

Report of the Carolina North External Relations Advisory Group

May 30, 2003

Introduction and Charge

In November of 2002, Vice Chancellor for Research and Economic Development, Tony Waldrop appointed the members of the External Relations Advisory Group and charged them to advise the Executive Committee on the following:

- **Communications** : A plan and recommended communications strategies to gain public and financial support for Carolina North, including recommendations on format, content, distribution strategy, and related issues pertaining to Carolina North marketing materials
- **Impacts**: A strategy to capture and track statistics and indicators of the programmatic, economic and business development of Carolina North over a longitudinal basis, and providing economic impacts of other university projects comparable to Carolina North
- **Partnerships**: An approach to develop and maintain strategic partnerships with relevant local, regional, national and international groups interested in the Carolina North campus

The group met four times: February 11th, March 25th, April 22nd, and May 27th. The Advisory Group broke into three working groups: Communications, Impacts and Partnerships and focused on the three distinct charges to the External Affairs Advisory Group.

Two important working assumptions emerged for these three working groups. First, due to the very preliminary nature of the planning process for Carolina North a detailed external relations work plan will develop as the plans for Carolina North emerge. Thus the findings included in this report are somewhat contingent upon the direction and findings of the Infrastructure, University Uses and Business Development Advisory Groups. From this first assumption, a second one emerged: a working external relations strategy that engages and communicates with external partners in an iterative way throughout the course of the planning and development of Carolina North is critical.

What follows are the recommendations of the three working groups:

Communications

General principles:

- Messages about Carolina North should be articulated in the context of the University's mission and should help explain why Carolina North helps to advance the University's

mission. Effective messages will be tailored to address the experiences, concerns and values of each target audience.

- The Carolina North planning process should remain "open and available" to all of the University's constituencies – the campus community, members of the local communities, and local government elected officials and staff. A special effort should be made to communicate with immediate neighbors of Carolina North because these people especially will influence municipal decisions.
- The University should continue to work on a cooperative basis to provide information to the community to address questions or concerns. The community must also understand that the planning for Carolina North is a "work in progress." In the early stages of planning, there may be more questions than answers. Even so, it is important to communicate what is known and what is not yet known.

Recommendations:

- The University should plan for and budget adequately for the implementation of a comprehensive communications plan for Carolina North. It is important for the University to communicate with all of its constituencies throughout the life of the Carolina North project.
- In the early planning stages, much of the communications effort should center on the planning process itself and opportunities to contribute to that process. Because many in the campus and local communities have been involved in previous planning efforts, communications about this process should describe how the JJR plan and Ayers Saint Gross plan are guiding Carolina North planning.
- In some cases, constituencies may have questions for which there are not yet answers. If so, it is important to indicate when it is likely that those questions or concerns will be answered.
- Even as planning for Carolina North continues, it is important to begin now to market the project to prospective partners.
- A Frequently Asked Questions (FAQ) should be developed and continuously revised as the planning moves forward. The FAQ, which should speak to all of Carolina North's constituencies, should be printed for distribution and posted to the Carolina North website.
- A comprehensive Carolina North website should be developed and continually revised as planning advances. Some of the material should be packaged into a brief brochure that provides an overview of Carolina North and directs readers to the website for more information.

- A standard PowerPoint presentation should be packaged for University administrators to use when addressing community groups, and it should anticipate and respond to community concerns.
- Upon the completion of a revised plan for Carolina North (expected in the early fall), the University should host a series of well-publicized forums in which administrators and planners can share the plan with a wide range of interested parties. Within the University this should include faculty, staff, students and alumni. In the broader community, the University should reach out to government bodies, the towns' advisory committees, community groups and the neighbors of the Carolina North property. These forums should provide the basis for gaining constructive input in order to craft a proposal for the development of Carolina North that will be submitted for formal consideration by Chapel Hill and Carrboro through their regulatory processes.
- After the forums in the fall and prior to the University making formal applications to Chapel Hill and Carrboro, a "Town/Gown" Committee similar to the committee created for the Central Campus Development Plan effort in 2002 should be established. The committees should be composed of University trustees and administrators and elected officials and senior staff from the local governments, including Orange County. The committee will be essential for the management of the myriad of issues and interested parties related to Carolina North.

