APLU Innovation & Economic Prosperity University Designees: Creating and using economic engagement metrics

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APLU.org/IEP
IEP Designees work with on-campus and off-campus stakeholders to identify strengths and improvement areas in economic engagement:

- **Talent** and Workforce Development
- **Innovation** and Tech-based Economic Development
- **Place** development via public service, outreach, and community engagement
The IEP Universities designation was established in 2013 to 1) provide visibility to campuses that are demonstratable committed to economic engagement and to 2) help campuses “know, measure, and tell” the impact of their economic engagement enterprise.

65 universities of all sorts have earned the IEP university designation. 20 institutions are in the ‘startup cohort’ pipeline.

As of 2018, **ALL** higher ed institutions access to the IEP program – not just APLU members – 2 non-members pursuing designation
• Institutional-level designation! Presidents initiate!
• To earn the designation, campuses undergo a rigorous self-study process
• Institutions work with internal stakeholders – tech transfer, engagement/outreach, extension, continuing education, economic development, distance education, student affairs, corporate relations, government affairs, communications, research parks, trustees, MEPs, SBDCs etc.
• Institutions engage external stakeholders – businesses/industry, venture capitalists, chambers, local govt, state govt, school boards, legislature, alumni, trade associations, community members etc.
**APLU’s Economic Engagement Framework**

- **Know**: Institutions should know what they’re doing well and what they need to improve with regard to their economic engagement enterprise.
- **Engage**: Institutions should be able to engage—develop authentic, reciprocal, transformative partnerships—with stakeholders in their community, region, state, and beyond.
- **Tell**: Institutions should be able to tell the story of their contributions to economic development.
- **Measure**: Institutions should be able to measure the extent to which they are accomplishing economic engagement goals—those of the community as well as the institution.

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Cindy Reifsnider
Monday, July 29, 2019
WHO WE ARE

First and only public university in the U.S. to award degrees in the 18th century

Over $1 billion in annual research expenditures

77 bachelor’s and 111 master’s degree programs

18,862 undergraduate students

11,049 graduate and professional students

Ranked #1 on Kiplinger’s list of best values in public colleges
OFFICE OF INNOVATE CAROLINA

- Innovation Culture
- Program Navigation
- Impact Measurement
- Communications

OFFICE OF TECHNOLOGY COMMERCIALIZATION

- IP Management
- Startup Guidance
- Incubator/Accelerator
- POC Grant Programs
- Outreach / IP Pipeline
- Strategic Partnerships

ABOUT OUR TEAM
Office of the Vice Chancellor for Innovation, Entrepreneurship and Economic Development
Office of the Vice Chancellor for Innovation, Entrepreneurship and Economic Development
Organization Chart: 06/19/2019

Contractors: Michelle Goryn, Erin Hopper, Liz Chen, Jennifer Lai, Shellie Edge
Where we are: Innovator’s Journey

**Learn**
- Shuford Program in E-Ship
- KFBS E-Ship Center
- Carolina Challenge
- Pathways to Impact
  * APS
  * BME
  * Comp. Sci.
  * Data Literacy/Science
  * Faculty Workshop
* Part of Innovation Roadmap Strategy

**Create**
- Creativity Hubs
- Funding: Idea Development
- Proof of Concept
  * BeAM
  * APS
  * BME
  * Comp. Sci.
  * ICS
  * CUBE
  * Spaces: Incubators, Accelerators, Dry/Wet Lab

**Develop**
- Office of Technology Commercialization
  * 1789
  * NC TraCS
  * Kenan Institute
  * Center for Public Service
  * Law E-Ship Clinic
  * Harvey Award
  - Market analysis + patent landscape
  * Dreamers Who Do

**Accelerate**
- Licensing and sponsored research
  * Launch Chapel Hill
  * KickStart Venture Services
  * Carolina Angel Network
  * Carolina Research Ventures Fund
  * Pinnacle Hill
  * Spaces: Incubators, Accelerators, Dry/Wet Lab

**Strategic Foundation**
- UNC System Plan
- Blueprint for Next
- Innovation Roadmap
- Unit Plans

**Communications**
- Master Innovation Space Plan
- Cross-Discipline Approach
- Practitioners/EIRs
- Coaches/Mentors

**Development Campaign**
- Managing University IP
- Patenting University Inventions

**Innovator’s Journey Across the Innovate Carolina Campus Network**
IEP Framework Activates UNC’s Strategic Plan

THE BLUEPRINT FOR NEXT

Of the Public, For the Public

Innovation Made Fundamental
The national conversation
(See APLU’s Economic Engagement Framework)
How is IEP helping to advance strategic priorities at Carolina?

