

NACRO 2014 Annual Conference

- Downloadable Agenda •

Blueprint Day, July 22, 2014

10:00 – 10:10 • Blueprint Welcome

Location: *Purdue Memorial Union (PMU) North Ballroom*

Blueprint Day, formerly known as the Newcomer's Session, is hand crafted for new NACRO members, new corporate relations officers and those new to higher education. This optional first day of the conference will focus on the NACRO Blueprint for holistic university corporate relations. Blueprint Day will focus on two of the best parts of the NACRO Conference: learning from each other and networking with colleagues. Sessions cover 100 level content on building mutually beneficial partnerships, different corporate relations roles and methodologies, as well as case studies and success stories from multiple universities. Since the definition of corporate relations differs between universities, we'll share information from several perspectives, creating value for you whether your duties include philanthropy, research or economic development.

Speaker: Jessica Watts, Director of Corporate Relations, University of Texas at Dallas

10:10 – 10:30 • NACRO President's Welcome

Location: *Purdue Memorial Union (PMU) North Ballroom*

Speakers:

Mitzi Richards, Senior Director for Corporate and Foundation Relations, Kansas State University Foundation
Sacha Patera, Director for Partnership Development, Northwestern Feinberg School of Medicine

10:30 – 11:15 • Corporate Relations Across the Map

Location: *Purdue Memorial Union (PMU) North Ballroom*

Ice Breaker Event

Moderators:

Tami Oppedahl, Director, Corporate Relations, University of California-Davis Health System
Morrel Wax, Assistant Director, Corporate and Foundation Relations, Miami University

11:15 – 12:00 • The Evolution of Corporate Relations Offices

Location: *Purdue Memorial Union (PMU) North Ballroom*

The structure of corporate relations offices and their associated responsibilities differ greatly from one university to another. This presentation will utilize case studies to first describe current corporate relations models; and then discuss those specific variables that influence structure. Although office structures may differ, common best practices exist that may help organizations that are creating or reorganizing their existing corporate relations office.

Speaker: Cameron McCoy, AVP for Industry Engagement, Lehigh University

12:00 – 1:15 • Networking Lunch

Location: *Purdue Memorial Union (PMU) North Ballroom*

1:15 – 2:00 • Corporate Outreach: Building Mutually Beneficial Partnerships

Location: *Purdue Memorial Union (PMU) North Ballroom*

Generating and maintaining new corporate partnerships, while coordinating corporate outreach efforts with many motivated players on campus, is a challenge. Corporate Relations Officers address the varied goals of their university and corporate partners, while connecting the dots to develop comprehensive strategies for engagement, support, and partnership. This session will focus on proven corporate outreach strategies and success stories from a philanthropic and research perspective.

Speaker: Shannon McKeen, Executive Director Global Corporate Relations, Kenan-Flagler Business School, University of North Carolina – Chapel Hill

2:00 – 2:45 • Art of the Deal

Location: *Purdue Memorial Union (PMU) North Ballroom*

This session will guide you through the Art of the Deal. When do you push the ROI? When do you back off and take it slow? What do you do when the “deal” is getting diverted by a well-meaning but anxious faculty member who doesn’t have the strategic picture in mind? What will it take for you to align your university’s strategies with corporations’ interests? This HIGHLY interactive session will combine success stories, tales of woe, and maybe even a little role play to demonstrate proven techniques to close the deal.

Speakers:

Anne O’Donnell, Director of the Corporate Affiliates Program (CAP) Jacobs School of Engineering at University of California San Diego

Kathy Lynch, Director of Corporate Relations, Boston University

2:45 – 3:00 • Networking Break

Location: *Purdue Memorial Union (PMU) North Ballroom*

3:00 – 3:45 • Sharing the Love: Stewardship of Corporate Partners

Location: *Purdue Memorial Union (PMU) North Ballroom*

Stewardship is the careful and responsible management of something that has been entrusted to you. In the context of corporate relations, it is imperative that in addition to prospecting for new partners and financial gifts, we also steward what we already have – show our institutional “love” for donors and other, existing corporate customers. The co-presenters will review common areas of academic engagement and share examples and best practices for stewardship, with the hope that it will become clear that this is a core activity in a successful, corporate relations program.

