

## Finding the Right Partner

- Expertise
- Responsiveness
- People we already know
- Same strategic goals
- A company that understands the university's restrictions (semesters, govt reporting requirements)
- A university that understands the company's motives
- Relationships and aligned goals
- Common understanding of the problem and the proposed solutions
- Capabilities that complement each other

**How close of a partnership do you need? (1=new partner, 5=done one off deals before, 10=strategic partner)**

Most said 8-10

### How do you select your Partner?

- Executive champion
- Willingness to make the time commitment
- Solid Reputation
- Alignment of goals and needs
- Similar R&D Goals
- Responsiveness and committment

## Best Practice for Application

Key Element	Company/ University/ Both	Office or Person Responsible	Key Considerations
1. Statement of Work	Both		
2. Budget	Primary Applicant		
3. Aligned Interests	Both		
4. Background Information	Both		What has come before; background IP. Including incumbrances on funding sources.
5. CVs & Experience	Both		Understand what different parties are bringing to the table and use the CVs to demonstrate
6. Submitting the application	Primary Applicant		Partnership to gather all info and make sure it's complete. Primary applicant responsible for submitting
7. Milestones	Both		Assign tasks that appear within the SOW. Implies a review and the consequences of that review. Determines the future of the project.
8. Review Process	Both		Everything is agreed to and collaborative.
9. Plan for cost sharing	Both		Work through the milestones and tasks to gain an understanding of how the cost sharing will work.
10. Other application considerations	Both		Hold pre application meetings. Discuss these items during meetings.



11. Scope & Budget fitting the funding announcement	Both		Whomever is responsible for a specific task or milestone should be looking at true costs. Then, primary applicant takes initial stab at developing the budget.
12. Communicating the process and who will take responsibility for each piece			
13. Project Manager	University		<p>Responds to feedback, touch point for moving through the process. Assign tasks and assign the people who will lead each task.</p> <p>A simple gant chart with responsibilities assigned helps company reps see their role in a process they are less familiar with. SOW should clarify the tasks and who is responsible for each.</p>
			<p>Universities are more familiar with public funding opportunities. There is an opportunity to educate company reps on how the funding mechanisms work. Company has a responsibility to self-educate and have someone who can help company reps understand the company's responsibilities.</p>
14. Build Relationship with Funding Agency Program Manager			<p>Get involved before the funding opportunity is posted. Contact the program manager to understand the problem they are trying to address. Work with the program manager to understand the problems and areas of interest. After the funding opportunity is posted, use the program manager as a resource for fully understanding the funding opportunity and the requirements. Building this relationship is important.</p>