Impacts

General principles:

- Evaluating the programmatic, business, and economic impacts of Carolina North in a credible and meaningful way, over time, will require resources and expertise to develop, query, and interpret longitudinal data sets of meaningful impact information.
- It is important that a general design for the evaluation be capable of conforming to the evolving character of the Carolina North development.
- It is critical to note that educational, research, business and economic interests often are very different in terms of the metrics used in considering benefits and impacts. The evaluation design will need to accommodate these different interests.
- It is premature to identify specific benchmark "Research Campuses" comparable to Carolina North. Once the uses and business model for Carolina North become clearer a listing of comparable facilities can be assembled.

Recommendations:

- Appoint an ongoing, multidisciplinary Evaluation Team to provide guidance pertaining to issues related to the assignment and evaluation of Carolina North Impacts.

- Assemble all relevant data sets and studies that have been undertaken by the University to assess programmatic, educational and business impacts of specific University activities.
- Assign responsibility for developing the Carolina North Impact Study design to an impartial party. Specify that the design should be completed prior to development of the site and should include methods for self-assessment that are verifiable by a third party. The design should also include comparison with other, relevant development efforts undertaken by peer Universities. This recommendation will require funding to procure and retain a contractor capable of performing these functions.

Partnerships

General principles:

- Partnerships developed around Carolina North can be characterized in two specific ways:
 1. supportive of the three-fold mission (teaching, research, and service) of the University
 2. relevant to the development and maintenance of the infrastructure of Carolina North
- The nature and make-up of partnerships will evolve along with the decisions made and implemented regarding the development of Carolina North.
- Efforts should be made to keep a mix of public-private partnerships, particularly as they promote the goal of economic development.

Recommendations:

- As planning progresses and as Carolina North grows, develop a structure and process for regular review and assessment of existing and potential partnerships that support the uses and infrastructure of the project.
- As consideration of retail partners progresses, include policies regarding how decisions will be made regarding ownership mix.
- Develop a structure to assure on-going input and communication between and among constituent partnership groups including, but not limited to, University administration, faculty, and Board of Trustees; government; citizen/consumer; business; and non-profit organizations.
- Using the infrastructure of Carolina North and the three-fold mission of the University, potential partner groups to engage include the following (with specific partners determined as uses and business decisions are finalized):

1. Infrastructure: National, state, and local authorities such as Department of Transportation, OWASA, city and county officials, Chamber of Commerce
2. Research: University units (schools, departments, centers, and institutes), government agencies (state and national), colleague universities, corporate research and development facilities, national labs, non-profit foundations, and international organizations
3. Teaching: Community colleges, school districts, executive and distance education, media outlets, child care and preschool, Small Business and Technology Development Center
4. Service: Area non-profits and NC Center for Non-profits (non-profit incubator space), health service organizations (AHEC, Piedmont Health Services), legal services, Chamber of Commerce, United Way

APPENDIX A

EXTERNAL RELATIONS ADVISORY GROUP MEMBERS

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for Public Service

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Mike Nelson, Mayor, Town of Carrboro

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EXTERNAL RELATIONS ADVISORY GROUP

KEVIN FITZGERALD, CHAIR

CHARGE: The External Relations Advisory Group will study and develop advice for (1) communications strategies and (2) partnership approaches by the University to the State of North Carolina and to local, regional, national and international communities and business organizations in ways that will advance common interests for the success and growth of Carolina North. The External Relations Advisory Group will be convened in February 2003 and is asked to provide its initial recommendations to the Carolina North Executive Committee by May 2003. The Group will remain in place to provide additional recommendations as needed through the submission of a plan for the development of Carolina North.

Some specific issues or work products to be addressed by the External Relations Advisory Group include:

1. Advise the Executive Committee regarding a plan and recommended communications strategies for gaining public and financial support for Carolina North.
2. Advise the Executive Committee on the economic development impact of other universities projects comparable to Carolina North.
3. Advise the Executive Committee on strategic partnerships for Carolina North which should be established with relevant local, regional, national and international groups interested in the Carolina North campus.
4. Advise the Executive Committee regarding recommendations on format, content, distribution strategy, and related issues pertaining to Carolina North marketing materials (print, electronic, broadcast, etc.).
5. Advise the Executive Committee on a strategy for capturing and tracking statistics and indicators of the programmatic, economic and business development impact of Carolina North over a longitudinal basis.
6. As requested, provide comments, suggestions, and related feedback to the Executive Committee and to other Advisory Groups.