

Finding Your Funding Model: Webinar Series on Creative Strategies for ATE Leaders Seeking to Move Beyond the Grant

THE FUNDING ENVIRONMENT: FROM FUNDER MANDATES TO INDUSTRY PARTNERSHIPS

[CLICK HERE TO WATCH THE WEBINAR RECORDING](#)

Nancy Maron, BlueSky to BluePrint

Rachael Bower, ATE Central

May 3, 2016

1pm Eastern

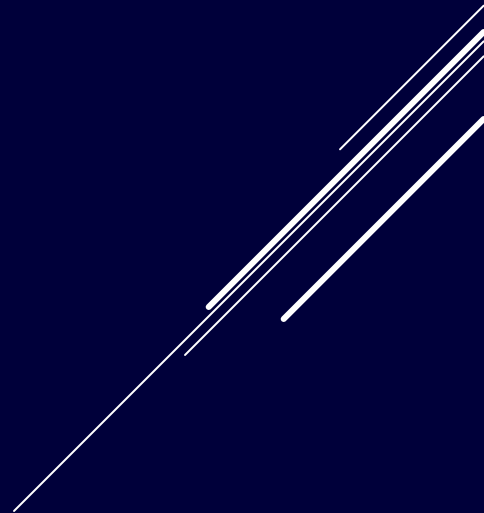
TODAY'S PRESENTERS



Nancy L. Maron
Founder, BlueSky to BluePrint, LLC



Rachael Bower
University of Wisconsin-Madison
PI, ATE Central



SPECIAL GUEST




Michael Lesiecki


Maricopa Community Colleges
Principal Investigator, Maricopa Advanced
Technological Education Center
(MATEC)

POLL QUESTION #1

I would describe myself as:

- A. Affiliated with an ATE grant
 - B. Affiliated with a TAACCCT grant
 - C. Not currently funded, but writing an ATE grant
 - D. Other
- 
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GOALS OF TODAY'S WEBINAR

- Encourage participants to explore the current environment in which they are operating
 - Offer a framework to use push farther in analyzing the changing environment
 - Share examples of how ATE grantees have used a deep understanding of changing conditions to make strategic choices for their projects/centers
- 

AGENDA

- INTRODUCTIONS
 - THE ROLE OF “ENVIRONMENT” IN SUSTAINABILITY PLANS
 - WHAT DO YOU KNOW ABOUT THE ENVIRONMENT?
 - WAYS TO CONSIDER LEARNING MORE (AND WHY)
- 

INTRODUCTIONS



ADVANCED TECHNOLOGICAL EDUCATION (ATE) PROGRAM

- **Education** of science and engineering **technicians** for high-technology fields that drive the nation's economy.
- **Community colleges** in leadership roles
- **Partnerships:** Industry and Economic Development Agencies, secondary schools, 4-yr institutions
- **Pathways:** 7-12, 2- and 4-yr

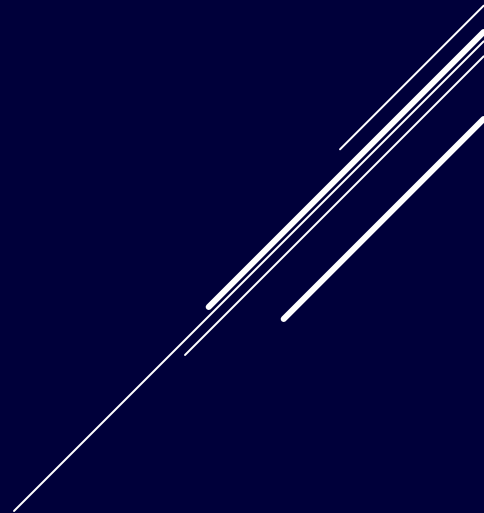


ATECENTRAL

<http://atecentral.net/>

Primary Purpose: Amplify the Impact of ATE

- Information Hub and Portal
- Resource Collection
- Services and Tools
- Outreach and Dissemination



SUSTAINABILITY SUPPORT

- ATE Central: community driven
- *ATE Community Needs Survey* (2011)
- Significant need: sustainability support
- Workshops + webinars

MATEC

(MARICOPA ADVANCED TECHNOLOGY EDUCATION CENTER)

- ▶ MATEC is beginning its 19th year
 - ▶ Member of a national network of 42 ATE centers
 - ▶ A member of the Workforce Development at the Maricopa Community Colleges



I T H A K A

ITHAKA is a not-for-profit organization that helps the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways.



