BUILDING MUTUALLY BENEFICIAL PARTNERSHIPS:
CAMPUS COORDINATION AND CORPORATE OUTREACH

Jessica Shepard Watts, University of North Texas
Shelley Walter, Northern Kentucky University
Outline

• Our role, CR Office Types
• Building partnerships across campus
• Campus wide strategy
• Corporate outreach strategies
• Success stories
• Discussion
University & Role

• Jessica Watts, Executive Director, Corporate & Foundation Relations, UNT
• Central Role, Report through Advancement
• Sole CR Focused Staff
  • 4 central CFR staff, support for CR
• No official CR staff in schools
• University of North Texas
University of North Texas

- Founded in 1890 as Texas Normal College
- 38k enrollment
- 250k alumni, 75% in North Texas
- 73 academic programs in top 100
- Award 9,200+ degrees annually
- UNT is a minority majority institution
- Research expenditures at $37M, ranked by Carnegie Classification
- Fundraising exceeding $36M
- Generates $1.65 billion annual economic impact in DFW
University & Role

- Shelley Walter, Director, Corporate Relations NKU
- Central Role, Report through Advancement
- 2 central CFR staff: VP and Director
- No official CR staff in schools
- Most corporate engagement with College of Business and Informatics
Northern Kentucky University

• Founded in 1968
• Approximately 15,000 enrolled
• Over 60,000 Alumni
• 75% of our Alumni stay in the Region
• 8 Colleges: 70 plus Undergraduate, 22 Graduate academic programs, and Law School
• 9 years in a row America’s Best Colleges Forbes
• 17 Division 1 Athletic Teams with 3 National Championships
• Fundraising exceeding $12M last yr
## Central vs. Unit Based Offices

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<th>Central</th>
<th>Unit based</th>
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<td>• Campus-wide focus</td>
<td>• Supporting specific department, college/school, center, unit...</td>
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<tr>
<td>• Company Centric</td>
<td>• Interest and focus contained in single unit</td>
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<td>• Serve units as needed</td>
<td>• Report to/dotted line to a Dean, Dept Chair</td>
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<td>• Serve as a resource</td>
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<td>• Interest and focus span 2+ units</td>
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Establishing Holistic CR at UNT

Central CR Staff

Central
Leadership
School Based
Career Center

30 Top Partners

Main Engagement:
- Recruiting
- Student Engagement
- Projects
- Program Support
- Research
University of Texas at Dallas University Model

Industry Partners

Central CR

Managed Centrally

School Based

Centers

Stay school based

Managed Centrally

School Based CR
University of California, Davis

- Companies free to engage independently with units
- Companies or campus units may engage with OCR as needed
UM Business Engagement Center

Founded in 2007, the Business Engagement Center is sponsored jointly by the U-M Office of Research and the Office of University Development.

BEC facilitates industry relationships with a broad spectrum of University of Michigan resources:
The role of Director of Corporate Relations was developed in October 2017.

Facilitates Corporate Relationships with a broad spectrum of NKU resources:
Building partnerships across campus (internal)
Building Partnerships in Chaos

• Corporate relations is a campus-wide endeavor
• Institutions are often “siloed” which can make collaboration difficult...
• ...lack of direct reporting lines, centralized database services and standardized processes...
• Sharing information can be difficult
• Creating a challenging environment for everyone, including our industry partners
• BUT... we love it, right?
Mastering the Chaos

“Five Essential Elements of a Successful Twenty-First Century University Relations Program”, Network of Academic Corporate Relations Officers, 2011
Mastering the Chaos

• Prioritize corporate partnerships
• Assemble tools for corporate relationship planning and management (marketing, communications)
• Coordinate information from resources (internal campus, alumni, engagements, research, foundation, databases, LinkedIn, and other resources)
• Create strategic plans
• Convene stakeholders (faculty vs. staff)
• Setting realistic expectations!
Building CR at NKU - First Steps

**FIRST 30 DAYS**

- Defined the Director of Corporate Relations Role
- Setup Introduction and Deep Dive Meetings
  - Advancement Team
  - Director’s of Development for each College
  - Career Services
  - Alumni Office
  - Deans & Chairs
  - Center’s
- Reviewed Current Relationships
Building CR at NKU - First Steps

31 to 180 DAYS

• Created Strategy
• Worked with Marketing to create a toolbox
• Developed a plan with the research team
• Attended the Annual NACRO Conference
• Celebrate Wins
Building CR at NKU - First Steps

