



BLUE RIBBON COMMITTEE MEETING #8 AGENDA CAMPUS DISTRICT VISIONING PROJECT

Meeting Objectives

1. Review BRC Meeting #7 outcomes and responses to information requests and questions.
2. Review research and trends related to non-traditional students.
3. Review and discuss the updated draft Concord Campus District Vision Framework document.

When

May 16, 2019
6:00 PM – 9:00 PM

Where

Concord Senior Center
2727 Parkside Circle, Concord

BRC Members

Dominic Aliano, Concord Councilmember
Susan Bonilla, Council for Strong America
Edward Del Beccaro, East Bay Regional
Manager, TRI Commercial
Greg Feere, Trades, Retired
Dr. Glenda Humiston, UC ANR
Randell Iwasaki, CCTA
Sharon Jenkins, John Muir Health
Buck Koonce, Lawrence Livermore NL
Bob Linscheid, Cal Poly San Luis Obispo
Satinder Mahli, CSUEB
Dr. Nellie Meyer, Mt. Diablo USD
Carlyn Obringer, Concord Mayor
Victor Tiglao, Student Representative
Dr. Peter Wilson, Retired Dean, CSUEB
Dr. Fred Wood, CCCC
Jim Wunderman, Bay Area Council

Project Team

Valerie Barone, City of Concord
Kathleen Treppe, City of Concord
Guy Bjerke, City of Concord
Daniel Iacofano, MIG
Dan Amsden, MIG
Jamillah Jordan, MIG

- I. Welcome and Agenda Review.....6:00 PM
- II. Planning Process Overview.....6:10 PM
 - Overall Process Schedule
 - BRC #7 Summary
- III. Additional Information.....6:30 PM
 - BRC Submitted News Articles
 - Survey Research around Non-Traditional Student Trends and Desires
- IV. Revised Draft Concord Campus District Vision Framework Document.....7:00 PM
- V. Public Comments.....8:30 PM
- VI. Close.....9:00 PM



CONCORD CAMPUS DISTRICT VISION FRAMEWORK

Blue Ribbon Committee Review Draft, Version 2 | May 10, 2019





Executive Summary

The economy in the United States and throughout the world is constantly evolving. Traditional academic and career pathways no longer bear the same fruit they did even a generation ago. And the competitiveness for industries to be innovative and attract talented people has never been higher. Over the past nine months, the City of Concord and a Blue Ribbon Committee made up of academic, industry, and agency leaders, have thoughtfully discussed these new realities. They have analyzed regional and national trends, studied campuses and innovation districts throughout the nation, and formulated a clear vision to strategically support regional economic and higher education through a new campus model—one that combines multiple academic intuitions at various grade levels, research and development, and manufacturing opportunities. This new Campus District will:

FOSTER CUTTING-EDGE INNOVATIONS

The Campus District will provide a full complement of academic, research and development, and innovation uses operating in a collaborative environment. Academic partners will benefit from an existing student population that is currently underserved by four-year higher education institutions. Industry partners

will have access to Bay Area talent and a wealth of local resources in the heart of the Northern California Megaregion. This clustering of innovative firms and academic institutions will form a cohesive district where ideas and talent are shared.

LEVERAGE CONCORD'S IDEAL LOCATION

The Campus District is part of the larger redevelopment of the Concord Naval Weapons Station. It will be supported by a full range of housing, retail, industrial, entertainment, and civic uses. The campus is ideally located near a BART station and has easy access to two freeways and a regional airport. The site is undeveloped and provides the unique opportunity to create a completely customizable campus that meets the specific needs of academic and industry partners.

RESPOND TO EVOLVING EDUCATION NEEDS

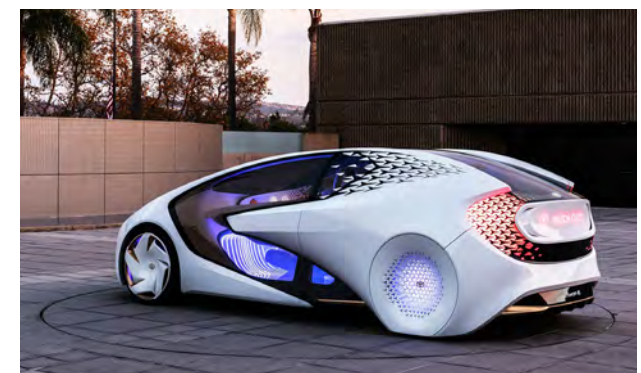
The Campus District is envisioned to have flexible and diverse academic programming at all levels, including competency building and career training opportunities for the next generation of California's workforce. Given the precipitous growth in technology-related

sectors, the campus will include a broad array of cutting-edge and high-tech courses tied to local, growing industries. Academic programs will cater to a diverse range of traditional students, and online and hybrid courses geared specifically towards non-traditional students (adult learners).