JSTOR is a not-for-profit digital library of academic journals, books, and primary sources.



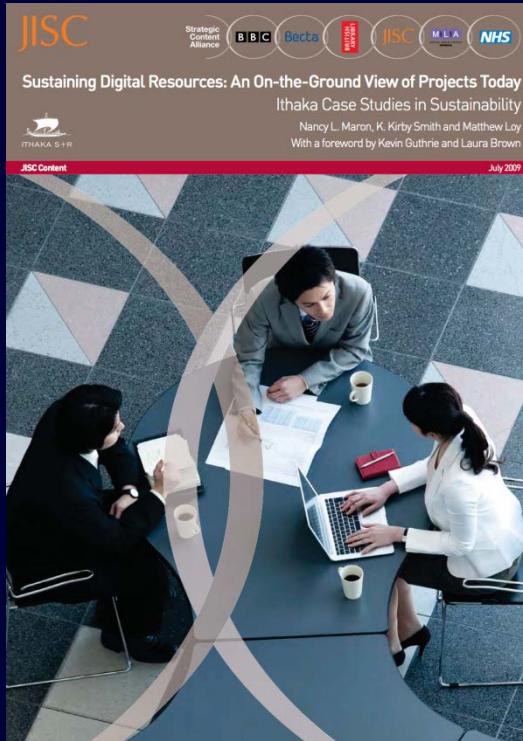
Ithaka S+R is a not-for-profit research and consulting service that helps academic, cultural, and publishing communities thrive in the digital environment.



PORTICO

Portico is a not-for-profit preservation service for digital publications, including electronic journals, books, and historical collections.

CASE STUDIES AND GUIDES TO BEST PRACTICE



- ▶ Includes briefs on each model with real-world examples and tips on how to decide if the model is right for you.

Available at: http://www.sr.ithaka.org/wp-content/uploads/2015/08/SR_Report_Sustaining_Digital_Resources_On_Ground_View_Projects_Today0709.pdf



BLUESKY TO BLUEPRINT


- Strategy, consulting, research and training
- Focus on business models in academic and cultural heritage settings, all disciplines
- Case studies, reports and tools freely available on the Ithaka website, and ours
- Customized training and workshops for project teams

THE ROLE OF ENVIRONMENT IN SUSTAINABILITY PLANS

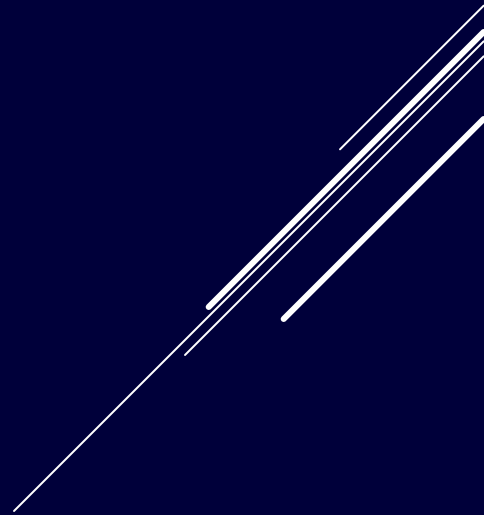


POLL QUESTION #2

The most important “environment” for me to understand is...