CURRENTLY
• Looking for the Blue Ocean
• Work with Community Partners
• Corporate Tiering
• Stewardship Plan

Priorities
• Build Trust
• Create Holistic Partnerships
• Celebrate the Wins
Research & Innovation Office Collaboration

- Monthly meetings with AVP of Research & Innovation
  - Work well with Office of Grants & Contracts
- Leads for the CR Team
  - Economic Development, UNT Inspire Park
  - Work together to expand the relationship beyond research connection
  - Bring Research in to the conversation, assist with faculty research direction
- Coordination - Research & Innovation Team recently trained on our Advancement Database
Accessing Multiple Revenue Streams

- Philanthropy
  - Scholarships, Programmatic Support, Community Relations, Engage Volunteers
  - Capital projects, Chairs and professorships
- Recruiting
  - Career Events, Student Organizations, Student Events (ex: Hackathons)
- Learning & Development
  - Corporate Education, Professional Programs, Executive Education
Accessing Multiple Revenue Streams

- Marketing
  - Naming Opportunities, Sponsorships, Events/Tables
- Research & Development
  - Research Projects, I/U CRCs, Student Research Competitions, Student Capstone Projects
- Business Development
  - Branding on campus, Strengthening their business case, Vendor Relationships
Is your campus and Leadership Ready, Willing, and Able To Partner with companies?

- Programs/Centers
- President/VPs/Deans

Make the time in their busy schedules, Respond to industry

Have a fit with Research/Expertise/Students/Programs
Campus Wide Strategy
Campus Wide Strategy Sessions

• Planning: What are the key goals, stakeholders and areas opportunity on campus?
• Launching: How to recruit participants and spread the message to university community?
• Executing: scheduling, agendas, topics and follow-up
• Improving: Seeking missing stakeholders, emerging opportunities and better systems
• Rejuvenating: Many groups, even the most successful, begin to lose momentum and focus. How can you reassess efforts and re-launch?
Campus Wide Industry Engagement Meetings

- **Invitations:** CR, Research, Career Center, School DO’s, Engaged Faculty, Athletics
- **Time Commitment:** limit to 60 minutes
- **Highlight particular companies, discuss their current engagement and how to add aspects**
- **Invite a speaker to discuss a key industry or topic, ex: D & I needs or an industry prominent in your region**
  - Intent is to develop a common understanding of the breadth and depth of engagement for corporations, and most importantly allow us to discuss potential opportunities to further develop the relationship.

- **KU:** 10 meetings a year, 20+ people attend, lunch
Annual Corporate Strategy Sessions

• January:
  - Full day meeting
  - Discussed 30 companies
    - Strategy docs on each company
    - Top, Emerging and New Partners
  - Attendees: CR Staff, Unofficial CR Staff – Assistant Deans, Diversity, Veterans Center, Institute of Innovation & Entrepreneurship
  - Action Item List produced

• July:
  - Two hours followed by lunch
  - Revisited select companies
  - Invited Career Center
### Areas of Engagement

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**Total Areas Supported**: 7, 13, 16

**Goal Areas**: 16

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For Reference - Previous Legend Used:
- ✱: Discussion underway
- ✫: Discussed in 2016/plan to discuss in 2017
- ✓: Funding / Participation secured

### 2017 Discussions

- Look at other university models on competitive company giving
  (i.e. multiple ask from competitive financial/technical companies in one building)

### 2017 Action Steps

- 2017: On Campus Co Op Expansion
  - Alumni Center Ask
  - ECS Room Naming
- Set up meeting with ASU to discuss Hack for Humanities in Dallas in Fall
- UTEACH Funding?
- Engage more with RMI
- Connect Raul with Dawn for Urban STEM Camp
- Start 2018 proposal - due in June 2017
- Funding for Actuarial Science?
Standing Campus Meetings

- Schedule reoccurring meetings with Directors of Development, Colleges, and Centers
- Led by central CR office
- Request agenda items
- Meetings with other offices as needed
NKU Corporate Engagement Council

- Corporate Strategy Meeting Monthly with the Advancement Executive Team
- Preparation and meeting once a quarter
  - VP’s, Dean’s, and Director of Career Services
- Agenda items include
  - update on CR Projects
  - discuss potential CR projects or opportunities
  - activities on campus that external partners maybe interested in
  - obtain buy in
  - discuss funding priorities
NKU Career Services Council

