

2019 TA Institute

Discussion Notes

Topic: Creative Funding Strategies/Finding More Sources of Unrestricted Funding

Notetaker: Abbey Alberico

Facilitator: Marc Tasse

Participants: Stephan Rock, Sally from Temple University, Marcia M. from New Mexico, Kerrie from University of Kansas, Sharon from Michigan UCEDD, Beth N., Colleen from New Jersey, David Rotholz from SC UCEDD, Lori Games from South Dakota UCEDD, Liz Perkins from FL, Rhonda Epplisheimer?, Chris from Oregon UCEDD, Derrick, Lauren, (didn't catch last name or UCEDD)

Background/Intro: The UCEDD Directors who attended this session discussed many examples and several strategies for creative funding versus relying on grant funding and finding more sources of unrestricted funding.

Discussion and examples:

- Kerrie- Her UCEDD is doing more work with licensing and commercialization offices. They built an internal data system to work with research groups, commercial industry partners, education partners, and going down a path to do licensing so their system can be integrated, and partners can login and enter their data. UCEDD maintains intellectual property and lawyers help them. 1/3rd of income data system makes goes to IT holder, 1/3rd goes to UCEDD, and 1/3rd to University. The 3rd that goes back to IT holder is royalty. Monies become a donation if it's decided to give it back to the university. The UCEDD is getting 2/3rd back instead of 50 percent. UCEDD doesn't pay extra for legal services. Their Innovation office helped them with this project. It was a two plus years process with many stops and starts. Future plans will be to start charging users in 5 years for a one-time use, and this will help UCEDD make money, so they don't have to rely on grants.
- Lori Games- South Dakota UCEDD developed a series of module trainings that align with standards of developmental disability case managers. They charge organizations for costs to photocopy and mail training modules to organizations who request it.
- Chris- Oregon UCEDD is looking into trademarking products, and one project is in earlier stages than Kerrie's/Kansas UCEDD's data system.
- Chris- Use DIBLES 1-minute reading/progress monitoring
 - They used to charge 1 dollar a student, and easy CBM for middle schools.
 - Worked well because it incentivized staff to work harder. But recently the university has taken away incentives.

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- Unfortunately, donations cannot be giving to UCEDD. All donations must go through the foundation. The university wants unrestricted gifts. UCEDD is permitted to have a donations button on website, but donation goes directly to foundation and donor has to write that it is to go to the UCEDD.
- Stephan Rock – A challenge they are having is getting access to donors. Different colleges at University own different donations.
 - UCEDD must go through foundation officer to ask anyone, even families, for donations.
- Sally- Temple UCEDD puts on a play and a low-cost fabrication project. Temple University highlights an event every month and they do crowd sourcing and the UCEDD has gotten two events.
- Derrick – Our UCEDD is focused on specific project. They need a connected person who will reach the right people. They are able to fund small projects that collects donations of up to \$1,500 at a time, and these are adding up.
- Chris from Oregon UCEDD – Oregon UCEDD has mandated process for indirect funds; they will return a portion to the unit and these are unrestricted funds. Their number one incentive is to attract PIs, and give them back unrestricted funds
 - 90% of the 25% is returned back to unit (there was \$300,000-\$400,000 in one account after PI retired, and these carry over from year to year in cash). However, it takes time for the money to grow.
- Some universities get indirect funds back, but it's not much. For example, the South Carolina UCEDD gets 22%
- 50% of indirects come back to UCEDD center, but they must use those dollars for IT or HR functions – Derrick's UCEDD
- Rhonda E. – Is anyone doing anything around CEUs, online teaching?
 - Yes, some of them are
- Lori Games does online teaching – if they go through CEU approvals, UCEDD can offer student whatever fee and only costs university \$50 for CEU, and the rest comes to the UCEDD
- Stephan Rock- they charge overhead for keeping track of students who took online courses – this is what they get back for running courses
- A problem is that universities are really relying on tuition and they see UCEDD as competing for funds because of this. The University asks- “why wouldn't you just have the student register at university”
- **Question:** Anyone get any tuition returns at their universities?
- Stephan Rock- Reno, Nevada UCEDD can get funding from summer school because it's not a part of their state's reimbursement –, it's done through their Special Education program (combination of in person classes and online classes).
- Colleen, New Jersey UCEDD – they get what adjunct rate is, and UCEDD gets money back from CEUs
- Marc Tasse – whatever Neuroscience Department gets, the UCEDD gets for “Neuroscience for Autism” or “Introduction to Autism” undergrad courses, that has high number of students
 - 50 percent of money from tuition
- **Question:** Could you be paid in overload?
- **Question:** Do any UCEDDS get any return on fee for services in medical schools?

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- Marcia, New Mexico UCEDD – Yes, they do get a return on fee for services. Have historical contracts that pay for interdisciplinary services and they bill Medicaid, etc. and rest of money goes into unrestricted account
- Negotiated Medicaid administrative matching contract, and use state contracts that they are permitted to match. They match staff and clinic time that isn't billable (allows for capacity building and paying for family services), and they keep all the revenue they generate. They pay for rent and all other costs.
- Kerrie, Kansas UCEDD – University is talking about shutting down some of UCEDDs special feeding clinics because they can't pay these special clinical staff enough to fulfill their salary.

Strategies:

- Lori Games – fixed price contracts are sometimes available. UCEDD's Special Education unit wants to do strategic planning and calls a director to do the planning. For \$10,000 the Director will lead group to develop goals and objectives – Director does the work and delivers the project.
 - David Rotholz at SC UCEDD has done this type of project too, but SC UCEDD has a rule that they can't pocket more than 25% of unrestricted funds
 - Derrick – you can try to work it through a fixed price contract in a way that would absorb those costs. However, if you have extra money – they will tax that at full indirect rate. Lori says it's different at their UCEDD, and they don't get taxed on extra money, they get all that money.
- Chris, Oregon UCEDD – Bill Walker, a previous director, went to the provost about training grants from the office of Special Education. Bill made a deal called returned tuition; and if they receive training, their tuition is returned to their department. The university used to give the UCEDD this money back but now it has to go back to university spending on administration, etc.
- Lori Games – Your UCEDD can run a conference and then keep the conference fees. These are unrestricted funds the center can get back.
- Lori Games – Another idea is capacity building in state. For example, like needing certified teachers, and they UCEDD may get asked to put together a special cohort to select certified teachers from. Then the UCEDD gets paid for selecting/building the cohort of teachers to recruit from.

Questions:

- **Question:** Anyone get any tuition returns at their universities?
- Marc Tasse: How many of your centers pay rent for UCEDD? Colleen, New Jersey UCEDD- does pay a little. Most session attendees UCEDD's don't pay rent.
- **Question:** Could you be paid in overload?
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Follow up for TA Team:

- Question and [Follow Up for TA Team](#): Sally, Temple UCEDD- Can AUCD do a webinar for creative funding strategies for UCEDDs who don't have an Innovation Office?