■ **ADVANCE EQUITY, OPPORTUNITY, AND INCLUSIVITY**

The Campus District will expand access to education and employment for individuals of all backgrounds and income levels. Insufficient enrollment capacity and rising tuition costs are restricting thousands of qualified students from accessing the education they require to attain professional success and financial security. Institutions and industries are working to become more equitable and inclusive, and the Campus District provides a unique opportunity to address these issues head on through new funding and operational models.

The new Concord Campus District will be impactful on the region, nation, and beyond. Building from the Bay Area's culture of innovation, world-class human capital, and unmatched institutional prestige, this project provides a truly unique and once-in-a-lifetime opportunity to create the next generation of academic and industry partnerships. One that is custom designed to serve the needs of the primary users, while also being self-governed to allow for the free flow of ideas, education, and innovation. **We invite you to be part of it.**



"Innovation districts facilitate the **creation and commercialization of new ideas** and support metropolitan economies by growing jobs in ways that **leverage their distinct economic attributes**. These districts build on and revalue the intrinsic qualities of cities: location, density, authenticity, and vibrant places. Given the proximity of many districts to existing neighborhoods, their intentional development can be a tool to help connect people to **employment and educational opportunities...**"

– Brookings Institute

July 2018



CONTENTS

- 1** INTRODUCTION
- 2** DEFINING THE NEED
- 3** VISION AND GUIDING PRINCIPLES
- 4** PROGRAMMATIC PRIORITIES

APPENDICES

A: Blue Ribbon Committee Meeting Summaries

B: Blue Ribbon Committee Meeting Presentations

C: Relevant News Articles

1



INTRODUCTION

Overview

Reuse Project Background

Campus District Location

Campus Visioning Process

Blue Ribbon Committee

Additional Community Engagement

Overview

Higher education and the innovative economy are rapidly changing.

The needs of industry, and the associated technical and intellectual skills required from students, are constantly evolving. Staying “ahead of the curve” is vital for ensuring local students succeed in the future workplace and local companies have the people and resources they need to stay competitive on a global stage.

Concord is uniquely positioned to **create something truly special** that bolsters both the academic and industry goals of the region. The city is located at the epicenter of the Northern California Megaregion and has land available adjacent to a Bay Area Rapid Transit (BART) station and an entirely new community being developed on the former Concord Naval Weapons Station (CNWS). What is most important is that the City and community have a desire to strategically support regional economic and higher education through either a traditional collegiate setting or a new campus model—**one that combines multiple academic institutions at various grade levels, research and development, and manufacturing opportunities.**



