

A vision and recommendations for University of Wisconsin–Madison

# OFFICE OF BUSINESS ENGAGEMENT

AUGUST 1, 2018



Office of  
Business Engagement  
UNIVERSITY OF WISCONSIN–MADISON



A vision and recommendations for University of Wisconsin–Madison  
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**Business Engagement Working Group**

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## EXECUTIVE SUMMARY

The Business Engagement Working Group was formed by the office of the Vice Chancellor for University Relations in February 2018 and charged to examine the current UW–Madison business engagement practices in comparison to best and prevailing national business-engagement practices. The working group was asked to provide recommendations and implementation guidance for how best to position a new Office of Business Engagement (OBE) at UW–Madison.

The group concluded that the best means to achieve this goal is by creating a central resource to coordinate comprehensive business engagements in collaboration with the university community, which would create shared value by fostering mutually beneficial relationships between businesses and UW–Madison. Further, this organization should work with businesses to forge trusted relationships yielding diverse engagements that may include collaborative research, professional development and executive education, recruiting talent, philanthropic support, sponsorship, technology transfer and licensing, campus marketing, and an array of other interactions.

The recommendations in this report aim to: achieve on- and off-campus recognition of the Office of Business Engagement as the hub for campuswide coordination of corporate relationships; increase UW–Madison’s revenue from companies; foster a collaborative campus culture with consistent and shared goals for industry engagement; and provide transparent information-exchange practices, platforms, and systems.

The working group provides a suggested mission and operational philosophy along with a series of recommendations in the following categories: structure, roles, governance, collaboration, and processes. The structural recommendations describe the comprehensive scope of the office, suggest the optimal university reporting line, and encourage ongoing cross-campus review to avoid unnecessary redundancies.

The roles recommendations provide a suggested organizational chart along with brief descriptions of all position responsibilities, with justifications for each of the suggested new positions. The governance section provides recommendations to establish multiple tiers of oversight for the organization including routine interactions with university leadership and the establishment of a business engagement advisory board. Also described are success metrics and goals for consideration, and tactics for communicating these to internal constituents.

The collaboration recommendations suggest the systems and interactive platforms needed for success. They also describe the desired alignment for OBE with many of the areas within the campus community that are crucial to OBE’s future success such as schools and colleges, career services, WARF, WFAA, Research and Sponsored Programs, University Marketing, and noncredit continuing and professional education. Finally, the process section describes recommended best practices necessary to achieve desired results.

Achievement of these goals will result in positioning UW–Madison as a national leader in business engagement with our corporate partners and peer institutions as well as provide increased resources to enhance the UW–Madison student experience and further enrich our globally recognized research environment.

## INTRODUCTION

In late 2017, UW–Madison Assistant Vice Chancellor for Corporate and Government Affairs Ben Miller and Wisconsin Foundation and Alumni Association (WFAA) Assistant Vice President Eric Salisbury worked at the direction of UW–Madison Vice Chancellor Charles Hoslet and WFAA President Mike Knetter to assess the University of Wisconsin–Madison’s business engagement practices.

To perform the assessment, they worked with the campus survey center to develop interview questions. They then met with ten key corporate partners with cross-campus relationships and held numerous meetings with campus stakeholders.

A key finding from these interactions was that our corporate partners seek comprehensive and cross-campus engagement. They are frustrated by the university’s apparent lack of coordination (in research contracts, recruitment, and development) and difficulty in helping them connect across the campus to solve their business needs. Further, unclear roles, responsibilities, and expectations between staff from the Office of Corporate Relations (OCR), WFAA/CFR, and schools/colleges have led to confusion, both on campus and for our key partners.

Internal stakeholder meetings yielded similar feedback, along with a shared belief that there is an opportunity for UW–Madison to become a recognized leader for its ability to develop and retain strong relationships with business, but that we need to make changes to capitalize on this potential.

In response to these findings a plan was created to realize this opportunity and address partner and stakeholder concerns. The plan establishes a single central campus entity charged with broadly promoting campus resources/opportunities and managing broad-based corporate partnerships, including the transition of the corporate philanthropy function from WFAA to a newly created entity. Further, it seeks to re-mission, rebrand, and bolster the existing OCR to a new Office of Business Engagement (OBE) that will include a new managing director with a projected start date by August 1, 2018.

Further, it called for the formation of a working group to examine business engagement across campus.

The working group was established in February 2018 with a charge to examine the broader landscape of corporate relations on campus and among national peers and provide recommendations for how best to position the Office of Business Engagement and the university. The working group focused its examination and recommendations toward structure, roles, governance, collaboration, and processes, and provides guidance regarding the implementation of these recommendations.



## ASSESSMENT

The working group began its efforts with a candid assessment of the current strengths, challenges, opportunities, and threats (SCOT) with regard to the business engagement practices and structure at the University of Wisconsin–Madison as of February 1, 2018. Below is a snapshot of that assessment.

