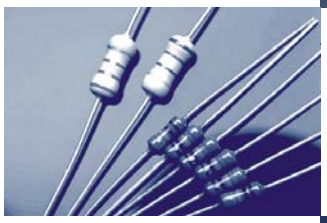
Kansas City Region Information Technology and Life Science Initiative: Focus Group and Interview Report

Prepared by
Susan M. Mercer



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PRI

Prepared for KCCatalyst

August 24, 2004
Report #270C

Policy Research Institute
University of Kansas
Steven Maynard-Moody, Director

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Acknowledgements

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The Kauffman Foundation, KCCatalyst, PRI, and KU are not responsible for any opinions expressed in this report.

Executive Summary

The Policy Research Institute's Center for Economic and Business Analysis at the University of Kansas conducted three focus groups with current life science leaders in the greater Kansas City region. Additionally, two individual telephone interviews were held with information technology and life science leaders from the region who were unable to attend a focus group session. The purpose was to gain important insight to assist leaders with creating a regional strategic roadmap for life science and technology in the Kansas City region.

Two major themes emerged from the focus groups and interviews: venture capital and upper level management (early stage entrepreneurs) are in short supply regionally. Both are also difficult to attract to the area. In most discussions, both topics came up quickly and the discussions often intertwined. Participants overwhelmingly agreed these deficits were hampering growth in the life sciences. The IT participant agreed that venture capital was a major issue, but believed recruitment was no more of an issue here than anywhere else.

The region's reputation for a strong work ethic coupled with its central location and low cost of doing business relative to the coasts gives it a distinct advantage over some other locations. Generally, participants felt they were able to overcome recruitment issues in most cases, especially when the potential employee has a local connection or comes for a visit.

In order to encourage more rapid technology-based economic development, participants suggested that politicians needed to get behind existing initiatives and help secure state and national level funding. At the same time, local organizations need to continue their efforts. Participants also wanted to see better cooperation among industry and area universities.

Participants likened the region's relatively slow growth in life sciences to a chicken and egg situation: more venture capital is needed to jump start the life sciences initiative but in order to attract venture capital to the region, venture capitalists need to see more development activity. Virtually all participants agreed that developing the region's life science potential would take time. Several compared their efforts during these nascent stages of the life science and IT initiatives to the work of the pioneer farmers who broke the first sod. Consequently, they believe their work will pay off in the long run for future life scientists and technology innovators.

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Overview

The Policy Research Institute's Center for Economic and Business Analysis at the University of Kansas conducted three focus groups with current life science leaders in the greater Kansas City region. Additionally, two individual telephone interviews were held with information technology and life science leaders from the region who were unable to attend a focus group session. The purpose of the research was to identify important background information for creating a regional strategic roadmap for life science and technology in the Kansas City region. Specifically, the focus groups and interviews sought to answer five important questions:

1. Where does the Kansas City region stand now relative to its competitors in life science and information technology?
2. What are the barriers to the Kansas City region becoming a leader in life science and information technology?
3. How can those barriers be removed?
4. What must happen in order for the region to succeed?
5. What specific (niche) opportunities exist in the region within life science and information technology?

Methodology

Participants were identified and recruited by KCCatalyst and included current leaders and researchers in information technology and life science industries from the greater Kansas City region. Each potential participant received a letter from KCCatalyst, the Ewing Marion Kauffman Foundation, and the Kansas City Area Life Science Institute (KCALSI) explaining the research project and asking for their participation. The letter is included as Appendix A.
All focus groups were held in January 2004 at the Ewing Marion Kauffman Foundation in Kansas City, Missouri. Each focus group included 2 to 5 participants and lasted approximately two hours. After the focus groups were held, university researchers attempted to schedule interviews with the identified technology and life science representatives who were unable to participate in the focus group sessions. E-mail requests were sent and follow-up phone calls were made requesting their participation in a brief interview to be scheduled at their convenience. The e-mail request is included as Appendix B.

Telephone interviews were conducted in February and March 2004. Interviews were scheduled in advance and lasted approximately 15 minutes. In the e-mail request, potential participants were also provided with the list of interview questions and given the option to answer the questions by e-mail, although none chose this option. Overall, 32 individuals were invited to participate in the study. A total of 12 individuals participated in the focus groups and telephone interviews for a response rate of 37.5 percent. Table 1 provides a breakdown of participation statistics.

The focus group protocol remained consistent throughout the three focus group sessions. However, minor adjustments were made during the discussions to gain more specific insight based on the composition and knowledge of the group. The protocol is included as Appendix C. Each session was moderated by the same PRI focus group facilitator. Other project team members were present at two of the sessions. Each session was audio-recorded and the facilitator and team members took notes.

The focus group protocol was modified into an abbreviated format for the interviews. The interview protocol is included as Appendix D. The interviews were audio-recorded.

The facilitator analyzed the focus group sessions and telephone interviews, and also wrote this report.

Table 1
Focus Group Sessions and Interviews

Date	Participants	Number
	Focus Groups	
Jan. 20	Life Science Representatives (Researchers)	5
Jan. 22	Life Science Representatives (Business & Researchers)	3
Jan. 29	Life Science Representatives (Business & Researchers)	2
	Interviews	
March 8	Life Science Representative (Business)	1
Feb. 24	Information Technology Representative (Business)	1
	Total Participants	**12**

Report Contents

This report summarizes the overall findings, organizing the results topically, including discussions of similarities and differences in views between participants or participant types. The report includes many verbatim quotes illustrating the various participant points of view.

Care should be taken in generalizing the findings, since the number of participants is too small to be fully representative of the general population. As there was only one participant representing the information technology sector, no specific conclusions can be drawn concerning that sector. However, highlights of this interview have been included within the relevant topical discussions and are clearly identified.

General Description of Participants

The life science participants included university and institutional researchers, physicians active in research, industry executives, and university research administrators. The IT participant was a long-time entrepreneur.

Findings

Barriers to Industry Success

Access to Venture Capital

Nearly all participants agreed that access to venture capital was perhaps the most significant barrier to growth in the life sciences.

With many leading life science communities located on the coasts, participants stated that venture capital was more readily available in those locations. San Diego, the San Francisco Bay Area, and Boston were highlighted because of their concentration of venture capitalists. Not surprisingly, these locations were also at the top of their lists when asked about the leading regions for life science activity.

