SHAPE BOOTCAMP MODULES

Block 1
Make the case for SHAPE
Level: beginner

Description: Technology transfer offices have traditionally followed commercialization pathways focusing on patenting and licensing of the "hard" sciences. Success has often been only considered from the viewpoint of economic return, overlooking the other significant ways that research contributes to positive societal impact. In this module we will examine the evolution from technology transfer to knowledge transfer to knowledge exchange and examine what this means for the university. We will demonstrate how especially in the fields of social sciences, humanities and arts, the societal benefits of research outputs can be very significant. For academics and professional staff, we will help you on how to make the case for SHAPE commercialization, and secure resources and research funding.

Learning Outcomes:
- Delegates will learn how to identify different routes of valorisation and impact, and value SHAPE outputs.
- Delegates will learn how to identify and value intellectual property.
- Delegates will learn how to effectively advocate for SHAPE commercialization.
- Delegates will consider steps needed for building support and securing resources for SHAPE.

How we built it: Case studies of two SHAPE ventures and how they went from research proposal to high impact ventures
Level: all

Description: In this session, we will explore the journey of a venture from its initial research idea through grants, translational research, early commercialisation, and to spin-out. We'll cover how to identify markets, secure translational funding, and develop a viable business model. The session will be interactive throughout. This module will give you practical insight into the mechanics of creating SHAPE spinouts.

Learning Outcomes:
- Delegates will learn how all of the other modules feed in to real examples.
- Delegates will learn what work is required to support successful projects.
- Delegates will gain insight into common mistakes made by others, helping them avoid similar pitfalls within their own institutions.

Block 2
Business models and how to finance them if there is no investment
Level: all

Description: Drawing on insights from hundreds of SHAPE projects, this module explores the types of business models commonly seen in SHAPE disciplines, which models offer the potential to scale, and how to generate revenue and get started without external investment.

Learning Outcomes:
- Delegates will gain an understanding of service-led business models.
- Delegates will be introduced to the concept of brand-building and practical strategies for doing so.
- Delegates will learn how to sustainably finance a bootstrapped venture without relying on investment or grant funding.

How to build and manage your project pipeline effectively through development stages
Level: Beginner

Description: Technology Transfer Offices and their teams often face challenges in adopting a strategic approach to building and managing project pipelines. Without structured methods beyond routine monthly check-ins, pipelines can become unbalanced, either too large or too small, or overloaded with projects at certain stages, leading to bottlenecks and inefficiencies. This module offers TTO staff and wider Professional Support Services the opportunity to learn how universities can develop and manage larger, more effective project pipelines, monitor project progress efficiently, optimize time management, and align efforts with university strategies to maximize output and impact.

Learning Outcomes:
- Delegates will understand how to build larger pipelines more quickly and strategically.
- Delegates will become familiar with tools and mechanisms to advance projects at different levels of development and pipeline stages.
- Delegates will learn how to collaborate and share best practices to holistically support pipeline development.
- Delegates will learn how to utilize and leverage specific outreach activities to encourage participation and help grow project pipelines.

Theory of change & Impact Measurement fundamentals
Level: beginner

Description: A key driver for all universities is to make impact from commercialisation and to be able to report on this to its stakeholders. But what impact, when and for whom? How are you going to capture it, especially where spinouts and licensees are notoriously bad at even reporting financial information? To understand what information you need you need to learn about the Theory of Change, which enables you to map out what data you need to capture, when, from whom and why, and how you can build this into your reporting in a way which doesn't create too much extra work for your licensees and spinouts.

Learning Outcomes:
- Delegates will learn how to develop an impact strategy for an innovation.
- Delegates will learn how they can apply a theory of change to a system of stakeholders relevant to that innovation.
- Delegates will learn how to develop sensible metrics and achievable goals for those metrics.

Block 3
How to enable researchers to become risk takers - an institutional approach
Level: all

Description: SHAPE researchers are in general a different kettle of fish than STEM researchers. This module will examine the differences between SHAPE and STEM, considering their respective histories, cultures, and way of working. The entrepreneurial mindset and ecosystem barriers will also be explored. Practical tools and policies that can be implemented to increase SHAPE researchers' engagement and impact will be demonstrated.

Learning Outcomes:
- Delegates will learn what may resonate with SHAPE researchers and how to approach them.
- Delegates will practice different techniques to engage with SHAPE researchers.
- Delegates will be given tools to employ at their home universities.

