



**OFFICE OF
CORPORATE RELATIONS**

University of Wisconsin-Madison

**Strategic Business Plan
2006-07**

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Overview and Status

Three years after the Office of Corporate Relations was established, it is apparent to the OCR staff and the leadership of the University of Wisconsin-Madison that the office's primary responsibilities remain the same. These responsibilities include:

- Create and strengthen mutually beneficial relationships between the private sector and the university;
- Contribute to a stronger Wisconsin economy; and
- Support the development of new business startups based on university research and discovery.

Based on staff evaluations of on-going work and client service, as well as on various meetings with university leaders, OCR is increasingly recognized and supported for its work to create beneficial relationships between the private sector and UW-Madison.

This document therefore builds on the direction of previous strategic business plans and is presented as a continuation of what was begun three years ago.

The OCR Mission

The mission of OCR remains unchanged:

- To serve as a primary connection between businesses and UW-Madison, and
- To give added meaning and significance to the Wisconsin Idea by helping businesses compete and succeed in the 21st Century economy.

OCR's Long Range Vision

A new element of the OCR strategic planning process is a statement of where the office's leadership envisions the office will be three years from now, and to that end, it is presented here as a new vision statement of the defining characteristics of where we would like the office to be as of July 1, 2009:

1. We are a well-functioning team that understand and appreciate each other's roles. We understand and are meeting the hopes and expectations of our key stakeholders. We are known and respected across campus and in the business community, especially among our target companies.
2. We are effectively and efficiently assisting companies connect with campus units, programs and people, and this helps them solve a problem or meet a challenge. We have developed strong relationships with key companies, such that there is frequent communication between OCR and those companies.
3. We have created a program or series of programs/activities that are recognized on campus and by the entrepreneur and investment community off campus as actively helping campus entrepreneurs create startup and spin-off companies, and we have a list of such companies.
4. We have been recognized by/written about in the Chronicle of Higher Education or other similar publications as a model of how universities can/should work with the business community. The article includes testimonials from companies on how helpful OCR is, and how, because of that help, they have saved money or found useful technologies or hired great people.
5. We have been recognized on campus as the university's primary point of contact with the business community, and as such, OCR is the manifestation of The Wisconsin Idea in terms of the state's business community.

Emerging Issues in OCR's Operating Environment

While many of the issues in OCR's operating environment have not changed from prior planning periods, there are some areas that have been identified as having special or increased importance to the office's ability to carry out its responsibilities and achieve its objectives going forward. They include:

- The primary stakeholders in OCR's work and performance indicate they are satisfied with the office's performance to date. However, there are some areas of improvement that need to be addressed, including:
 1. Better communication with OCR's stakeholders on the office's on-going work, and
 2. More focus on results and outcomes of the office's work that benefit the campus, rather than citing processes the office is following or tallying information on OCR outcomes (for example, how many meetings we have had with companies)
- Clients of OCR appear to have the same set of service needs that OCR has been focusing on for the past three years, including:
 - Executive education and professional development
 - Recruitment of students and graduates
 - Access to faculty/staff expertise
 - Connection to tech transfer services
 - Information about global markets
 - Support for entrepreneurship
- Despite three years of existence, some have observed that OCR has yet to fully establish its position or even its full credibility within the UW-Madison environment as the primary campus entity for managing relationships with the business community. Among the points noted:
 - The office staff has remained relatively static in numbers;
 - The office has not merged with or absorbed other campus units operating in similar areas of responsibility;
 - The office is moving from its current location on campus to a new location in the University Research Park, three miles removed from the campus, which could have the unintended consequence of being misinterpreted as a de-emphasis of the importance of the office.