Participants noted that venture capitalists expect entrepreneurs to relocate their businesses so that the investor can keep close tabs on the company. For investors, this reduces some of the risk associated with investing in start up operations.

> *They want to be able to effectively control it. They want to guarantee success because their investors have put a lot of money and responsibility on them. They can't do that from 2,000 miles away.*

One researcher recently found out first hand the importance of location when negotiating venture capital deals.

> *We sat down at one of the nicest restaurants I've ever been to…and about five minutes into the conversation, he turns to me and he says, "When are you ready to leave for San Francisco?" He jokingly pulled out the checkbook and said, "$15 million if you move the company to San Francisco." And I turned to him and I said, "Ok, let's start it." I mean he was faking, he was calling my bluff. And I called his bluff. Now, we haven't got the check and we're not moving the company to San Francisco. But that's what it took… And that got us to, 'Ok, let's discuss the next step.' That restaurant and that conversation would have stopped at that very moment if I wouldn't have been willing to say that.*

Another researcher described an alternative approach to finding venture capital.

> *You get a good idea. You mortgage your house. You do as much private banking as possible. And then you decide you're going to sell off some portion of your company. So you go on a road show and see who bites.*

But for some researchers, a road show would mean shutting down their operation because they are the entire company.

> *You need the money to get to a critical mass and you're in that catch 22.*

Other participants said not all entrepreneurs in the region want to re-locate and they would like to see venture capitalists take a local interest. However, they noted that getting venture capitalists to pay attention to a particular region is not an easy task.

> *More frequently, companies go where the risk capital is because the risk capital's not willing to move. …If you're chasing capital, the challenge is going to be getting the capital you need without having to relocate.*

> *It's much easier to start a company there [coasts]. In terms of getting venture capital, it is much, much easier. Also, if you are right there and starting a small company, you can get opportunities to work with the larger companies and contract.*

> *[Venture capitalists] tend to look in obvious places. They go and start turning stones over where they think they're going to find something. So, you're not going to get a lot of my classmates coming down here trying to find something, because it's not an obvious and evident place. They're looking for something that's discreet enough so that nobody else knows about it so that they can garner some extraordinary profit, but it's at least evident enough that they, in their educational background and training, know enough that they can find it.*

But participants questioned how to improve entrepreneurial activity in life sciences without an infusion of venture capital to get it all started.

> *You can get venture capital to come here if there's a high deal flow, if they see a lot of things coming out of the area. So it's a chicken and egg. You need the money to get the thing started to get the deals to get the money. So if we started to have a flow of drug development or things in the life sciences, and the deal flow picked up, money would come from other places.*

One suggestion was to find regional investors to become involved in local venture capital efforts, but participants were skeptical about the practicality of this.

> *There's a lot of money in Kansas City. There's not a lot of money for high risk in Kansas City, at least what's* ***perceived*** *as high risk. In fact, there's money that goes into stuff that's higher risk than what they think.… What's needed is a confidence factor and some way to pool money so the risk is diversified. No one is going to concentrate risk in this area. And it's gaining the credibility and the confidence of the people with the money, that this is going to be a reasonable investment opportunity, not risk free, but not as high risk as they currently perceive it to be. There's a lot of money; it's hard to get it in risk and ventures.*

> *What it does require is people in the Kansas City area who have a lot of money and are willing to put it into this kind of thing. There are a lot of people with a lot of money. I don't see them putting it into the kind of things we're talking about.*

Difficult as it is to do, at least one participant thought there was hope for attracting venture capital without resorting to relocation.

> *We'll never get anyone to say, 'We're going to create a fund here in Kansas City and we're only going to invest here.' They will never do that. But we might be able to get someone to create a bioscience fund and have an office in Kansas City to screen investments here and let them stay here.*

One participant was reluctant to say that more venture capital was needed in the region. He has experience with attracting outside dollars to the region and believes it is always possible to find funding for meritorious projects.

> *Here's my caveat: Given the deal flow that we have today, there's adequate venture capital. Now the question is, if there was more venture capital, would we get more deal flow? You know, we raise money for the companies that I chair the board of, and we raised money out of New York and brought it to Kansas City. So, good deals get funded.*

Some offered evidence that venture capital funds could be raised here. One researcher pointed to a successful pharmacy company that was started elsewhere by a researcher with local ties who brought the company back to this area and then raised $14 million. Similarly, a life science business leader spoke of a recent conversation he had with venture capital firms:

> *We also do some risk sharing, where we may invest cash or services at no cost or a discounted cost. We may invest those in a product or a company or a technology. Some of the times, I've had at least two venture capital groups that have come in to meet with us. One from San Francisco said if we do a deal with you and we would consider moving here because the whole economy in the state of California – they don't feel it makes sense for them to run a business out of that state. They said we would have no problem relocating our entire business here. Now it never really materialized or came to fruition. But we've seen that twice. In this example I had, this was basically a venture capital group that wanted to spin off a virtual drug company.*

From the IT perspective, the interviewee had a similar view to the majority of life scientists.

> *From a pure start-up point of view, which is my reference point, access to capital needs – venture capital–is probably the biggest [barrier to locating in Kansas City.]*

There are funds available [in the region] but for the amount of people that want to get to those funds, yes, it's not sufficient. We've had, from an IT point of view, high tech point of view, different venture firms try to invest in this market. Whether it be for the timing being bad, which is a definite part of it, because when things were going great in the late 90s, then people started coming to this marketplace. The market kind of went bust and people went away with not too good of results. So, it will be tough to get those folks back. So I think you're going to have to see more of a grass roots approach, unfortunately, here for awhile to establish some successes and get whatever support you can. From there, then maybe you might be able to attract some outside dollars. We cannot just fund it ourselves, it seems.

Availability of Top Level Management

The second major theme that emerged from the focus groups and interviews was the lack of the availability of top level management, particularly management with an entrepreneurial mindset that can take a young or struggling company and make it successful.

Early stage venture guys and gals. That to me is the biggest gap that I have.

Some indicated that having strong, proven management in place is so important that it can, in fact, decrease the need for companies to be located near venture capital.

It comes back to relationships… All venture capital doesn't have to be near the investment. The ones who sign on to deals [will invest,] as long as they know there's someone there to manage it that they know and trust.

Leadership issues, I think, are the biggest issue. Capitalization will sometimes come if you can identify the right leaders.

Participants agreed that early stage managers are especially important in young companies where the researcher or inventor lacks business interests or skills. Several university researchers discussed the pitfalls of trying to get a company off the ground while juggling academic duties and other research pursuits.

