



Annual Member Meeting

April 2, 2024



April 2, 2024



Annual meeting of the UIDP membership as outlined in Article II, Section I of the UIDP Bylaws

This document is for UIDP member use only. Do not distribute outside your organization.

Agenda

Welcome – Susan Martinis

Organization Facts – Jarrett Ellis

Membership – Nerissa Draeger

Projects – Wendi Yajnik

Events – John Wilson

Member Services & Financials – Kathy Lynch

Elections – Wendi Yajnik

ERVA – Tony Boccanfuso

UI Collab – Tony Boccanfuso

FY25 Priorities – Susan Martinis

Conclusion – Tony Boccanfuso



Strengthening
University-Industry
Partnerships

Organizational Facts



Organizational facts



- Membership is institutional
- Fiscal Year is July 1 – June 30
- Started in Dec. 2006 – originally convened by National Academies
- Graduated in July 2015 to an independent 501(c)3
- *Official Address: 1705 Richland St., Suite G Columbia, SC 29201*
- *Physical Address: 1905 Gadsden St, Columbia, SC 29201*
- *We will be moving to a new location, effective June 1, 2024.*

Current Voting Board Members FY2024



Presiding Chair
Susan Martinis
University of Illinois
Urbana-Champaign



Incoming Chair
Nerissa Draeger
Lam Research



**Immediate
Past Chair**
Wendi Yajnik
Novartis



University Director
Jarrett Ellis
Georgia Tech



Industry Director
Carla Leigh
Cisco



University Director
Kathy Lynch
Yale



Industry Director
John Wilson
GlaxoSmithKline

UIDP Senior Fellows

Senior Fellows are appointed annually and can be re-appointed each year.



Sandra
Brown



Todd
Cleland



Jilda
Garton



Anna-Marie
Greenaway



Karl
Koster



Randy
Hall



Jim
Spohrer

The UIDP Senior Fellows program identifies and recognizes members of the UIDP community who have retired or had a significant career shift but still wish to participate and serve the partnership.

Current Personnel

Tony Boccanfuso, President & CEO

OPERATIONS & HR	MARKETING COMMUNICATIONS	EVENTS	CONTENT MANAGEMENT	PROGRAMS	PROJECTS/SPECIAL INITIATIVES	MEMBERSHIP	ERVA
Rebecca Springfield Chief Administrative Officer	Sandy Mau Marketing Communications Director	Natoshia Goines Events Manager	Morgan Jones-King Events Content Manager	Mike Brizek Program Director	Chris Ramming Senior Strategic Advisor	Angie Taylor Membership Services Manager	Rebecca Silveston ERVA Executive Director
Mohammed Salehin Accounting & Grants Manager	Open Position Marketing Communications Manager	Lisa Frierson Staggers Events Coordinator	Alex Taylor Program Coordinator	Open Position Program Manager	Kristina Thorsell Senior Projects Advisor	Kelsey Sadlier Membership Engagement Manager (4/16)	Emily Shorkey ERVA Operations Manager
Taylor Davis Development Specialist	Maddy Howard Media & Communications Consultant (FT)	Kimberly Brennan Events Specialist	Natalie Brown Program Specialist	Jenna Conant Program Consultant	Brian Carter Special Projects Consultant	Lily Neal Membership Consultant (FT)	Ashley Richardson ERVA Program Manager
Michelle Lubaczewski Operations Coordinator (PT)	Madison Stone Graphic Design Consultant (PT)	Open Position Events Intern (PT)	Kate Waddell Content Mgmt Intern (PT)		Tammy Henry HBCU Initiative Consultant		Josh Aebischer ERVA Engagement Specialist
					Melissa Erekson UICollab Lead Consultant		

Contractors



Brian Carter
Special Projects



Jenna Conant
Projects



Melissa Erekson
UI Collab



Tamara Hayman
HBCU Initiative



Maddy Howard
Communications



Madison Stone
Graphic Design



Lily Neal
Membership



Chris Ramming
Strategic Advisement



Kristina Thorsell
Projects



Strengthening
University-Industry
Partnerships

Membership

Membership—Community

UIDP is home to 197 member organizations

- Up from 154 in 2019
- Global research universities
- Diverse sector leaders from industry
- Partnering R&D funders and performers

Membership—Facts

Our community is home to:

- **13 global universities (outside the U.S.)**
- **6 Leading HBCUs (Historically Black Colleges and Universities)**
- **2 DOE National Laboratories**
- **12+ diverse corporate sectors**