- **Time Commitment:** Preparation and monthly meeting
  - Director’s of Development, Central Career Services Team, Unit Based Career Service contacts, and Center for Applied Informatics
- **Agenda items include**
  - Co-ops/Internships - Recruitment
  - Career Fairs
  - Sponsors
  - Student Projects
  - Corporate Partner updates
Campus wide coordination efforts

- Standing Campus meetings (colleges/programs)
- Company focused meetings
- Campus Wide CR Strategy Sessions
- Corporate Relations/Career Center/Recruiting Meeting
- Information sharing meetings
- Playing nice in the sandbox
- Creating a culture of collaboration and proactive information sharing
Corporate Outreach (external)
Corporate Outreach

- Business alignment
- Research initiatives
- Conferences
  - JP Morgan Healthcare Conf. – 10,000 attendees, 450+ companies
  - BIO (Biotechnology Innovation Organization)-16,000 attendees, 5000 companies, 70 countries
  - Using online platforms at conferences (usually a fee)
- Alumni connections
- VP and Dean connections
- And let’s be honest, family, neighbors, cousins...
Corporate Outreach Approaches

- Top employers
- Top recruiters
- Large employers in the region
- New companies in the region
- Some Metros are booming (DFW)
- Strength or challenge (see 2009 and the autos...)
- Starts in a school/center, expand to campus wide
- Existing relationships expand into new initiatives
Examples of Outreach

Current industry partners
• Sharing relevant news articles highlighting your school or a researcher
• Scheduling regular (monthly, quarterly) update calls
• Offering coffee or lunch (for regional partners)

Prospective industry partners
• Using online platforms at conferences (usually a fee)
• Introduction through your network
• “Cold call”
# Top Corporate Prospect List

<table>
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<tr>
<th>Company</th>
<th>Top Prospects - Stakeholders</th>
<th>Total # of Alum Employees</th>
<th>Top Employers</th>
<th>Top Employers in N TX Area (6,000+)</th>
<th>Recruiting: Last 4 Yr Grads</th>
<th>Fortune 500 TX HQ</th>
<th>Giving: Lifetime</th>
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Tiering Corporate Partners

(1) to rank top corporate partners based on multiple variables in addition to giving
(2) inform university and school leadership
(3) identify areas for further engagement with partners
(4) set goals for further engagement with partners

UIUC Index:
• Giving
• Employment
• Alumni
• Presence in the UIUC Research Park
• Profitability & Growth
• Service
Illinois Business School Corporate Index

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**Strategic Potential**

**Tier 1**
- Project
- Scientists/Business Development
- Leadership Engagement
- Local presence
- Talent/recruitment

**Tier 2**
- Comprehensive Interest
- External Academic Collaboration
- Interest in Tech/Innovation
- Gifting
- Research Agreement/IP Terms
- Gift support
- Sponsored Research

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UC Davis – CR, Research Office
LEVELS OF ENGAGEMENT

TRADITIONAL ENGAGEMENT

COMPANY A
- Clinical Trials

COMPANY B
- Vendor

COMPANY C
- Sponsored Research

COMPANY D
- Student Groups
- Recruiting
- Gifts

COMPANY E
- Sponsored Research
- Gifts

COMPANY F
- Matching Gifts
- Executive Speaking

COMPANY G
- MBA Recruiting
- Gifts
- Trustee

COMPANY H
- Engineer Recruiting
- Faculty Awards, Gifts
- Sponsored Research

COMPANY I
- Clinical Trials
- Gifts
- Board Member

COMPANY J
- Sponsored Research
- Gifts Across Campus
- Student Groups
- Board Memberships
- Alliance

COMPANY K
- Student Group Gift
- Sponsored Research
- Gifts Across Campus

COMPANY L
- Gift Across Campus
- Student Groups
- Office of Research
- Vendor

COMPANY M
- Sponsored Research
- Gifts Across Campus
- Recruiting
- Student Groups
- Trustee
- Master Agreement

COMPANY N
- Master Agreement
- Gifts Across Campus
- Sponsored Research
- Student Groups
- Recruiting

COMPANY O
- Gifts Across Campus
- Sponsored Research
- Trustee
- Recruiting
- Student Groups

PARTNERSHIP

TIER 1
Single Point of Engagement
Involved in a limited capacity

TIER 2
Managed Relationship
Has a few points of interest that require coordination

TIER 3
Tailored Partnership
CR works closely with company to identify value-added opportunities for deep relationship

TIER 4
Broad-Based Engagement
Engaged across multiple units in a variety of ways, with company leadership participation

TIER 5
Strategic Partnership
Relationship is long-term, with significant ongoing, financial contributions (sponsored research, gifts, etc. Requires coordination with multiple internal offices

Source: Metrics for a Successful Twenty-First Century Academic Corporate Relations Program, NACRO, August, 2012
Corporate Open House

• **Purpose:** Connect and engage potential industry supporters by showcasing the benefits of engaging with UTD through recruiting talent, research and student engagement.