Speakers:

Brad Ricker, Associate Director for Corporate Relations, Michigan State University

Mike Marion, Associate Vice President of Corporate and Foundation Relations, Rutgers University Foundation

3:45 – 4:45 • From Blueprint to Reality: A University Panel Discussion

Location: *Purdue Memorial Union (PMU) North Ballroom*

This final session of the day will focus on pulling together all the essential elements as well as touch on the metrics of running a successful corporate relations team as described in the NACRO white papers on the same subject. The format will be a panel discussion led by NACRO members who are driving the strategies of each of their respective teams. We will have representation from public and private universities as well as small and large offices of corporate relations. The session will culminate with a Q & A session providing an opportunity to address any additional questions from presentations throughout the day.

Speakers:

Nick Pasquarello, University Business Liaison, Corporate Relations, University of Wisconsin-Madison

Richard Potter, Director, Office of Corporate Engagement, Kansas State University

Bill Swisher, Assistant Vice President for Corporate & Institutional Partnerships & Advancement Information Systems, Carnegie Mellon University

Moderator: Dorothy Dorton Kittner, Assistant Dean & Director of Corporate Relations, Olin Business School, Washington University in St Louis

4:45 • Closing Comments

Location: *Purdue Memorial Union (PMU) North Ballroom*

5:15 – 6:00 • Blueprint Attendee Reception

Location: *Dauch Alumni Center – Prusecki Room*

6:00 – 8:00 • Opening Night Reception

Open to all conference attendees

Location: *Dauch Alumni Center – Prusecki Room*

**Wear your school spirit gear!*

Wednesday, July 23, 2014**7:30 – 8:30 • Breakfast**

Location: *PMU North Ballroom*

8:30 – 8:45 • Opening Remarks

Location: *PMU North Ballroom*

Speaker: Margarita Contreni, Assistant Vice President for Corporate and Foundation Relations, Purdue University

8:45 – 9:45 • Keynote Address

Location: *PMU North Ballroom*

Speaker: David Ricks, Senior Vice-President Eli Lilly; President Lilly Bio Medicines

9:45 – 10:00 • Networking • Walk to Concurrent Sessions**10:00 – 11:00 • Concurrent Session • HP – A Complete Partnership from Gifts to Grants to Endowed Chair**

Location: *STEW 214 ABCD*

This session explores the models, strategies and practices that enabled the Purdue-HP relationship to be an exemplary long-term university-company partnership. Through an interview by Purdue and HP representatives, who have been involved throughout the relationship's evolution, we will describe how they addressed cultural differences, built trust between university and company researchers, and developed strategies and practices for continuously evolving engagements aimed at identifying and developing opportunities for collaborative research and building strong research programs that adapt well to changes. Attendees will gain insights into models and approaches that they can take to their institutions.

Speakers:

Jan Allebach, Ph.D., HP Distinguished Professor of Electrical and Computer Engineering, Purdue University

Ken Lindblom, Ph.D., HP Fellow, Hewlett-Packard Printing and Personal Systems Group

Lou Witkin, University Relations Manager (Retired), Hewlett Packard Labs

Moderator: Margarita Contreni, Assistant Vice President for Corporate and Foundation Relations, Purdue University

10:00 – 11:00 • Concurrent Sessions • University Research Parks: The Value Proposition**Location:** STEW 310

Large corporations are establishing technology centers at university research parks as one way to increase engagement with faculty and students on innovation and workforce needs. The employment of students on campus allows companies to develop students as a workforce pipeline and leverage their skills and perspective before they graduate. On-campus company staff helps increase frequency of communication with departments and faculty on campus for technical information sharing, recruitment, and uncovering new opportunities for collaboration. Corporations are also using the location to spur an entrepreneurial environment to “incubate” their own technology needs and to build relationships with startup companies collocated with them. Panelists will discuss how corporations have successfully created business value an improved performance and product development by partnering with universities at their research parks.