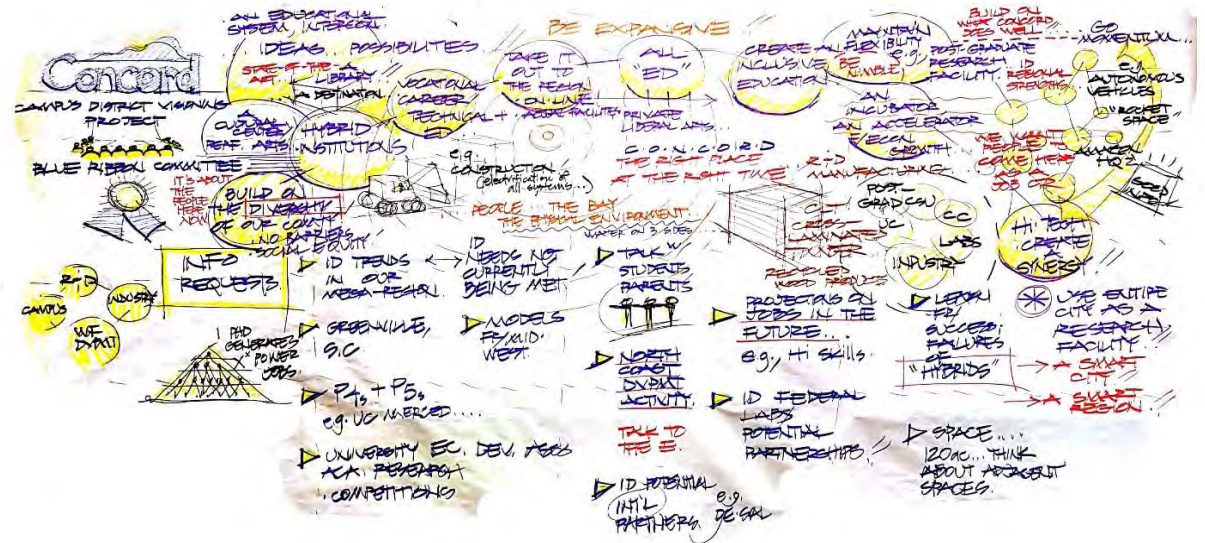
Over the past two decades, the City of Concord has worked with local residents, the business community, regional partners, and other agencies to transform the former Concord Naval Weapons Station (CNWS) into a new, dynamic mixed-use neighborhood supported by a full complement of essential services and public open spaces. A key component of the comprehensive vision for the Reuse Project is the allocation of approximately 120 acres for a higher education campus. This new campus is envisioned to address academic and applied research needs in the region and beyond.

In August 2018, the City formed a **Blue Ribbon Committee (BRC)** composed of education leaders, business and industry representatives, and regional stakeholders to help identify and articulate a shared vision and set of guiding principles for the new campus. The culmination of this collaborative process revealed substantial interest in developing a world-class inclusive hybrid Campus District with a diverse range of academic programs, degrees, and training opportunities for students of all ages. In addition, the BRC identified the need and opportunity to include private industry in the campus, helping to bolster unique research and employment opportunities that support Concord and the Northern California Megaregion.

This **Concord Campus District Vision Framework** identifies the advantages of creating a hybrid Campus District in Concord on the former Naval base, without precluding the possibility of a single university traditional campus. It does this through a review of current and projected demographic and economic trends for the region, evaluation of the strategic assets already available in Concord, and review of key lessons learned from the creation of other Innovation Districts and hybrid campuses throughout the United States.



Most importantly, the framework defines the BRC-drafted vision for what the Campus District can become. This vision was created through extensive and thoughtful discussion from the BRC during a nine-month process. The vision is further articulated through a series of guiding principles that will inform decisions around institution and industry partnerships, programming, campus design, sustainability, community amenities, equity and inclusivity, and financing. While the goal of this framework is to define a clear vision for the future of the Campus District, it is intentionally drafted in a manner to allow the City of Concord to be **flexible and nimble** as the campus grows and evolves in the years and decades to come.



