one basis with the community.”

**Office is ‘a connector’**

In essence, the office acts as “a connector,” says Bloom. “Our role is to make it easy for companies to engage with the different units of the university, but we also have to make it easy for our research faculty and associate deans for research. We’re a concierge externally to companies and internally to researchers.”

In fact, he cautions colleagues that “you can say you’re trying to increase sponsored research all you want, but if you’re not making it easier for companies and faculty to collaborate, and for sponsored research administration to manage it, you’re slowing the process.” The OCP, he adds, aims to “connect companies with a researcher at a college. We can really help them solve their problems, and we’ve started working with associate deans and sponsored research administrators to streamline the collaboration process.”

Here’s an example: “We’ve designated one administrator to handle a portfolio of just sponsored research agreements,” Bloom reports. There should also be a backup, of course, “so you don’t leave those accounts in the hands of one person.” He adds that USF is “very early in the process of having a dedicated person working to connect companies with researchers and working with faculty, and we’re looking very carefully at how to streamline the process.”

And, as always, he emphasizes, “we’re doing a lot of listening.” Calling himself and Holmes “wet behind the ears,” he acknowledges that their several months on the job requires them to “listen to faculty, listen to associate deans for research, and listen to companies.”

**Advisory boards in the works**

Listening to companies will be easier once the advisory boards the OCP team is assembling become operational.

“Listening is key,” Sanberg says. “You need to know what the university’s capacities are. You can’t have an office that goes and promises things when it’s supposed to be a conduit to the colleges -- and there may be researchers who don’t want to work in that area.”

The OCP is in the process of “finishing up establishing advisory boards,” he adds. Says Bloom: “This is an ongoing process. We’re working with internal partners right now to be more proactive and strategic, and externally we’re putting together boards with a range of types of companies -- start-ups to well-established firms -- so we can be responsive to a range of customers.”

The OCP is also working with other areas of the university’s industry-facing activity. “When we developed the OCP, we had really looked at best practices at top universities,” Bloom says, “at what the successful ones were doing. But the end result should be customized for the university. I report both to the foundation and to research and innovation, and that’s crucial. You can’t be siloed. You need to promote collaboration.”

He adds: “I’ve worked at other universities where corporate engagement was either in research
or in foundation relations, and each side viewed the other competitively. The structure here is intentionally based on breaking down those siloes so we can work together across the university.”

Of course the office is tracking its own performance and has devised a set of metrics to do that, but not everything can be so easily measured, Bloom emphasizes.

“Metrics are extremely important to everything we do,” he explains. (See sidebar, below.) “We’re driven by metrics. At the same time, though, inter-

USF strategic plan powers OCP’s metrics

Like many university efforts to attract corporate partners, the creation of the University of South Florida’s Office of Corporate Partnerships began at the behest of a Board of Trustees as an element of a recently updated research enterprise strategic plan.

“We’re very metrics-driven,” says Paul R. Sanberg, USF’s senior vice president for research, innovation and knowledge enterprise. “We have to detail what we’re going to do with the funds we have over next five years” to achieve the goals in the USF Research Strategic Plan 2017-2021. That guiding document, he adds, is the result of “a year-long, iterative, inclusive process involving input from more than 550 stakeholders from across the USF System and the Tampa Bay community.” Working with companies, he says, “was a big part of that.”

The group included USF leadership, faculty, staff and external community leaders and constituents. A Research Strategic Planning Committee included 51 members, he adds, from “high-impact research areas” systemwide. The plan ultimately identified four goal categories: Rankings, Visibility, Collaboration and Impact, which include a heavy emphasis on sponsored research.

One of the strategies to improve impact, for example, is “fostering university-industry collaborations,” and one of the tactics is to “develop an Industry-Funded Grants & Contracts metric.” The key strategy identified for increasing collaboration is “fostering a transdisciplinary research culture and productivity, building on strengths, with special emphasis in the Six Focus Areas: brain and spinal cord, data science, heart, human security, research translation and water.” Those key research areas are “aligned with national priorities and initiatives” and “opportunities exist for participation of most colleges, departments, centers and institutes.”

A fifth focus area, research translation, encompasses not just IP commercialization but also industry collaborations “that support economic development” -- and that “involves partnerships for the development of a commercial pipeline and joint industry and university R&D.”