STRENGTHS	CHALLENGES
<ul style="list-style-type: none"> <li>• Global recognition of UW–Madison as a source for talent, education, and research</li> <li>• Desire by businesses to engage with UW–Madison</li> <li>• Desire by many faculty members to work with businesses for research purposes</li> <li>• Good business engagement professionals (faculty, staff, etc.) in place</li> <li>• Strong history of IP management and tech. transfer</li> <li>• Established comprehensive business engagement occurring on campus</li> <li>• Strong campus employer relations committed to improved coordination across internal boundaries</li> <li>• One of the largest alumni and friend networks</li> </ul>	<ul style="list-style-type: none"> <li>• Need for a stronger culture of trust with regard to business engagement</li> <li>• Lack of a common business engagement philosophy and common goals has created stress with internal and external constituents</li> <li>• It is unclear among members of the university community that business engagement is a priority</li> <li>• It is perceived by internal and external partners that UW–Madison does not have common standards of engagement for research contracts and agreements</li> <li>• IP is managed by an affiliated entity</li> <li>• Long-term business engagement is not always a consideration in IP management</li> <li>• Lack of efficient platform for sharing business engagement data</li> <li>• Duplicative and occasionally competitive campus business engagement efforts</li> <li>• Mainly reactive approach to large-scale research partnerships</li> </ul>

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Positively enhance the research environment, student experience, and public relations through improved business engagement</li> <li>• Campus community seems to desire a new business engagement paradigm</li> <li>• Comprehensive coordination of business engagement at peer institutions has led to increased revenue (and here to a certain extent)</li> <li>• Companies increasingly seeking preferred partner relationships</li> <li>• Opportunity for increased revenue from industry-sponsored research with campuswide standards for engagement</li> <li>• Platforms for internal coordination of business engagement have emerged (CCC, Corporate Forum, etc.)</li> <li>• Best leverage of existing personnel through role clarity and coordination</li> </ul>	<ul style="list-style-type: none"> <li>• It is easier for our business partners to work with peer universities</li> <li>• Status quo will lead to less business engagement, less revenue, and fewer opportunities for UW–Madison students</li> <li>• More competition as peers improve and invest in business engagement</li> <li>• Companies are doing more engagement with fewer universities</li> <li>• If brand struggles, we struggle; maintaining world-class brand is essential</li> <li>• Competing internal interests</li> <li>• Decentralized business engagement leading to increased stress and confusion, internally and externally, which leads to lost opportunities in all aspects of business engagement (recruiting, research, sponsorship, etc.)</li> </ul>

It is evident that UW–Madison underperforms in its business engagement practices in comparison to peers and those recognized nationally as benchmarks for business engagement. A primary cause is that multiple campus organizations with similar yet distinct missions and objectives are reaching out to our existing and potential business partners with little, if any internal coordination. This creates or compounds existing confusion and stress for our external partners; it also fosters competition rather than collaboration, resulting in an overall distrust of campus business engagement efforts in the campus community.

Further, businesses no longer consider themselves donors to academia; they consider themselves investors. According to the summer 2010 Sloan Management Review article “Best Practices for Industry-University Collaboration,” industry interactions with academia are intended to “extract the most business value possible from [university] research.” Corporations today consider themselves to be investors and business partners, where knowledge creation and transfer are a significant part of the equation. Companies seek partners that provide them strategic benefits such as future employees, research, new technologies, brand building, employee training/ executive education, and more. Universities succeed where they are able to match these interests with opportunities that are mutually beneficial to both partners such as fellowships, research funding, jobs and internships for students, program and event sponsorship, access to highly specialized facilities, in-kind gifts, participants in executive education programs, licensing income, corporate foundation funding, and so on.

The in-depth assessment and analysis of on-campus and national practices coupled with working group discussions sought to identify the core elements of business engagement for UW–Madison and determine how best to enable engagement with those elements given the nuanced structure and culture of our great university. Our working group believes that there is no one “best” business engagement model. Rather, we sought to identify prevailing practices from excelling programs and determine how they might best succeed here. What follows is a set of ideals, recommendations, and implementation guidance with the goal of best positioning UW–Madison for success. For the readers’ benefit, the recommendations are arranged into the following categories: structure, roles, collaboration, and processes.

## WHAT WILL SUCCESS LOOK LIKE?

**Early in our process, we identified success metrics for the Office of Business Engagement. They are:**

- **Institutional support.** The commitment of university leadership to effective business engagement and the Office of Business Engagement is critical. The offices of the chancellor and school/college deans must make it clear that establishing and maintaining durable relationships with business in collaboration with the Office of Business Engagement are a priority. The value a company seeks from UW–Madison is rarely within the exclusive domain of any one college, school, or department. By clearly charging the Office of Business Engagement with coordinating the totality of a business’s relationship on campus, the university community will be more likely to share information and collaborate with OBE — thus creating a collaborative culture focused on achieving common goals.



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- **Recognition of OBE as a hub for campuswide business partnership coordination.** OBE will be uniquely positioned to coordinate business engagement across, and in partnership with, the university community. OBE should become recognized internally and externally as the platform for campuswide coordination of business engagement activities. It is our strong recommendation that OBE not serve as a gatekeeper or assert “ownership” of business relationships. Rather, it should facilitate access to the university community as relevant to the interests of the company and bring together campus constituents in order to coordinate specific and realistic strategies for key business relationships. This role clarification signals to our external partners who coordinates their relationship.
  - **Increased institutional revenue.** Working together with a clear mission, consistent effort, and a focus on key relationships will yield increases in the revenue we receive from business through research contracts, licensing, sponsorship, continuing and executive education, and philanthropy. Having one entity focused on optimizing our revenue from business will also require OBE to serve as a catalyst within the campus community in an effort to continuously improve upon the ways by which the UW–Madison can effectively and efficiently engage with business.
  - **A collaborative culture.** Successful business engagement requires cooperation across the many internal boundaries created within the university community that the vast majority of our business partners neither know about, nor care about. Enabling an efficient network to facilitate business engagement requires transparent and consistent communications between multiple units to produce a trusted platform. OBE’s success will for a large part be a result of the success of its peers in other units across campus working together toward a common goal. In order to be successful, OBE must establish and maintain strong collaborative relationships with these offices throughout campus whose engagement with companies can advance or hinder university-wide relationship building. These include the Office of the Chancellor, VCRGE, WARF, continuing and executive education providers, University Marketing, WFAA, campus career services, and others. When working together collaboratively, these entities will share information, leads, opportunities and activities, all with the goal of building broad partnerships with the business community.
  - **Transparent exchange of information.** The collection and sharing of comprehensive partner data among colleagues across campus engaged with business can be a significant tool in building trust, enabling transparency, and facilitating collaboration. There are no current processes or systems on campus for collecting or sharing comprehensive data regarding our business relationships. It will be crucial that shared data system(s) and other platforms that facilitate sharing of information be developed.