Speakers:

Greg Deason, Vice President and Executive Director of the Purdue Foundry
Jon Phillips, Managing Director - Strategy, Worldwide Education, Dell

Moderators: Laura Frerichs, Director at the University of Illinois Research Park, University of Illinois at Urbana-Champaign
Cameron McCoy, AVP for Industry Engagement, Lehigh University

10:00 – 11:00 • Concurrent Session • Defense and Aerospace -- What's ahead?**Location:** STEW 313

The DOD predicts a decline of their budget by 20% by 2017. While many public and private universities are engaged in a variety of DOD funded programs directly, they may not have considered the impact these drops will have on their relationships with the defense contractors and aerospace firms who collaborate with faculty/research scientists, engage with and recruit students, and license technologies. How will relationships be impacted? Are firms growing the number of relationships they have? Refining them? Are there new avenues to be explored? How do we attract/retain/grow these relationships? What can we share with our deans, department heads, and other campus leadership who depend on CROs to grow relationships?

Speakers:

Dean Bartles, Ph.D., Executive Director for the Digital Manufacturing & Design Innovation Institute in Chicago
Joseph Krok, University Liaison Manager, Rolls-Royce Corporation/Libertyworks
Kevin Sullivan, Executive Manager and Partner, Applied Research Solutions, Inc.

Moderator: Mark Nolan, Director of Corporate Relations, IT and Economic Development, University of Illinois at Urbana-Champaign

10:00 – 11:00 • Concurrent Session • Big Data/Big Challenges/Big Opportunities

Location: STEW 218 ABCD

According to TechnologyReview.com, "big data is revolutionizing commerce in the 21st century. When it comes to business, big data offers unprecedented insight, improved decision-making and untapped sources of profit." Campuses are likely hearing the term from our industry partners - perhaps for collaborative research, or for their recruiting needs, or for addressing their corporate challenges. Faculty and research scientists may be looking for corporate support or participation in a variety of "big data" opportunities. What seems obvious? What's not? Industry panelists will present their views on the topic - from collaboration, to opportunities and obstacles in recruiting, through to best practices.

Speakers:

Ross Bundy, Senior Engineering Manager and Site Manager, Turn Innovation Center
Erwin Cruz, Director, Innovation & Intellectual Property Strategy | W.W. Grainger, Inc.
Dana Gharda, Senior Manager of University Relations, Walmart

Moderator: David Lipari, Director of Corporate Relations, College of Engineering, University of Illinois at Urbana-Champaign

10:00 – 11:00 • Concurrent Session • Energy in the Near Term

Location: STEW 206

For 2014, Battelle and R&D Magazine forecast that R&D funding within the energy industry will exceed \$7 billion in the U.S. (an increase of 1.7%) and approach \$22 billion globally (up 4.8%). Recognizing that energy is a broad topic, what are some of the themes (petroleum, coal, biofuels, bio-coals, solar, smart grid, others) that will comprise this field in the near term? What is the role of universities? What is the role of non-US universities? Where can campuses add value? Collaborative research? Licensing? Students? Where might firms make investments (philanthropic or otherwise) on campuses? From industry's perspective, what is ahead? What should CROs be sharing with deans and campus leadership?

Speakers:

Timothy Appleberry, Co-founder and Managing Member of Crimson Hill LLC
John Dau, Manager, DTE Energy
Anthony (Tony) Denhart, Region Manager, University Relations – GE Corporate
Richard Smith, Director – Research & Development, Ameren Services Company

Moderator: Brent Burns, Director of Industry Relations, Michigan Technological University

11:00 – 11:15 • Networking Break • Walk to General Session

11:15 – 12:15 • General Session • Corporate Responsibility**Location:** *PMU North Ballroom*

What happens when companies fund campus initiatives and research? Are they making gifts or investments? Are we being bought? Are businesses buying a good reputation by affiliating with a university? What happens when a corporation's reputation goes bad? How do you address these issues tactfully? Recent news stories have highlighted the perceived (or real) conflicts of interest that occur when academics and academic institutions receive funds from donors with a point of view or an interest in the outcome of the funded project. The panelists will circulate during the discussion and then various groups will be asked to share their insights. The panel will use this input to create and summarize tools and techniques for participants to use in their future conversations with potential donors.