The report also notes that “industry research and start-up opportunities exist in computer software; USF has expertise in Software-as-a-Service solutions, especially in healthcare and medicine.”

Metrics by department

Taking advantage of sponsored research opportunities is a university-wide effort, Sanberg points out, and each individual college or department will have to step up and find a way to report its results. “We are a very metric-driven university,” he says. “We’re a very metric-driven state right now, so we have metrics we need to meet as a state university.” Each college that conducts research has its own metrics, too, he adds, and the OCP will ensure they’re reported as well. “Individual colleges need to take ownership,” adds OCP senior director Michael Bloom, PhD. “Our success is their success in a really integrative way.”

The first step for OCP, Sanberg emphasizes, will be creating “baseline metrics we’ll report on. They’ll include corporate engagement partnerships, internships, and philanthropy. We definitely want to increase our R&D, and we want to make sure our students have internship opportunities. Clearly, we want to increase corporate philanthropy. Each of these things is a goal at each of our colleges, and that will be part of the metrics.”

The numbers so far look good, he points out. The USF System -- USF, USF St. Petersburg and USF Sarasota-Manatee, all separately accredited -- just reported setting a record with more than $475 million in new grants and contracts in the 2016-2017 school year; private contracts and grants, at $196 million, accounted for 40% of that total.

The USF Health enterprise -- the Morsani College of Medicine and the Colleges of Nursing, Pharmacy and Public Health -- saw $145 million in private partnership income, about 45% of the $319 million health total.

The Tampa Academic Colleges -- Arts & Sciences, Behavioral and Community Sciences, Education, Engineering and Marine Science, plus the Muma College of Business and the Patel College of Global Sustainability -- saw their non-federal research funding rise slightly to $87.5 million, from last year’s $87.2 million.

Contact Sanberg and Bloom via Vickie Chachere, director of strategic communications, at 813-974-3370 or vchachere@usf.edu. ▶
International SRAs worth the extra effort they require

Negotiating and administering sponsored research projects with international corporate partners is more time-consuming and requires more effort than do deals with domestic collaborators -- "international" anything almost always does. But international deals are worth the extra hassle, say industry research managers who've completed them. And the benefits go far beyond monetary.

"Conducting international research is important for an institution like the George Washington University," says Tom Russo, assistant vice president for industry and corporate research there. "It gives the university an opportunity to broaden its research reputation, diversify funding mechanisms and provide researchers with an opportunity to learn by applying their findings in different conditions with unique challenges."

The big difference, he adds, is "there is no single set of laws or regulations that governs both entities." As a result, he explains, "international agreements may need to be more detailed because of multiple governing sets of customs, laws and regulations." International partners "can range from a very small business in a rural area that doesn't have electronic systems to a large company with a U.S. headquarters that is a subsidiary of an international parent organization," Russo also notes, adding: "for most, but not all, international projects, the initial negotiation and set-up is more time-consuming when compared with domestic research funders and partners."

Long list of issues

Indeed, he explains, "there are a number of issues that require extra consideration when reviewing international sponsored research agreements." He lists these issues among others that can pose extra challenges when dealing with an international partner:

- intellectual property rights;
- copyrights and trademarks;
- visa issues;
- US Foreign Corrupt Practices Act compliance;
- export control compliance;
- anti-boycott regulations;
- language and currency differences;
- dispute resolution;
- cultural differences;
- publications;
- privacy;
- travel;
- human subjects protection;
- conflict of interest;
- hiring; and
- taxation.

Each international SRA is "essentially unique," he adds, "with its own special considerations, depending on the country and scope of work." He also cautions that "international research agreements, depending on the country or other factors, may be more likely to receive a 'high risk' rating, which will subject the expenditures to more regular review and assessment."

But Russo emphasizes that "the potential extra work is not a deterrent to undertaking international partnerships." Indeed, GW boasts about partnerships "across the globe" -- including Brazil, Italy, Romania, Peru, Mauritius and India. Partners include Leica Microsystems, Raith Nanofabrication and Vanda Pharmaceuticals Inc., among others.

Those efforts get support from the school's International Research Programs, which assists in new collaborations with funds for travel expenses and project costs.