- Align priorities with physical space master plan
- Embed economic engagement efforts into the institution
- Elevate place as a priority for I&E efforts
- Measure and communicate I&E impact
Economic Engagement

“... The ways in which universities and their public-private partners contribute to economic growth, opportunity, and competitiveness through regional talent and workforce development; innovation, entrepreneurship, and tech-based economic development; and place development via public service, outreach, and community engagement.”
Economic Engagement Framework

1. Institutions should **KNOW** what they’re doing well and what they need to improve with regard to economic engagement;
2. Institutions should be able to **MEASURE** the extent to which they are engaged;
3. Institutions should be able to **TELL** the story of their contributions to economic development, and
4. Institutions must **ENGAGE** with external stakeholders throughout the processes of knowing, measuring, and telling in order for their contributions to have meaningful impact.
Engagement Has Many Forms and Methods

- Community Service
- Service Learning
- Engaged Research (including community-based participatory, government-university-industry partnerships)
- Training and Technical Assistance
- Capacity Building
- Economic Development (including startups, tech transfer)
- Policy Advising, Development and Implementation Support
Measuring and Communicating UNC’s Impact and Engagement

Innovate Carolina creates and continues to refine:

- Two databases (startups and network)
- Impact Dashboard
- County Storyboards

This interconnected and complementary mechanism of collecting data and telling the associated impact story was conceived and created in response to the IEP self-study and assigns special emphasis on place-making efforts, as per the IEP framework.
INNOVATE CAROLINA STARTUPS DATABASE

• Most comprehensive database of its kind across higher education
• Includes IP-based, program-supported, independently initiated and social startups
• Data: funding, revenues, jobs & volunteers, founding school, program participation, press, people impacted, products & services
• Currently tracks 640 companies, 1958 to present (changes daily)
Innovate Carolina Startups Database: Getting Started

Vision (2013)
- Judith Cone, VC
- IEED
- Selection of platform

Implementation (2014)
- Cindy Reifsnider, program manager
- Database structure
- Partners

Data (2014)
- Scope
- Sources
- Data Quality
- Metrics
“The University’s value, measured in jobs, spending and other economic indicators shows an active and effective University system positively impacting people and communities all across North Carolina.”

“Demonstrating the Collective Economic Value of the University of North Carolina System,” February 2015

Taxpayers, Legislators, and Prospective Students want to know...

- Economic impact of commercialization and development
- Outcomes of teaching and learning, culture of entrepreneurship
- Number of Startups
  - Capital raised
  - Jobs created
  - Revenues
Platform: Why Salesforce.com?

From spreadsheets and bits of information to a **customized CRM database**...

- Cloud-based, for multi-user access, but still secure
- Recognizable user interface for users with varying comfort levels with technology
- Flexible configuration of included objects and fields, with easy customization
- Sizable capacity
- Reasonable costs for licenses
- Built-in reports functionality
- Multiple levels of security and access
- Salesforce for Outlook
Implementation and Data

1. Information Audit: Inventory of programs, needs, data
2. Defining what is included and what is not
3. Database planning (esp. customizations)
4. Selecting initial group of partners
5. Data gathering (and cleaning!)
6. Research (i.e., fill in the gaps)
   - Company research (press, funding, and milestones)
   - Founder discovery
7. Data documentation
Innovate Carolina Startups Database
A single version of the facts

DATA SOURCES

- US SEC Filings
- SBIR.gov
- IRS.gov
- NSF.gov
- USASpending.gov
- NIH
- Dun & Bradstreet
- Standard & Poor's
- News Aggregation Sites
- State Gov't Websites
- Company Websites
- Funding Agencies
- Thomson ONE
- PitchBook
- PrivCo
- Federal Procurement Data
- Business Journals
- CB Insights
- Hoover's
- ORBIS/Zephyr
- Lexis Nexus
- InfoUSA
- Private Foundations
- Factiva
Champions