## MISSION AND PHILOSOPHY

Like most research universities, UW–Madison is heavily dependent on federal funding to fuel its research enterprise. However, with increased competition for federal dollars and consistent fluctuation of federal research priorities and federal research budgets, there is a growing need to diversify and expand its sources of support. Looking at how to increase the ease by which businesses are able to engage with the university and how to derive the most value for both partners from those relationships is crucial.

In this regard, the group sought to establish a pragmatic mission and operational philosophy for the organization to clearly articulate its role to both the campus community and potential and existing external partners. Further, the group responded to needs identified throughout the review process of current UW–Madison business engagement practices and national best practices in order to position OBE for long-term success in comparison to its national peers, as well as to strengthen the university’s connection to industry and increase revenue derived from that connectivity.

It is recommended that the university endorse the following mission and operational philosophy for the Office of Business Engagement:

### MISSION:

*To create shared value by fostering mutually beneficial relationships between businesses and the University of Wisconsin–Madison.*

### OPERATIONAL PHILOSOPHY:

*The Office of Business Engagement facilitates a cross-campus network seeking to enhance the student experience, bolster our research community, and benefit society by providing an efficient resource to coordinate comprehensive business engagements across the UW–Madison community with those interested in mutually beneficial relationships, and serve as the primary point of contact for businesses seeking to engage with the university.*

*The office will work with businesses and appropriate campus entities to forge trusted relationships yielding diverse engagements that may include collaborative research, professional development and executive education, talent recruitment, philanthropic support, sponsorship, technology transfer and licensing, campus marketing, and an array of other interactions.*



## STRUCTURE

The location of an organization like OBE within a university organizational chart has been in flux in this country for at least the past decade. Nearly all major American research universities have implemented at least one similar restructuring in the past 15 years. Much of this is migration from a solely philanthropic-focused mission and reporting structure to a more comprehensive relationship-management organization in response to industry's shift from altruistic support of academia to a more mission-driven partnership model. Notably, these structural changes have moved to a reporting structure within the chancellor's or provost's office. The decision on the specific reporting location within either of these offices seems to be based on the specific culture, needs, and environment at a particular institution rather than a prevailing practice or trend.

UW–Madison is unique when considering an appropriate business engagement structure in that it couples a proudly decentralized and highly renowned global research university with a number of external and separately managed organizations overseeing key business engagement functions such as technology transfer and commercialization, philanthropy and alumni relations, and continuing and executive education.

Further, the recommendations needed to also incorporate the transition of existing OCR staff into OBE roles and integrate a focus on increasing the revenue received from industry — primarily through research relationships, sponsorships, philanthropy, and continuing and executive education programming. The structural recommendations below seek to best position OBE for success based upon prevailing national practices and trends coupled with UW–Madison's unique and nuanced organizational structure and culture.

There was also discussion on the correlation between OBE's primary office location and overall performance of the organization. The working group found no data to infer any relationship between physical location of a university's business engagement unit and success among similar organizations at U.S. research universities.

***It is recommended that OBE operate as a comprehensive office for corporate partnership.***

A comprehensive business engagement office can serve as a front door for any business seeking to engage with UW–Madison while it also leads coordination of cross-campus activities aimed at realizing mutual value for the university and existing key business partners and developing new key partnerships. Further, the office is charged with generating revenue from all sources (philanthropy, sponsored research, continued and executive education, sponsorship, and more) rather than any one particular area. This enables OBE representatives to eliminate conscious or unconscious biases that may lead one to steer toward a particular suboptimal outcome due to how the university is organized or how it accounts for its dollars. Instead, OBE will be freed to pursue opportunities — often across multiple campus entities — that derive the most mutual value for the university and its business partner.

In serving as the front door for all businesses, it should not be assumed that OBE is able to be all things to all companies. Through its front door role, the OBE team should have efficient processes to triage all inquiries and provide a warm introduction to that unit, demonstrating a clear effort to find a campus entity best suited to handle that request.

In doing so, OBE will be able to achieve its goal of deriving mutual value from the relationships it facilitates through collaboration across campus. As part of this, OBE should establish criteria for key partnerships and curate and disseminate to internal constituents a list of key external partners for the campus.

These should be the 150–250 organizations that have the strongest existing UW–Madison engagements or overwhelming engagement potential. OBE should work in collaboration with all appropriate parties across campus to develop and execute specific relationship strategies for each of the identified key partners as well as strategies to cultivate new partnerships with potential to achieve key partner status.

***It is recommended that the Office of Business Engagement report to the Assistant Vice Chancellor for Government and Corporate Affairs.***

The working group agrees with the assessment of Miller and Salisbury that the most recent corporate relations structure at UW–Madison, where multiple units tried to manage cross-campus corporate relationships, was suboptimal. According to the most recent NACRO membership survey with respondents from 115 North American research universities, national prevailing practice shows that 70% of respondents identify their business relations mission as comprehensive. The 2016 NACRO member survey (121 university responses), showed that 72% have a singular, central designated office for corporate relations.

