

Working With Industry: From Office Management to Sponsor Relations

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Goals When Working With Industry

- ❑ Achieve successful and efficient contract negotiations
- ❑ Ability to relate to industry and understand their objectives
- ❑ Establish and develop long-term working relationships – don't forget the people element.

How do we achieve those goals?

- ❑ Ensure that your staff brings a balance of skills and experience to your office.
- ❑ Assign workload to provide not only strong customer service to internal customers (faculty and staff), but external customers (industry) as well.
- ❑ Be proactive with industry to establish and develop strong working relations.

Staff: Skills & Experience

- Private sector work experience
 - Understand the culture and expectations
 - Prior contacts a plus
- Contract negotiations and/or legal experience

Staff: Skills & Experience (cont'd)

- Working experience in a specific area:
 - Pharmaceutical or biotech company → if your office negotiates clinical trial agreements, medical research agreements, or MTA's.
 - High-tech (software, engineering, etc.) companies → if your office negotiates research or collaboration agreements, or MTA's.

Staff: Skills & Experience (cont'd)

- Strong verbal and written communication skills
 - Need to clearly articulate explanations and arguments both in verbal and written form.
 - Need to be able to succinctly and clearly summarize outcome of a verbal discussion in written form.
- Strong customer service skills

Staff: Skills & Experience (cont'd)

Technical knowledge

- Understand the academic, research, and patient care (if applicable) mission of the university.

What does this mean?

- Many things that are acceptable in private industry are not acceptable at a university.
- For example, don't forget about tax implications and non-profit status of your university.

Staff: Skills & Experience (cont'd)

□ Technical knowledge (cont'd)

- It is a plus if your staff person comes to the job with prior university research administration experience, but it's rare!
- However, there are more and more people who have experience working with universities while in their industry jobs.

Staff: Skills & Experience (cont'd)

- Technical knowledge (cont'd)
 - Need to understand the difference between what is research and what is not:
 - Gift v. Contract v. Grant
 - Sponsored Project v. Consulting

Staff: Training & Development

- Important! Don't forget to do!
- Goal
 - To develop a staff that is not only technically strong in their specific area, but who also understand how their work fits into the big university research administration project.
 - For example, understanding "gift v. contract v. grant," F&A rates, PI effort, IRB, etc.

Staff: Training & Development (cont'd)

- Why? So your staff can be more creative and flexible. Perhaps the solution to creating a successful partnership involves more than just the sponsored projects office...

Staff: Training & Development (cont'd)

- What kind of T&D is there?
 - General research administration and contracts & grants training at your university or through outside organizations (e.g., NCURA).
 - Training and courses by other universities, such as:
 - UC Santa Cruz and UC Berkeley extension have a number of courses and workshops about drug & device development, and science for non-science people working in science.

Staff: Training & Development (cont'd)

- Meetings about specific topics put on by outside organizations, such as:
 - Clinical Contracting Meeting (about contract & legal issues for CTA's)
 - Biotechnology Industry Organization (understanding what is happening in the biotech world, what are important to companies, what they think are the benefits and (more importantly!) the challenges of working with a university)
 - Clinical Research Site Training (understanding CT budgeting and financial management)

Staff: Training & Development (cont'd)

- Don't' forget experts at your own university!
 - Conflict of Interest
 - Human Research Protection Program (i.e., IRB)
 - Risk Management
 - Others?

Staff: Training & Development (cont'd)

- Other benefits of outside meetings and conferences in addition to increasing technical knowledge:
 - Networking
 - Meet that company negotiator whom you have exchanged hundreds of emails and phone calls with!
 - Meet new companies who might sponsor research at your university.

Workload Assignment & Management

- ❑ My favorite concept... one-stop shopping!
 - Each staff person is responsible for a set of departments and negotiates all industry agreements for that department.
 - Examples of agreements with industry:
 - ❑ Clinical Trial Agreement
 - ❑ Sponsored Research Agreement
 - ❑ Collaboration Agreement
 - ❑ Material Transfer Agreement (MTA)
 - ❑ Non-Disclosure Agreement (NDA) also known as Confidential Disclosure Agreement (CDA)

Workload Assignment & Management (cont'd)

- Why “one-stop shopping”?
 - Build relationships with PI’s (take time to talk with the PI).
 - Better understand the research of your portfolio of PI’s.

Workload Assignment & Management (cont'd)

- Why “one-stop shopping”? (cont'd)
 - Provide strong customer service → PI only needs to call one person about his industry sponsored research needs.
 - Build relationships with the companies that most often would collaborate or work with your portfolio of departments.

Workload Assignment & Management (cont'd)

- Models of “one-stop shopping”
 - A single office that negotiates all industry agreements for the entire university or school.
 - Two offices: One that negotiates all clinical trial agreements (e.g., Clinical Trial Office (CTO)) and one that negotiates research agreements with no human subjects.

Workload Assignment & Management (cont'd)

- Changing assignments
 - Perform annual review of volume of work and determine whether changes in department assignment are needed.
 - Take into consideration the relationships that have been built.
- Regular staff meetings.

Relationships with Industry

- Routine interactions via contract negotiations.
- Networking at conferences/meetings.
- In-person meetings with companies in your area (especially when travel budgets are tight!)
 - Who attends?
 - Contract and/or legal staff; and/or
 - Faculty; and/or
 - Senior leadership at your university.

Relationships with Industry (cont'd)

- Have a good website.
 - Easy to find info → should not have to click more than 2 times to get to what you want.
 - Make it industry friendly.
 - Put yourself in their shoes – what are they looking for and make that info accessible!
 - Don't forget about your faculty and staff.
- Try to get onto your university's homepage or no more than one click away.

Relationships with Industry (cont'd)

- Consider a single industry portal on your university's homepage for all offices that have industry interactions, such as:
 - Development Office
 - Technology Transfer
 - Research Contracts (i.e., Office of Sponsored Projects)
 - Business Development or Entrepreneurship Office
 - Clinical Trial Office

Relationships with Industry (cont'd)

Anecdote: An attendee at a recent Biotechnology Industry Organization (BIO) meeting asked a session panelist from industry: "How can you tell if the university that I am considering entering into partnership with is "with it"?"

The panelist responded: "Go to their website. If it's a good website, it's a sign they are a strong office."



Relationships with Industry (cont'd)

- Brochures and Info Sheets
 - Keep it simple
 - Promote your strengths
 - State relevant statistics
 - Keep it current & updated
 - Downloadable PDF from website
 - Phone # should be general line – not specific person b/c what if person leaves, then you need to update all materials.
 - Dedicated email for inquiries

What now?

- Identify the industry priorities at your institution.
- Develop a strategy and plan.
- Identify resources needed.
- Get management support – the more the better!
- Implement – but it may take some time.
- Don't forget "maintenance."

Thank you!

More questions?

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