One-stop shop for industry

"Under the umbrella of the Office of the Vice President for Research, we are a one-stop shop for industry," Russo notes. "In addition to our office, we have the Technology Commercialization Office to handle IP concerns and our Office of Entrepreneurship to work with GW researchers to commercialize technology from GW. Collectively, we work with all international requests for research collaborations."

GW staffers work with foreign sponsors "in the same ways they work with domestic sponsors," he adds -- and he notes that "the number of face-to-face interactions depends more on the project than on the location of the sponsor." He adds: "In the case of technology transfer, the TCO is involved as necessary for all agreements, including international SRAs."

Many challenges associated with international deals are addressed in the school’s "Policy Statement on Compliance With Laws When Conducting University Activities Overseas." When it comes to "anti-bribery, economic sanctions, foreign boycotts, anti-terrorism and foreign laws," the document says, "it is GW policy to comply with U.S. laws and regulations and foreign laws that apply to the school's..."
overseas activities.” Other GW policies cover export control, international travel approval, and international travel insurance coverage.

GW also offers an International Research Toolkit with tips for negotiating international research agreements. It cites “potential language and cultural barriers” and notes that international deals “typically take longer to negotiate and execute” and that they’re “scrutinized more carefully for award terms,” because “it has become common for international sponsors to require that the award be audited.”

The toolkit also addresses data sharing and the export control and information technology security issues it can raise, and notes that “prior written authorization from a U.S. government agency may be required to carry out certain sponsored projects involving specified technologies or certain countries.”

And the toolkit explains that “the tax implications of setting up programs and activities overseas can be extremely complex, and vary widely from one country to another.”

‘We have to make it work’

“We need to operate with a global mindset, so as an academic medical center we have to make it work like other global enterprises -- the communications, the operational element, all of it,” notes Peter Kotsonis, PhD, MRACI, CChem, MCPM, director of the University of California at San Francisco’s Office of Strategic Alliances, within Innovation Ventures. That’s the umbrella entity for the UCSF offices that manage its business development, IP licensing and entrepreneurship activities.

Kotsonis’s office “connects industry with UCSF researchers,” while Catalyst, the Center for Digital Health Innovation, the Entrepreneurship Center and the Technology Management office handle the mechanics of commercializing the school’s discoveries. “We have partners from across the globe, from Japan, Germany, China and other places,” Kotsonis adds, pointing to these recent international research partnerships in particular:

- A 2017 drug development collaboration with ShangPharma Innovation Inc. arranged through UCSF’s Catalyst, the Innovation Ventures element that fosters academic-industry collaborations.
- A 2015 early-stage funding and discovery collaboration with GlaxoSmithKline that was part of GSK's Discovery Partnerships with Academia program.
- A 2014 drug discovery deal that has Daiichi Sankyo Company Ltd., Tokyo, providing its compound library to the UCSF Institute for Neurodegenerative Diseases so they can perform high-throughput compound screening and optimization together. Daiichi Sankyo scientists from its Venture Science Laboratories work on-site, and the company kicks in research funding, milestone payments and royalties and then can opt for an exclusive license to develop and commercialize promising compounds.
- An October 2017 consortium with GSK, the Lawrence Livermore National Laboratory and the Frederick National Laboratory for Cancer Research called Accelerating Therapeutics for Opportunities in Medicine that will develop “an open platform to transform the way cancer drugs are discovered.” GSK contributes data on compounds and molecules and “expertise in drug discovery and development.”

Kotsonis also points to these global collaborations with international aspects:

- A 2015 cancer therapy discovery collaboration between Celgene Corp. and the Recombinant Antibody Network -- involving UCSF and the Universities of Chicago and Toronto -- and its “automated antibody engineering pipeline” that has Celgene paying $25 million for future license options to commercialize promising discoveries.
- A 2017 two-year alliance called the UCSF Immunoprofiler that’s also backed by AbbVie, Amgen and Bristol-Myers Squibb to the tune of $10 million; researchers will analyze tumor samples and make the dataset available to all four partners.

In all of these arrangements “we do see cultural differences,” Kotsonis comments. “So when we formally launch a partnership, we’re careful to spend time in the same room with both our national and international partners, to understand the corporate culture and the regional culture and to determine the best way to communicate to help make sure it’s a healthy alliance.”

