How Not to Research Alone: Creating Meaningful Relationships with Funders

A Research Live Spring 2023 Workshop Series

Series Kick-off January 13, 2023

Research Live
Series Creators and Presenters

Larry Hornak, Assoc. Vice President, Integrative Initiatives, Office of Research
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Matt Pruitt, Director of Foundation Relations, Development & Alumni Relations
Kyle Tschepikow, Executive Director of Business Engagement
Workshop Series Kickoff:

It’s All About Relationships

What are the important characteristics of every successful relationship?
No matter the funder, the ideal relationship with them is...

... a long-term one, grounded in shared value and trust.
What is Shared Value?

- Outcomes of the relationship that both you and your funder value, often for very different reasons.
  - Your Research/Scholarship
  - Your Students
  - Your Impact

- Establishing shared value creates a true partnership to achieve outcomes and derive value from them.
Achieving Shared Value

• Do you know what your funding partner truly values?
  • Guessing at what your partner values is a risky proposition.
  • Not knowing results in a short-term relationship, if any at all.

• Find out what your funding partner values and know it’s not static!
  • What are their needs?
  • What motivates them?
  • What is their reward system?
  • What are their vision and goals?

• Do some basic Customer Discovery
Building and Sustaining Trust

- Trust is the foundation of all long-term relationships.
- Trust is established and maintained through consistent delivery of value to your funding partner.
- Open communication is key!
Fostering a long-term, trusted relationship grounded in shared value will require a different, thoughtful approach to each funder type and individual.
Tailoring your Relationships

**Industry Partnerships**
Richard Potter, Office of Business Engagement

**Federal Funding**
Jake Maas, Office for Proposal Enhancement

**Foundation Funding**
Matt Pruitt, Foundation Relations

**Mission Agencies**
Marty Bink, Defense and Security Collaborations
The Business of Research: Building Industry Partnerships that Pay

A brief overview

Richard Potter, Director for Business Engagement
University-Industry Partnerships

The Office of Business Engagement at The University of Georgia cultivates long-term, holistic partnerships with companies by aligning university resources with business goals to help expand the positive impact of both organizations.
University-Industry Partnerships

- Transactional
- Alliance
- Traditional Engagement
- Awareness
- Involvement
- Support
- Sponsorship
- Holistic Engagement
- Strategic Partner
University-Industry Partnerships

January 27 session takeaways:

1. Why should you engage in corporate-funded research?
   • Diversify your funding portfolio
   • Access to additional sources of funding (SBIR, STTR)
   • Access to unique resources
   • Insights on industry innovations and new directions
   • Opportunities to commercialize research findings
   • Valuable experience for students
University-Industry Partnerships

January 27 session takeaways:

2. Unique aspects of industry-sponsored research projects
   • Corporations typically do not promote their research needs or priorities
   • It can be challenging to identify corporate partners and corporate contacts that align with your research expertise
   • Timeline to achieve milestones and deliverables
   • The corporate scientist may have more at stake than a federal agency or private foundation program officer
University-Industry Partnerships

January 27 session takeaways:

3. How industry-sponsored research can develop from multiple avenues of engagement
   - Student engagement
   - Sales and service
   - Professional and executive education
   - Licensing
   - Start-up connectivity
   - Consulting
University-Industry Partnerships

January 27 session takeaways:

4. Keys to building effective relationships with relevant corporations
   • People in your network: former advisors, colleagues, students may work for potential corporate sponsor
   • Scientific society or professional association for your discipline with active local or regional chapter
   • Regional associations where UGA is a member (e.g., Georgia Bio)
University-Industry Partnerships

January 27 session takeaways:

5. Keys to framing your expertise to appeal to corporate sponsors
   • Corporations probably won’t simply fund your research
   • Corporations are looking for innovations and solutions that appeal to customers and enhance shareholder value
   • How you present yourself is as important as how you present your research
University-Industry Partnerships

January 27 session takeaways:

6. Tools and resources to help identify potential corporate sponsors
   • Online search tools (e.g., newsfeeds, D&B Hoovers)
   • Office of Business Engagement
   • Other UGA support units (e.g., Innovation Gateway, Office of Economic Development)
University-Industry Partnerships

January 27 session takeaways:

7. Tools and resources to identify the right corporate contacts
   • OBE can help identify UGA alumni employees
   • LinkedIn can help identify key contacts (e.g., research scientists, chief innovation officers)
University-Industry Partnerships

“I’m a great believer in luck, and I find the harder I work the more I have of it.”

Thomas Jefferson
Navigating Explicit and Implicit Relationships on the Path to Federal Funding

A brief overview

Jake Maas, Director of the Office for Proposal Enhancement
Ten Steps to Success

1. Find the right opportunities
2. Research the program
3. Make a detailed plan
4. Take advantage of grant expertise
5. Engage readers
6. WRITE (to your audience)
7. Send draft to readers
8. Revise
9. Submit
10. Resubmit
Go/No-Go: is the overlap big enough to be worth it?