The scientist has to understand they don't have the skills to manage or raise the money.

If we had wanted to work in the corporate world, we would have done it years ago. So we didn't set out to do this. But it is an opportunity. And it's right in front of you and you have some resources, and some people will go so far as to give up the university job. But other people are not prepared to do that.

Participants said proper management sometimes can mean the difference between success and failure.

One of the other companies I'm associated with is dead because one of the other inventors wanted to dominate the company and he didn't want to take risks. Which I think of the three companies we started, it could have been the best, but it's actually the worst because it was not handled right.

According to participants, not only are these entrepreneurial managers important, but also they can be difficult to attract to the region. Several explanations to this were offered.

People on the coasts don't even look at Kansas City as a major city.

The pool of managerial talent is much greater (on the coasts.)

If it doesn't work out [here,] they're looking at a major upheaval again. Whereas in San Diego and Boston, they go to a venture, if it doesn't work out, there's another venture that's in need of people. They can hop over. So, there's a pool; they can float around. They know if this one doesn't work out, they can find another one. That's not true here. It's a critical mass thing.

I've got friends of mine on the East Coast and they've got the same problem. It's not unique to us… I think finding early stage management is a problem.

But they said it can be done and many have learned that finding managers with a local connection is the key to successful recruiting.

Recruiting [managers] to come here is a challenge, unless they have been here. We find the alumni base, the association base, is how we attract people here.

The easiest people to recruit here are people who have lived here.

We can certainly find people who want to come here.

Participants said offering more money would not aid efforts to attract management to the region.

The kind of manager you want is not driven by salary. They're driven by wealth creation, which means they can take a company and turn it into a zillion dollars and take a fraction of that. …You can buy them on a competitive package that says they get a piece of the action. … For the entrepreneur, it's not about the cash now. In fact, I'd be very worried about an entrepreneur that wanted to come in and manage a company for a $200,000 salary right now. What you're really looking for is a serial entrepreneur, who has enough money to live on that isn't worried about salary right now. They just did a deal and they're looking for the next one and they don't care about getting paid now. They're interested in creating the next increment of wealth…Steve Jobs is a classic serial entrepreneur. People who have been successful and made other people money have a great ability to attract new money, even if it's a dumb idea.

The IT representative was generally more optimistic about filling these management roles.

You're always able to find certain talent, I think, to fill certain needs. And if not, if you have to bring them in, no matter if you're in New York City, or in San Francisco or Chicago. I mean companies there are bringing people from Kansas City in to run their businesses. I think then it becomes more of what line of business you're in, if you're looking for someone with that experience, or if it's a personality, and you have to bring them in from outside. There are so many variables there.

Recruiting to Kansas City

Although money was not believed to be a factor in attracting serial entrepreneurs to the region, participants said salaries and other resources are very important when recruiting scientists and researchers to the region.

If you can offer world-class packages of support you can get world-class people, and particularly if they see other world-class people that are there. They begin to see colleagues that they can interact with.

Some [scientists] want the security of living in New Jersey, because I know that tomorrow if I quit working at BMS, I can go to Aventis and not have to relocate my family. But there are tons of examples of where this [region] does appeal to folks. And it is an incentive. We really try and push those points when we're recruiting and interviewing folks.

But there are also a number of people who are looking for opportunities in this region. This is usually because they have a local tie – their family is from here or they went to college in the area.

We are producing many graduates. We have many, many post-docs. And interestingly enough, once people have lived here, they are very reluctant to leave. They would just love to work here, to work in a company. I still get to talk to alumni of the department who are telling me, if you ever have anything, I would love to come back. So it's a bit of a myth that nobody wants to work here. Certainly the people who came from here and are all working now on the east and west coast, they wouldn't mind coming back.

The easiest people to recruit here are people who have lived here.

Getting people here to experience it first hand makes a big difference.

From my perspective, 90 percent of the time it's an easy sell with the school systems here. Make sure schools stay good and we'll stick around.

One life science business leader said programmers and engineers were difficult to find locally, but recent trends had improved recruiting conditions.

> *It's not the best place to find programmers and engineers and so we recruit quite a bit from Iowa State and places like that. Some recruiting from KU. So that's our challenge, finding good engineers. Particularly with the economy, we've found that, I've been hiring engineers from California and Berkley and making them relocate. Right now at least, they're willing to do that because they have fewer options.*

> *Did I want to move here from Seattle? No, but this is where the job was. Coming from the northwest, it was very hard to come here. Now that I have kids, I appreciate it. I had a very difficult time leaving Seattle to come here and this was definitely going to be a temporary stop. You end up making home where you lay your head at night.*

The region's IT labor pool is strong, according to the IT participant.

> *I haven't found a problem with it in the past and I don't foresee having a problem with it in the future. I think there's an ample supply of bright, intelligent people. I think the local colleges are doing a great job in producing graduates with the various different degrees, business management to IT, along with the vocational schools, the DeVrys, that are providing a wealth of good people across the board. I don't think it's a problem.*

Similarly, he did not find recruiting to the area a challenge.

> *People always look at you funny at first, then when they get here, I think we've done a pretty good job of not only getting them here then. Then once they're here and they change jobs, they tend to stay in the area instead of going back to where they came from. I think it's a matter of getting them here to see what we have to offer. A lot just depends on what their personal values are. If someone is married, no kids, and they've been living in Chicago and they love the night life, and they have no intents of having kids, it's going to be tough to get them here. If someone's going to be raising a family and still wants some of the theater but not living in the city like they did in New York or wherever, then we've got something to offer. It's a matter of also being realistic in terms of who you're recruiting and matching that personality profile.*

Other Challenges

Few other topics emerged in the discussions. Most were viewed as minor problems that could be easily overcome. Nevertheless, they are mentioned below.

> *As I travel about 75 percent of the time, probably the most difficult thing is not having an airport with a hub. But the things that make it difficult for our business… being located in the center of the country, away from a lot of our clients and activities, makes it a little more challenging. We actually have very few clients here in the Kansas City area. Most of them are on the east coast and west coast.*

> *It would be easier from a travel perspective and a communication perspective [if our business were located near our clients,] but it's not paramount. Our business is so diverse that there's probably no, and it's so big that there's not one geography that could support it. Yeah, it's not really a big deal.*

Lack of funding for technology/invention development prevents many good projects from going forth from the universities. Research administrators said they simply lack the resources to move most projects forward. Similarly, the inventor doesn't have the resources and can't get the attention of larger companies or venture capital organizations.