BRC meeting wallgraphic recording of committee comments and ideas



Reuse Project Background

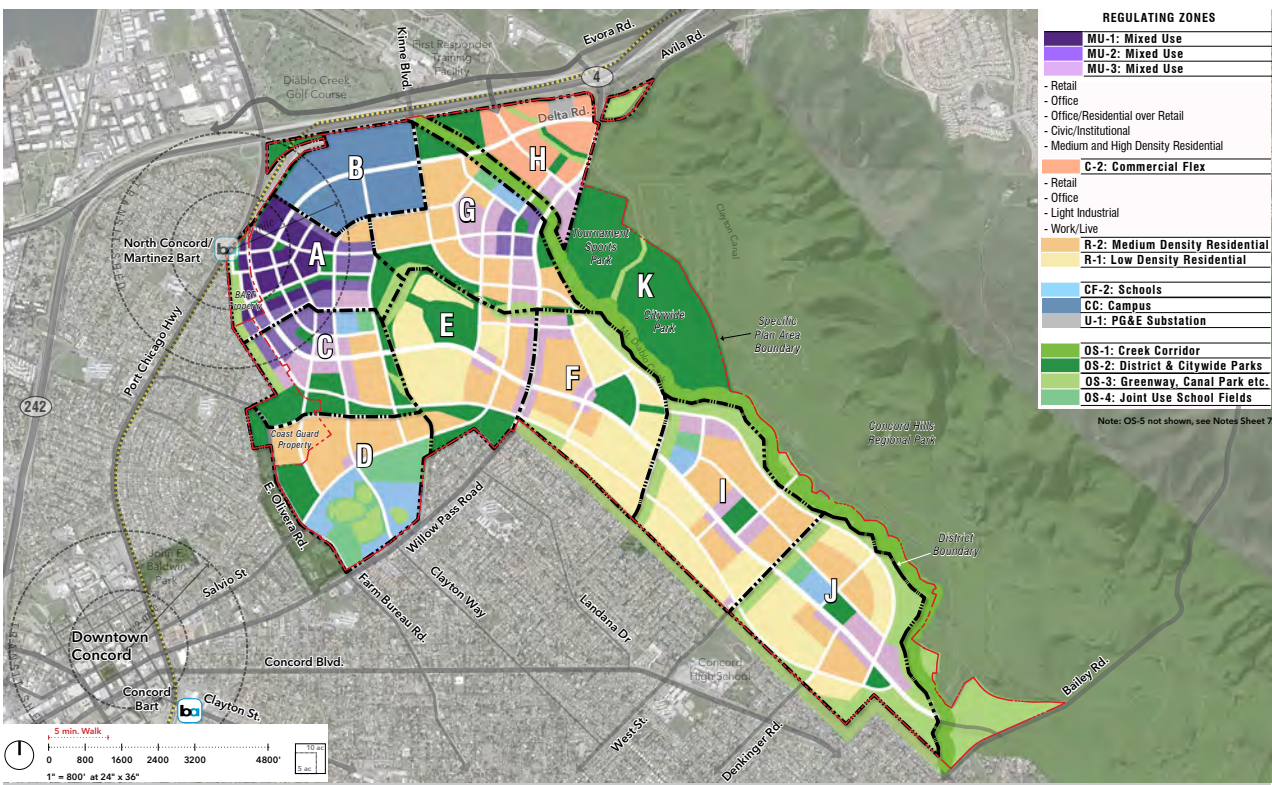
In 1942, the U.S. Navy established the CNWS along Contra Costa County's northern waterfront to serve as its primary Pacific Coast ammunition port, supporting maritime operations during World War II and later military operations in the Korean, Vietnam, and Gulf Wars. Following the 1944 disaster at Port Chicago, in which 320 sailors were killed by a deadly munitions explosion, the Navy purchased an additional 5,200 acres south of the port to serve as its new **Inland Area**.

Plans to redevelop the site gained momentum at the onset of the 21st century. Due to the changing landscape of geopolitics and U.S. military objectives, the Federal government announced the official closure of the CNWS Inland Area in 2005. The following year, the City of Concord was designated as the Local Reuse Authority (LRA) responsible for guiding all subsequent redevelopment efforts, paving the way for a collaborative process of blank-slate thinking.

Campus District Location

In 2012, the City adopted a comprehensive **Area Plan** that established the conceptual framework for the redevelopment of an approximately 2,250-acre portion of the CNWS Inland Area. The Plan envisioned a chain of distinct, yet complementary mixed-use districts supported by a diversity of housing options, commercial and retail amenities, passive and programmed open spaces, and an array of community benefits.

This high-level vision plan forms the foundation upon which several concurrent planning processes are being built. In particular, the Plan included a 120-acre piece set aside for a higher education campus (see area **“B”** on the diagram to the right). The campus site was strategically located close to an existing BART station and a planned mixed-use hub (area **“A”**). The intent was to ensure the campus was highly visible from local freeways, had easy access to BART, and could be seamlessly integrated with new neighborhoods. These combined locational assets make the campus site an ideal location for a major hybrid campus district.