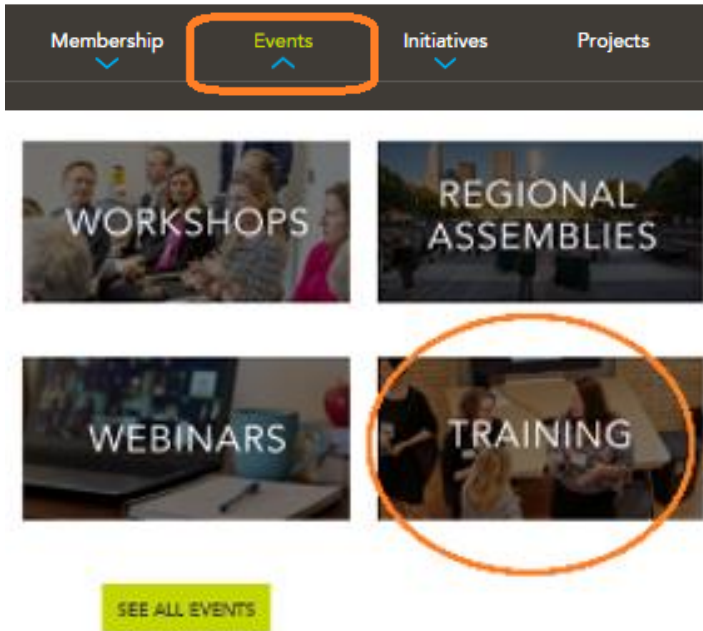
Membership—Engagement

Institutional Membership offers benefits to an unlimited number of employees

This Fiscal Year

- 12 new organizations have joined as UIDP members
- Retention rate of 94%
- 45+ representatives, on average, per organization are participating
- 800 (+) new member representatives have connected to the community

Membership– Support



Orientation Sessions

- Hosted bi-weekly!
- Offer a refresher about member benefits
- Support onboarding new colleagues
- Help you connect diverse business units to UIDP

Annual Dues – General Membership



- **General Dues (renewing) - \$5,500 (FY25)**
 - \$500 increase (announced in FY20)
 - \$7500 (FY27)
 - \$10,000 (FY29)
- **New Members - \$10,000**
- **Enhanced Dues - \$10,000 (FY25-28)**

Enhanced Membership Benefits



- Recognition on website as UIDP General Sponsor
- Quarterly consulting service call (1 hour)
- Institutional access for UIDP Virtual Meeting
- Half-day regional event organized for your region
- One complimentary registration for UIDP-organized events out of your organization's home country

PLUS One Commitment



UIDP's modest organizational membership dues (\$5,500) cover only a small portion of the cost to provide value to our community, so UIDP relies on non-recurring fees to ensure we can continue to provide significant ROI.

Show your support by committing to at least one of the **PLUS One** options below:

- ✓ [Enroll in enhanced membership program](#)
- ✓ [Sponsor an event](#)
- ✓ [Host an in-person event—local, regional, national, or international](#)
- ✓ [Lead a UIDP Project](#)
- ✓ [Serve on a UIDP committee](#)
- ✓ [Refer eligible organizations for UIDP membership](#)