The 2016 NACRO survey also shows the most common reporting structures. The largest number report to the university advancement office (50%). This pattern, however, is rapidly changing as that number is down from 78% in 2012, with the changes almost equally spread between reporting lines to chancellor/ president offices, provost offices, and vice president/ vice provost for research offices. A reporting line to the Assistant Vice Chancellor for Government and Corporate Affairs will best position the unit for success at UW–Madison.

It is recommended that OBE seek to partner or collaborate wherever possible to eliminate redundancy of effort.

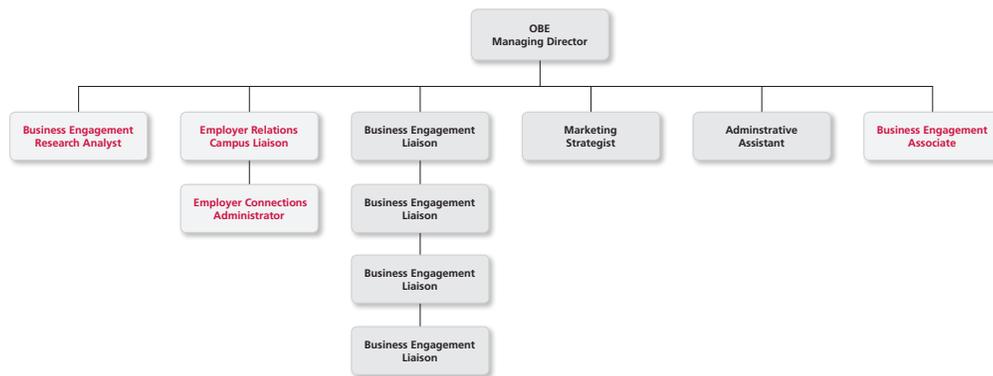
This will require careful and consistent effort to bolster and maintain internal relationships key to UW–Madison’s success in realizing its goals for corporate partnership. These will include a range of formal and informal agreements such as with the WFAA to provide an array of support for philanthropic activities, the Office of Research and Sponsored Programs for research contract and other relevant negotiation, as well as numerous others across the campus community. Many of these are detailed in this report. A more formal agreement is encouraged where the partnership is crucial to OBE day-to-day operations.



## ROLES

In reviewing the roles and skills necessary for OBE to function, the working group looked pragmatically at existing competencies that could be leveraged as well as skill or service gaps that could provide benefit to campus beyond OBE. OBE requires personnel to achieve both the effective development of new and coordination of existing key campus relationships while also efficiently responding to the large volume of business engagement-related inquiries from external parties.

***It is recommended that OBE adopt the organizational chart shown below. Brief descriptions of the positions are provided following the chart.***



Red font color indicates a recommended new position. Rationale for these roles are included in the descriptions below.

The organizational chart accounts for the transfer of a majority of current OCR office personnel into roles in OBE. Specifically, Kathy Collins and Melissa Simon as business engagement liaisons, and Susan Mayer as administrative assistant. Further, it is recommended that Kari Schrage continue her majority percentage assignment to OBE as marketing strategist from University Marketing.

The role of the *managing director* should include leading the launch and rebranding of the Office of Business Engagement to internal and external stakeholders, as well as evaluation, dissemination, and coordination of professional development necessary to equip current and new staff members with the skills necessary to facilitate comprehensive business engagement at UW–Madison. Further, staff members will be expected to build trusted, professional, and productive working relationships with UW–Madison’s schools, colleges, centers, and institutes, as well as UW–Madison’s affiliated organizations such as the Wisconsin Foundation and Alumni Association (WFAA), University Research Park (URP), and the Wisconsin Alumni Research Foundation (WARF) in an effort to establish comprehensive strategies, goal setting and effective stewardship of all identified business relationships. The managing director will also work with these entities to implement technology and communications strategies that streamline how UW–Madison tracks interactions with businesses and develop methods to share campuswide business engagement data as needed.

Beyond implementation of the new unit, the managing director will be expected to comprehensively manage cross campus coordination of UW–Madison’s key business partnerships. This will include being lead for the university for some top business partnerships. Further, the managing director will be responsible for the overall management and

professional development of the OBE office and personnel as well as be an advocate for business engagement within the university so that we are able to continue to make it easier and more beneficial for business partners to choose and work with UW–Madison.

The role of the **business engagement liaisons** will primarily be to coordinate, create new, and expand existing engagements between UW–Madison and businesses that produce shared value. This includes planning, developing, and implementing effective strategies with colleagues across the campus community. This will further include effective coordination, cultivation, and appropriate solicitation of a personal portfolio of assigned business relationships.

The research analyst will be responsible for the collection and dissemination of comprehensive university business engagement data such as giving histories, research contract data, sponsorship history, hiring data, continuing and executive education participation, and more. Further, the analyst will be responsible for proactive and responsive research profiles and information gathering with regard to key coordinated business relationships and those visiting UW–Madison. It is suggested that this new position also have an informal connection to the WFAA's prospect research unit in order to provide the staff member with regular direct access to professional peers for professional development and sharing of best practices.

The **research analyst** position fulfills a critical university need. There is no one within the campus community currently charged with curating and distributing comprehensive business engagement data. Current campus practice relies on individuals to gather this information on an as-needed basis for specific needs. This position follows prevailing national practice among comprehensive business engagement organizations and is a growing specialty area within the philanthropic research profession. The primary roles of the position would be to:

1. collect and curate all relevant business engagement data from across campus. This would include philanthropic totals, research contract data, career services information, continuing and executive education, a potential for patent and licensing information as well as procurement data and additional relevant information.
2. distribute comprehensive data throughout the business engagement community
3. proactively research existing campus business partners to keep coordinators up to date
4. prepare campus relationship summaries to be included in on-campus or off-site visit briefs.
5. work with the managing director to select and implement short- and long-term solutions for sharing comprehensive business engagement data across campus.