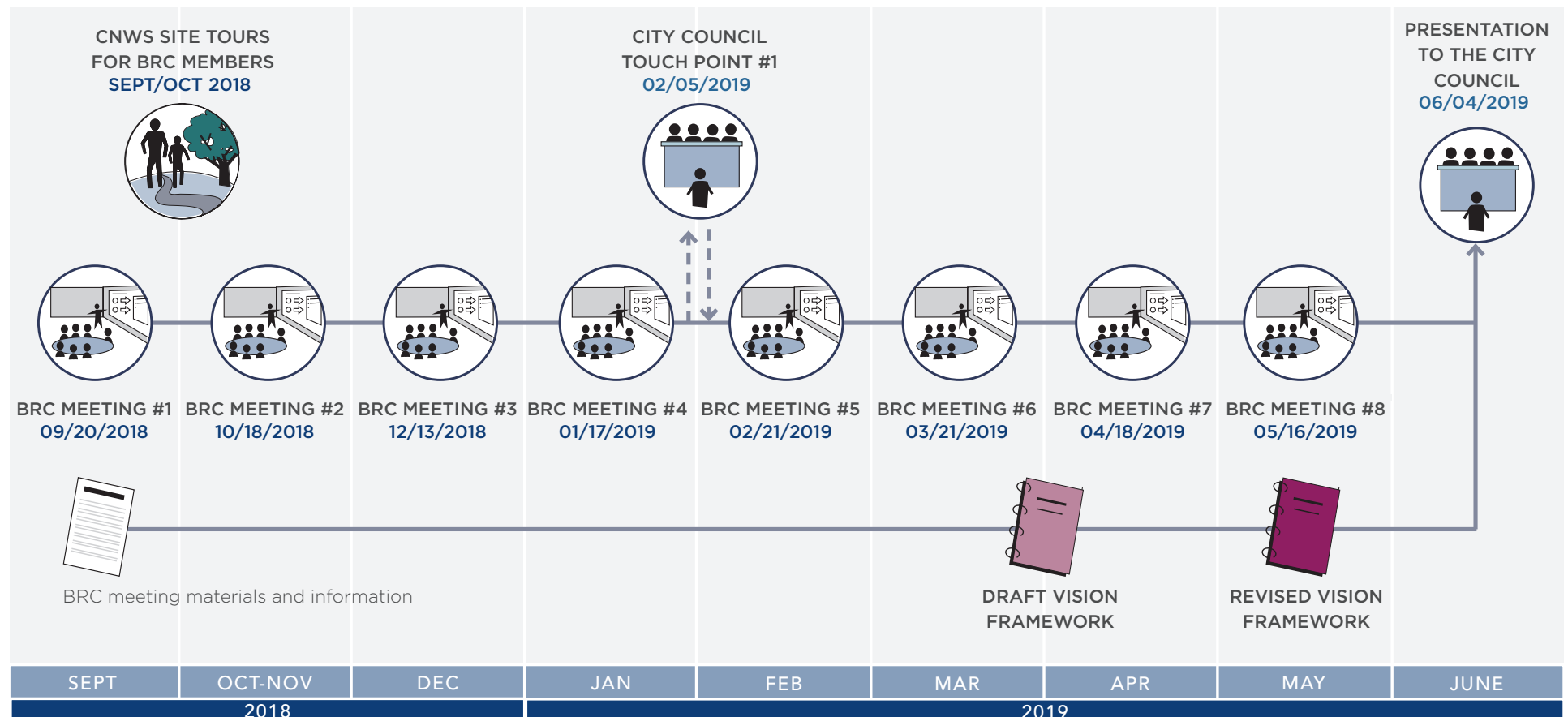


Campus Visioning Process

Between August 2018 and May 2019, the City led a collaborative planning process that included a site tour, eight topical BRC meetings, and two presentations to the City Council (as shown below). Each BRC meeting had a unique agenda that typically included: a summary of news items; presentation of research and comparable projects; open discussion of ideas from BRC members; and opportunities for community comments.

Each meeting was facilitated by MIG—a Bay Area-based campus planning and design firm that has assisted the City with visioning the future of the CNWS site for over a decade. MIG, working closely with City staff, prepared materials and presented information during each meeting. In addition, they recorded BRC member comments on large posters to help coalesce ideas and identify strategies.

The BRC meetings served as the primary forums in which the vision, guiding principles, and implementation actions for the Campus District were discussed and refined, leading to the groundwork for the comprehensive planning framework proposed in this document.