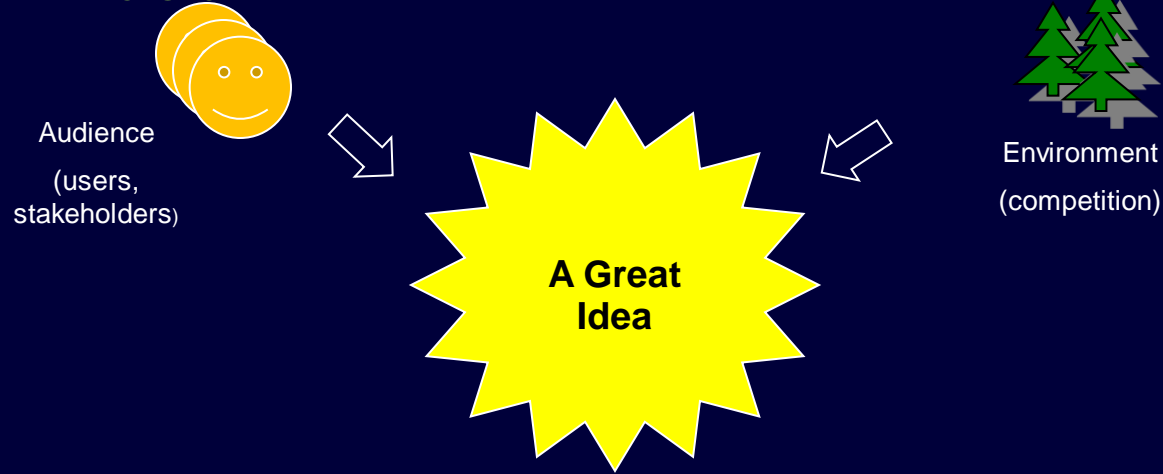
- A. My own academic program or department
 - B. Conditions at my institution
 - C. Government policy and politics
 - D. Social trends
 - E. Other
- 
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First, there is...



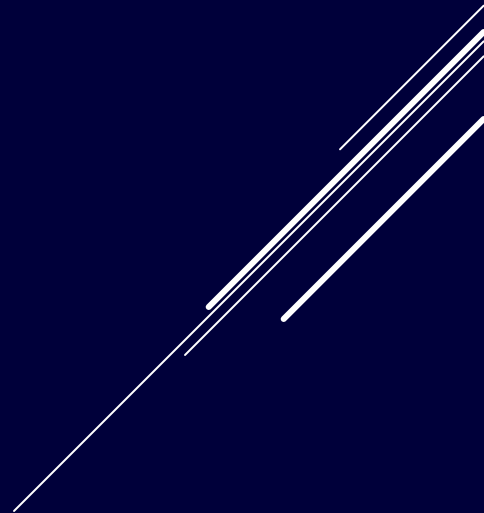
There are forces that may help you refine that idea...

EXTERNAL FACTORS



With project aims clarified, how to achieve them?

EXTERNAL FACTORS



With project aims clarified, how to achieve them?

EXTERNAL FACTORS



INTERNAL FACTORS

GOALS

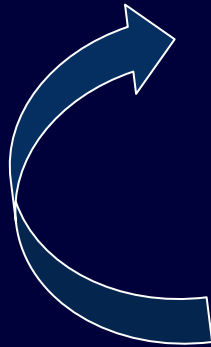
ACTIVITIES

COSTS /RESOURCES

FUNDING SOURCES

A reliable, recurring cycle of investment and value

EXTERNAL FACTORS

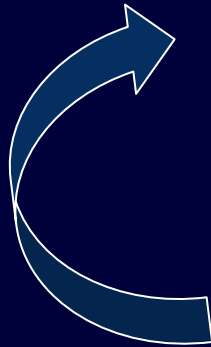


INTERNAL FACTORS



A reliable, recurring cycle of investment and value

EXTERNAL FACTORS



INTERNAL FACTORS



ROLE OF ENVIRONMENT IN SUSTAINABILITY



FOR EXAMPLE.....