Speakers:

Melissa Stapleton Barnes, Senior Vice President, Enterprise Risk Management, and Chief Ethics Officer, Eli Lilly and Company

Patricia Foster, Ph.D., Professor of Biology and Associate Vice-Provost for Research at Indiana University, Bloomington

Stuart Yoak, Ph.D., Executive Director, Association for Practical and Professional Ethics, Indiana University

Moderator: Gretchen Winter, Executive Director, Center for Professional Responsibility in Business and Society, University of Illinois at Urbana-Champaign

12:15 – 1:15 • Networking Lunch & NACRO Business Meeting**Location:** *PMU South Ballroom***Speakers:**

Mitzi Richards, Senior Director of Corporate and Foundation Relations, Kansas State University Foundation

Sacha Patera, Ph.D., Director of Partnership Development, Northwestern Feinberg School of Medicine

1:15 – 1:30 • Networking Break • Walk to Concurrent Sessions**1:30 – 2:30 • Concurrent Session • Navigating Change: Skills, Strategies, and Stories from the Front Line****Location:** *STEW 214 ABCD*

Change is inevitable. It will come from internal changes in your organization and it will come from changes in the companies you are working with. Change is hard but it can be managed serve as a positive force. This interactive session will surface challenges and strategies proven successful during transitions. Attendees should come to this session ready to engage. Come with examples you need help with and advice you can offer. Attendees will leave this session with their own toolbox of contacts and ideas that they can put into place in their organization to help them prepare for change.

Speakers:

Karen Bender, Ph.D., Director of Corporate Relations, University of Illinois at Urbana-Champaign

Kathy Lynch, Director of Corporate Relations, Boston University

1:30 – 2:30 • Concurrent Session • Gifts v. Grants: Seeking Clarity in Muddy Waters

Location: STEW 218 ABCD

What are the differences between grants, charitable grants, and gifts? How do we match gift criteria and tax law? A great deal of confusion around this topic is created by the collision of federal tax law, CASE counting standards, accounting standards and internal audit procedures, internal contracts/sponsored programs guidelines, and industry and tax law terminology. The result is significant uncertainty related to gift receipting, stewardship, etc. Join in this panel discussion of issues to consider and best practices related to establishing and making policy decisions for gifts and grants.

Speakers:

Todd Cleland, Ph.D., Director of Industry Relations, University of Washington
Kristin Duffy, Contract & Industrial Relations Coordinator, Northern Illinois University
Angela Liegel, Director, Corporate & Foundation Relations, Loyola University Chicago

Moderator: Cathy Dufour, Director of Major Gifts & Corporate and Foundation Relations, Penn State University

1:30 – 2:30 • Concurrent Session • Feeding the Beast: Adding Focused Staff for New Prospect Development

Location: STEW 310

Would you refer to your prospect pipeline as stable, mature, or even stale? Adding new companies to the pipeline is time consuming and has low initial ROI, so it's often the last item on our task list. Of course, we know it is critical to our future success. Solution: Dedicate a member of the team to focus on future prospect qualification and nothing else. We'll discuss the organizational analysis undertaken, strategies and tasks for this prospect manager, how to convince your ROI conscious boss it's worth the investment; and successes to date.

Speakers:

Scott Zerger, Director of Corporate & Foundation Development, University of Kansas
Megan Hill, Assistant Director of Corporate & Foundation Development, University of Kansas

1:30 – 2:30 • Concurrent Session • Trends in Intellectual Property: A Changing Landscape

Location: STEW 206

It's been nearly two years since several academic institutions from across the United States decided to take some new approaches to intellectual property management and licensing. In this session, we'll revisit the motivations that led to these new approaches, discuss early outcome indicators to-date, and assess the impact on academic/corporate partnerships on their campuses. We have invited representatives from the sponsored projects, technology transfer, and licensing offices of the University of Minnesota, Penn State University, and a few others to join us for a lively panel discussion on these topics. Questions and comments from the audience will be encouraged.

Speakers:

Elizabeth H. Adams, Executive Director, Office for Sponsored Research, Northwestern University
Rick Huebsch, Associate Director, Office for Technology Commercialization, University of Minnesota
Ronald Huss, Ph.D., Associate VP for Research & Director of the Office of Technology Management, Penn State

Moderators:

Barry Curtis, Assistant Director for Industrial Outreach, University of Florida

Sacha Patera, Ph.D., Director of Partnership Development, Northwestern Feinberg School of Medicine

2:30 – 2:45 • Networking Coffee Break

2:45 – 3:45 • Concurrent Session • HP – A Complete Partnership from Gifts to Grants to Endowed Chair

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Speakers:

Karen Bender, Director of Corporate Relations, University of Illinois at Urbana-Champaign
Kathy Lynch, Director of Corporate Relations, Boston University

3:45 – 4:00 • Networking Coffee Break

4:00 – 5:00 • Find Your People: Affinity Group Discussions

For the first time, there is an official opportunity to participate in an Affinity Group. The groups are designed around the primary constituencies we serve in our Corporate Relations roles: Engineering, Health Sciences, Business and Central. During these concurrent sessions, members will share interests, common goals and current challenges. Affinity sessions are designed to be conversational with a moderator and discussion leaders. We anticipate vibrant conversation.