Community Partners & Leadership Circle

UIDP is grateful to our Community Partners

CANNONDESIGN



ELSEVIER



Collaborative
REAL ESTATE



**THE
UNIVERSITY
FINANCING
FOUNDATION, INC.**



Wellspring



Boeing remains a
longstanding
Leadership Circle
member



Strengthening
University-Industry
Partnerships

Projects



UIDP Resources



Project Deliverables

quick guides, full length project reports, online resources

Reports & Event Summaries

workshop reports, conference summaries, ERVA reports

Webinars, Podcasts, & Videos

Recorded town halls, Legislative Updates, partnering opportunity webinars

Additional Resources

F&A Rate List, Business Funding List

UIDP Projects



Strategically Crowdsourced Solutions

Surveys, working group calls, breakout sessions, targeted emails

Responsive to Member Needs

Topics originate with member requests and comments

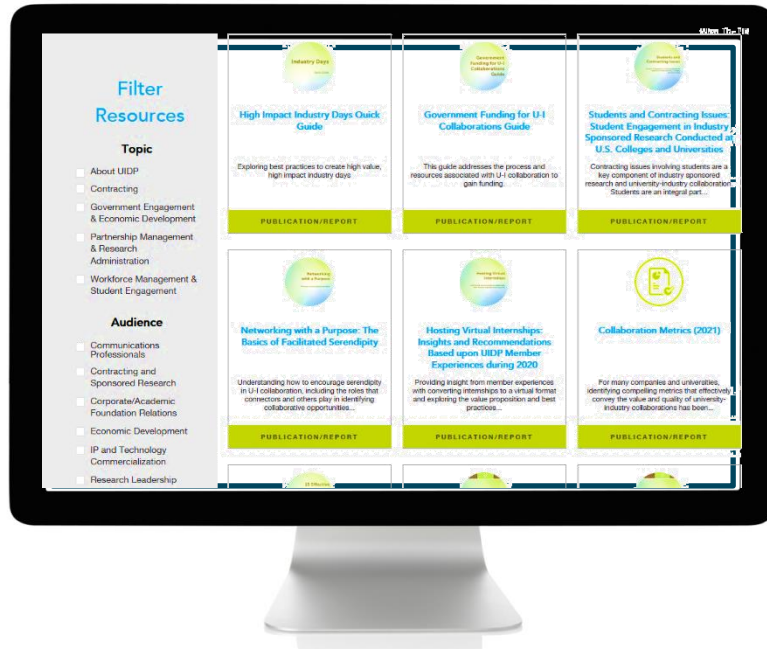
Modified Peer Review Process

All project deliverables undergo peer review

Project Committee Oversight

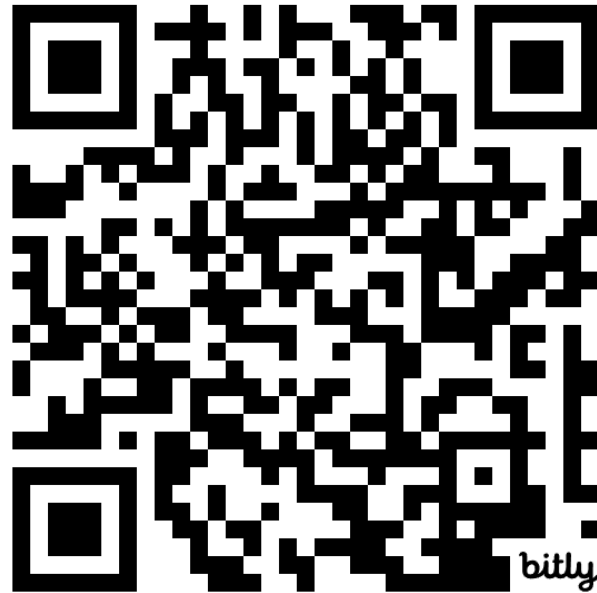
Delegated responsibility for review and approval of all projects in the portfolio

Access Project Resources



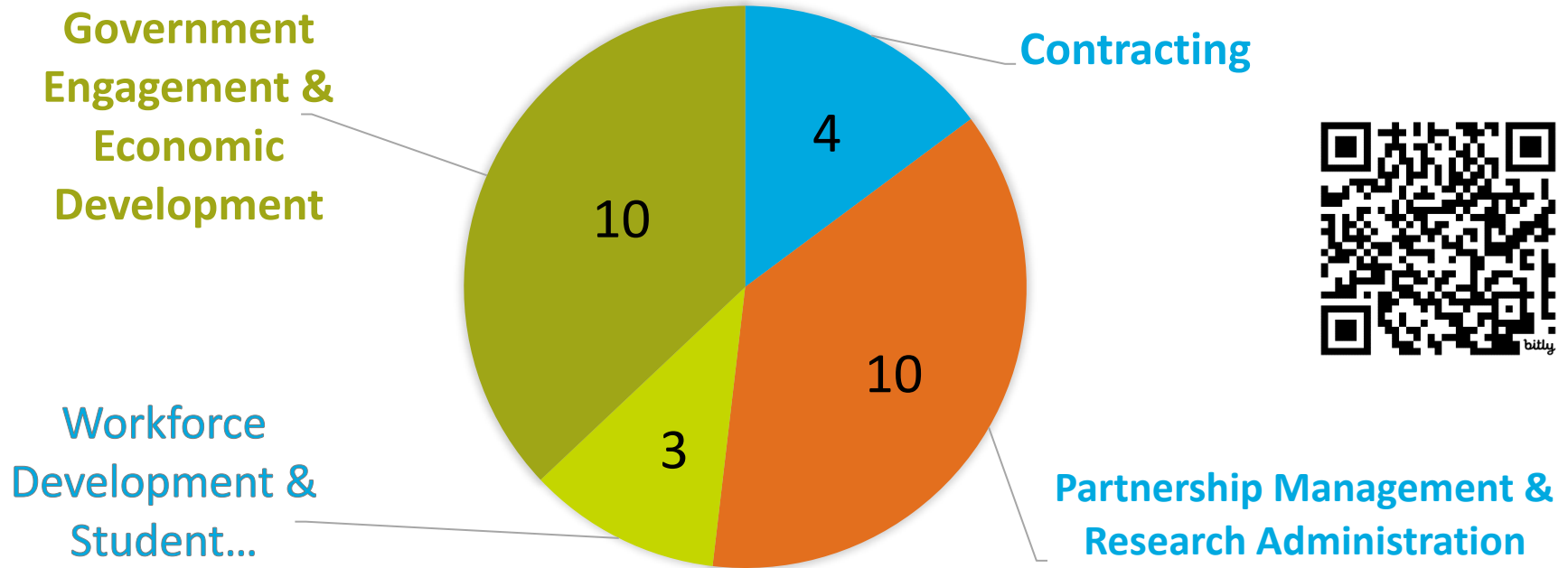
- Login at uidp.org
- Select Topic areas of interest to you
- Filter by **Published Project Materials**
- Click on videos, publications, and more

Get Updates & Get Involved



For UIDP member use. Do not distribute.