University Leaders
I&E Program Sponsors
Communications

System Administrators
I&E Program Managers

Support Staff
Student Interns

Doers

Sustainability

Innovate Carolina
INNOVATE CAROLINA NETWORK DATABASE

- Provides back-office support to UNC I&E programs (not just startup support programs)
- Program applications linked to database, drop information directly into processing queue
- Categorizes impact and stories by the corresponding indicators and trends they demonstrate, per IEP: Talent Preparedness, Industry Relations, Diversity, Multidisciplinary and/or Interdisciplinary, Innovation Skillsets
- Powers greater PLACE classification of impact and stories
Network Database for Day-to-Day Operations Across Engagement

IEP Framework: Talent, Innovation, Place

Efficiency: Process Automation from Forms as Point-of-Entry to Email Communications

Increased Functionality and Usability

Inform Strategic Planning through Tactical View of System

Relationship Building

Marketable Product: Value Add to University (i.e. good data)
Remember! Engagement Has Many Forms and Methods

- Community Service
- Service Learning
- Engaged Research (including community-based participatory, government-university-industry partnerships)
- Training and Technical Assistance
- Capacity Building
- Economic Development (including startups, tech transfer)
- Policy Advising, Development and Implementation Support
Additional Partners and Data/Impact Types

• Office of Institutional Research and Assessment
• Carolina Center for Public Service
• Office of the Vice Chancellor for Research
• Gillings School of Global Public Health
• UNC Health Care
• School of Government
• More
Perspectives: Brainstorming Engagement Metrics

• Vice Chancellor of IEED – stakeholder perspective
• Program Staff – IEP perspective
• Communications Staff – audience engagement
• Database Administrators – data perspective
UNC I&E IMPACT DASHBOARD

INTELLECTUAL PROPERTY

FY2018

183 INVENTION DISCLOSURES
109 PATENT APPLICATIONS
68 PATENTS ISSUED
$7.4 MILLION LICENSING REVENUE
90 TECHNOLOGIES LICENSED
5 IP-BASED STARTUPS LAUNCHED

IP-BASED STARTUPS BY SCHOOL AND DEPARTMENT

50%
29%
15%
4%
1%
1%

School of Medicine
College of Arts & Sciences
Eshelman School of Pharmacy
Gillings School of Global Public Health
School of Dentistry
School of Education
Impact Dashboard: Talent

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innovate.unc.edu/impact
Impact Dashboard: Innovation

- Intellectual Property
  - Startups
  - NC Economy
  - Entrepreneurship Education
  - Investor Programs
  - Innovation Programs

**INTELLECTUAL PROPERTY**

**FIVE-YEAR COMPARISONS**

- **IP-BASED STARTUPS**
  - **FY2013-17**: 49
  - **FY2008-12**: 29
  - **69% INCREASE**

- **US PATENTS**
  - **FY2013-17**: 219
  - **FY2008-12**: 127
  - **72% INCREASE**

- ** LICENSING REVENUE**
  - **FY2013-17**: $22,900,000
  - **FY2008-12**: $12,300,000
  - **86% INCREASE**

**ACTIVE IP-BASED LIFE SCIENCE STARTUPS**

- Human Health & Health Applications: 28%
- Industrial Biotechnology: 7%
- Therapeutics: 14%
- Biomarkers: 21%
- Diagnostics: 12%
- Drug Delivery: 4%
- Imaging: 4%
- Medical Devices: 4%
- Pharmaceuticals: 2%
- Research Tools & Methods: 2%

[innovate.unc.edu/impact](http://innovate.unc.edu/impact)
Impact Dashboard: Place

NC ECONOMIC IMPACT

HQ OUTSIDE NC: 6%
HQ IN NC: 94%

REVENUE BY LOCATION

Of the $10.6 billion in annual revenue earned by UNC startups, the vast majority is earned by startups headquartered in the state.

Startups from UNC-Chapel Hill are headquartered in 21 NC counties.

77% of ventures launched at UNC-Chapel Hill (399 of 521) are still active.

Inactive 23%
Active 77%
How does UNC-Chapel Hill make an economic and social impact in Carteret County?