- A scholarly online “encyclopedia” created almost entirely with volunteer time and offered as a Open Access work, freely, online.
- Founders aware of certain conditions at the start: support for OA; value of community-contributed updatable content (wikipedia before Wikipedia!)
- Differentiators: high quality, peer-reviewed content, encyclopedic coverage by experts



AWARENESS OF THE ENVIRONMENT



Audience and stakeholders were very receptive to OA mission



Libraries and funders in a position to support;



Publishing formats still important, and a source of revenue

RESPONDING TO ENVIRONMENTAL CHANGES

- ▶ **Then:** very strong local and national demand for Semiconductor Manufacturing Technology technicians
- ▶ We were riding one horse



Photo courtesy of Intel Corporation

THE ENVIRONMENT AND DEMAND CHANGED

What's a program to do?

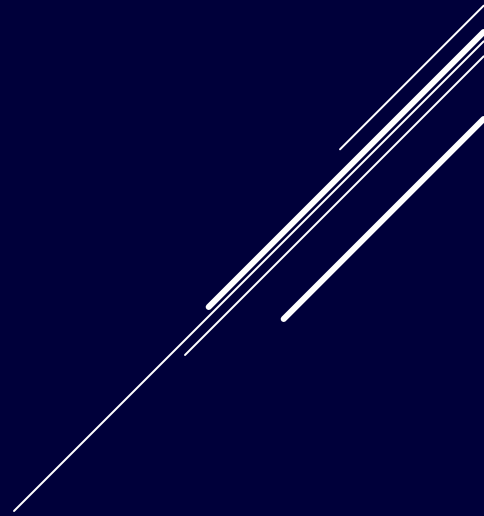


Photo courtesy of PRI Automation




QUESTIONS?

WHAT DO YOU KNOW ABOUT YOUR
ENVIRONMENT ?



POLL QUESTION #3

We have a firm understanding of...

- A. How what we do compares to other similar initiatives
 - B. How our users actually see our value, compared to other available options
 - C. The trends in our field or discipline
 - D. The trends in the wider world around us (government, politics, institutional)
- 


WHAT IS THE "ENVIRONMENT"?

- Relating to your project specifically
 - Your direct and indirect competition
 - Your actual and potential funders (NSF, your institution)
- The wider world outside
 - Political, economic, social, technological, legal and environmental factors


DO YOU HAVE COMPETITORS?




SURE! PROJECTS COMPETE FOR:

- *Users' time and attention*
 - Their perception of relative value is more important than "reality"!
 - *Scarce resources*
 - For not-for-profits, competition takes on an ethical dimension – is your project making the best possible use of philanthropic funding or institutional resources?
- 


UNDERSTANDING THE LANDSCAPE

1. *Identify others doing something similar*
 2. *Analyze their strengths and weaknesses on criteria that are important to your audience*
 3. *Determine how your initiative compares to theirs*
- 

IDENTIFYING YOUR COMPETITION

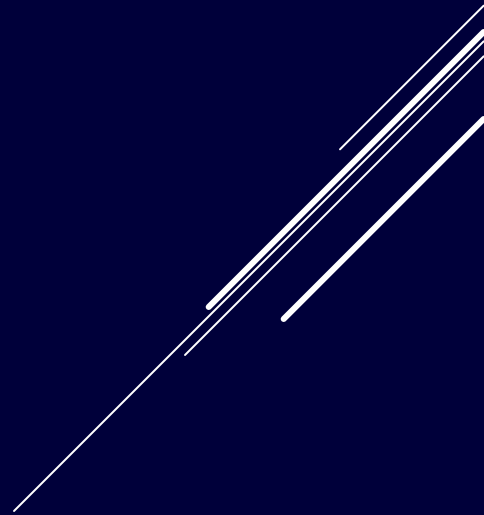
1. **Direct competitors:** Alternatives to your project that may include projects similar to your own, aimed at audiences quite similar to yours.
 2. **Indirect competitors:** Projects that offer overlapping benefits to similar audiences.
- 

HOW DOES YOUR PROJECT COMPARE?