In an effort to prepare the moderators, we urge participants to submit a question or challenge ahead of time by emailing us at: affinity@nacroonline.org

If you notice that we are missing an affinity group below – please let us know!

Affinity Group: Engineering **Location:** STEW 214 ABCD
Moderator: Jennifer Schwartz, Senior Director of Corporate & Foundation Relations, University of Maryland

Affinity Group: Health Sciences **Location:** STEW 206
Moderators:
Megan Greenawalt, Corporate Relations Officer, University of Pittsburgh
Terry Pearl, Senior Director of Corporate and Foundation Relations for NYU Langone Medical Center

Affinity Group: Business Schools **Location:** STEW 313
Moderator: Dorothy Dorton Kittner, Assistant Dean & Director of Corporate Relations, Olin Business School, Washington University in St. Louis

Affinity Group: Central Office **Location:** STEW 218 ABCD
Moderator: Robin Seth, Assistant Director of Corporate Relations, University of Houston

Affinity Group: Research Office/Economic Development **Location:** STEW 310
Moderators:
Cameron McCoy, AVP for Industry Engagement, Lehigh University
Brian Darmody, Associate Vice President for the Office of Corporate and Foundation Relations, University of Maryland, and Special Assistant Vice Chancellor for Technology Development, University System of Maryland

6:00 – 8:00 • Evening Reception

Open to all conference attendees

**Show your school spirit by wearing your school colors!*

Location: Ross Ade Stadium

Speaker: Mitch Daniels, J.D., President, Purdue University

Thursday, July 24, 2014

7:30 – 8:30 • Breakfast

Location: *PMU North Ballroom*

8:30 – 9:30 • General Session (Panel) – “Essential Elements” White Paper Review

Location: *PMU North Ballroom*

The 2011 NACRO White Paper presented five essential elements of a successful twenty-first century university corporate relations program. But how are our member institutions actually using them? How have they helped their work be more effective? And how have they been able to implement them within their individual campus environments and cultures? Panelists from five institutions will discuss how and why they have chosen specific elements from the recommendations in the White Paper at their universities, providing tips on how to use them and considerations to make within your own organization.

Speakers:

Adria Alhadeff, Assistant Director of Corporate Relations, Washington State University

Sylvia Bierhuis, Associate Director of Corporate & Foundation Relations, University of California Berkeley

Anne, Borchert, Senior Executive Director, Corporate Relations & Strategic Projects at Case Western Reserve University

Brent Burns, Director of Industry Relations, Michigan Technological University

Lindsay Coolidge, Manager of Government and Community Relations, University of Ontario Institute of Technology

Moderators:

Megan Greenawalt, Corporate Relations Officer, University of Pittsburgh

Terry Pearl, Senior Director of Corporate & Foundation Relations, NYU Langone Medical Center

9:30 – 9:45 • Networking Break • Walk to Concurrent Sessions

9:45 – 10:45 • Concurrent Session • Your Thoughts: NACRO Professional Development Programs & Member Benefits

Location: *STEW 204*

NACRO is developing plans to offer additional programming outside of the annual conference to help ensure a vibrant member network. Come join us for an ideation session to hear more about our initial plans and contribute your opinions and questions. We'll discuss topics such as: Do you prefer to receive professional development live or online? Would it be helpful to have more networking opportunities in your region or related to your responsibility area? What skills are essential for a successful CR Officer? We want to hear from you!