IT STARTS WITH AN IMPORTANT

TALENT | INNOVATION | PLACE
Talent

Develop Human Capital and the Future Workforce

Students

90

Undergrad and Grad students from Carteret County attend UNC (Fall 2019)

Health Care Providers

31

Medical student rotations coordinated at area hospitals (Fall 2017)

783

Health care providers trained in Carteret County (2017)

Citizens and Local Government

1,092

Contacts with Carteret Citizens and Officials by the UNC School of Government in 2017

- Courses
- Publications
- NC Benchmarking Project
- Advising Projects
- Civic Education
- Teaching Sessions
- Environmental Finance Projects
Three-Team Collaboration

UNC Lineberger Comprehensive Cancer Center + UNC Cancer Care + Carteret Health Care

UNC Center for the Study of Natural Hazards and Disasters

Trillions of Advanced Computing Calculations Per Second

- Better prepare for hurricanes and tropical storms
- Predict storm surge and flooding in Carteret County and other coastal communities

Community-wide strategy for cancer screenings
- Early detection and treatment
- Treatment planning and professional education
- Streamlined second opinions
- Clinical trial access
**So… what have we accomplished?**

<table>
<thead>
<tr>
<th>KNOW</th>
<th>MEASURE</th>
<th>TELL</th>
<th>ENGAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active, cohesive ecosystem and network of more than 20 programs that include students, alumni, faculty and staff</td>
<td>Monitoring of 500 active startups and ideation teams</td>
<td>Adding visualization tool Tableau for interactive dashboard and complex analytics</td>
<td>Enabling grant proposal applications to launch new areas of development</td>
</tr>
<tr>
<td>Increased operational efficiency for program staff</td>
<td>Demographics of participants and points of engagement</td>
<td>Increasing communications with industry partners and alumni</td>
<td>Increasing participation of internal participants and external partners</td>
</tr>
</tbody>
</table>
Value of IEP designation

Recognizes UNC as a premier institution in the field of innovation and economic engagement.

Enables UNC to engage with, learn from, and build relationships with the broader IEP community of campuses also committed to advancing comprehensive engagement efforts.

Revisits UNC’s founding mission as a university for the people by conducting a self-study of UNC’s expansive innovation ecosystem, its partnerships, and its relationships with communities.

Enables UNC to adopt and refine ways to better know, measure, and tell the story of its innovations and their impact and engage in meaningful partnerships to support this work.

Provides a comprehensive framework to align UNC’s strategic priorities with the physical space Master Plan through the lens of innovation and economic engagement.

Encourages holistic codification of engagement across campus, cultivating new internal and external partnerships.
Cindy Reifsnider

cindy.reifsnider@unc.edu
Appendix

Innovate Carolina
WHERE WE’VE BEEN

2010
- BOT: Innovation Roadmap kicked off (Chancellor Thorp)
- Innovation Showcase (ongoing)
- Innovation Roadmap released
- APS + BME targeted

2011
- BOT involved in Roadmap
- Innovation Circle Summit
- APS Task Force

2012
- BOT: 2-year progress report & Innovation Circle Summit
- CUBE at Campus Y
- Computer Science Entrepreneurs Lounge

2013
- BOT: First meeting of I&E committee
- First I&E Network meeting (ongoing)
- Launch Chapel Hill + 1789 Venture Lab
- Blackstone Entrepreneurs Network

Strategic Foundation | Educational Programs | Cross-Discipline Collision | Venture Support | Environmental Design | Faculty Translation | Development
---|---|---|---|---|---|---
| | | | | | |
WHERE WE’VE BEEN (CONT.)

2014
- BOG commercialization meeting
- Startups database launched
- Data studies task force
- APS Dept. approved

2015
- BOT: CRVF ($10M) + VC for IEED
- VC for IEED/Innovate Carolina created
- $100M Eshelman Institute for Innovation gift

2016
- BOT committee for IEED (1 of 4)
- Innovation spaces master plan completed
- BeAM makerspaces
- Carolina Angel Network
- Triangle Venture Alliance
- $60M NC Venture Capital Multiplier Fund

2017
- BOT committee for IEED (1 of 4)
- $18M Shuford Program gift
- Startup wet lab accelerator plans approved
- BLUE makerspace in Carmichael

2018
- BOT: Approval of wet lab accelerator
- Campus Y managed by Innovate Carolina & Student Affairs
- APLU IEP designation
- ICS feasibility study completed
- Pinnacle Hill ($65M)
ECONOMIC ENGAGEMENT AT UNC