- *What attributes do your users, funders and contributors care about?*
 - e.g. ease of access, quality of content, etc.
 - *How do your competitors measure up on these dimensions?*
- 


QUESTIONS?

SOME TIPS FOR GETTING STARTED



POLL QUESTION #4

To understand our competition, we regularly ...

- A. Identify existing and potential competitors
 - B. Gather quantitative data on similar initiatives
 - C. Speak with our stakeholders about their other options
 - D. Other
- 

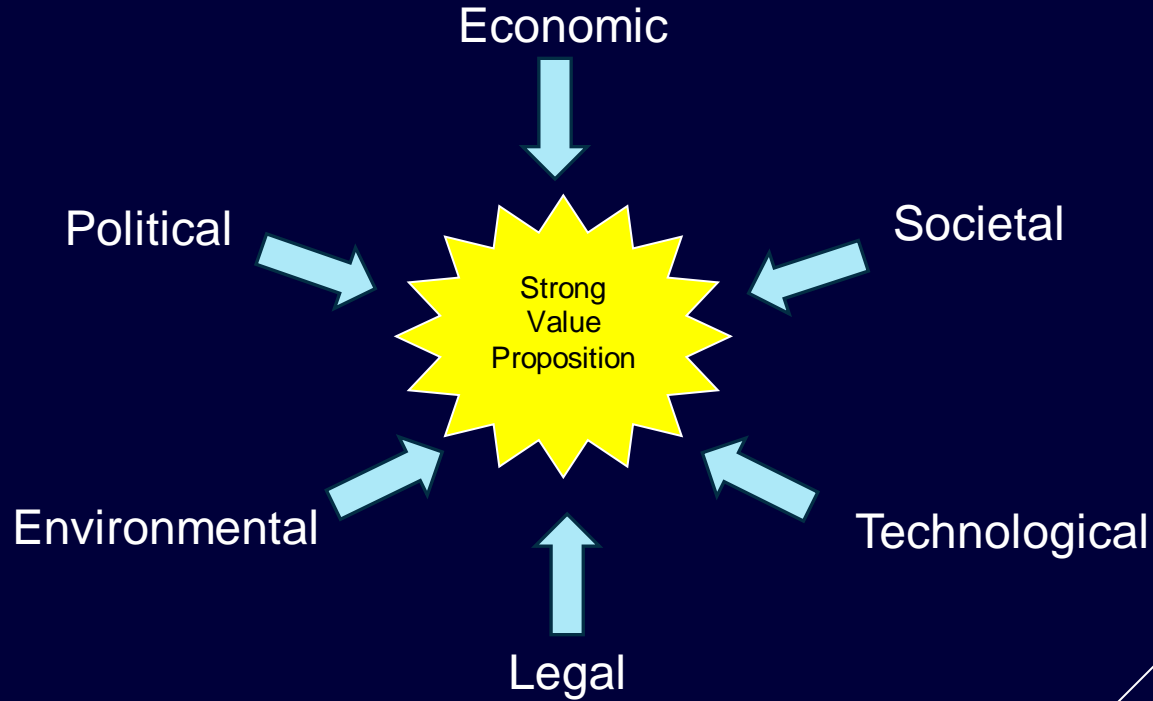
COMPETITIVE ENVIRONMENT TEMPLATE

FACTORS	My Resource	Competitor 1	Competitor 2	Competitor 3
DESCRIPTOR A Usage Average unique users per month				
DESCRIPTOR B Volume of content Number of resources				
DESCRIPTOR C Discoverability Search ranking for relevant terms				
CRITERIA A Quality of content Rank on scale 1-5				
CRITERIA B Brand strength/familiarity Rank on scale 1-5				
CRITERIA C Community vitality Rank on scale 1-5				
CRITERIA D Ease of use Rank on scale 1-5				