Blue Ribbon Committee

The new campus in Concord presents a “blank slate” opportunity to creatively and thoughtfully envision what the next generation of a higher education campus should look like and how it should function. Since there are no existing uses on the site, it also provides an opportunity to think of ways to create a landmark campus.

In order to ensure a creative and comprehensive campus visioning process, the City of Concord formed a Blue Ribbon Committee (BRC) consisting of regional academic leaders, local industry representatives, and elected officials who have both the knowledge and understanding of Contra Costa County and the future of education and industry in California. The BRC was organized as an advisory committee to the City Council with the charge of helping the City and community:

- **Identify** the specific research and academic needs of the City of Concord, Contra Costa County, and the broader region.
- **Understand** the facility sizing and programming needs of various potential university and college partners.
- **Evaluate** financial, regulatory, and legal solutions that will encourage a new institution to locate in Concord.
- **Reach** a general consensus on the desired outcome and strategic next steps.



BLUE RIBBON COMMITTEE MEMBERS

City of Concord

Carlyn Obringer, Concord Mayor
Dominic Aliano, Concord Councilmember
Ron Leone, Former Concord Councilmember

Bay Area Council

Jim Wunderman, President and CEO
Matt Regan, Senior Vice President

California State University East Bay

Satinder Mahli, Assoc. Director, Government and Community Relations
Dr. Robert Phelps, Concord Campus Director

California Polytechnic State University, San Luis Obispo

Bob Linscheid, Special Advisor for Economic Development, Office of the President

Contra Costa Community College District

Dr. Fred Wood, Chancellor
Mojdeh Mehdizadeh, Executive Vice Chancellor

Contra Costa Transportation Authority

Randell Iwasaki, Executive Director
Tim Haile, Deputy Executive Director

Council for Strong America

Susan Bonilla, California Director

John Muir Health

Sharon Jenkins, Employer Broker Relations

Lawrence Livermore National Lab

Buck Koonce, Senior Advisor
Scott Wilson, Community Relations Officer

Mount Diablo Unified School District

Dr. Nellie Meyer, Superintendent

Public Member

Dr. Peter Wilson, Retired Dean, California State University East Bay, Concord Campus

Student Representative

Victor Tiglao, Diablo Valley College Student

Building and Construction Trades

Greg Feere, Retired CEO
Dan Torres, Business Agent

TRI Commercial

Edward Del Beccaro, East Bay Regional Manager

University of California, Division of Agriculture and Natural Resources

Dr. Glenda Humiston, Vice President



BRC MEETING #1

This meeting formally kicked-off the project and provided an opportunity for BRC members to introduce themselves and learn about the current Reuse Specific Plan process. The focus of the discussion was to review and understand national employment and academic trends. BRC members also brainstormed preliminary ideas for campus design and programming.

Key Discussion Points

- Campus design and programming should be value-driven, prioritizing principles of equity, inclusivity, regional integration, program diversity, flexibility, and facility modernization.
- Campus features should include a library, cultural center(s), postgraduate research facilities, and an applied industry incubator.
- The campus should aim to serve and collaborate with firms in the technology, manufacturing, construction, biomass, and renewable energy sectors.

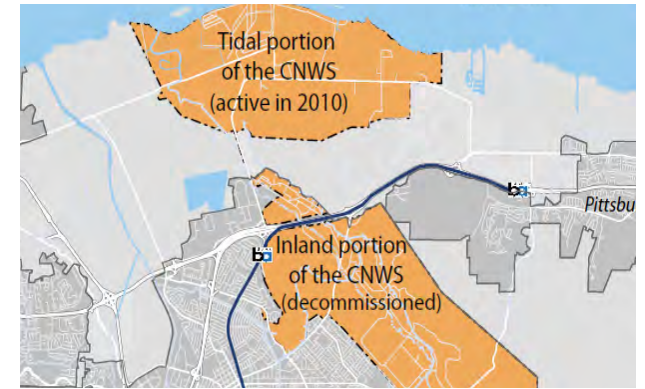


SITE TOUR

BRC members and the project team took a tour of the CNWS site to better understand the area's physical characteristics, including its assets, constraints, and strategic opportunities.

