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?
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.
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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