The **marketing strategist** is an embedded University Marketing staff member who will work with OBE staff to create or coordinate and analyze performance of all OBE print and digital content. An immediate need will be to work with the managing director to create and implement a communications strategy for the OBE launch to all relevant internal and external parties.

The **employer relations campus liaison** will serve as the primary strategic engagement contact to external organizations seeking to recruit students for employment and coordinator for this activity across the 26 campus career service units. This individual would also lead a portfolio of recruitment-based relationships with key companies that are not yet in the portfolios of business engagement liaisons, with the goal of promoting them to key company relationships.



Both this position and the employer connections administrator role, discussed below, are recommended jointly by the OBE working group and the task force for Career Services. Although both would be specialized roles within OBE, we believe that their presence within this new organization will be optimal for the university. These would provide all employers and prospective employers a single point of contact for their career services needs. The positions would typically be part of a central career services organization at most peer institutions. However, at UW–Madison, career services has been decentralized operationally for many years.

In the last few years, through voluntary, collaborative efforts led by the Career Services Council (CSC), our career centers have begun to partner on programming, outreach, and relationship management efforts for recruitment relationships with companies. However, the CSC is limited in its ability to make significant progress due to a lack of accountability and full participation because of disparate levels of staffing and resources across the career units on campus supporting employer relations. These recommended positions within OBE would dramatically enhance our ability to coordinate these efforts across campus career units while also rolling all goals/metrics up to the larger OBE goals holistically for our key companies. The **employer connections** administrator role is critically important in that nearly 80% of incoming calls/requests to corporate relations are rooted in recruitment/hiring (which is most commonly a natural entry point for deeper and more holistic relationships down the road campuswide). This position would create an expedited mechanism for connecting employers to our career units and to the newly installed Handshake recruiting system, which is the gateway to all postings/recruiting activities campuswide.

The other critical need that has been revealed via our transition to Handshake is a consistent, central person who can handle management of employer access to Handshake and employer actions within the system. Currently, this effort is shared across multiple units, which leads to a number of inconsistencies despite the best efforts of the CSC to create comprehensive policies. This position in OBE would create great value by providing our employers with an expedited, one-stop place to begin to hire our students.

Having these positions embedded in OBE with a structured informal relationship to Wren Singer in undergraduate advising will further the OBE goal of serving as a campuswide platform for coordinating business engagement activities. Further, it will serve as a central source for monitoring opportunities for growth in employer relationships and identify those relationships with potential to grow into more comprehensive campus partnerships. For future consideration, it may also serve as a model for coordinating other decentralized business engagement activities such as continuing and executive education programs.

The **employer connections administrator** would triage and serve as a switchboard to connect incoming recruiting requests to the appropriate campus career unit(s). This person would also centrally manage all employer account and job postings in Handshake and would assist with reporting on employer traffic and actions taken (as determined by metrics). The administrator will provide an orientation and tactical support to recruiting and recruiting systems and procedures on campus.

The **business engagement associate** will primarily work with the managing director and business engagement liaisons to provide logistic and project management support for the ongoing coordination of key business partnerships. In addition, the position will address any external inquiries that cannot be immediately addressed by the administrative assistant or directed to the career services campus liaison.

OCR business liaisons spend as much as 25% of their time coordinating company visit logistics, planning on- and off-campus activities for business partners, and any of the many projects that are born from or delegated to the office. While this essential work is necessary for a successful business engagement organization, many peer organizations utilize a business engagement associate to handle these above-mentioned duties. By doing so at OBE, it will free up a significant amount of time for each of the business engagement liaisons while also improving planning consistency and creating efficiencies.

The **administrative assistant** will provide administrative support to the Office of Business Engagement as directed by the managing director and serve as the initial point of contact for external organizations contacting OBE by phone or digital and social media channels.

The suggested organizational structure includes the addition of four new positions. Each serves a vital role in enabling the OBE mission. The working group was purposeful in not recommending additional business engagement liaison positions. The four positions currently allocated to OCR that will transfer into OBE should enable full coverage of the university's current key partnerships due to the capacity added by the above-mentioned positions. Additional capacity should also be gained by leveraging campus colleagues as partnership coordinators where relevant.

For future consideration, the working group underscores that there may be a need to increase the number of business engagement liaisons if OBE successfully increases the quantity and depth of corporate relationships. The optimal business partner portfolio reported consistently over the past few years on NACRO surveys has been 35 per person. We suggest that the Business Engagement managing director and Assistant Vice Chancellor for Corporate and Government Affairs review this periodically to determine the need for additional business engagement liaison positions.

## GOVERNANCE

To effectively coordinate business relationships that yield consistent and increasing value to the university over time, OBE must maintain strong trusted relationships with many campus community schools, colleges and departments. Colleagues from these organizations should view OBE as an extension of their group and vice versa. This takes time, effort, and consistent open communication. The 2017 NACRO member survey showed that business engagement officers spent as much time meeting with internal colleagues as they did meeting representatives from existing external and potential new business relationships. The following recommendations are intended to provide frameworks and platforms for enabling these internal relationships to flourish.

***It is recommended that the University recognize the Office of Business Engagement as the sole platform for campuswide coordination of comprehensive business engagement activities.***

We believe this is a critical step toward achieving our stated goals of OBE's recognition as a hub for campuswide coordination of business engagement activities and establishing a trusted culture for collaboration.



