The 4 Hour Day
How a half day workshop can result in project breakthroughs

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Our methodology
Inspire a diverse group of people to progress toward common goals and objectives in a short period of time.
A facilitator’s job is to *Plan, Question, Listen, Negotiate, Summarize & Record.*
Every Hour of Facilitation = 1 Hour of Planning & Follow Up

2 Hours of Planning & Follow Up
You're invited!
JOIN US FOR A WORKSHOP TO DISCUSS
ADVISING PRACTICES

8 NOVEMBER 2017
9am - 1pm

You do not need to bring anything or prepare anything in advance.

Topics:
Major Planning
Academic Probation
Communication
Customize and Connect

- What you have been told?
- What you have observed?
- What do you need to know?
Workshop Framework

- Workshop Introduction: 10 minutes
- Participant Engagement: 15-20 minutes
- Venting Session: 30-45 minutes
- Break: 10 minutes
- Activity: 45-60 minutes
- Break: 10 minutes
- Activity: 45-60 minutes
- Wrap Up: 15-30 minutes
How are we going to work together today?
What was your most memorable experience when advising a student and why?
Challenges

- 7 vacancies - 50% vacancy
- Finding people/training/building culture
- Retention
- Bureaucracy - specifically around payments/finance
- Paper copies of invoices
- Double approval for payments - 3rd approval for over $5K (in low firms)
- Lack of integration with KFS
- Lack of IT support for processing online payments
- Manual licenses for software sales
- Lack of University Support
- Customer service suffers due to being short staffed
- Online portal for status/check in
- Online disclosure

- Partly filled out disclosure form
- Limited ability to give instructions on disclosures
- Time spent giving updates to inventors
- Let's cut time spent on education
- Limited self help tools
- Need for "hand-holding"
- No access to online reports
- Anxiety of moving to a new system
- Complicated distribution algorithms - currently custom coded into existing system
- 90% of time spent on ~10% of distribution but don't follow policy
- Moving historical data to new system (grandfathered rules)
- IP policy answers -> exceptions
- Terms of license agreements -> exceptions
- Managing faculty expectations
- Educating faculty about IP rights / decision making authority
- Disconnect between OTC mission / goals and the goals of the inventors

- Delivering non-patent assets
- Slow patent decisions
- OTC misunderstanding of inventions (faculty perspective)
- Need for a CRM - track marketing communication
- Data vi-relay
- Dealing with government compliance
- Need for integration with government portals
- Keeping up with requests for info from grant agencies
- Timely reporting due to OTC decision, processes and limited bandwidth
- Increased disclosures with limited resources
- Need faculty to disclose
Workshop Introduction 10 minutes
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Venting Session 30-45 minutes
Break 10 minutes
Activity 45-60 minutes
Break 10 minutes
Activity 45-60 minutes
Wrap Up 15-30 minutes
Deliver it as “their” work!

Images redacted
http://it.umd.edu/processinnovation