UIDP Project Themes



Contracting



Under Development

Contracting Curriculum

Federal Flow Down Reference Guide

Pending Release

Annotated Sample NDA for training researchers

Strategies for Managing Confidential Information



Government Engagement



Under Development

UKRI & NSERC Recurring Funding Opportunities

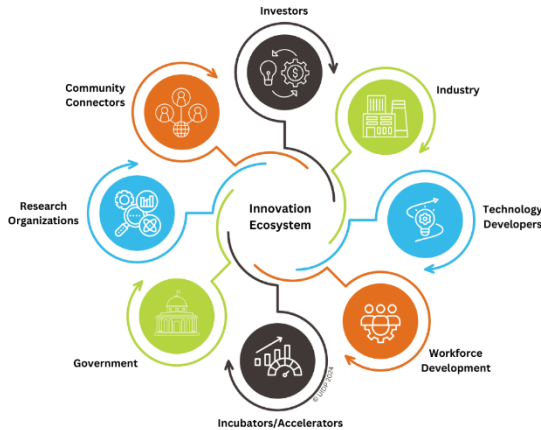
Ways Companies Can be Involved in Government Funded Projects

Advantages & Disadvantages of Pursuing Government Funding

Pending Release

Industry Strategies for Pursuing Government Funding

Innovation Ecosystems



Under Development

Innovation Ecosystems: Key Players, Roles, & Responsibilities

Innovation Ecosystems: What are they

Pending Release

Industry Strategies for Pursuing Gov't Funding

Key Components of an Innovation Ecosystem



Innovation Ecosystems

Proposed Topics

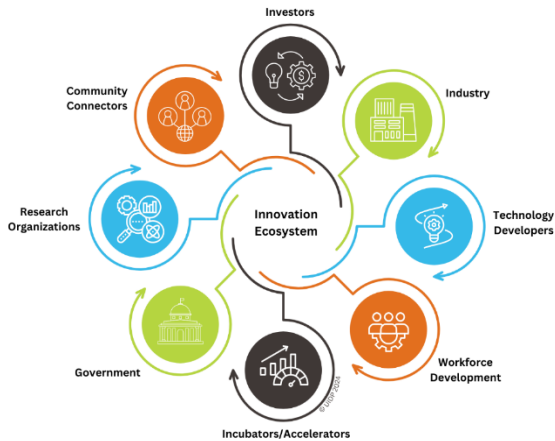
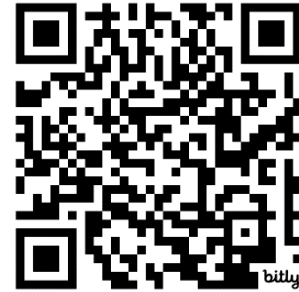
Metrics for Success

Identifying & Recruiting Participants in an Innovation Hub (matchmaking approaches)

How to Leverage an Existing Ecosystem

Strategies for Internal Organization of an Innovation Hub

Facilitation, Coordination, & Execution of an Innovation Hub





Strengthening
University-Industry
Partnerships

Events



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FY2024 Events & Activities

As of 3/4/2024

1 —● Virtual Conference

2 —● In-Person Conferences

4 —● Regional Assemblies

12 —● In-Person Workshops

34 —● Webinars

Upcoming Events

HBCU Engage 2024

April 16-17, 2024
Baltimore, MD

UIDP San Antonio 2024

May 7-9, 2024
San Antonio, TX

MFB Chemistry Workshop

May 14-15, 2024
Washington, DC

Midwest Forum

May 22-23, 2024
Chicago, IL

UIDP Xurban WVU 2024

June 11-12, 2024
Morgantown, WV

EPSCOR Workshop

June 17-18, 2024
Washington, DC

Cambridge Workshop

July 9-10, 2024
Cambridge, UK

UIDP Penn State 2024

Sept. 9-11, 2024
State College, PA

RTP Regional Assembly 2024

Oct. 24, 2024
Chapel Hill, NC

Non-U.S. Events



UIDP Europe

June 12-13, 2023
Stockholm, Sweden

We are continuing to expand our global reach through hosted events outside of USA



London Forum

October 17, 2023
London, UK



Tokyo Forum

October 10, 2023
Tokyo, Japan

The Future of Challenge-Driven Partnerships Workshop

July 9-10, 2024
Cambridge, UK

HBCU Engage



New to HBCU Engage

- Student-focused workshops on STEM education, entrepreneurship development, applied research, and community leadership
- 1:1 meetings with potential funders and partners

Local Co-hosts: Bowie State, Coppin State, Howard, Morgan State, University of the District of Columbia, and University of Maryland Eastern Shore

Host an Event!



**UIDP regularly evaluates requests
to host events**

If you are interested in hosting a conference, regional event, or workshop, please let us know at info@uidp.net



Strengthening
University-Industry
Partnerships

Member Services



News Briefs and Webinars



Member-only webinars offer opportunity to ask questions about current opportunities and legislative happenings

News briefs and webinars archived on UIDP website.