- Vice Chancellor for Research
- Vice Chancellor for Innovation, Entrepreneurship, & Economic Development
- Provost’s Office
- Development Office
- Vice Chancellor for Communications
- Vice Chancellor for Finance & Ops
- Individual Schools
- School-based Centers & Institutes

HPDP, NRI, IMS, Coastal Hazards
Innovate Carolina, OTC
Carolina Center for Public Service
UNC Corporate Relations
UNC Community Relations
NC Policy Collaboratory
Public Health, Govt, Law, Pharmacy
Water Institute, IGHID
IEP process and timeline

Summer 2016 – UNC joins the cohort of IEP startup institutions

Summer 2016-Fall 2017— Led by Innovate Carolina, UNC undergoes a comprehensive and rigorous self-assessment (self-study) of the activities, resources, and partnerships required for successful economic engagement.

Spring 2017-Ongoing – In response to the IEP self-study, Innovate Carolina continues to expand existing Startups Database and creates and refines Network Database, the Impact Dashboard, and the County Storyboards.
IEP process and timeline

October 2017 – UNC submits application for comment only. (See IEP’s designation guidelines for more information regarding submitting for comment vs. designation.)

May 2018 – UNC submits application for designation.

June 2018 – UNC learns it has been awarded the IEP designation.

November 2018 – UNC is formally recognized at the APLU’s Annual Meeting in New Orleans.
Aligning UNC’s strategic priorities with the IEP framework

Through participation in IEP’s designation process, UNC has:

• Moved forward its strategic priorities laid out in the Innovation Roadmap and Blueprint for Next and aligned them with the physical space Master Plan.
• Taken considerable steps to institutionalize its economic engagement efforts.
• Created a first-of-its-kind Database + Dashboard mechanism for collecting data, measuring impact, and telling UNC’s story, effectively establishing itself as a national model in this space.
• Elevated the priority of place-making as a means for successful innovation and engagement efforts.
• Prioritized the expansion of capacity to build and track industry partnerships.
APLU Innovation & Economic Prosperity University Designees: Creating and Using Economic Engagement Metrics

Cindy Reifsnider
Monday, July 29, 2019
My Background

- MS Information Science, UNC-Chapel Hill
- Started working with large data sets during college
- Bus/Tech Research Analyst (20 years’ experience)
- Co-PI on US Economic Development Administration grant (3 yrs.)
- Experience with business demographics, economic development impact, database development, project management and technology roadmap planning
  - Hewlett-Packard
  - UNC Kenan Institute of Private Enterprise (business school)
  - UNC Innovate Carolina (VC IEED)
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INNOVATOR’S JOURNEY ACROSS THE INNOVATE CAROLINA CAMPUS NETWORK

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- UNC System Plan
- Blueprint for Next
- Innovation Roadmap
- Unit Plans

- Master Innovation Space Plan
- Cross-Discipline Approach
- Practitioners/EIRs
- Coaches/Mentors

- Communications
- Data + Metrics
- Social Innovation

- Development Campaign
- Managing University IP
- Patenting University Inventions

- Licensing University Technology
- APLU/IEP
IEP Framework Activates UNC’s Strategic Plan

THE BLUEPRINT FOR NEXT

Of the Public, For the Public

Innovation Made Fundamental

Of the Public, For the Public
The national conversation
(See APLU’s Economic Engagement Framework)
How is IEP helping to advance strategic priorities at Carolina?

- Align priorities with physical space master plan
- Embed economic engagement efforts into the institution
- Measure and communicate I&E impact
- Elevate place as a priority for I&E efforts
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• Capacity Building
• Economic Development (including startups, tech transfer)
• Policy Advising, Development and Implementation Support
Innovate Carolina created and continues to grow:

- Two Databases (Startups and Network)
- Impact Dashboard
- County Storyboards

To tell our associated impact stories, we built this interconnected and complementary mechanism in alignment with our IEP self-study for

- Development of Metrics,
- Assessment, and
- Data collection.