> *Almost from the get-go we're asking is there a likely licensing partner for this technology to cover the patent [cost]? And if we, or the inventor doesn't know who is likely to license the disclosure of the initial patent, too often we say, 'Well, we'll return this intellectual property to the inventor and you're on your own. Go see what you can do with it.' And I think we're leaving some good ideas on the table.*

One researcher reported that it costs about $100,000 to file a drug patent worldwide—about the same amount his university has available annually for patenting expenses.

Pathways to Successful Initiatives

Many participants argued that it was fine to look at the current industry leaders for ideas but that ultimately, this region needed to discover its own talents and make the long term commitment to nurture those niches. Area universities were often mentioned as good places to look for clues about niche opportunities.

> *We're not going to be a Boston, we're not going to be a San Diego, we're not going to be you know… and the list goes on and on. But we can be, what we can be is a niched microcosm of a bigger life sciences community – pick out a handful of things and do them real well. Put Kansas City on the map because of the collaboration that takes place across the life sciences and IT. Be an area that is strong in communications and commitment.*

> *We need to look at what are our strengths and look at our universities for our strengths. Identify those in the long term planning. We don't want to do something if we don't even have good expertise here. Or if we feel we need that expertise, then maybe there needs to be some discussion about that and maybe it needs to be developed.*

> *All universities, even the great universities, are not great in all fields, only in niches. I think they'll evolve. That's the way they always do. The spectrum is life sciences, human sciences, animal, plant. Among those, some niches will evolve. Where is the prime expertise now? That's where it's likely to come from.*

Strategic Opportunities

Participants had many ideas about potential areas to focus on when developing the region's life science initiative. They also offered some clues about how to develop these niches. Examples are included below.

> *I came back to academia for several reasons. I think in my area, which is ag[ricultural] biotechnology, we're poised really to have a series of rapid advances in terms of applying ag[ricultural] biotech to solving problems in agriculture. The reason I'm saying that is because companies like the one I came from are invested heavily in generating genomics resources, but I think that the real value that's going to be extracted from those resources will be in proportion to how many bright people who understand the biology have access to those resources and are able to translate an understanding of the underlying genetics and to value added trades. I think that pool of talent is in places like Kansas State.*

> *Something we've encouraged KCALSI to think about is that the Kansas City area really should be thought of as the area extending from Columbia to Manhattan because Kansas City has traditionally been the urban center for this large agricultural region. …We need to think about agriculture in different ways in the future and we need to think about the hub Kansas City provides.*

> *I actually think there's an opportunity for us in the processes to move technology from research to the commercial market. And the reason I say that is having a foundation that's focused on entrepreneurism in the Kauffman Foundation. I also say that because there's a handful of universities that are experts at it, but there's no region that's an expert at it.*

A few participants offered very specific ideas about niche opportunities. Human health, animal health, agricultural chemistry, orphan drug development, animal plant science, vaccine development were some of the areas named as having potential.

> *Bayer animal health is a big player and they're certainly tied into the life science initiative. There are other little tiny niches. Orphan drug for cystic fibrosis treatment, we actually think orphan drug has good potential because big pharma is not interested…$100 million potential.*

One group discussed the potential market for drugs targeting treatments of diseases in developing countries. According to participants, the large pharmaceutical companies are not interested because they "don't know how to get paid." Orphan drugs were noted by several groups as an option that should be carefully considered for development.

Utilizing the expertise of several area companies, a few participants talked about the potential to streamline healthcare delivery and also impact healthcare quality by improving the flow of information from treatment discovery to patient care protocol. Along those same lines, they discussed the opportunity for figuring out how to consolidate the massive amounts of data that exist in a multitude of formats into a common format that would allow meaningful analysis to occur.

> *My view is that one of the real opportunities in Kansas City that we're not leveraging is there is a need for interdisciplinarity in research. At many of these centers, there are these huge silos of remarkable research expertise, but getting the multiple disciplines to work together translating discoveries into practice...*

> Another participant agreed and added to the discussion: *There's so much valuable data, but very few people actually take the opportunity to consolidate it in a common format. So you have all sorts of observable trends, but very few answers to the questions… Why is esophogal cancer for white males just exploding since the 70s. Beats me. It doesn't correlate to smoking habits, but it's going on. The data is probably there.*

> *We need more creative ways to overcome the inertia to progress. I think we can recognize opportunities that other cities have not yet taken advantage of. I think we could recognize the opportunity to look at translational medicine. Look at healthcare delivery and healthcare quality. We are so short of our potential.*

From the IT perspective, software development was named as an area of continued potential in the Kansas City region.

> *In the software arena, I still believe there is tremendous opportunity as far as software goes, and that people shouldn't automatically say software is a thing of the past – 'Let's strictly go to health sciences.' Yeah, I think health sciences is a huge opportunity and one that probably, from an emerging point of view, is more emerging, versus software, people sometimes look at as getting into a mature state. But that doesn't mean that the opportunity for growth isn't there any longer. I still think there are plenty of opportunities in the software arena for people to either get in businesses or grow their current businesses with the way technology's changing industry, period.*

The Kansas City Advantage

There are a number of reasons why the businesses who chose to locate here did so. For some, the decision was basically the result of Kansas City being home to them. But their secondary reasons for locating here included factors such as the high work ethic of the local workforce and the low cost of doing business, relative to other locales.

> *We can probably get human resources at a lot better dollar value [here]. We don't have a lot of cost of living constraints as a San Francisco or something like that. So we're able to get, you know, just the good Midwestern button down work ethic at reasonable prices.*

> *And what makes it to be an ideal location is the philanthropic community, the broad diverse background, and availability of opportunities in Kansas City, culturally and technically and scientifically. And access to a good strong workforce.*

Kansas City's central location relative to either coast was cited as a factor that made doing business from here convenient.

> *Half of our associates don't even live here in Kansas City so everybody has laptops now and virtual offices and you buy plane tickets. Air travel is, I think, our second highest expense item after labor. We travel. We do ask our associates to be located near a decent airport. We don't like them to be off in the woods somewhere. But we're very, very mobile.*

> *It's a central location, big city environment, and lower costs…and relatively easy to get from here to there. It's closer than India. East Coast, West Coast, one advantage of being here rather than one of the coasts, you're in between the two time zones and you can interact really easily during the day with people on either coast.*

The IT entrepreneur chose to stay here for a number of reasons, but largely because employees have a strong work ethic and the cost of doing business is relatively low.