3-Minute Read



Timely, discussion-stimulating briefs connecting the dots in multi-sector research collaboration.

Read on the UIDP website, watch your inbox, and join the conversation on LinkedIn!

<https://www.linkedin.com/company/uidp>

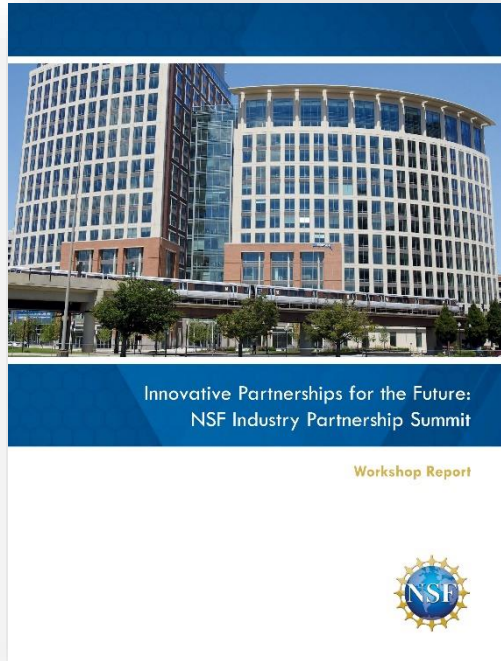
UIEA Newsletter



A unique, how-to publication that helps universities embrace the increasingly nuanced and holistic approach to industry engagement — and prepares their campuses, staff, faculty, policies, and planning mechanisms for a new level of integrated and strategic corporate collaboration.

<https://techtransfercentral.com/marketplace/university-industry-engagement-advisor/>

Workshop Reports



- NSF TIP Directorate workshop, UIDP as convener
- Goals:
 - Shape effective strategies for partnering for research or workforce development;
 - Identify companies highly interested in pursuing deeper discussions on partnership opportunities; and
 - Expand industry awareness of the opportunities for public-private partnerships to accelerate research and workforce development
- Report includes 12 key findings/recommendations; NSF has begun acting on several.

Brief Surveys



UIDP Projects Survey: Size of Academic R&D Investments from Industry

Oct. to Nov. 2021 | n=20

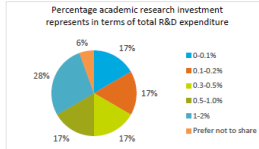
Companies with a keen interest in collaborative research have limited information upon which to base investment levels in external R&D efforts. Although government investment in research is well documented, similar investment from industry is not fully known. UIDP is exploring a benchmarking project to better understand the levers used to determine investment in university-industry research. To inform the project, we asked industry member representatives to offer information about their company's investment in university sponsored research. Respondents were forthcoming about how much they spent on sponsored research and offered important context pertaining to their overall research expenditure.

The survey was in the field for one week and received responses from 20 UIDP member companies across a range of sectors. The largest proportion of respondents were from the tech sector (40%), followed by the chemical sector (20%). Other sectors represented were information, manufacturing, healthcare, food/consumer products, energy, agriculture, and aerospace. Company size was calibrated by number of employees worldwide; 35% of responding companies (the largest proportion) employ more than 100,000, and the next largest segment (30%) employ 50,000-100,000, indicating that a majority of respondents represent very large organizations. However, 10% of respondents were in companies with between 5,000 and 10,000 employees.

In terms of total R&D expenditure, companies by and large spend less than 1% of total research investment in university-sponsored research. Less than one-third of respondents (28%) invest between 1% and 2% on research with university partners, and not a single respondent said they spent more than 2%. It is also worth noting that 6% of respondents preferred not to share this information.

We asked respondents about their annual global expenditure in academic research programs. In dollars, the majority of respondents (60%) spent more than \$5 million annually on university sponsored research. Of those spending the highest amount, a majority (65%) were also among the companies with the most employees (more than 50,000). However, company size does not necessarily correlate with the largest university research expenditures, as 35% of respondents came from companies with between 5,000 and 50,000 employees.

Informal, non-scientific survey of UIDP members. UIDP work product for member use only. Do not distribute or reproduce in any manner.



Annual global expenditure for academic research programs

Expenditure Range	Percentage of Respondents
Less than \$1M	10%
\$1M-\$2M	10%
\$2M-\$5M	10%
\$5M-\$8M	5%
\$8M-\$5M	5%
\$5M+	60%

- Based on topics of interest to UIDP members
- Most take about 1 minute to complete
- Project surveys inform UIDP Projects
- See survey reports in the UIDP Resource Center

Do you have an idea for a UIDP 1-minute survey?