COMPETITIVE ENVIRONMENT TEMPLATE

FACTORS	Stanford Encyclopedia of Philosophy	Wikipedia
DESCRIPTOR A Usage Average unique users per month	200k-450k <u>uniques</u> per month, 1000+ professional philosophers collaboratively write, referee and maintain the work	Philosophy (general) page viewed 250,972 times in the last 30 days, 17,152,805 registered users (general), ~4k contributors
DESCRIPTOR B Volume of content Number of resources	1300+ entries	16, 811 philosophy articles
DESCRIPTOR C Discoverability Search ranking for relevant terms	<ul style="list-style-type: none"> • Philosophy (5th) • Encyclopedia of Philosophy (2nd) <i>Less prominent philosophers</i> <ul style="list-style-type: none"> • Hans-Georg Gadamer (2nd) • Henry Odera Orika (2nd) <i>More prominent philosophers</i> <ul style="list-style-type: none"> • Plato (3rd) • Socrates (2nd) <i>Philosophy sub-fields</i> <ul style="list-style-type: none"> • Epistemology (2nd) • Ethics (9th) • Logic (6th & 7th) 	<ul style="list-style-type: none"> • Philosophy (2nd) • Encyclopedia of Philosophy (6th) <i>Less prominent philosophers</i> <ul style="list-style-type: none"> • Hans-Georg Gadamer (1st) • Henry Odera Orika (1st) <i>More prominent philosophers</i> <ul style="list-style-type: none"> • Plato (1st) • Socrates (1st) <i>Philosophy sub-fields</i> <ul style="list-style-type: none"> • Epistemology (1st) • Ethics (1st) • Logic (2nd)
CRITERIA A Quality of content Rank on scale 1-5	5- Content can be cited, is written by experts in the field, and is refereed by an editorial board before made public.	3 - Anyone can write entries however Wikipedia has specific policies to guard the accuracy of the content. Not an acceptable citation in most academic work.
CRITERIA B Brand strength/familiarity Rank on scale 1-5	3.5 - Associated with a top university, relatively high page rank and discoverability, large number of unique users/month	5 - High discoverability, large number of unique users/month

PESTLE ANALYSIS



FUNDING AND STRATEGY

- ▶ Initiated by grants: allowed a 100% focus on curriculum, faculty professional development and program growth
- ▶ The funding horizon was clear



ONE "SUSTAINABILITY" SCENARIO



RECOGNIZING THE WORKFORCE TREND AT COMMUNITY COLLEGES

- ▶ Found a new home in the WD Unit of the College District
- ▶ Focused on adding value through partnering to attract external funding
 - ▶ Got on the Workforce Bandwagon
- ▶ Dug ourselves in; added value

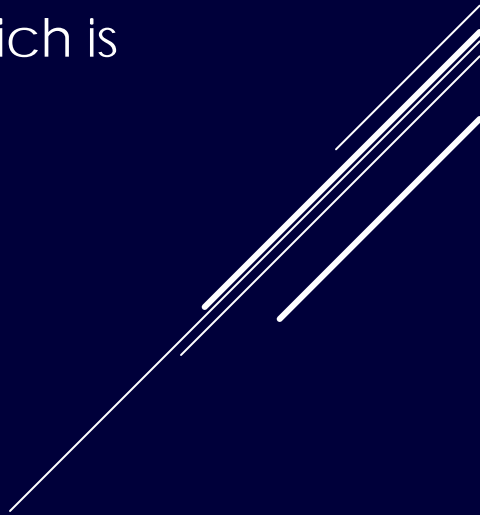
TODAY

- ▶ MATEC is no longer directly funded by NSF
- ▶ We have a variety of funded projects and an infrastructure supported by the college district