Language can be an issue, he adds, and appreciating the corporate culture and internal operations “can add another layer of complexity.” In addition, he points out, the international companies American universities collaborate with often are multinationals with multiple locations. “Because Sanofi, Bayer and Merck are global and manage multiple sites, research collaborations can be a challenge because of time zones and distance,” he says. “Often, you don’t get to meet in person.”

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Bridge the differences

Kotsonis emphasizes that despite the challenges, “that doesn’t mean you can’t bridge the differences. It doesn't mean you can’t make international collaborations work and be successful.”

For example, he reports, both UCSF and its international partners often “invest heavily in one-day cross-cultural training sessions” for U.S. researchers because “some partners have boots on the ground -- say, chemists on the ground -- and we want to make it work with those folks who come from the Mothership.”

Researchers may interact with their counterpart project leads at the overseas headquarters only during a videoconference -- they “may not be aligned on their understanding of what the next step is or the right strategy in a given project,” he adds. “In some cultures, a ‘Yes’ may mean ‘I’m checking with my line manager.’ These are elements we need to be mindful of as alliance professionals.”

The U.S. negotiators “will notice the differences beyond time zone and geography” in face-to-face meetings, he emphasizes. “You’re often trying to interpret body language and nonverbal cues.”

Building relationships with U.S. branch representatives of international corporations is important, too. “More often than not, a company will have a U.S.-based dedicated alliance manager or someone to have a peer-to-peer conversation with, so you’re often talking to an alliance counterpart who’s in the U.S.,” Kotsonis says. “But that person may be in the Bay Area -- or in New Jersey or Boston. GSK has bodies in the Bay Area, for example. But if you don’t have that luxury, you may need to invest in some travel to various geographies” -- in the U.S. and abroad, “including, for example, Tokyo or Paris or London.”

Don’t try to change culture

In fact, Kotsonis says building a relationship face-to-face is so important that the university and the international corporate partner should “formally kick off the alliance together, even if you have to fly to Japan. We’ve done that in order to have folks in the same room for a day or two to get to know each other and to align what they’re doing. You need that face-to-face time to acknowledge the cultural differences and work through them, and to formalize a process that helps.”

But don’t try to change the culture to fit your operations, he cautions. “You’re not going to change that,” Kotsonis emphasizes. “You’re going to have to make it work with a healthy appreciation and respect for the culture that has probably made the company successful. As frustrating as some partnership differences can be, the companies often are at least open to jointly evolving the business model with the university partner, to improving the best practices, and to

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Communication critical to international research deals

Making international sponsored research work requires keeping the lines of communication open, says John M. Carfora, EdD, CCEP, RIO, associate provost for research advancement and compliance in the Los Angeles-based Loyola Marymount University’s Office of Academic Affairs. He spoke during a recent webinar titled “Building International Sponsored Research Collaborations: Navigating Culture, Contracting, Compliance and IP Protection.” Here are highlights of his remarks:

- “I like to sit down and talk about deliverables and timetables and come to an agreement on that. We converse. And we share thinking. That’s where we come up with our deliverables. Early in the project, we develop a statement of work, then put together deliverables, then add timetables. It’s really important to start that conversation early.
- “When we’re sharing cross-cultural perspectives on integrity, ethics and the cultural differences involved, we talk about how those differences might matter and how we can overcome them.
- “I work with partners to address the issues that consistently come up in international contracts, whether it’s IP, copyright, data retention and management or export controls. We checklist that as the conversation moves forward so we know more or less that we’re on the same page.
  - “A personal touch in communications is important -- how you talk on the phone, how you e-mail and how nuanced in general your communications are.
  - “I had faculty doing work funded by a Spanish company whose president insisted on flying to America to meet me and to sign the contract. It was not even 10 minutes of work, but it was important to put a face to everything. A personal touch serves us very well with colleagues across the globe.

Contact Carfora at 310-338-6004 or jcarfora@lmu.edu. For information on the recorded webinar, originally presented in February 2017, go to: http://techtransfercentral.com/bisrc/.
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lessening the impact of some of the cultural barriers.”
Examples he cites include “basic process improvements and strategizing together with leadership and/or steering committees to maximize

value” for both sides. “Partners should be open to that,” he adds. “But trying to change the overriding culture of a company? You’re not going to.”