Email us at info@uidp.net



UIDP Conversations Podcast



3,325+ plays to date. Take a listen to:

Brad Lukanic, CannonDesign

Quincy Quick, Tennessee State University

Michael Oakes, University of Minnesota

Lubab Sheet-Davis, UI Collab

David Reed, U Florida

Chris Austin, NIH-NCATS

Daron Green, Autodesk

Cynthia Sweet, Pitt

Eric Corey Freed, CannonDesign

Carlos de Brito Cruz, Elsevier

Nathan Utz, Purdue University

Natascha Eckert, Siemens

Charles Johnson-Bey, Booz Allen Hamilton

Ned Calder and Freddy Solis, Innosight

Malcolm Skingle, GSK

Doug Maughan, C-Accel

John Bamforth, READDI

Matt Ridley, *How Innovation Works*



FY24 Completed Webinars by Category



How to Access Webinars



- Visit uidp.org/uidp-webinars/ and review our free and premium webinar offerings for members.
- Visit the Resource Center and filter by **Recorded Webinars** to access recordings, associated slide decks, and any related handouts.

FY24 Town Halls



- Members-only
- Contemporary topics
- Usually not recorded

Recent Town Halls

- Implementation Guidance of Research Security Programs (NSPM-33)
- HBCU Engagement Town Hall
- Internal Structuring for Maximizing Impact from Industry Engagement: The SRO Perspective
- IP Terms and Conditions in Sponsored Research Agreements
- Federal March-In Rights: A Discussion with Former NIST Director Walter Copan
- Alternative Contracting Models (Upfront IP)
- Federal March-In Rights: A Discussion with AUTM CEO Stephen Susalka
- A Model for Joint Faculty Employment
- Analysis and Winning Characteristics of the NSF Engines Inaugural Class



Strengthening
University-Industry
Partnerships

Financials



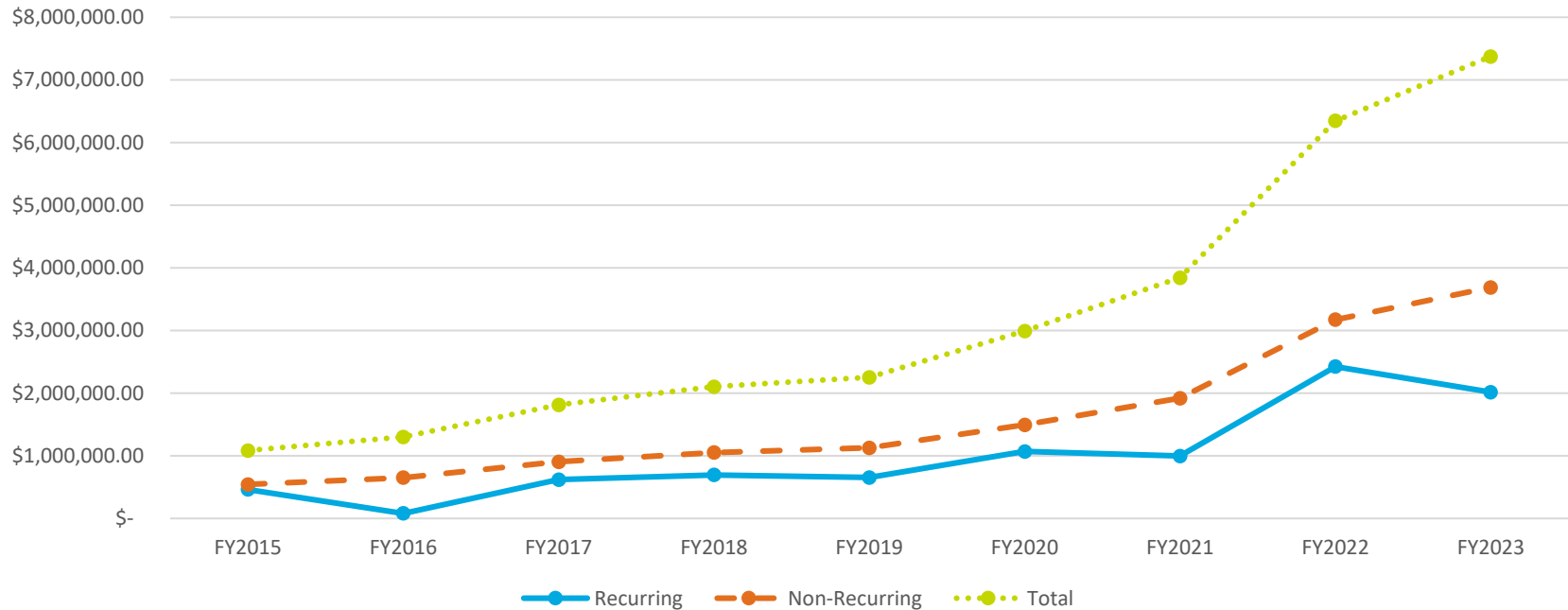
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Key Points