Soft IP and How to manage it
Level: all

Description: IP is all the range in tech transfer offices but what does it mean for SHAPE spinouts? Does the spinout process even work if you don't have a patent? And how are you meant to protect the venture? Find out in this session on how to think about IP for SHAPE spinouts. We'll cover how SHAPE IP differs and what types of IP you typically get.

Learning Outcomes:
- Delegates will learn about the typical types of IP in SHAPE and how they differ from STEM.
- Delegates will learn about how the wider economy uses and worries about IP and how they might think about things differently in their own institutions.
- Delegates will come away with a strategy of how to manage IP through innovation projects, how they apply this across a portfolio, and what this might mean for a university office and how it might need to change its approach.

Company structures and the role a university plays
Level: all

Description: Universities get involved in their spinouts for two major reasons, to protect their investment and financial interests and to ensure that the reputation of the institution is preserved. There are varying degrees to which a university can participate in its own spinout, and with financial interest in SHAPE spinouts potentially being less than for STEM spinouts, universities need to know what they are signing up for. This module will cover the main legal structures you are likely to see, what role a university can play in them, how much work it is and what the likely outcomes are.

Learning Outcomes:
- Delegates will learn about the different types of company structures you can get and the different degrees of involvement an individual or organization can have in those companies.
- Delegates will learn the advantages and disadvantages of a university participating at varying degrees of involvement in those companies.
- Delegates will come away with an idea of how they can make recommendations to their own institutions on how they should proceed with new types of company.

Block 4
Impact growth for IP lite and non-VC fundable ventures
Level: Medium

Description: Knowledge Transfer Officers often struggle to find suitable resources for ventures or academic projects that have a strong service-based focus and prefer not to pursue traditional funding routes such as private investors or venture capital. This session will explore strategies like pre-incorporated trading and venture building, equipping KTOs with decision-making tools to confidently determine how to advance these types of ventures and projects.

Learning Outcomes:
- Delegates will learn how to track and grow ventures both inside and outside the University.
- Delegates will understand how to apply alternative funding and scaling strategies tailored for service-based ventures.
- Delegates will gain practical tools for making informed decisions on venture progression in non-traditional investment contexts.
- Delegates will explore methods to effectively support and sustain impact-driven academic projects.

Impact data – how do you demonstrate the value you bring to the ecosystem?
Level: advanced

Description: Just as your social enterprises and spinouts need their own Theories of Change, so does your office. What impact is your own Knowledge Transfer Office trying to demonstrate and how are you going to prove it? This module will take you through how to build a Theory of Change for your own Knowledge Transfer Activities by starting with how you determine what impact you want to achieve, enable you to work out what data you need to capture in order to demonstrate that you are on a pathway to your goals.

Learning Outcomes:
- Delegates will learn how to develop an impact strategy for their own complex knowledge transfer operation.
- Delegates will learn how they can apply a theory of change to a complex system of stakeholders and how the institutional theory of change maps to other stakeholders' theories of change.
- Delegates will learn how to develop sensible metrics and achievable goals for those metrics.

Block 5
Building university alliances, aligning with university strategies and creating champions
Level: all

Description: Most universities do not have the capacity or the scale to attempt new initiatives in SHAPE alone and they will need to put collaborations together with other institutions to get the critical mass to develop sustainable infrastructure. For this, you will need to learn how to put such collaborations together, how to apply for funding, and how you can find and support champions within other institutions to further your own objectives to build successful projects.

Learning Outcomes:
- Delegates will learn how to start a new collaborative effort with universities from nothing.
- Delegates will learn how to map out stakeholders, their desires and how this might align with their own institutions.
- Delegates will be given tools and templates to apply to build a case for an alliance of universities and strategies they might employ for getting these projects funded.

Designing successful pilots. What data do you need from them and how do you capture it?
Level: beginner

Description: Though getting funding for a pilot is important and the focus of a typical knowledge transfer officer is getting it, the best pilots are designed as a scientific experiment, but rather than testing a scientific theory, you are using the pilot to test various commercial questions which will need to be answered for the project to progress beyond the pilot. This module will cover what those questions are likely to be, how to design them into the pilot, and what to do with the results.

Learning Outcomes:
- Delegates will learn which key commercial concepts they should test with a pilot.
- Delegates will learn how to design a pilot to test as many of these concepts as possible.
- Delegates will learn about some of the logistical issues they will have to overcome to run the pilot through their institutions.