> *Since I'm from here, obviously that was the first and foremost thing. The work ethic has always been good here. My experience in 20 plus years, having different start-up organizations, that has been a great reason. Number two, and it ties into that somewhat, the wage structures make it affordable and attractive to locate start-ups here in this environment as well.*

Important Next Steps

Participants were asked to discuss what needs to happen next in order to move the life sciences initiative forward.

> *If you had one single thing to do, it's create a pool, a bio/life-science pool of venture capital or institutional funds that can be used to support start-ups and attracting small pharma[ceuticals] and companies. Money does work.*

> *Incentives, and trying to do things to create the culture and pool of people, and the potential institutional linkages. You shouldn't discount the value of K-State and KU. They are technological bases, they are assets in these areas that create people and they create technologies that facilitate the spin out of people and technologies, of people out of the institutions.*

> *I don't know that we've got optimal cooperation from the life sciences companies in this area. For example, we do very little with Stowers. We work with a couple of these small niche service providers. It strikes me that maybe there could be better cooperation. …So, I would say, culture, the life sciences companies need better cooperation and we should be doing a better job of linking with K-State, KU, and MU.*

> *If you want other things happening, the first thing is to have life sciences. Investment in basic sciences is needed. Endowed chairs in universities – how does the region compare? What about life science grants? Number of good papers coming out of this area? Not enough investment in life science is happening here.*

Some indicated the problem was more basic—facilities. One university researcher said his institution was hiring dozens of new faculty members but that there was no space within current facilities even for offices. Others lamented space issues, crumbling facilities, and outdated laboratories.

> *What's happening is faculty members are coming and they're not in the same building as their colleagues. So that's going to hurt us in recruiting. That's going to hurt us in collegiality. It's going to hurt Ph.D. and graduate students. This is a major problem. As we grow in research, we need additional space for labs. Our leadership is fully aware of that, but we need money for more buildings. If an individual or an organization really wanted to make a difference to the viability of the life sciences, at our campus anyway, this would be one extremely viable way to do it.*

> *This is the only two hours I've spent all month where I wasn't thinking about space issues.*

Having an environment that includes a range of cultural opportunities was identified as an important component of a successful life science and IT initiative. Participants said sports are an important component of the cultural environment too.

> *If I think on Chiefs days, Fridays are our casual days, and I think how many people are walking around in Chiefs sweatshirts. I'm not sure it's cultural. In terms of interests for your employees, I think there's value there.*

> *You need a blend [cultural, sports] because we're all different.*

> *The key note speaker [at a recent life science banquet] focused on culture and was comparing and contrasting the successful areas like Silicon Valley and so forth, and how important culture, some music, arts play.*

> *It's very difficult to get big pharma[ceutical] companies to move. That's not cost effective. But creating small companies and getting small companies to move here, well they're going to move here if they think there's an exciting atmosphere that's going to help them be more successful. Like a pool of people and talent and learning from what the other ones are doing across the street, all those kinds of things.*

The IT participant believes in focusing on moving forward.

> *I guess sometimes it just comes down to 'hey, just get after it and get it done,' instead of complaining about the certain things we can't get done. There's plenty of opportunity.*

Important Players

A number of entities were mentioned as having important roles to play. KCCatalyst, KCALSI, The Stowers Institute, Ewing Marion Kauffman Foundation, all the area universities and medical centers along with the region's industry leaders and politicians at all levels were named as key partners for these initiatives.

> *I think the Life Sciences Institute has to be successful. But other than that, I think… our strength is in a little bit [of participation and action] from a lot of different people as opposed to one organization doing the heavy lifting. I just think that's the case.*

The IT perspective did not vary from what the life scientists said. However, he did offer a word of caution about the time it would take to bring the vision to fruition.

> *Well, success breeds success, as far as that goes. That's a part of it. City leaders, politicians that can help drive that. I think that's going to be an impetus to it as well. What's going on with the Stower's Institute is great in terms of the attention that their getting. But it's obviously well endowed, in terms of having the funds to go out and attract top notch people. Top notch people attract top notch dollars too. It's kind of chicken and egg too. Also, grass roots – entrepreneurs, people who have been involved in the industry, to help support that in various different ways, whether it's time, giving that back to support the up and comers, is an instrumental part of it. I know there are different initiatives going on too. Some things just take some time to happen. Silicon Valley didn't happen overnight. It just didn't. Route 128 in Boston didn't happen overnight. So, you can't get from A to Z overnight. It just takes some time too and some successes behind you or under your belt, I believe.*

The Role of Government and Politicians

The majority of participants believe government has a very important role to play in moving the life science and information technology initiatives forward. Particularly, Congressmen and Senators were identified as the key players because they could push for resources at the Federal level.

> *If you want to get money in the system too, I think it's easier for the Kit Bonds to go up to Congress and say, 'We do not have good quality healthcare in Kansas City. We have disparities in care. We have outcomes that are substandard on the basis of race or on the basis of gender. It is the mission of the Department of Health and Human Services to eliminate these disparities by 2010; we need $150 million for Kansas City to be a pilot center for the eradication of these disparities.'*

> *That's exactly right.… That's how the Moffet Center in Tampa did it. And you don't bootstrap it by taxing your local population. That's not going to work. It was Congressional intervention. It can come out of centers where you wouldn't expect it. I think H. Lee Moffett Cancer Center in Tampa's an interesting example. Right? Who cares about USF [University of Southern Florida]. USF medicine, research, you know, football. It's not really an academic powerhouse. And out of nowhere, you get, I think the number three volume-wise adult oncology center, huge research institute. They're hiring like crazy. It was really a Congressman that really went to bat for them in the beginning. They went from 0 to 60 in 12 years.*

Several pointed to examples where politicians had helped bring attention and resources to a particular region or industry.

> *Well, I studied Research Triangle…First off, it took it 25 years to get started. They were basically back hills land. Until the governor got IBM to commit to put an R&D facility there, and then quickly followed by an NIH facility, nothing happened. Those were the catalysts. Having said that, there's not a lot of interaction (now) between the companies. There's some interaction [now] with the universities but not a lot, surprisingly. But there is a labor pool that's there. But these companies, in fact the way the research triangle is designed, you can't even see your neighbor, let alone reach out and touch them. They're kind of isolated. But there is a floating labor pool and people do float*

around to different companies in that area. They had a vision: 'This is going to be a research triangle park and the universities are going to play the catalytic story and may be a resource, a people resource and some access.' But for a long time it was really a haphazard development for decades. It really went nowhere until it had a political kick-start.