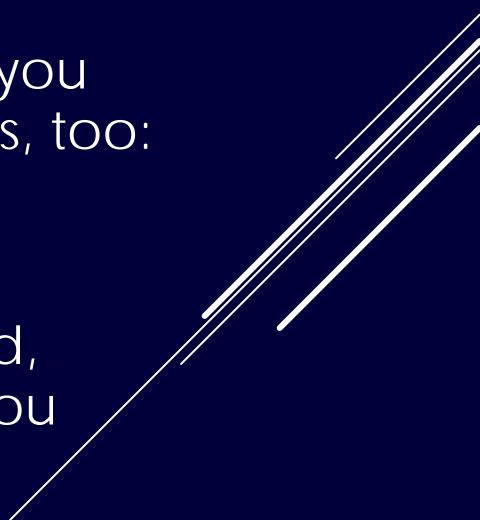


GETTING STARTED

- Sketch out your answers on the form.
- Which of those is based on hard data, and which is just a good guess?
- How can you firm that up?



DESK RESEARCH

- Great for
 - Digging up quantitative data on your “competitors”. Many of the same sources you use for audience segmentation work for this, too: organizational websites, annual reports, promotional materials, press releases
 - Often, in academia and the not-for-profit world, even “competitors” will be willing to talk with you about their work. Don’t be shy about asking!
- 

SURVEYS AND INTERVIEWS

- If you have planned to reach out to users/stakeholders, you can use this opportunity to ask questions that help with understanding the environment as well. Make sure to include questions like:
 - What [courses, materials] do you use now?
 - Where do you go to get information on...?
 - What are your greatest concerns for the next 3-5 years?

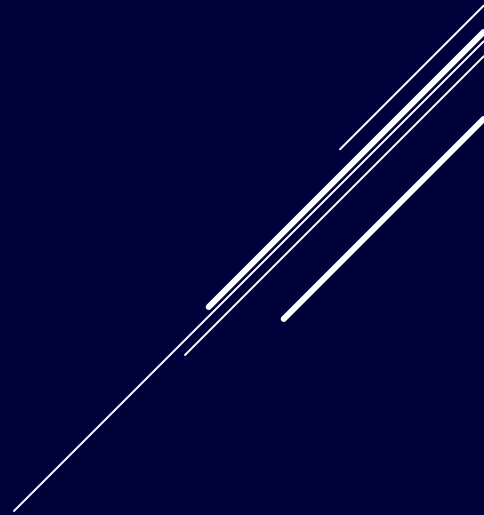
SUMMING IT ALL UP

- Understanding the environment is important; none of us operates in a vacuum!
- Early knowledge makes it easier to shift gears (and not get run over when changes do come)
- Can serve as a powerful tool for sharpening the value of what you do, and expose market gaps you might want to fill



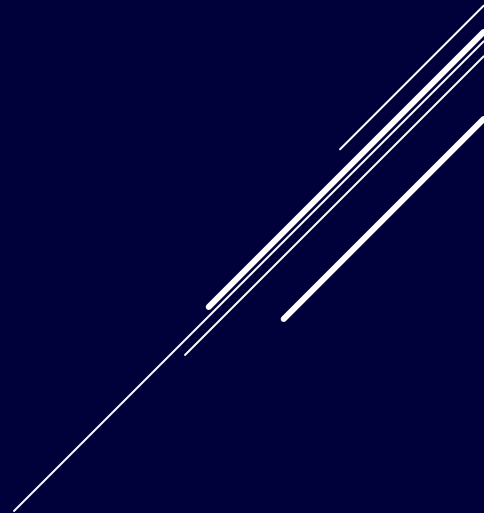
KEY STEPS TO SUSTAINABILITY

- **Define your long-range goals** for the project/center. **What do you really want to sustain?**



KEY STEPS TO SUSTAINABILITY

- **Define your long-range goals** for the project/center.
- Carefully assess all elements you will need to continue delivering value