Moderators:

Megan Greenawalt, Corporate Relations Officer, University of Pittsburgh

Don McGowan, Ph.D., Director of Corporate & Foundation Relations, Tufts University

9:45 – 10:45 • Concurrent Session • Dow AgroSciences: An Example of a Well Managed Holistic Relationship**Location:** STEW 322

By 2050 the world population is expected to exceed 9 billion people. In the next 50 years, we're going to have to produce more food than we have in the last 10,000 years. We need to find ways to employ technology and science to increase production to feed a hungry planet. Global food security is a challenge that demands industry and academia partner in an efficient, results oriented, and profitable manner. Hear about a partnership between Indianapolis based Dow AgroSciences and Purdue University on how they have formed a mutually beneficial, holistic relationship that encompasses student recruitment, identification of mutual research areas, philanthropic contributions, and funding for targeted initiatives that all address the grander challenge of feeding the world. On hand will be representatives from Dow AgroSciences and Purdue who have actively grown this relationship over the past 7 years.

Speakers:

Jay Akridge, Ph.D., Dean, College of Agriculture, Purdue University

Katherine Armstong, Global Trait Product Development R&D leader for Dow AgroSciences

David Isenhour, Ph.D., R&D Talent Manager, Dow AgroSciences

Tammy Kettler, Director of Corporate Relations, Purdue University

Karen Plaut, Ph.D., Senior Dean for Research and Faculty Affairs, Purdue University

Moderator: Kyle Bymaster, Director of Development, Purdue University**9:45 – 10:45 • Concurrent Session • Faculty/Staff Startups: Opportunities? Conflicts? Both?****Location:** STEW 310

As the technologies and concepts are more mature, many corporations are eyeing (investigating, partnering with, acquiring) university affiliated startups. Evidenced by the Innovation Corps (I-Corps) program born at the NSF and expanding into DOE and NIH, federal program officers are looking to accelerate university-born "ideas, devices, processes or other intellectual activities into the marketplace" in order to benefit society. What challenges and conflicts arise when faculty/staff start businesses from intellectual property? In addition to licensing income -- what are the financial wins for the university? What is the CRO's role?

Speakers:

William Dick, President and CEO, Illinois Rocstar LLC and Director of Operations in the Illinois Applied Research Institute at the University of Illinois

J. Mark Nolan, Chief Operating Officer, Waymark System, Inc.

Joe Pekny, Ph.D Professor of Chemical Engineering and Interim Director of the Burton D. Morgan Center for Entrepreneurship

Moderator: Cameron McCoy, AVP for Industry Engagement, Lehigh University

9:45 – 10:45 • Concurrent Session • Industrial Affiliates Programs: Driving Collaboration, Innovation & Revenue

Location: STEW 314

Engaging companies and corporate executives across campus is key to the longevity of the relationship with your university. Industrial Affiliates Programs offer opportunities for companies to network with industry colleagues, interact with faculty and students and have access to academic leaders and the latest university research. Effectively managing these programs takes dedicated staff and an ample amount of time. Join us to hear from three universities that have developed programs that are mutually beneficial to their university and participants, and of course, bring in revenue for their school or department. Attendees will learn how each program was started, how it has grown and strategies they can implement at their own institutions.

Speakers:

Todd Cleland, Ph.D., Director, Industry Relations University of Washington

Cristina Farmus, Managing Director, School of Chemical Engineering, Purdue University

Alexa C. Hansen, Director of Corporate Development for Carnegie Mellon University's Tepper School of Business

Moderator: Jessica Watts, Director of Corporate Relations, University of Texas at Dallas

10:45 – 11:00 • Networking Break • Walk to General Session**11:00 – 12:00 General Session (Panel) – Lifecycle of a Center of Excellence & the Role of the CRO**

Location: PMU North Ballroom

The NACRO Benchmarking Committee spent the last year gathering information on various Models of Centers of Excellence and the lifecycle of these cross-disciplinary units that create great opportunities for external partnerships. This session will take you through the life cycle of a center and look at the critical role played by the corporate relations officer in developing and maintaining and even sun-setting these powerful communities of innovation, talent and research.

Speakers:

Brent Burns, Director of Industry Relations, Michigan Technological University

Mona Ellerbrock, Director of Corporate Relations, University of California, Davis

Olof Westerstahl, Assistant Director of Corporate Relations, University of Illinois at Urbana-Champaign

Moderator: Anne O'Donnell, Director of Corporate Affiliates, Jacobs School of Engineering at University of California San Diego

12:00 • Conference Close

Boxed Lunches to go

Please do not book flight reservations departing before 3:00pm on Thursday