While participants were skeptical about the feasibility of venture capital funding coming from government sources, they believed tax incentives were a way the government could help.

Direct government money is difficult. The closest working model is K-Tech. Ad Astra money went away…you don't hear about it anymore. When something fails, everyone wants to know who to blame. Then you have political interests…

The government's not very good at venture capital. Tax incentives are about the only way government can help.

However, the IT participant was open to the possibility of government investment in start-ups.

So I think, state level, looking at different funds to fund new start-ups, things of that nature, would be great to have. No doubt about it.

Participants were very interested to know more about the Kansas Bioscience Initiative. At the time of the focus groups, little information was known about the initiative. Although participants had concerns about how it would be set up and operated, they were hopeful it would provide assistance in moving the Life Science Initiative forward.

Targeted Networking

When asked about networking, participants were generally cool to the idea. In many cases, they stated that they believed enough had been done already and that it was now time for action – they know who the other players are in their industry, they're ready to get to work.

[We need a] collaborative culture, it's not that people aren't talking to each other. The last few years we've been getting together and talking all the time.

I cannot complain that I don't know enough about what people across town are doing, or in Lawrence. Now there needs to be some decisions that involve investment or attracting human capital, most important at the investigator level, but also at the level of real smart administration with a vision who can now raise money, build this infrastructure. I think we would all be disappointed if the outcome of these meetings is the suggestion for coming up with a few more formats for people to get together in meetings. I think that's good but it's already happening. Professionals in the community know enough about one another. The community at large may continue to need education. That will continue and it's good. I don't think professionals not talking is a bottleneck any longer.

But some participants saw value in highly targeted, specific events that were less frequent and more purpose driven.

Chambers have monthly events…. Monthly is pretty frequent. Quarterly is pretty good. Then it becomes meaningful. Maybe not a banquet, but maybe a buffet dinner and cocktails. Make it a social event with a program. It is hard to say.

Last year at the life sciences banquet, there were a couple of things that impressed me. One was, I was really surprised, and frankly I had no idea, the new bio-life science-type companies that were cropping up in Lawrence and Manhattan. I think most of us were unaware of that.

This idea of cooperation – San Diego Connect is a model worth looking at. They really get people to take time across industry to connect. When you do that, you might find some synergies. They can actually learn from one another or help one another. For the small business sector, it's particularly important and it can be stimulating. It also helps connect people with money.

One participant had an example of how such an exchange might be fruitful in creating an opportunity for cooperation.

I think, particularly in academia, maybe there is some researcher that has some model or has some sort of technology that maybe is in some way related to what we do. Put both those ideas together and maybe you create a commercial opportunity. Just to give you an example, we have some in vitro models in our laboratory that were developed in collaboration with [university] pharmaceutical sciences group. They had developed these models for their own academic interests and for their own research program. And we had a commercial application to that. We worked with them to take it to the next level. These were cell culture models. They trained our folks over at [university] and provided us with at least some of the initial cells and then functioned as consultants. Because pharmaceutical science is most of the stuff we do, we have a good relationship with them.

The IT entrepreneur was not interested in additional networking meetings and opportunities for some of the same reasons others mentioned.

I think it got to the point where it was too much. Therefore the whole value was diluted I believe. Invitations every month.… I think it got to the point where the value was diluted. It got to the point where the value was diluted for me. Was it really networking of people looking for jobs or was it really to move forward the opportunities that present themselves as an industry here in this town?

Examples of Success

In the course of the discussions, a number of programs, cities and initiatives were highlighted as examples of how other communities, entities, and organizations have succeeded. A few of these discussions are included below.

We need entities in this region that can serve as conveners for different kinds of networks. We need to increase networks across the region and within our region. But we need to bring people in who might not be here otherwise. I guess the one example I found myself thinking of as I was driving to this meeting is the Burl Ag-bio partnering meetings that happen in San Francisco every year by an investment bank called Burl & Company. They host a meeting every year that's very small. The people who take part are the heads of small companies. And then groups of people from big companies like Dupont, other large ag companies, and also venture capitalists. So the heads of small companies give non-confidential discussions of their company; the status of their technology. There are opportunities to arrange private meetings with the ones who are there with the potential to invest and the ones looking for investment. I would like to have more discussions like that in the region at an earlier stage, before we've decided to launch a company or not, to create more buzz around some of the ideas that are coming out of our faculty.

One focus group brought up the success of UT Southwestern as an example of success. They said it was important for the region's universities to have a significant level of financial commitment from donors. (Note: The focus group that brought this up was not the focus group of university administrators and researchers.)

UT Southwestern is a remarkable example. In the 1960s it looked like some WWII barracks. And now they have multiple Nobel laureates. Every time I go there there's a new 12-story building there. I mean it's an extraordinary example.… So, it's a theme that sort of circles around the university, that it's a source of the intellectual life that's going to give birth to a lot of capital and innovation and market opportunities.

Well, they know how to work with donors. Every thing there is endowed and named after someone.

St. Jude's Hospital was highlighted as an example of setting a clear vision and keeping the focus.

St. Jude's is doing something right now that's amazing. They went out and they're doing actual drug discovery and development and manufacturing. They're pumping out tablets now. They got good manufacturing practice, certification, they have good manufacturing facilities. When you think of St. Jude's you think of kids with cancer. I tell you the hospital and clinic is very small and the research center is massive and they're building on there. So the public image of what it is… they don't want you thinking of rats in cages and monkeys, that's not good PR. But that's what they're really doing. But they're trying to find a way to integrate the full cycle from discovery to patient treatment, outcomes analysis, surveillance. They're really focused on connecting that full cycle and that's one of the things I think makes them unique and powerful. They've got a vision. They sell that vision. And money just pours in. It's compelling. It's clear; people can understand it. I can't remember how much they raise on an annual basis. It's a phenomenal amount of money. It's that finding a way of connecting things that traditionally are separate disciplines in separate organizations with separate economic interests. That's really catapulted them over and above their peers.

Moving Forward

As the participants talked about the life science initiative, its barriers, difficulties, and setbacks, they were generally optimistic about the progress that has been made and their expectations for the future.