- Looking into the near future, changes can be anticipated in the following areas that could affect the office
 - Evolution of new leadership at UW-Madison
 - Continued pressure on budget/resources
 - Pending elections in state government offices and the potential resulting change in leadership

Operating environment issues noted in prior plans remain part of OCR's planning process. They include:

- Sustained, growing appreciation of the importance of a healthy business community, as the basis for more and better jobs and a stronger tax base.
- Increased activity among a variety of organizations in the state to support businesses and strengthen the state's economy; more activity with less coordination of efforts in both the public and private sectors.
- Changing levels of awareness about the efforts of UW-Madison to reach out and help businesses; presumed to be higher in some areas closer to Madison, lower elsewhere.
- Growing expectations from economic development groups at local, regional and state levels that a major public research university like UW-Madison can – or should -- have a greater and more direct impact on the economy.
- Possible opportunities to build stronger bridges with other campuses in the UW System to operate in a more cohesive, organized way with the business community throughout the state.

OCR's Clients, Constituents, Partners and Influencers

OCR has identified and worked with a wide range of clients, constituents, partners and influencers, and those groups continue to be important to the office's ability to focus its efforts and carry out its responsibilities. They remain the following:

□ Clients:

- "First tier" businesses in Wisconsin and beyond that have been identified through careful research and analysis as having the critical mass, internal capabilities and need for UW-Madison resources;
- "Second tier" businesses that may seek out the university through the OCR on their own;
- Companies that are based in University Research Park; and
- Companies related to UW-Madison that are in the process of early formation and in need of particular entrepreneurial resources.

□ Constituents:

- UW-Madison faculty, staff and students with an interest in obtaining or strengthening relationships with the private sector;
- UW-Madison administrators, deans and other campus leaders with an interest in the university's relationships with the private sector.

□ Partners:

- UW-Madison Schools and Colleges
- Other campuses in the UW System;
- The Wisconsin Alumni Research Foundation (WARF);
- The leadership of University Research Park;
- The Wisconsin Alumni Association;
- The UW Foundation;
- The organizations that support the entrepreneurial community in the greater Madison area;
- The investment community, including venture capital groups, angel investors, banks and financial services companies; and
- A host of other off-campus groups and organizations working to help businesses and build a stronger state economy.

- **Influencers:**
 - News media at the local and state levels;
 - Elected and appointed officials at the local, state and federal levels;
 - Special interest groups, leaders and commentators; and
 - Other UW System campuses relative to their regional business environment.

OCR's Objectives

With the addition of a new Vision Statement of where OCR plans to be in three years, the office has identified a primary, overall objective that it will focus on.

Primary objective:

**Strengthen the relationship between UW-Madison and the business and financial community
in order to:**

- **Attract more support for the university from the business community;**
- **Facilitate more business relationships for the university; and**
- **Contribute to a stronger Wisconsin economy.**

Strategic Objectives

In order to achieve that single objective over time, OCR plans to pursue the following three core strategic objectives, with results measured on an annual basis:

Strategic Objective One: Build Awareness

OCR will build and strengthen awareness of and appreciation for UW-Madison among our clients, constituents, partners and influencers.

Strategic Objective Two: Facilitate Relationships

OCR will facilitate relationships between UW-Madison and businesses in Wisconsin and beyond.

Strategic Objective Three: Promote Entrepreneurship

OCR will promote entrepreneurship, particularly among UW-Madison faculty, staff and students.

OCR's Strategic Business Plan

Strategic Objective One: Build Awareness

OCR will build and strengthen awareness of and appreciation for UW-Madison among our clients, constituents, partners and influencers.

OCR will accomplish this objective through these activities and programs:

- Continue to make personal contacts with clients and prospective clients
- Conduct more outreach to and contact with constituents on campus
- Explore new ways to build on and leverage existing relationships with allies
- Conduct more outreach and contact with elected officials, especially at the state and local levels in Wisconsin
- Participate in conferences, trade shows and other business-related events on a selective basis in order to have the greatest impact in the most efficient ways possible
- Complete the OCR marketing plan, and implement its recommended steps within OCR's available resources
- Revisit the activity of making presentations about OCR and the university to business and economic development organizations as time permits

Measurement of results:

Conduct awareness and attitudinal research among both targeted and non-targeted companies in 2006 to obtain a benchmark of awareness levels, and a year later, in 2007, repeat the research. The target metric would be at least a 10% increase or improvement in levels of awareness.