The system enables special emphasis on place-making efforts, as per the IEP framework.
• Most comprehensive database of its kind across higher education
• Includes IP-based, program-supported, independently initiated and social startups
• Data: funding, revenues, jobs & volunteers, founding school, program participation, press, people impacted, products & services
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7. Data documentation
Innovate Carolina Startups Database
A single version of the facts

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- IRS.gov
- NSF.gov
- USASpending.gov
- NIH
- Dun & Bradstreet
- Standard & Poor's
- News Aggregation Sites
- State Gov't Websites
- Company Websites
- Funding Agencies
- Thomson ONE
- PitchBook
- PrivCo
- Federal Procurement Data
- Business Journals
- CB Insights
- Hoover's
- ORBIS/Zephyr
- Lexis Nexus
- InfoUSA
- Private Foundations
- Factiva
Sustainability

University Leaders
I&E Program Sponsors
Communications

System Administrators
I&E Program Managers

Support Staff
Student Interns

Champions

Doers

Sustainability

Innovate Carolina
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User-Friendly Functionality

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Additional Partners Demonstrating Engagement Impact

- Office of Institutional Research and Assessment
- Carolina Center for Public Service
- Office of the Vice Chancellor for Research
- Gillings School of Global Public Health
- UNC Health Care
- School of Government
- More
Perspectives: Brainstorming Engagement Metrics

- Vice Chancellor of IEED – stakeholder perspective
- Innovate’s Program Staff – IEP perspective
- Communications Staff – audience engagement
- Database Administrators – data perspective
- Program Partners – engagement impact data and viewpoints
Impact Dashboard: Talent

innovate.unc.edu/impact
Impact Dashboard: Innovation

FIVE-YEAR COMPARISONS

**IP-BASED STARTUPS**
- FY2013-17: 49
- FY2008-12: 29

Increase: 69%

**UC PATENTS**
- FY2013-17: 219
- FY2008-12: 127

Increase: 72%

**LICENSING REVENUE**
- FY2013-17: $32,900,000
- FY2008-12: $12,100,000

Increase: 86%

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Impact Dashboard: Place

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77% of ventures launched at UNC-Chapel Hill (399 of 521) are still active.

Inactive 23%

Active 77%
How does UNC-Chapel Hill make an economic and social impact in Carteret County?

IT STARTS WITH AN IMPORTANT

TALENT  |  INNOVATION  |  PLACE
Talent
DEVELOP HUMAN CAPITAL AND THE FUTURE WORKFORCE

Students

90
UNDERGRAD AND GRAD STUDENTS FROM CARTERET COUNTY ATTEND UNC (FALL 2017)

Health Care Providers

31
MEDICAL STUDENT ROTATIONS COORDINATED AT AREA HOSPITALS (FALL 2017)

783
HEALTH CARE PROVIDERS TRAINED IN CARTERET COUNTY (2017)

Citizens and Local Government

1,092
CONTACTS WITH CARTERET CITIZENS AND OFFICIALS BY THE UNC SCHOOL OF GOVERNMENT IN 2017

- Courses
- NC Benchmarking Project
- Advising Projects
- Civic Education
- Teaching Sessions
- Environmental Finance Projects
UNC Institute of Marine Sciences

- 60,000 square feet of research space
- 12 UNC faculty
- 65 graduate students and staff

6.3 acres of Bogue Sound waterfront
- 1 48-ft coastal research education vessel
- 4 flat inshore boats

Breakthrough marine research for coastal communities:
- Water Quality
- Sea-Level Rise
- Storm Water Runoff
- Shoreline Management
- Oil Spills
- Health Effects of Algae
- Fisheries
- Offshore Wind Energy
- Severe Storms
Three-Team Collaboration

UNC Lineberger Comprehensive Cancer Center
UNC Cancer Care
Carteret Health Care

UNC Center for the Study of Natural Hazards and Disasters
Trillions of Advanced Computing Calculations Per Second

- Community-wide strategy for cancer screening
- Early detection and treatment
- Treatment planning and professional education
- Streamlined second opinions
- Clinical trial access

- Better prepare for hurricanes and tropical storms
- Predict storm surge and flooding in Carteret County and other coastal communities
## What Have We Accomplished?