How do you convince reviewers your project is a perfect fit?
Explicit Relationships

- Colleagues (senior)
  - Sources of information
  - Expert reviewers
  - Demonstrate your value as a collaborator
- Colleagues (peers)
  - Peer reviewers
  - Writing support/accountability
- Colleagues (junior)
  - Building blocks for future large, high $, complex awards
- Lay Readers
- Research Development Office
- Sponsored Projects Administration
- Program Officers/Agency Personnel
Implicit Relationships

• Solicitation writers
  • They are the author(s); you have to interpret their meaning
  • Grant solicitations/RFPs/RFAs are complex, messy, multiply-authored documents
  • How do you reconstruct the intent of a solicitation and navigate between its often disparate, even contradictory, components?

• Reviewers
  • You’re the author; they have to evaluate your proposal
  • What can you learn about the makeup of your audience?
  • How do you get into a reviewer’s mindset?
  • How can you write to your audience without compromising your research agenda?
Seeking funding from foundations

A brief overview

Matt Pruitt, Director of Foundation Relations
Some useful context

Foundations vary widely in size, mission, and operating procedures

“If you know one foundation…you know one foundation.”

• Some are highly localized; others operate on a national scale

• Some have professional staff and highly structured procedures; others operate less formally.

• Some a use two-stage application process or have multiple deadlines; others provide one shot
A Few Generalizations

- Foundations often want to have a direct impact on a specific issue or population
  - “want to save lives or change lives”
  - but still work incrementally: often focus on shorter-term projects with tangible outcomes
- Often have fairly narrow mission/focus areas (which may periodically change or evolve)
  - getting funding depends on helping them achieve that mission and focus
  - equity is an increasingly common concern in grantmaking decisions
- Dollar amounts available vary greatly but are typically smaller than what federal agencies offer
What do foundations like to see?

- Collaboration; cross-disciplinary or multi-disciplinary efforts; and sometimes multi-organizational efforts

- Multiple funders (typically don’t want to be the sole source)
  - this can make foundation funding a good complement to other funds or supplement to ongoing work

- Work that is in the “sweet spot”
  - far enough along to show some success or evidence of likely success
  - But still at a point where an infusion of funds will make a real difference
How do I pursue foundation funding?

• Work with the Foundation Relations team!

We can
• provide guidance and consultation
• try to identify potential funders
• provide assistance and support with outreach, crafting and submitting proposals, etc.

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Do You Accept This Mission?: Meeting the Needs of U.S. Mission Agencies

A brief overview

Martin Bink, Director of Defense and Security Collaborations
Do You Accept This Mission?:
Meeting the Needs of U.S. Mission Agencies

Mission Agency = Federal agency responsible for delivering solutions to the government and the citizens.

- *Not* public-purpose research
- U. S. Department of …
  - Agriculture
  - Defense
  - Education
  - Energy
  - Homeland Security
  - …
- Focus at UGA is on National Defense and Security Agencies
  - University of Georgia Research Institute (UGARI)
  - Office of Defense and Security Collaborations
Meeting the Needs of U.S. Mission Agencies

Not just weapons

• DoD is one of the largest funders of cancer research
• Large complex research enterprise
  • Quantum physics
  • Training and education
  • Bio-medical science
  • Meteorology and geospatial information
  • Civil and infrastructure engineering
  • Microelectronics and computer science
  • Data science and artificial intelligence

• “Mission” presents interesting problem areas
Meeting the Needs of U.S. Mission Agencies

- Spectrum of research from basic (fundamental) to application to prototyping to translational/clinical

- Research must support laboratory strategy/mission areas
  - Program (need) driven
  - Flexibility in topic areas and scope

- Always collaboration (government, industry, and academia)

- Look for funding for technologies and capabilities
Meeting the Needs of U.S. Mission Agencies

• Key to funding = **Engagement**
  • Learn the Agency/Program
  • Learn the Mission
  • Engage points of contact
    • Broad Agency Announcements
    • Attend Conferences and Meetings
  • Engage funders and **end users**
  • Fellowships and student programs

• It’s **NOT** all about $
Upcoming RLive Workshops (All are Fridays at 11)

Jan 27 Workshop 1: The Business of Research: Building Industry Partnerships that Pay  
Workshop Leader: Richard Potter, Office of Business Engagement

Workshop Leader: Jake Maas, Office for Proposal Enhancement

Feb 17 Workshop 3: Fill the Gaps in Your Foundation: Tips for Seeking Foundation Funding  
Workshop Leader: Matt Pruitt, Foundation Relations

Mar 3 Workshop 4: Do You Accept This Mission?: Meeting the Needs of U.S. Mission Agencies  
Workshop Leader: Marty Bink, Defense and Security Collaborations
Thank you! We look forward to seeing you at the Workshops.

Questions?