***It is recommended that the OBE managing director establish regular interactions with university deans.***

Revenue derived from businesses is not equally spread across the campus community. Like all Carnegie Classified R1 research institutions, 70–90% of all revenue derived from businesses will benefit engineering, biomedicine, and information technologies. Further, historic relationships with businesses no longer assure philanthropic giving. University leaders will need to work creatively with OBE to develop and realize strategies that achieve a business's goals while also realizing a university need. The managing director should work with each dean to mutually determine how often and with whom they should be meeting and working to set realistic annual goals.

***It is recommended that the OBE managing director form a business engagement advisory group that meets quarterly.***

The majority of U.S. research universities have reorganized or established new business engagement offices at least once since 2000. It is an emerging and evolving profession. The working group suggests that the OBE managing director assemble an advisory team consisting of peer representatives from campus units with significant involvement in business engagement. The purpose of the advisory group will be to exchange feedback regarding the collaboration between the units as well as to review and discuss national business engagement trends in order to explore potential new directions, processes or policies that will keep UW–Madison well positioned as a top university for business engagement in a competitive and evolving national environment. Advisory members could include representatives from the following offices, organizations, or services: career services, continuing and executive education, Research and Sponsored Programs, WFAA, University Marketing (sponsorship), and WARF. Because of the multiple career services offices on campus, we suggest that the career services representative be the current chair of the career services council executive committee.

***It is recommended that OBE set clear performance goals and provide regular communication regarding its progress toward those goals.***

OBE performance should be measured by its ability to establish new, bolster existing, and realize value from UW–Madison business relationships. We suggest a few, easy-to-track and easy-to-understand measures for each. For the first, OBE should determine a means to identify all existing business engagements. Any new organization engaging with the university through OBE would be identified as a new engagement. For existing relationships, OBE will be tasked with broadening those relationships. Activities that result in the verifiable expansion of an existing relationship can be documented within a CRM system and reported. Thus, OBE can report the cumulative number of “nodes” added to engaged relationships.

Reporting on realized value from business relationships is not as straightforward. It becomes problematic when real or perceived pressure is exerted to claim credit for incoming revenue when in reality, multiple entities and individuals from across the campus community likely played and will continue to play a significant role in the ongoing engagement of that business. Because successful business engagement requires such broad involvement, we strongly suggest that OBE refrain from taking credit for incoming revenue when it may lead to resentment among the campus partners they need for future success. Instead, we suggest a simple tool for measuring the level of involvement for incoming revenue from businesses. OBE would utilize a three-point scale and assign a value to all incoming transactions of \$5,000 or more that are gift dollars, research contract dollars, continuing and executive education investments, or sponsorships. A score of two indicates that the revenue would likely not have been received without OBE's involvement in the process. A score of one

indicates that OBE had some role in this particular engagement. A score of zero indicates that OBE had no involvement in the acquisition of this revenue. Thus, a report would show all revenue derived from business engagements and OBE's impact. In addition, OBE should work toward establishing an annual comprehensive revenue goal that would be shared with all campus units.

***It is recommended that OBE use the success metrics identified by the working group to measure and communicate its impact.***

In addition to how OBE measures its impact on campus business engagements, it should use the above-stated success metrics to periodically assess its progress in achieving the desired level of institutional support, recognition as a hub for coordination of campuswide business engagement, advancement of the collaborative campus environment, and its ability to provide a transparent and efficient exchange of comprehensive business engagement data.

## COLLABORATION

To harness the university's capacity for business engagement, OBE must excel at fostering cross-campus collaboration with all entities actively engaged or seeking to engage with businesses. To optimize OBE for this purpose, consideration was given to both physical and digital platforms that would facilitate collaboration.

***It is recommended that OBE staff, along with all other campus colleagues with full or part-time business engagement roles, manage their relationship data through a common customer relationship management (CRM) system.***

A CRM system is a requisite tool for any university business engagement office. CRM systems are effective for documenting interactions, contact information, relationship histories, and strategies, and for coordinating individual and group actions. At least two existing CRM systems are being used by campus community personnel for business engagement purposes. It is strongly suggested that a single CRM be identified and used exclusively by all university and campus community personnel involved with business relationship management. Outside of OBE, this would include existing roles such as the College of Engineering director of corporate relations and the director of industry engagement for the School of Medicine and Public Health.

***It is recommended that OBE take the lead in identifying, implementing, and maintaining an efficient digital platform for sharing comprehensive business engagement data.***

An ability to efficiently share, compile, and access comprehensive business engagement data would be a significant business engagement asset for the university. It is recognized that many of the campus community organizations manage their own database to store information specific to their mission. There is not an adequate system to handle the specific needs of the diverse units across campus. However, it is suggested that an effort be made to identify a solution that would draw relevant data from multiple sources across the campus community including the OBE CRM system (once identified), Research and Sponsored Programs, career services, executive and continuing education outlets, university sponsorships, and others. This solution would then have the capability to combine the relevant data from all sources so that business engagement personnel across campus would have a holistic relationship view on one screen including giving, research contracts, hiring, executive education investment, and more. The recommended advisory group could play a key role in realizing this goal.



This is a longer-term project that would yield much benefit and deliver significant efficiencies. In the short term, the business engagement research analyst can work with the above-mentioned organizations to devise an interim means for compiling and sharing comprehensive business engagement data.