Key Discussion Points

- There is a vast amount of available land on the former CNWS site with strong connections to existing Concord neighborhoods and BART.
- Several transit connections make the site easily accessible for residents, employers, and employees within the broader region.
- The planned Tournament Level Sports Complex is an asset for the future campus, and there are many opportunities to co-locate uses between the campus and new or existing neighborhoods.
- The campus site is situated on a knoll and provides beautiful views of Mount Diablo and surrounding areas. And in turn, the campus will be highly visible from major roadways and BART.



BRC MEETING #2

This meeting included a review of the physical conditions on the CNWS site and an opportunity to further advance initial concepts for the Campus District. BRC members also discussed demographic and programming priorities, and refined overarching planning principles that were discussed during the first meeting.

Key Discussion Points

- The campus should be envisioned as part of a hybrid educational system, based on partnerships with regional industries and educational institutions offering different types and levels of education.
- The campus should maintain flexibility to adapt to evolving workforce needs and student preferences, both in terms of programs/degrees and also physical spaces.
- The campus should respond to the needs and trends of the regional economy and population.



BRC MEETING #3

This meeting was focused on reviewing comparable campus planning models and trends, discussing conceptual programming options, and brainstorming potential public-private partnership opportunities. BRC members discussed issues related to financing, but also opportunities for partnerships and examples of innovative new funding models.

Key Discussion Points

- The campus should be a leader in the production of cutting-edge research and innovation, closely collaborating with industry and public institutional partners.
- The campus should offer a hybrid education system, based on partnerships with regional industries and aiming to maintain flexibility to adapt to evolving workforce needs and lifelong learning opportunities.



BRC MEETING #4

This meeting included a review of campus and innovation district financing mechanisms that have worked successfully on other projects. A guest speaker (James Birkey from JLL) presented three case studies on public-private financing, lessons learned, and other potential strategies to align public and private interests.

Following the presentation, BRC members framed initial concepts for the campus vision and guiding principles, laying the foundation for the framework proposed in this document.

Key Discussion Points

- The campus will likely need multiple financial approaches to ensure it is economically feasible.
- All forms of Public-Private Partnerships (P3s) should be explored to help finance the campus.
- There needs to be a strategy to attract the first major institution to the campus.



BRC MEETING #5

This meeting included a robust discussion around the potential for a “hybrid campus” partnership. There were presentations on the UC Division of Agriculture and Natural Resources’ (ANR) Nano-Fiber program, which included a description of the new technology and government mechanisms currently in place to expand research.

The BRC discussed emerging cyber security opportunities that cross-cut different industries, and ways to leverage cyber security related to new educational clusters and industry needs.

Key Discussion Points

- Work with existing employers and survey company representatives.
- Support the existing autonomous vehicle industry and identify ways to complement the Northern Waterfront Initiative.
- Tour the Auraria Campus in Denver to get a better sense of the programming and organizational structure.



BRC MEETING #6

This meeting included a detailed review of several important community assets that can be bolstered by the new campus, including: GoMentum Station; Buchanan Field Airport; and the UC Berkeley Open Innovation Lab. There was also a review of the CSU San Marcos campus, which highlights innovative ways for academic and financial partnerships.

The BRC discussed a series of initial district physical planning concepts that included flex spaces; hyper mixed-use; joint-use and shared spaces; and compact/walkable campuses.

Key Discussion Points

- The CSU San Marcos example shows a creative way to seamlessly blend academic uses with new private development, while also including creative public-private partnership (P3) financing opportunities.
- Actions needed to implement the Vision Framework will be taken by the City and many local and institutional partners.



BRC MEETING #7

This meeting included a review of several additional campus models, including the University of Delaware STAR Campus and the University Center of Lake County. The majority of the meeting was dedicated to BRC members sharing their ideas and comments on the draft Campus District Vision Framework. This included specific refinements to the draft vision, guiding principles, and implementation actions. These comments were used by the City and MIG to prepare an updated version of the document.

Key Discussion Points

- Additional research needs to be done to better understand the needs and desires of both traditional and non-traditional students.
- Consider whether a successor entity to the BRC will be required to advance the implementation process, and what their composition and role will be.