Contact Russo via Maralee Csellar at 202-994-7564 or csellar@email.gwu.edu; contact Kotsonis at 415-323-3108 or peter.kotsonis@ucsf.edu. ►

Indiana U, OrthoWorx partner on start-ups and sponsored research

A new collaboration between Indiana University’s recently spun out start-up shop and a regional not-for-profit’s just-launched accelerator is mainly aimed at start-ups and licensing, but it could lead to sponsored research opportunities as well, focused on new or more cost-effective therapies for musculoskeletal injuries and diseases. In fact, OrthoWorx -- formed in Warsaw, IN, in 2009 with initial funding from the Lilly Endowment -- is looking into expanding its university-focused activity and IU is looking into similar multi-institution, multi-company collaborations in other research fields. And both say sponsored research will likely play a part.

IU and the Indiana University Research and Technology Corp. entered into a partnership agreement with AcceLINX, the business accelerator launched by OrthoWorx to identify and support further development and commercialization of musculoskeletal health technologies developed at the university. Says Tony Armstrong, CEO and president at IURTC and associate vice president in the IU Office of the Vice President for Engagement: “If inventors lack the commercial and operating experience to advance a technology, AcceLINX has the expertise and the network of resources to partner with us to help provide a quicker transition from idea to successful product or service.”

Accelerator offers expert help

AcceLINX is a multi-stage, musculoskeletal health accelerator that “leverages the unprecedented concentration of medical device industry resources in Northern Indiana” to “accelerate the results of start-ups it engages with.” Through the partnership, IU and IURTC will have access to “an affiliated team of successful musculoskeletal health industry executives and investment professionals from AcceLINX,” Armstrong adds, “to provide qualified start-ups with access to needed capital to fund growth.”

AcceLINX industry and subject matter experts -- both in-house pros and experts from “an extended network of supply chain companies, operational talent and end users” -- will provide commercial and technical screening of technologies developed at IU and offer feedback to the inventors as well.

“The arrangements are structured such that the [subject matter experts] from AcceLINX meet with researchers at the universities to gain an understanding of their technologies and then provide feedback in approximately 10 different areas that an industry partner would view as important,” explains OrthoWorx executive director Brad Bishop. “Areas that are looked at,” he says, “include the market’s size, growth rate, unmet need and competition; the technology’s feasibility, development plan and IP; the regulatory and reimbursement situation; capital plans; and exit opportunities.”

The AcceLINX advisors’ combined expertise also covers accounting, finance, legal, management, manufacturing, quality engineering, and R&D. The accelerator also promises easy access to bench testing, clinical testing, packaging, product design, prototyping, regulatory strategy and submissions, sterilization, and third-party logistics.

The subject matter experts make return visits to the university campus every three to six months to review progress and provide guidance, Bishop notes. “In between visits,” he says, “the university researchers are encouraged to reach out to the AcceLINX team should questions arise.” The accelerator also offers “assistance in sourcing capital” from an affiliated partner and working space as appropriate depending on a company’s stage of development. Bishop notes that “all of this is done pro bono.”

Buying expertise as needed

IU and IURTC will also have access to AcceLINX experts on a fee-for-service basis for more involved projects. That means, according to Bishop, “projects where more in-depth analysis is required to address a key unknown. Examples may include qualitative or

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quantitative market analysis with potential customers, detailed oversight of product development, regulatory analysis and IP strategy development.” He adds, importantly: “Statements of Work are drawn up and fees are on either a project or an hourly basis and are in line with market rates.”

That kind of input will likely accompany “one of our technologies we’ve formed a start-up around,” Armstrong points out, “when we’ve worked with them in their consulting capacity and we feel like we have a good relationship.”

He’s optimistic about the arrangement. “The AcceLINX network can help us in [the orthopedics] space,” he says. “The SMEs possess a depth of knowledge and a unique reservoir of competitive intelligence -- salespeople, regulatory people, marketing people -- all specific to the orthopedic industry.” Because it’s an industry that requires deep knowledge and intelligence to succeed, he adds, “we have to buy expertise somewhere. We’d rather buy it from a group we have a relationship with.”