***It is recommended that OBE coordinate and lead a monthly cross-campus meeting for the purpose of strategic coordination of key business relationships.***

Consistent, transparent, and open communication fosters trust and collaboration. OBE should bring together its staff with all colleagues from across campus who interact with companies for the purpose of advancing business relationships. The meetings should serve as a platform for information sharing, forwarding and evaluating comprehensive strategies, overall coordination of efforts, and avoiding duplication of work. These gatherings should be the primary interface for all campus business engagement practices and processes. Constituents attending these meetings should include OBE personnel, College of Engineering corporate relations director, School of Medicine and Public Health director of industry engagement, University Athletics director of employer relations and corporate partnerships, Wisconsin School of Business senior director of corporate learning (CPED), and similar colleagues from across campus.

***It is recommended that OBE coordinate and lead two to four annual cross-campus meetings that bring together all campus community staff for the purpose of fostering collegiality, professional development, and raising awareness of campus services, opportunities, and priorities relevant to those involved with business engagement activities.***

Many others across campus play important roles in the ongoing coordination and success of our business relationships. It is important to bring these colleagues together periodically to inculcate the OBE mission and share good news and best practices.

***It is recommended that a liaison be designated to serve as a point of contact for business engagement activities for all schools and colleges.***

A designated liaison in each school or college will optimize communication, setting of common goals and overall coordination. Just as the volume of business engagement fluctuates by school or college, the volume of interaction with the designated liaison will vary. For colleges or schools with existing staff members dedicated to business engagement, it is suggested that these personnel serve as liaisons.

***It is recommended that OBE be aligned with the Research and Sponsored Programs Office (RSP) in identifying and establishing standards for engagement and evaluation of existing policies that support these standards.***

While Research and Sponsored Programs is responsible for negotiating research agreements, OBE will play an important role in identifying companies with sponsored research needs. OBE's ability to influence research partnerships in part depends on a symbiotic relationship with the Research and Sponsored Programs Office. In order to attract research partnerships, OBE needs to appropriately describe to industry partners what the university can offer from both a science and a contractual perspective. To do this, OBE and RSP must have a mutual understanding of the UW-Madison framework for contracts. If OBE and RSP say different things to our sponsors, sponsors will conclude that UW-Madison is disorganized or unable to live up to promises that originally created interest in a partnership. This will alienate UW-Madison from these sponsors.

To create this symbiotic relationship and equip OBE with the tools to successfully sell UW–Madison on the contractual side, the university needs set standards of engagement for sponsored agreements. This would involve:

- Publishing standards of engagement with UW–Madison, outlining what we can offer in agreements and where UW–Madison’s absolute pressure points are. This is a best practice nationally. Purdue and Cornell offer excellent information outlining this for sponsors as well as for university staff.
- Creating better visibility regarding policies that support these standards of engagement, and if policies don’t exist, establishing these policies. All of the policies should provide information that not only details what UW–Madison can’t do, but also includes alternatives showing what we can offer.
- Considering use of an outside consultant to evaluate whether the university’s policies and standards of engagement line up with the national experience, as well as with achieving our goals regarding sponsored research. This outside consultant would advise UW–Madison on where we stand, enabling us to determine if we want to maintain course or change direction.

As part of setting the standards of engagement, particular consideration should be paid to the university’s approach to tech transfer. If the university engages an outside consultant, that consultant should have experience with intellectual property to advise on this pressure point in university/industry relations. Whether or not the UW–Madison engages an outside consultant, the university should consider establishing expertise regarding agreement language surrounding intellectual property because of the inherent push and pull between universities and sponsors. This could be accomplished either through a closer relationship with WARF regarding negotiation of intellectual property provisions of agreements in light of the science, or by establishing an individual on campus who can look at the science and contractual language and advise on approaches for the agreements. If establishing an individual on campus, this person would ideally be located either in Research and Sponsored Programs or in the UW Office of Legal Affairs. Whether UW establishes a closer relationship with WARF or establishes its own intellectual property individual on campus, either approach could then advise on what standards of engagement UW–Madison should publish.

***It is recommended that OBE be aligned with WFAA.***

The WFAA will be a key partner of OBE by enabling access to and leveraging its existing expertise, data, and processes. A good percentage of the revenue invested by our business partners will be categorized as philanthropic gifts. WFAA has a well-established and effective infrastructure for philanthropic giving that includes gift processing, gift accounting, gift acknowledgement, gift counsel, and more that must be integrated into OBE processes. Further, OBE and WFAA personnel will leverage the common customer-relationship management platform to coordinate and integrate strategies when key business partners have alumni in positions of influence at the company who are also donors or potential donors to UW–Madison. In addition, the WFAA prospect research unit can serve as a peer group and source for professional development, standardization, and sharing of best practices to the business engagement research analyst.



***It is recommended that OBE be aligned with WARF.***

WARF frequently engages with industry as it fulfills its mission to actively manage the intellectual assets of the university and bring these innovations to the global marketplace. At present, WARF licensing and technology strategy development and relationship data are devised and held separately from UW–Madison corporate relationship data. The working group suggests exploring the potential of sharing data on key partner relationships and examining how WARF might partner with OBE to leverage existing key partner relationships for future WARF licensing and technology strategies.

***It is recommended that OBE be aligned with Career Services.***

Career Services works to educate, consult with and connect students, alumni, and employers for recruitment and hiring purposes. As a gateway to UW–Madison, it is imperative that OBE identify itself as one of the two core pillars of career services alongside the UW advising community. The managing director of OBE and Associate Vice Provost and Director of the Office of Undergraduate Advising should work as peers to lead centralized career services advocacy across campus. Members of OBE should be integrated into the Career Services Council and its executive committee and be supported to contribute to this important campus community.

***It is recommended that OBE be aligned with noncredit continuing and professional education.***

At least 12 units at UW–Madison provide noncredit continuing and professional education to businesses with Wisconsin ties. Combined revenue is estimated at \$21MM, with the largest units being Engineering Professional Development, the Wisconsin School of Business Center for Professional & Executive Development, and Liberal Arts and Applied Studies, at the UW–Madison Division of Continuing Studies.