<table>
<thead>
<tr>
<th>KNOW</th>
<th>MEASURE</th>
<th>TELL</th>
<th>ENGAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active, cohesive ecosystem and network of more than 25 programs that include students, alumni, faculty and staff</td>
<td>Monitoring of 500 active startups and ideation teams</td>
<td>Adding visualization tool Tableau for interactive dashboard and complex analytics</td>
<td>Enabling grant proposal applications to launch new areas of development</td>
</tr>
<tr>
<td>Increased operational efficiency for program staff</td>
<td>Demographics of participants and points of engagement</td>
<td>Increasing communications with industry partners and alumni</td>
<td>Increasing participation of internal participants and external partners</td>
</tr>
<tr>
<td></td>
<td>Increasing types of engagement, partnership data and metrics</td>
<td></td>
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</tbody>
</table>

Innovate Carolina
Value of IEP Designation

Recognizes UNC as a premier institution in the field of innovation and economic engagement.

Enables UNC to engage with, learn from, and build relationships with the broader IEP community of campuses also committed to advancing comprehensive engagement efforts.

Revisits UNC’s founding mission as a university for the people by conducting a self-study of UNC’s expansive innovation ecosystem, its partnerships, and its relationships with communities.

Enables UNC to adopt and refine ways to better know, measure, and tell the story of its innovations and their impact and engage in meaningful partnerships to support this work.

Provides a comprehensive framework to align UNC’s strategic priorities with the physical space Master Plan through the lens of innovation and economic engagement.

Encourages holistic codification of engagement across campus, cultivating new internal and external partnerships.
Appendix

Innovate Carolina
WHERE WE’VE BEEN

2010
- BOT: Innovation Roadmap kicked off (Chancellor Thorp)
- Innovation Showcase (ongoing)
- Innovation Roadmap released
- APS + BME targeted

2011
- BOT involved in Roadmap
- Innovation Circle Summit
- APS Task Force

2012
- BOT: 2-year progress report & Innovation Circle Summit
- CUBE at Campus Y
- Computer Science Entrepreneurs Lounge

2013
- BOT: First meeting of I&E committee
- First I&E Network meeting (ongoing)
- Launch Chapel Hill + 1789 Venture Lab
- Blackstone Entrepreneurs Network

<table>
<thead>
<tr>
<th>Strategic Foundation</th>
<th>Educational Programs</th>
<th>Cross-Discipline Collision</th>
<th>Venture Support</th>
<th>Environmental Design</th>
<th>Faculty Translation</th>
<th>Development</th>
</tr>
</thead>
</table>
WHERE WE’VE BEEN (CONT.)

2014
- BOG commercialization meeting
- Startups database launched
- Data studies task force
- APS Dept. approved

2015
- BOT: CRVF ($10M) + VC for IEED
- VC for IEED/Innovate Carolina created
- $100M Eshelman Institute for Innovation gift
- UNC/GSK HIV Cure Center + Qura

2016
- BOT committee for IEED (1 of 4)
- Innovation spaces master plan completed
- BeAM makerspaces
- Carolina Angel Network
- Triangle Venture Alliance
- $60M NC Venture Capital Multiplier Fund

2017
- BOT committee for IEED (1 of 4)
- $18M Shuford Program gift
- Startup wet lab accelerator plans approved
- BLUE makerspace in Carmichael

2018
- BOT: Approval of wet lab accelerator
- Campus Y managed by Innovate Carolina & Student Affairs
- APLU IEP designation
- ICS feasibility study completed
- Pinnacle Hill ($65M)
ECONOMIC ENGAGEMENT AT UNC

• Vice Chancellor for Research
• Vice Chancellor for Innovation, Entrepreneurship, & Economic Development
• Provost’s Office
• Development Office
• Vice Chancellor for Communications
• Vice Chancellor for Finance & Ops
• Individual Schools
• School-based Centers & Institutes

HPDP, NRI, IMS, Coastal Hazards
Innovate Carolina, OTC
Carolina Center for Public Service
UNC Corporate Relations
UNC Community Relations
NC Policy Collaboratory
Public Health, Govt, Law, Pharmacy
Water Institute, IGHID
IEP process and timeline

Summer 2016 – UNC joins the cohort of IEP startup institutions

Summer 2016-Fall 2017— Led by Innovate Carolina, UNC undergoes a comprehensive and rigorous self-assessment (self-study) of the activities, resources, and partnerships required for successful economic engagement.

Spring 2017-Ongoing – In response to the IEP self-study, Innovate Carolina continues to expand existing Startups Database and creates and refines Network Database, the Impact Dashboard, and the County Storyboards.
IEP process and timeline

October 2017 – UNC submits application for comment only. (See IEP’s designation guidelines for more information regarding submitting for comment vs. designation.)