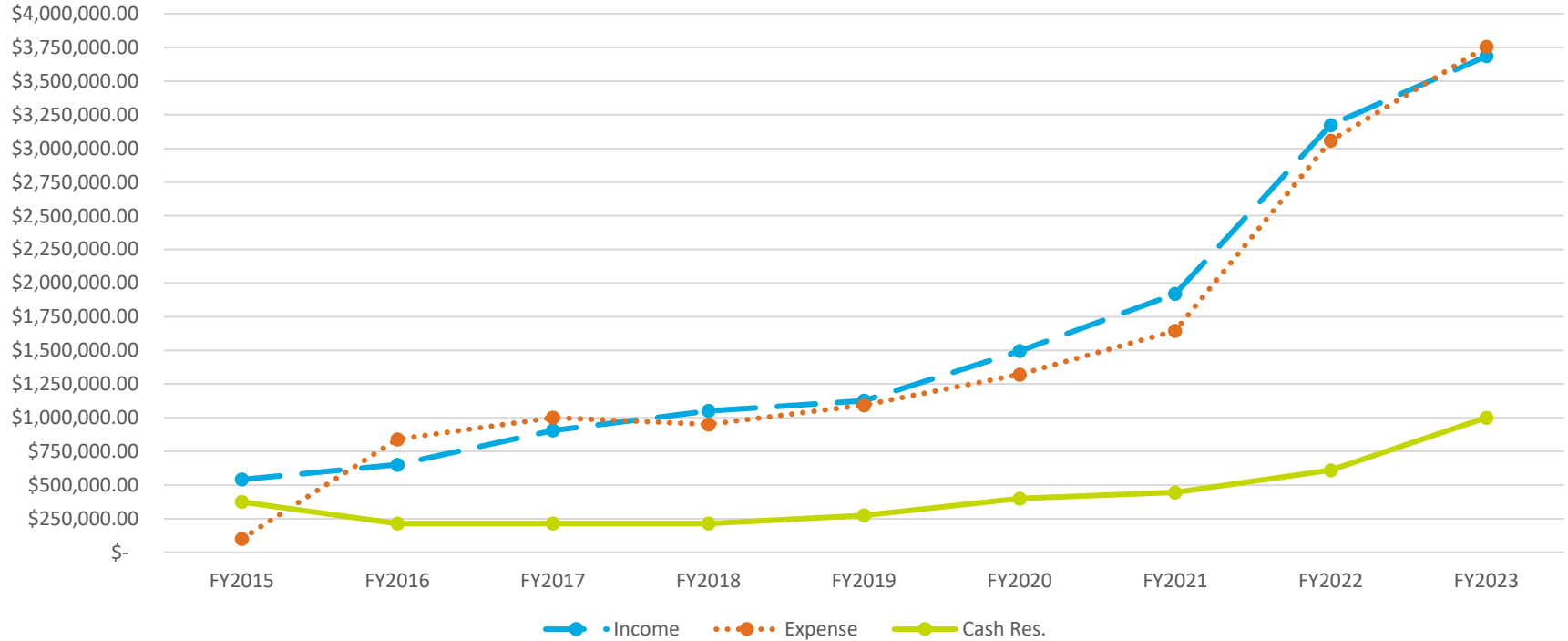
- Membership ↗
- Revenue ↗
- Staffing ↗ Consultants ↗
- Increasing number of UIDP events/member services
- Financially stable
- Financial audit completed annually

Income



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Income, Expenses, & Cash Reserve



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Strengthening
University-Industry
Partnerships

Elections



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2025 Board Election



- Board elections begin tomorrow, 4/3
- Ballots will be accepted from April 3rd at 8 a.m. US EDT until April 12th at 5:00 p.m. US EDT
- Primary representatives, or their designee, may vote
- Only one person from each member organization may vote
- Write-in votes are permitted
- All terms begin on July 1, 2024
- Results will be announced at our spring conference, UIDP San Antonio next month

2025 Board Candidates

Incoming
Chair



Padma
Raghavan

Industry
Director



Evelyne
Viegas

Industry
Director



John
Wilson

University
Director



Kathy
Lynch



NSF Engineering Research
Visioning Alliance



NSF Engineering Research
Visioning Alliance

A shared vision

FOR ENGINEERING RESEARCH



The first engineering
research visioning
alliance of its kind

ERVA enables impact on national research priorities by convening diverse minds and voices from across the nation to identify emerging trends and solutions.

ABOUT ERVA

- Neutral convener of diverse minds
- High-impact engineering research opportunities
- Address national, global, & societal needs