Strategic Objective Two: Facilitate Relationships

OCR will facilitate relationships between UW-Madison and businesses in Wisconsin and beyond.

OCR will accomplish this objective through these activities and programs:

- Seek out more opportunities to connect businesses with campus resources
- Sponsor special events that connect businesses with campus experts
- Maintain communications with all audiences
- Complete training on and put into use the Microsoft CRM database that collects and tracks information about clients and prospective clients
- Work with campus units to find ways for them to reach out to and connect with businesses

- Entertain targeted clients and potential clients as appropriate and as resources permit
- Produce and deliver more communications that are targeted to specific industries and companies
- Activate the planned OCR External Advisory Council, made up of OCR's charter sponsors
- Produce and deliver an OCR news letter to clients, stakeholders, partners and influencers, to keep them all fully aware of OCR's work and progress
- Conduct satisfaction surveys of clients and constituents, to identify areas of improvement

Measurement of results:

An increase of at least 10% in the number of contacts made with businesses and in the number of requests for information and help received by the office.

Strategic Objective Three: Promote Entrepreneurship

OCR will promote entrepreneurship, particularly among UW-Madison faculty, staff and students.

OCR will accomplish this objective through these activities and programs:

- Continue to refine and manage the UW-Madison New Business Start-up Initiative, as specifically described on the OCR Entrepreneurial Resources web site: <http://www.ocr.wisc.edu/entrep/startup.html>
- In addition, and often as part of the UW-Madison New Business Start Up Initiative, OCR will:
 - Collaborate with other organizations on- and off-campus with a stake in new business start-ups
 - Communicate with the financial community about investment opportunities emerging from research and discoveries on the campus
 - Conduct outreach programs to provide the financial/investment community with specific investment opportunities
 - Showcase the pool of managerial talent in Madison area to potential investors
 - Continue to work to build greater awareness of OCR's "E-ship" programs

Measurement of results:

OCR will track data on the numbers of program events, attendance, participation, and numbers of contacts with financial investors and entrepreneurial companies etc., with a goal of demonstrating an increase of at least 10% year over year.

Summary

Over the past three years, the Office of Corporate Relations has made significant progress in addressing its core mission.

Outreach to and communication with the business community in Wisconsin and beyond is producing a significant numbers of contacts and opportunities for businesses to work with and support the university.

New initiatives, such as the UW-Madison New Business Start Up Program, have been put in place to support and nurture entrepreneurship on campus, and stimulate more spin-off and start-up companies based on research and discovery by faculty, staff and students.

Special efforts, such as the UW-Madison presence at BIO2006 in Chicago, have pulled together a wide range of campus bioscience units with an interest in pursuing new relationships with business and industry.

Interest in the services of the office is steadily increasing, as evidenced by the growth in traffic to the redesigned OCR web site and the number of people making use of the office's UW Business News Wire to learn more about programs and events on campus of value to the business community.

Feedback from campus constituents and business clients alike is positive and encouraging, as evidenced by the vignettes of corporate relationships with OCR that are presented in the latest OCR Annual Report. Further feedback resulting from formal surveys and informal conversations with clients is providing insights into how the office can build on and improve its services.

All of this suggests two things:

1. There is a real need and opportunity for the university to reach out to and help meet the needs of companies competing in today's marketplace; and
2. There is much more work that can be done by the Office of Corporate Relations to serve the interests and mission of the University of Wisconsin-Madison by building relationships with the business community, not only in Wisconsin but beyond.

Looking forward, the Office of Corporate Relations is poised and prepared to achieve its mission and operating objectives, and contribute to a stronger economy that benefits everyone.

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