May 2018 – UNC submits application for designation.

June 2018 – UNC learns it has been awarded the IEP designation.

November 2018 – UNC is formally recognized at the APLU’s Annual Meeting in New Orleans.
Aligning UNC’s strategic priorities with the IEP framework

Through participation in IEP’s designation process, UNC has:

• Moved forward its strategic priorities laid out in the Innovation Roadmap and Blueprint for Next and aligned them with the physical space Master Plan.
• Taken considerable steps to institutionalize its economic engagement efforts.
• Created a first-of-its-kind Database + Dashboard mechanism for collecting data, measuring impact, and telling UNC’s story, effectively establishing itself as a national model in this space.
• Elevated the priority of place-making as a means for successful innovation and engagement efforts.
• Prioritized the expansion of capacity to build and track industry partnerships.
CIMA Summer Meeting
28 Jul - 31 Jul 2019

Poll results
Table of contents

- Have you had any formal conversations on campus to develop metrics and indicators for your university's economic engagement work?

- Have you already developed economic engagement metrics at your institution? If so, please share your institution's name and your name (if comfortable)

- APLU needs CIMA's help in identifying key challenges members face when developing or utilizing economic development metrics (talent, innovation, community engagement/place). Discuss challenges as a group and share on Slido.

- Now that you've shared some of the problems that arise when developing/using economic development metrics for your university, discuss strategies APLU/CIMA/IEP designees could work on to address these challenges. Share on Slido

- Would you personally be interested in follow-up to this session? (phone call, more detailed survey, focus group interview, working group, discussion group etc.) If so, please share your email address.
Have you had any formal conversations on campus to develop metrics and indicators for your university's economic engagement work?

- Yes: 75%
- No: 25%
Have you already developed economic engagement metrics at your institution? If so, please share your institution's name and your name (if comfortable)

- .
- Very basic
- Not sure
- May be
- No
- no
- I don't know
- UTSA C.Saygin
- USF
- no
- No
- No
- No
- I don’t know
- ASU
- FSU
- No
- BGSU
APLU needs CIMA's help in identifying key challenges members face when developing or utilizing economic development metrics (talent, innovation, community engagement/place). Discuss challenges as a group and share on Slido. (1/2)

- Split efforts between University and System Agencies
- Collecting the data and having folks in office of community engagement with skills in data management and analyses
- Commitment?
- Old ways of thinking
- Disconnected data and no standard formats or process for collecting
- Sustainability
- Locating Data sources
- Credible definitions; identification/data collection
- Varying definitions, confidential MOUs, hidden pockets of engagement.
- Silos
- Incentive
APLU needs CIMA's help in identifying key challenges members face when developing or utilizing economic development metrics (talent, innovation, community engagement/place). Discuss challenges as a group and share on Slido.

(2/2)

- large institution - silos
- commitment of staff time
- Data Silos
Now that you've shared some of the problems that arise when developing/using economic development metrics for your university, discuss strategies APLU/CIMA/IEP designees could work on to address these challenges.

Share on Slido

(1/2)

- APLU can lead discussions on data definitions and shared data schemas
- Advocate for better federal data collection and access for institutions to multi-institutional, multi-state databases.
- Connect with AUTM for metrics share best practices among those that have started the metric collection
- Relevance of metrics across units
- provide concrete examples of metrics, how data collected, analyzed, and shared. Publish more materials on definitions of metrics
- Develop shared definitions and collect
Now that you've shared some of the problems that arise when developing/using economic development metrics for your university, discuss strategies APLU/CIMA/IEP designees could work on to address these challenges.

Share on Slido (2/2)

- data across IEP designees
- How to best engage external stakeholders
- Transparency of definitions
- Publish Data definition list
- Yes
Open text poll

Would you personally be interested in follow-up to this session? (phone call, more detailed survey, focus group interview, working group, discussion group etc.) If so, please share your email address.

- Corporate@asu.edu
- Yes dsingel@montana.edu
- scoppola@uncc.edu
- hkelly@udel.edu
- rburnette@fsu.edu
- Geoffrey.pinski@uc.edu
- Yes torres@ku.edu
- Yes
- not really