OrthoWorx seeks to tap into the region's huge medical device industry

Medical device innovation is complicated by the “web of regulatory clearances required to market and gain reimbursement for products,” and the path from concept to company often takes more than six years. So large companies prefer technologies that are further along in their development cycle than they did in the past, hoping to assure that regulatory paths, clinical performance and commercial potential are well-understood.

That’s why OrthoWorx was formed, and that’s why it launched AcceLINX: So entrepreneurs could “benefit from guidance and technical and production support to develop and test concepts from an economic and medical perspective.”

The Warsaw, IN-based orthopedic device cluster is “one of the most concentrated centers of medical device economic activity anywhere in the United States,” the organization points out, noting that the companies in the region “are multi-billion-dollar global enterprises, anchoring an industry cluster that represents 50% of the global orthopedic market for total joint replacements.”

OrthoWorx was formed “to preserve and extend the region’s legacy.” Its mission is to “work with orthopedic industry members, academic partners and community leaders to capitalize on the resources and expertise across our region and in our industry to achieve common goals.”

OrthoWorx advisory board facilitates academia-industry interaction

OrthoWorx, a community-based initiative that works strategically and collaboratively with the orthopedic industry, credits its University/Industry Advisory Board with making “significant progress in bringing together the orthopedic cluster and Indiana universities, leading to very promising collaborations.”

Members include IU, the University of Notre Dame, Purdue University, Ball State University, Indiana University-Purdue University Ft. Wayne, Indiana University-Purdue University Indianapolis, Ivy Tech Community College, Manchester University, Grace College & Seminary, Trine University, Rose-Hulman University, Valparaiso University and Indiana Tech. Indiana’s participation on the OrthoWorx Board, says Tony Armstrong, CEO and president at IURTC and associate vice president in the IU Office of the Vice President for Engagement, was one of the first steps toward the school’s recent collaboration with AcceLINX.

“IU has been on the OrthoWorx University/Industry Advisory Board for about 10 years,” he reports. “It’s served as a broader way for all of us -- a number of schools and economic development associations from around the state -- to go up to Warsaw as a group for a big seminar where we hear what the industry is up to. We all get along and work closely together.”

And while he can’t cite any sponsored research that’s come of it yet, he appreciates the opportunity to participate in “a little bit of education both ways, for the folks up there to understand how the academic world works, how faculty work, and vice versa, so we can better utilize each other’s experience and expertise and resources.”

“The goal of the OrthoWorx university engagement effort was to engage with the state’s principal research institutions, as well as several other universities in proximity to the Northern Indiana orthopedic industry cluster,” explains OrthoWorx executive director Brad Bishop. “We are considering invitations to other Indiana schools but are not at that point yet.”

While not the main goal of the Board, sponsored research deals appear in the offing for some participants. “OrthoWorx conducted a workshop series which resulted in a number of conversations between industry and university members around topics of mutual interest,” Bishop adds. “No specific projects have been launched, although discussions continue, and we are hopeful that such collaborations will take place in the future.”
In addition to the start-up assistance, AcceLINX will “work with IU and IURTC to identify opportunities for university-related faculty or graduate students to participate in research for technologies originating in the private sector.” That’s where the sponsored research comes in.

‘Other collaboration opportunities’

“The AcceLINX and university partnership programs are just getting under way,” Bishop reports. “AcceLINX was set up to support musculoskeletal health innovations originating in both the private sector and university environments and is working at building relationships that span these sectors. As AcceLINX works with its private sector clients, it learns of their needs that can be addressed by expertise or specialized equipment at a university, and AcceLINX can make an introduction between the company and the university.”

He adds: “This introduction may result in a sponsored research project, the details of which are worked out between the two parties.” The introductions, he points out, represent “an example of AcceLINX working as a ‘connector’ in the musculoskeletal health ecosystem.”

The specific kinds of opportunities for sponsored research that arise “really depend on the needs of the client and the capabilities of the university,” he emphasizes. “Some examples of sponsored research,” he says, “might be hiring a professionally led, but student-staffed, team to develop concepts and prototypes; engaging a professor and a graduate student to conduct testing; or having a university-affiliated group of surgeons perform an evaluation of a new technology in cadavers. I’m sure we will find other collaboration opportunities as we continue our efforts to build relationships.”