Idea



Visioning
Event



High-Impact
Report

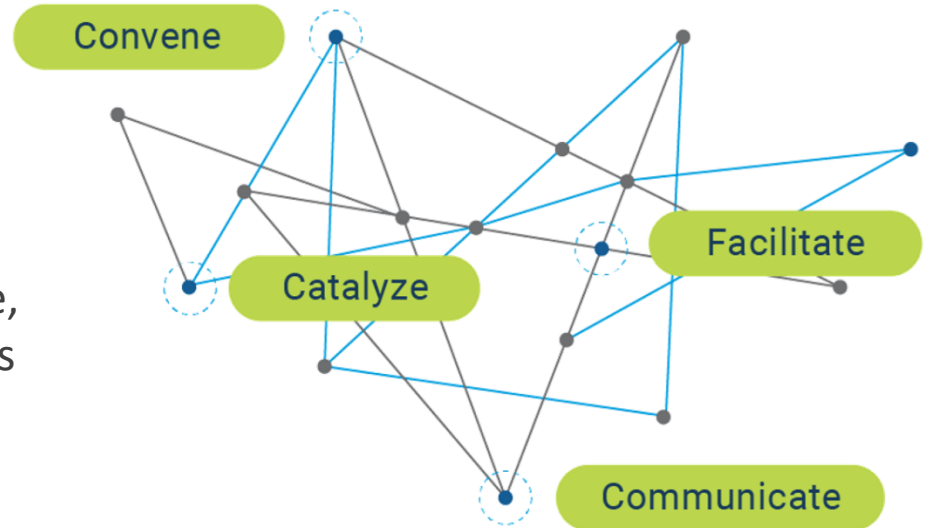


Disseminate
Broadly

OUR MISSION

To identify and develop bold and transformative new engineering research directions and to catalyze the engineering community's pursuit of innovative, high-impact research that benefits society.

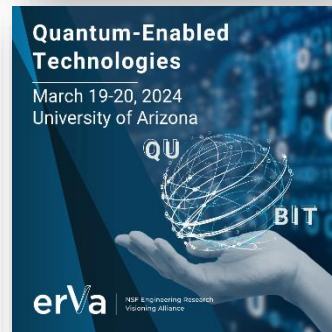
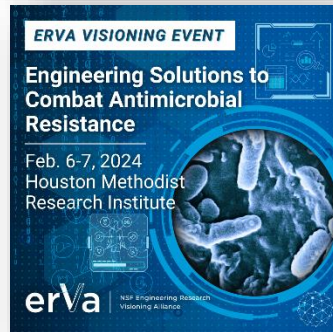
HOW WE DO IT



ERVA Year 3

4

Visioning Events Executed

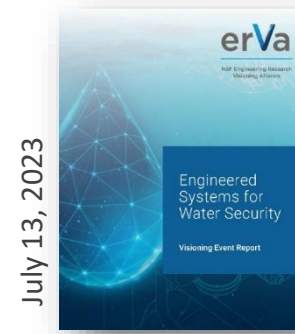


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Visioning Event Reports Published



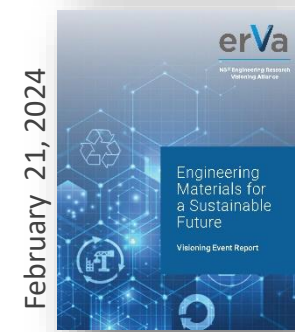
April 26, 2023



July 13, 2023



October 12, 2023



February 21, 2024



Join us!

- **Suggest ideas** for a visioning event theme
- **Nominate** experts to participate in visioning events
- **Follow us:** @ERVACommunity
- **Contact us:**
info@ervacommunity.org or rsilveston@uidp.net
- **Become an ERVA Champion:**
www.ervacommunity.org/get-involved





UICoLab

Powering Partnerships

A new consulting subsidiary of UIDP, that includes a select team of experts with extensive experience in the U-I space at top universities and companies.

Our consultants have significant experience in:

- ✓ U-I Strategy
- ✓ Partnership
- ✓ Contracting
- ✓ Innovation Ecosystem Assessment and Development

**How can we help power your
university-industry partnerships?**



ui-collab.com

Consultants & Project Managers

- Kim Capps
- Brian Carter
- Todd Cleland
- Andrew Cockerill
- Melissa Erekson
- Dennis Fortner
- Jilda Garton
- Karl Haider
- Tamara Henry
- Chris Heivly
- Karl Koster
- Edward Krause
- Rob Lowe
- Matt McNair
- Lili Portilla
- Jaap Schut
- Lubab Sheet-Davis
- Jeffrey Southerton
- Kristina Thorsell
- Joanne Tornow
- Stewart Witzemen



Strategic Solutions

- Tackle strategic and tactical challenges
- Create a roadmap that balances your aspirations with practical implementation plans
- Individual, tailored plans



Program Evaluation

- Evaluate internal processes, structures, resources, stakeholders, and outcomes.
- Benchmarking through survey instruments and result interpretation



Executive Education and Capacity Building

- Professional development and training programs for your leaders and entire staff.
- Integration into strategic or evaluation projects or offered as a stand-alone service
- Temporary executive support – bring in one of our experts to launch a new office or provide expertise during a transition.

FY25 Priorities



**Ensuring that
UIDP is
indispensable to
its members**

FY25 Priorities



- **Funding**
- **Government Engagement**
- **HBCU Beyond an Event**
- **Member Engagement**
- **Non-US Programming**
- **Online Offerings**
- **Regional Events**
- **Staffing**
- **Thought Leadership**
- **Training**
- **UI Collab**



Strengthening
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Connect with Us



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803.807.3679