• **2018 Recap**
  - Introduction from University President
  - Dallas Chamber CEO Keynote
    - (2017) Industry panel
  - Sessions on recruiting, research, student projects and student organizations
  - Created a Corporate Engagement Booklet
  - (2017) 100 external attendees/70 unique companies; (2018) 150 external attendees/100 unique companies
  - 77% of survey respondents would return next year

*Borrowed good practice from University of Wisconsin*
Internal Corporate Summaries

COMPANY OVERVIEW

Toyota is among the world’s largest automotive manufacturers by revenue, designs and manufactures a diverse product line-up that ranges from subcompacts to luxury and sports vehicles to SUVs, trucks, minivans, and buses. Its vehicles are produced either with combustion or hybrid engines, as with the Prius. Toyota’s subsidiaries also manufacture vehicles: Daihatsu Motor produces mini-vehicles, while Hino Motors produces trucks and buses. Toyota makes automotive parts for its own use and for sale to others. Popular models include the Camry, Land Cruiser, Tundra and luxury Lexus line.

SWOT ANALYSIS

Strengths: Strong brand image, Global supply chain, and Rapid innovation capabilities

Weaknesses: Hierarchical organizational structure, Secrecy in organizational culture, effects of recent product recalls

Opportunities: Growing markets in developing countries, Rising demand for fuel-efficient automobiles, Growing interest in advanced electronics in vehicles, and Weak Japanese Yen vs. U.S. Dollar

Threats: Growing market presence of low-cost competitors and Rapid innovation of competitors

INDUSTRY PEERS

General Motors: $145B revenue, Nissan: $9.7B revenue, Honda: $7.8B revenue

COMPANY NEWS

TOYOTA, Sep, 19, 2018 - [ICN Newswire] “Mini Renewable Energy Fund” to be established by SPARK, Toyota is investor.

The fund aims to invest in renewable energy power facilities. The fund is “driving renewable energy growth and use throughout Japan,” to further improve regional socio-economic development and Japan’s energy self-reliance. Toyota is searching for future electricity supplies for its plants, electric vehicles, and dealerships, as part of its “Environmental Challenge 2050” goals. The fund aims to support the realization of a low-carbon society that maximizes use of clean energy.

PR NewsWire - Texas, Sept. 10, 2018: Valenstein named group-up, revenue management and product profitability.

Valenstein will be responsible for product cost and profitability analysis, including introduction of enhanced data analytics tools, and leading financial support for Toyota’s parts and accessory operations.

PLANO, Texas, Sept. 4, 2018 - [PRNewswire] “Sales down 2% from August 2017”

Toyota reported August 2018 sales of 223,055 units. With the same number of selling days in August 2018 compared to August 2017, sales were down 2.0 percent on a daily selling rate and volume basis. Toyota division posted August 2018 sales of 194,413 units, down 2.2 percent, while Lexus posted August 2018 sales of 71,642 unit.
External Engagement Summaries

FIDELITY INVESTMENTS

EST. 1890

FIDELITY & UNT

AN INVALUABLE PARTNERSHIP

FIDELITY IS THE TOP CORPORATE EMPLOYER OF UNT ALUMNI.

FIDELITY HIRES MORE UNT COLLEGE OF BUSINESS GRADUATES THAN ANY OTHER COMPANY.

698 Total UNT alumni employed by Fidelity.

574 Total UNT alumni employed by Fidelity in DFW.

*Based on LinkedIn data; actual numbers may be higher.

COLLEGE OF BUSINESS ENGAGEMENT
- Sponsored undergraduate College of Business capstone case competition (3 years).
- Professional Leadership Program (PLP) partner for 10 years.
- Al Riviezzo, Fidelity SVP and Site Manager, is a current COB Advisory Board member.
- Through support of Mark Pullam and Paul Gorman, Fidelity plays an active and influential role in the lives of UNT students.
- In 2017, approximately 15 Fidelity employees volunteered their time to mentor students of PLP, which led to 10 of the mentees earning employment at the firm.
- Internships with Fidelity: Marketing, Logistics, and Operations Management, Finance, and Professional Leadership Program.