‘Finger on the pulse of ortho’

IU has “worked with OrthoWorx for quite a while,” Armstrong notes. “They’re great partners, including a broad scattering of co-working sites Whitney has established. His office is “making sure our faculty and staff can take advantage of those, to bring the corporate tenants closer to us, not only to take what we’re doing and bring it to the market, but also be a front door, to see if we can help.”

Already, the school can claim considerable sponsored research success. The school’s Innovation and Commercialization Office, formerly part of IURTC, reported “strong results” for the 2016-17 fiscal year. In 2013, nonfederal research funding was $154 million. In 2017, nonfederal research funding was $243 million. Of that, “commercial” was 14%. “The focus on collaborative work is the reason,” Armstrong says. “We’ve done a good job of being aware of the opportunities and really focusing what we’re doing on getting the resources necessary for our faculty to be more competitive.”

IU is also boasting about ranking first in the state, 19th in the US and 27th overall in the Reuters Top 100: The World’s Most Innovative Universities; the school has made the top 50 all three times the list has been published.

In the 2016-2017 fiscal year, the ICO submitted 285 global patent applications and was issued 57 by the U.S. Patent and Trademark Office, a new record; 199 total patents represent a 20.6% increase from the year before. The Reuters ranking “reflects IU’s progress in meeting the goals in the Bicentennial Strategic Plan” -- which “calls on IU to engage in seed funding to support collaborative faculty research initiatives.”

The just-reorganized ICO and IURTC are “reinvigorated,” Armstrong says; in fact, the school’s entire corporate engagement effort is, he adds. “We’re accelerating all of our commercialization activity,” he says, “and the restructuring enables each organization to be focused -- and creates the synergistic effect of these things humming along, finding partnerships, building them, writing grants, getting funding and becoming a partner of choice.”
and they really have a finger on the pulse of ortho around the world. Now we have a chance to be better connected for start-up opportunities from IU folks and to have a better window into the ortho companies in Warsaw and the whole industry, where things are headed and what their research challenges will be.” That, he adds, helps IU “better link what our faculty and grad students are doing, to help researchers understand some of the challenges the ortho companies face” – which, if all goes well, “leads to sponsored research for some of the faculty members.”

Indeed, he characterizes it as “a two-fer: commercialization help and a chance for faculty to be involved in more cutting-edge research.” Some faculty members at IU’s Fort Wayne campus, for example, have “worked with the folks in Warsaw,” Armstrong says, “not only on research, but on clinical aspects as well. The new arrangement is very much the progression of a lot of the work we’ve done together.”

**IU eyes similar cybersecurity setup**

Not only could the arrangement with OrthoWorx and AcceLINX be replicated at other universities, it could soon be replicated at IU. “We’re exploring something around cybersecurity,” Armstrong says. “In Bloomington, there’s a lot of research work at schools and a fair amount of military presence and a lot of cybersecurity work. We’re exploring the same type of collaborative effort. It really is a model that can replicate in other industry sectors.”

The next iteration, he adds, “may be even broader, with a number of universities and, we hope, military, law enforcement and private sector industry.”

The AcceLINX arrangement “will affect the entire research enterprise,” Armstrong says, “giving us real insight into where the ortho field is headed, getting that real-world data and sharing that with folks at the university.”

One result he hopes for is that the National Institutes of Health and specialty foundations will see that “the work we’re doing is focused on the clinical issues people are facing,” giving the university an advantage when competing for grants. Once the partnership brings about commercialized technologies, he adds, that in turn will lead to “more intense interactions and a more deliberate relationship because we know what they’re looking for.”

The school “sets up meetings with faculty and industry folks,” he adds, “so we’ll know what the companies in the accelerator are doing. We may have IP to add, even if the main discovery is not from IU.”

Contact Armstrong at 812-855-7353 or at armstrong@indiana.edu and Bishop at 574-306-4122 or at brad.bishop@orthoworxindiana.com.

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How to enlist faculty in sponsored research marketing efforts • Linking corporate venture funding and sponsored research • TriNetX network brings new clinical trial opportunities • When a corporate partner is also a patent infringer

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