I'm not discouraged. I kind of look at it a little bit like we're the people that are breaking the sod, you know? Because you know you're not always the most successful farmer when you're the first to break the sod. It's the farmers that come along behind you. … I see these things as having an incubation period. It's going to take some time. We're learning by our own mistakes, what works and what doesn't work and what's important and what's not important. I'm optimistic that we will be successful.

I think one broader issue is, I think for the long term viability of a life sciences initiative, you've got to take research, you've got to bring it to commercial markets, you've got to create wealth, and then harvest that wealth and plow it back into the community in which it was created in. I think organic growth is more important than pulling people from away into the Kansas City Area. I think the people that are umping… moving based on personal… what deal they can cut in what location. I think they'll jump no matter what. And as soon as we don't have the tax breaks or whatever it is for them to be happy they'll be gone. That's why I think organic growth is important. It's just like me. I'm here because I like Kansas City. That's the reason. If I didn't like Kansas City, I wouldn't live here. So when you look at companies that are trying to go to the highest bidder to move. I think that's a bad model.

If you look at how long it took RTP [Research Triangle Park] to get started, it took a long time. It took a very long time. I think we'll have a steady increase in those activities. The whole thing could be anchored very, very well if some relatively major company was to say, you know I'm going to make Kansas City my base. That would have been the case if Hoechst Marion Roussell would have stayed in Kansas City. … HMR leaving was a major blow to this area.

It doesn't happen in three years, it takes a decade to really get it started.

I think people want this to succeed.… If you want this to succeed, you have a much better chance of succeeding. I'm actually very confident for the future.

Appendices

Appendix A

December 18, 2003

Dr. John Smith
XYZ Institution
1234 NE St.
Kansas City, KS 66160

Dear Dr. Smith:

We need your help! KCCatalyst, together with the Kansas City Area Life Science Institute and the Ewing Marion Kauffman Foundation have been working to complete a life science and technology master plan for the Greater Kansas City region. The ultimate purpose of the master plan is to insure strategic alignment across government, academia, and industry, and to provide local business, civic and academic leaders with a road map that will enable the Kansas City bi-state region to successfully compete with other regions in the global technology arena.

As part of this effort we have commissioned the Policy Research Institute (PRI) at the University of Kansas to complete several background reports which will help to clarify our region's strengths, weaknesses and opportunities as well as serve as a benchmark against which future progress can be measured. The completion of these reports requires involvement from a broad range of individuals in the life science and technology sector which is why we are writing you today.

To fully understand the depth and breadth of our regional opportunities, the PRI group will be conducting a series of focus groups made up of key researchers, business and civic leaders and other private sector individuals in specific fields of interest. The key outcome of the focus group discussion will be to gather responses to topics including:

- Identification of barriers to the commercialization of innovations in specific areas of interest;
- Additional support assets needed in order to form a successful clusters in a specific area of interest; and,
- Identification of current or projected projects with the potential for collaborative opportunities between the researcher and the private sector.

We have talked with Barbara Atkinson and we all believe you would provide important feedback. As such we invite you to participate in the focus group scheduled for January 20, 2004 at 1:30 p.m. that will be held at the Ewing Marion Kauffman Foundation. We ask only that you bring your experience and your opinions to what we believe will be an informative and useful session.

We thank you in advance for your cooperation and support. If you have any questions, please feel free to contact one of us and we will be happy further explain any aspect of the initiative.

Sincerely,

David Frankland
KCCatalyst

Lesa Mitchell
Ewing Marion Kauffman Foundation

William Duncan
Kansas City Area Life Science Institute

Appendix B

E-Mail letter soliciting participation in a telephone or electronic-mail interview.

As you may recall, you were recently contacted to participate in a focus group sponsored by the Kansas City Area Life Science Institute, the Ewing Marion Kauffman Foundation, and KCCatalyst. The focus groups are part of a research study by KU's Center for Economic and Business Analysis at the Policy Research Institute. The purpose of this project is to provide valuable background data that will lead to the creation of a regional strategic roadmap for life science and technology in the Kansas City region.

As a local leader, your participation is important to the success of this initiative. At the same time, we recognize the significant demands on your schedule and would like to make your participation as easy as possible by providing two options for participation. The first option is a brief 15 – 20 minute telephone interview to discuss your views on this topic. Mark Dollard from the University of Kansas Policy Research Institute will call by March 5 to schedule your interview.

If an interview is not possible, you may complete your answers to the interview questions (below) and submit them by e-mail to smercer@ku.edu.

1. What factors make Kansas City a good location for your business?
2. What factors make your business' Kansas City location difficult?
3. Are your company's business interactions (customers or suppliers & partners) primarily local, regional, national, or global?
    a. If your company's business interactions are primarily non-local, could they be better served through local interaction? (i.e. Is physical proximity to customers or suppliers & partners relevant to business efficiency or synergy within your firm or industry? Please explain.)
4. Kansas City aspires to be a leader in the IT/Life Science industries. Based on your own experience, what are the most significant barriers to achieving this goal?
    a. Can those barriers be removed? And if so, How?
    b. Who (organizations or people) must be involved if Kansas City is to succeed?
5. Are there certain areas (niches) within Life Science/IT where Kansas City has a significant opportunity to be an industry leader? (Please explain as specifically as possible.)
6. How important is access to venture capital for growth in the Life Science/IT industries?
    a. Is there adequate access to venture capital in the Kansas City region?
    b. If not, what can/should be done to address the issue?
7. Is there an adequate supply of skilled and talented workers in the Kansas City region for all levels within your company?
    a. If not, what is missing and how can the supply be improved?
8. Is there anything else relevant to this discussion that you believe is important for us to know?

Please note: While we will include your responses in the analysis, you will not be identified in any way and all individual information will remain confidential. If you choose to opt for the short telephone interview, your interview may be audio recorded. However, the recording will be used by university researchers for analysis purposes only and will be destroyed once the project is completed. If you choose to submit your responses via e-mail, even though we will make every effort to maintain confidentiality, there is a remote possibility that a third party may gain awareness of your participation.

Thank you for your participation. We appreciate your thoughtful responses.

Appendix C

KCCatalyst Focus Group Protocol

A. Introduction (15 min.)

1. Introductions: Moderator

2. Explain the idea of a focus group. Focus groups are a way of discussing a topic in a group setting to gain insight about that topic. This research is being conducted by the Center for Economic and Business Analysis at KU's Policy Research Institute through a grant from KCCatalyst.