UNT IS A FIDELITY CUSTOMER
- Fidelity is a vendor and preferred retirement manager option for 10,000 employees across the UNT System.

ENGAGEMENT ACROSS CAMPUS
- College of Engineering
  - Established pipeline for Fidelity’s LEAP technology development program from CS and Computer Engineering Majors.
  - Zina Townley, former Scrum Master at Fidelity and ’97 UNT alumna, is on the College of Engineering Advisory Board.
- Integrative Studies Major has become a successful hiring pipeline for Customer Service.

PHILANTHROPIC SUPPORT
- Since 1986, Fidelity Investments has contributed $500k to UNT.
- Fidelity’s most recent contribution was $50k in support of the College of Business Professional Leadership Program.

UNT CONTACTS
- Dr. Marilyn E. Wiley
  - Dean, UNT College of Business
  - M.wiley@unt.edu
- Jessica Waites
  - Director, Corporate Engagement
  - Foundation Relations
  - Jwells@unt.edu
- Dan Neapell
  - Executive Director
  - Career and Leadership Services
  - Dnejap@unt.edu

*The most rewarding thing about the Fidelity Case Competition was a chance to find my passion. I felt passionate about the proposal we came up with. I knew we had a great idea and I wanted Fidelity to hear it.*

-Michela Malisco, 2017 Fidelity Investments Integrated Case Competition winner
Stewardship Reports

The Ericsson Impact

Advising
3 advisory council members serve 2 schools and

Expansions
More than 200,000 additional square feet in 2 buildings is used

Community
160 Academic Bridge Program students served per year.
More than 6,000 attendees at
Supported 54 students in the Young WISE Investigators program

Events
5 events over 5 years. Lecture sponsorship for
Alumni receptions on Ericsson campus. Annual corporate visit

Scholarships
Since 2010, contributions greater than $700,000 have impacted more than

Research and Innovation
5 UTD projects with IP ownership,
OPEX one-day award at the Business Idea Competition.
4 awards at the Business Idea Competition.

Partner Contacts

Stacey Bennett
North America University Relations Program Manager
Primary Contact

Nathan Hills
Head of Business Experiences North America

Wendy Winkeler
Vice President, Project Operations

UT Dallas Contacts

Jessica Shepard Watts
Senior Director, Corporate Relations
Primary Contact

Pete Poormandl
Director, Corporate Relations
Corporate Outreach – Communications

• Website
• CR Newsletter
• Sharing relevant news articles highlighting your school, research, partnerships
• Save the date for events on campus
• Engage them, show them why they should learn more
Corporate Outreach – Communications

- Website
- CR Newsletter
- LinkedIn
- Twitter
Corporate Outreach – Communications

Northwestern

CORPORATE ENGAGEMENT

For Faculty, Staff and Students

Search this site

Research and Innovation
Our team seeks to connect the most innovative organizations with world class research and ideas in order to invoke dynamic change. We recognize that each partnership is unique and remain committed to customizing options to enhance your engagement with Northwestern. To begin making an impact on campus and within your organization, explore the different opportunities below.

Recruit and Sponsor Students
Partner with Northwestern through sponsored research, technology transfer, working with student innovators and more.

Phanthropathy
Work with us to find the best for your philanthropic

Recruit and Sponsor Students
Connect with our students. Learn about the career offices on campus and discover ways to interact with our student groups.

Support the Arts
Show your company’s support of the arts by getting
Success (ish) Stories
WHAT? I THOUGHT WE WERE IN THE TRUST TREE IN THE NEST?

ARE WE NOT?
Engaging New Partners

- What did we learn?
  - Listen to the company
  - Be patient
  - Great connections can be made at career fairs
  - Moving fast pays off
  - Over prepare your faculty
Outside the Box

What did we learn?
- Be open to new approaches to existing programs
- Allow time for conversation in campus briefings

Stewarding Your Longest Partner

What did we learn?
- Don’t take them for granted
- Treat them like a new partner
- Open the relationship and talk about the good, the bad and the ugly.
Companies who should not be named

- What did we learn?
  - Understand funding capabilities early in the process
  - Know when to quit – or at least step back. Tell your friends!
  - Perseverance CAN payoff
  - Relationships stemming from one person’s interest are not robust
  - It’s hard to say no to big company names but - value your time
  - It’s ok to demand (ok request), the respect you deserve
Shelley Walter
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Northern Kentucky University
walterm4@nku.edu

Jessica Shepard Watts
Executive Director, Corporate & Foundation Relations
University of North Texas
jessica.watts@unt.edu