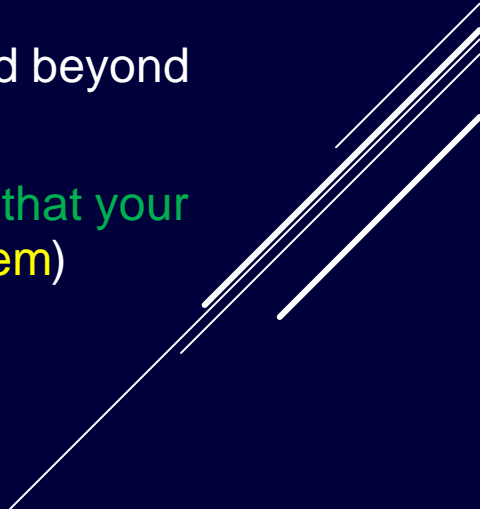


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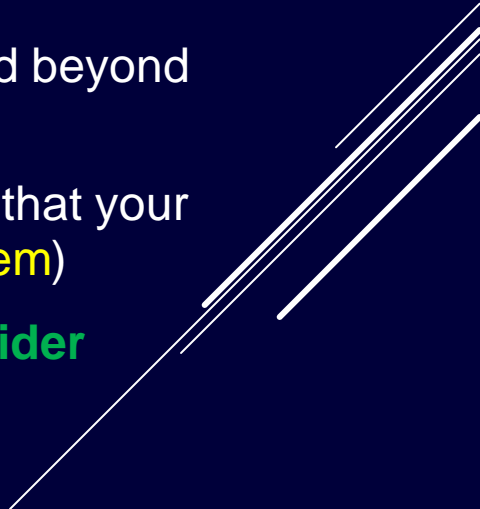
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- **Develop a budget**– What will it cost during the grant and beyond to keep up the activities you think are most important?



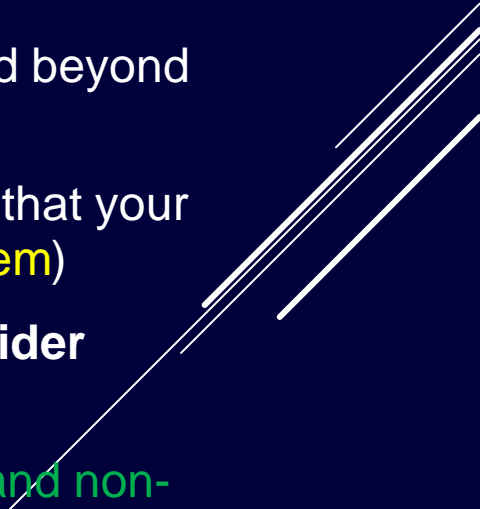
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KEY STEPS TO SUSTAINABILITY

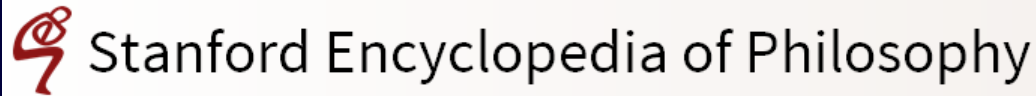
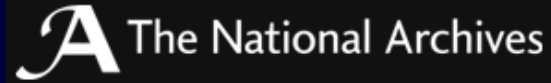
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Value proposition

- **Determine all possible sources of support** (financial and non-financial) (**Define assumptions and test them**)

CASE STUDIES IN SUSTAINABILITY (20+)



BUSINESS MODEL BOOTCAMP

AUGUST 8-10 -- CHICAGO

[HTTP://BLUESKYTOBLUEPRINT.COM/](http://blueskytoblueprint.com/)

August 8-10
@
Northwestern

- 3-day intensive workshop
- Work with teams and individuals to develop hypotheses for your funding model and plans for testing it
- Learn basics of business strategy and apply them to your project: audience assessment, competitive review, value proposition, budgeting and funding model development
- **Apply:** blueskytoblueprint.com

CLOSING THOUGHTS

... AND PLEASE TAKE OUR SURVEY!