3. Introduce the topic for the session: Today we hope to gain a better understanding of what your Kansas City area business needs in order to be successful within the industry (IT or life science).

4. Explain that the session will be audio recorded to assist with the analysis of the discussion. Explain that the identity of individuals will remain confidential. Encourage participants to maintain each other's confidentiality as well.

5. Guidelines for participation:
   - Speak one at a time.
   - Speak so that everyone may hear you.
   - Do not hesitate to disagree with others; there are no right or wrong answers. We are interested in the range of answers.
   - I may need to interrupt from time to time to keep the discussion on track.
6. Introduction of participants
   So that we may all get to know each other a little better, let's begin with each of you telling:
   - Your name;
   - Your company and position;
   - How long you've been in the (IT/life science) industry; and
   - What you like to do when you're not working.

B. Warm-Up (15 min.)

1. With what areas does Kansas City compete in attracting business investment in life sciences/IT?

2. If your business were not located in Kansas City, where would it most likely be located?

3. What are the primary factors that influenced the choice of your business's location? (Did you consider other locations outside the KC area? If so, where?

4. Has your business considered relocating to another geographic area in the past 5 years? Why?

C. Industry Synergies (20 min.)

1. Who does your business interact with on a regular basis?
   - Businesses
   - Organizations
   - Individuals (type)

2. Are they located here in the KC metro area?
   - If not, where are they located?
   - Could your business be better-served if you could interact with some of these entities on a local level? Which ones?

3. Is it more important/critical for some to be available locally than others? Which ones?

4. What kinds of synergies are possible between your business and other businesses in the area? (consider both potential and actual synergies)
   - Can those synergies lead to a competitive advantage?

D. Business Environment (30 min.)

1. Which elements of the business environment have the greatest positive impact on your business's success?
   - Cost & Finance (cost of doing business, state & regional tax incentives, non-tax incentives, startup services, state & local regulatory environment, local access to risk capital)
   - Supporting business (specialized laboratories or research facilities, opportunities for collaboration with other businesses in the region, availability of specialized suppliers of crucial goods or services, local business or trade organizations, "knowledge spillovers" and exposure to cutting edge development)
   - Labor (availability of management team members, availability of qualified scientists and engineers, available pool of skilled workers, local quality of life)
   - Education and R&D (transfer of knowledge from institutions in the region that perform basic research, collaboration with regional institutions in R&D ventures, related graduate or undergraduate programs, technical training, K-12 education)
   - Sales (local market for your business's products or services, transportation services)

2. Which factors do you consider to be the greatest threats to your business if not addressed?
   - Cost & Finance (cost of doing business, state & regional tax incentives, non-tax incentives, startup services, state & local regulatory environment, local access to risk capital)
   - Supporting business (specialized laboratories or research facilities, opportunities for collaboration with other businesses in the region, availability of specialized suppliers of crucial goods or services, local business or trade organizations, "knowledge spillovers" and exposure to cutting edge development)
   - Labor (availability of management team members, availability of qualified scientists and engineers, available pool of skilled workers, local quality of life)
   - Education and R&D (transfer of knowledge from institutions in the region that perform basic research, collaboration with regional institutions in R&D ventures, related graduate or undergraduate programs, technical training, K-12 education)
   - Sales (local market for your business's products or services, transportation services)

3. What action by the government, if any, can improve the business climate? ŸCost and finance (implement tax reform to encourage investment in innovation, simplify compliance procedures for government regulations, support the particular needs of start-up companies, government-funded venture capital)

   - Supporting businesses (provide additional support for specialized research facilities, catalyze partnerships between government, businesses and universities)
   - Labor, education and R&D (promote world-class primary and secondary education, promote specialized training and education programs targeted for your industry, increase funding for university-based research, increase funding for community college training programs, increase funding for university departments, address quality of life issues)
   - Sales (provide services to assist and promote regional exports, improve transportation and physical infrastructure)

4. All things considered, what one change could make doing business in Kansas City easier/more pleasant/more profitable?

E. Strategic Opportunities (20 min.)

1. What are the best national and international opportunities in your field?
   - General technology
   - Products
   - Processes

2. What capacities to meet those opportunities exist in the Kansas City area?
   - What can Kansas City do to improve its capacities?
   - Can we be nationally competitive?
   - Consider: share of current market (staff, revenues, patents, start-ups) adequate resources (entrepreneurialism, labor, physical capital, finance capital, related businesses)

3. Can Kansas City be a leader in life sciences/IT?
   - If so, what has to happen? (Who should lead the effort? Who must be involved? Who should NOT be involved?)

F. Wrap-Up & Summary (10 min.)

1. At this time, I would like to provide you with a short summary of our discussion today. This is a way for me to double-check what I think I have understood from our discussion. [Moderator gives a brief verbal summary (2-3 min.) of the discussion, highlighting the main points.]

2. Was my summary an accurate account of our discussion? If not, what points should be added?

3. Thank you very much for your participation today. This will help us a great deal in assessing the life science/IT business climate in the Kansas City area. Before we go, is there anything we didn't discuss today that you believe is important for me to know?

Appendix D

Telephone Interview Protocol

1. What factors make Kansas City a good location for your business?
2. What factors make your business' Kansas City location difficult?
3. Are your company's business interactions (customers or suppliers & partners) primarily local, regional, national, or global?
    a. If your company's business interactions are primarily non-local, could they be better served through local interaction? (i.e. Is physical proximity to customers or suppliers & partners relevant to business efficiency or synergy within your firm or industry? Please explain.)
4. Kansas City aspires to be a leader in the IT/Life Science industries. Based on your own experience, what are the most significant barriers to achieving this goal?
    a. Can those barriers be removed? And if so, How?
    b. Who (organizations or people) must be involved if Kansas City is to succeed?
5. Are there certain areas (niches) within Life Science/IT where Kansas City has a significant opportunity to be an industry leader? (Please explain as specifically as possible.)
6. How important is access to venture capital for growth in the Life Science/IT industries?
    a. Is there adequate access to venture capital in the Kansas City region?
    b. If not, what can/should be done to address the issue?
7. Is there an adequate supply of skilled and talented workers in the Kansas City region for all levels within your company?
    a. If not, what is missing and how can the supply be improved?
8. Is there anything else relevant to this discussion that you believe is important for us to know?