As with the overall efforts of forming the new Office of Business Engagement, UW–Madison noncredit continuing and professional education programs provide opportunities to gain efficiencies and effectiveness via increased coordination at the institutional level. Current conversations are exploring how to reduce redundancies in the collective portfolio and better represent UW–Madison’s noncredit continuing and professional education opportunities to the business community. Leaders of the largest units also believe better coordination, resource optimization, and reduced redundancies will result in increased revenues to UW–Madison.

It will be critical that OBE align with the key noncredit continuing and professional education units on campus.

***It is recommended that OBE be aligned with University Marketing.***

University Marketing will be leading a sponsorship program for central campus auxiliary units (not schools/colleges), working with a third-party vendor to identify and activate marketing sponsorship opportunities. Sponsors are often large brands/companies that may have the capacity for added interactions or opportunities on campus. OBE will be a critical partner in leveraging these brand/company relationships, as well as identifying potential new companies for sponsorship opportunities. OBE is instrumental to the success of these efforts, and will sit on related campus working groups.

Finally, University Marketing manages a multi-million-dollar trademark-licensing portfolio. Many companies that are part of UW–Madison’s trademark-licensing program could offer additional opportunities for corporate engagement. OBE will work with University Marketing to identify opportunities for collaboration with these companies.

## PROCESSES

The group recommends a number of national best practices that are consistent across high-performing peer institutions.

It is recommended that OBE adopt a key partners approach in order to optimize the value derived from its business relationships.

Prevailing practice at both research universities and large companies that broadly engage with universities is that organizations are doing more with less. OCR has assembled a key partner list identifying those with existing engagements across the university. OBE should review the criteria used to compile that list and determine what, if any, changes are necessary to the criteria and the list. This list should be distributed internally and relationship coordinators assigned to each ranked relationship. The key partner list and criteria should be reviewed annually and updated as needed.

***It is recommended that OBE be the lead for coordination of key business partner relationships.***

OBE should be the nexus for coordination of key business partner relationships. This means that OBE should be held responsible for working across campus to develop, implement, steward, and assess progress on engagement strategies for all key business partnerships.

This does not assume that all lead relationship coordinators will be OBE personnel or be the only staff members interacting with company representatives. However, OBE should be responsible for assuring that all lead relationship coordinators are developing strategies consistent with the OBE mission and operating philosophy and that those interacting with the company are doing so according to the agreed upon strategy. Lead relationship coordinators will be responsible for bringing together campus personnel to identify realistic goals for specific key partners based on their identified interests. These should include tactics to initiate, expand, or broaden research, student employment, sponsorship, continuing and executive education, and philanthropy, as well as any other relevant opportunities.

Further, this does not assume that OBE can provide this level of service to all companies interested in engaging with the university. It is imperative that OBE work with appropriate campus units to identify key partner criteria so that those identified yield the most value for the university while delivering equal value to the partners. These are typically large, financially stable organizations with the capacity and interest in maintaining a relationship that provides consistent value to UW–Madison.

***It is recommended that OBE be promoted and recognized as the recommended point of entry for all businesses seeking to engage with UW–Madison.***

OBE should have a triage system in place so that any phone or digital inquiry regarding a potential business engagement can be responded to efficiently. OBE cannot be all things to all people; however, it should be able to direct any inquiry to the appropriate destination. This will require a knowledgeable team and effective internal communication coupled with strong verbal or digital customer-service skills.



## IMPLEMENTATION GUIDANCE

The working group strongly suggests that it be recognized that the implementation recommendations outlined in this report will require significant effort from many across the campus community. Of utmost immediate importance is the need to establish a strategy for communicating this new organization and its mission to the campus community as well as to existing and potential business partners. The guidance below is a suggested prioritization and realistic ideal projection of the time required to realize each recommendation.

### SHORT-TERM (FIRST 6 MONTHS)

- Internal support established
- Budget secured
- Internal communications plan developed
- External communications plan developed
- Key partner criteria reviewed
- Key partners identified and coordination assigned
- Monthly meeting attendees identified
- Monthly meetings initiated
- Managing director hired
- Timeline for new position hiring established
- Job descriptions for new positions completed
- New positions posted in identified priority
- Managing director initiates meetings with deans
- FY 18/19 goals set and communicated to university leadership
- CRM training provided as needed
- Evaluation and implementation of initial and long-term shared comprehensive business engagement data solutions
- Professional development needs assessment of existing personnel completed and personalized plans implemented
- School/ college liaisons identified and named

### MID-TERM (6-18 MONTHS)

- All new positions hired
- CRM system selected Campus community meetings initiated
- Business engagement advisory membership set and meetings scheduled
- University standards for engagement with regard to research contracts established
- Initial comprehensive key partner business engagement data solution complete and regularly distributed to campus business engagement community

## LONG-TERM (18–36 MONTHS)

- Long term shared comprehensive business engagement data solution completed
- All implementation recommendations completed
- Annual comprehensive revenue goals established

Managing director leads brief reassessment of OBE mission and operations with assistant vice chancellor for government and corporate affairs with input as needed from business engagement advisory and university leadership

## CONCLUSION

The assessments, recommendations, and implementation guidance in this report are the consensus opinion of the Business Engagement Working Group. These are made with best intentions to establish UW–Madison as a leader in business engagement among our current and potential corporate partners as well as our peers in academia. Further, it will provide increased funds, information, and access to equipment, tools, and materials that will bolster our student and research environments.