Additional Community Engagement

CITY COUNCIL TOUCH POINT

Midway through the process MIG and City staff met with the City Council, Planning Commission, and Design Review Board to update them on the Campus Visioning process. This included a presentation on an emerging vision and guiding principles. The decision makers complemented the BRC on their thoughtful approach to the project, and provided key feedback and direction, including:

- Ensuring that the future campus addresses local Concord needs as well as regional needs.
- Confirming interest in a hybrid campus that can serve many different functions and institutions, while also cautioning that the campus not turn into a stale corporate office park.

PROJECT WEBPAGE

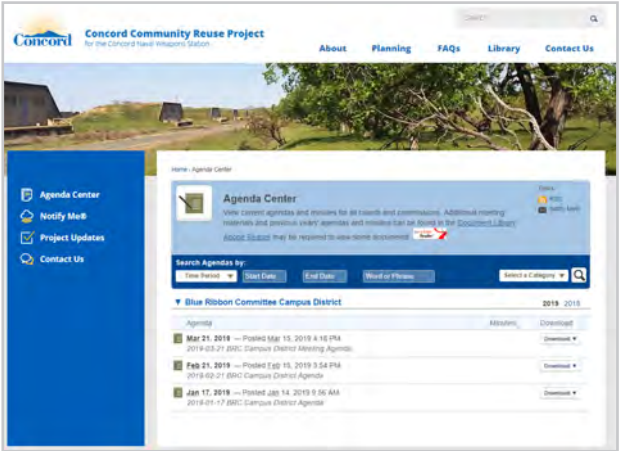
Throughout the process the City maintained a project web page, linked from the Reuse Specific Plan website, that included all BRC materials (e.g., agendas, presentations, summaries, etc.).

STUDENT SURVEY

During the BRC Campus Visioning process, a graduate class from UC Berkeley developed a survey to understand what local high school students would like to see included in a future Concord campus. The survey was administered in Fall 2018 and input from students was used to help refine the guiding principles included in this document.



3b. Presentations
Future Campus District & Tournament Sports Complex located in former Concord NWS



2





DEFINING THE NEED

Overview

Higher Education Trends

Regional Demand

Strategic Local Assets

Campus Case Studies

Creating an Innovation District

Potential Funding and Financing Approaches

Overview

The way students, industry, and governments interact with higher education is changing. No longer are colleges and universities isolated enclaves that operate in a “bubble” removed from outside forces. Today, the **line between education and industry is rapidly blurring**. Students are finding themselves opportunities to apprentice and learn on-the-job while studying for a certificate or degree. Industries have the ability to leverage their internal resources with academic “brain trusts” to create approaches to research that are mutually beneficial. This change is happening rapidly—and the megaregions that are embracing this new way of learning and innovating are **reaping benefits for both the economy and community**.



Higher Education Trends

California is endowed with world-class academic institutions, headlined by the ten University of California campuses, 23 California State Universities, and 115 community colleges. The San Francisco Bay Area region is particularly renowned as one of the world's premier higher education hotspots, home to countless institutions at the cutting-edge of research and development (R&D) initiatives and producing some of the nation's most skilled and best educated graduates.

STUDENT ACCESS AND COMPETITION

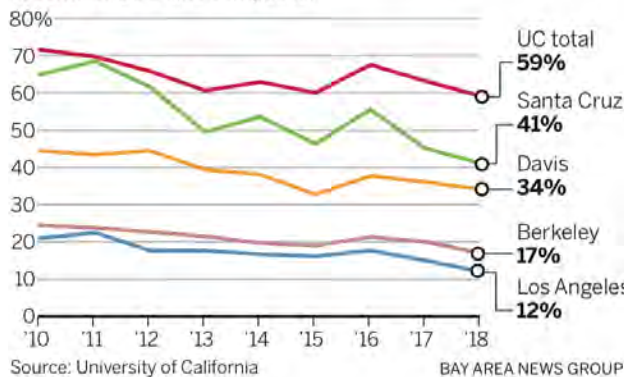
There is an urgent need in California to address the barriers that restrict access to public higher education institutions. In an effort to compensate for State funding cuts during the 2008-09 recession, California's public universities are now charging the highest tuitions in the State's history, saddling more and more students with debt repayment obligations well into their professional lives.

Though the State has increased financial aid to lower-income students, a 2016 survey from the Public Policy Institute of California (PPIC) revealed that 57% of all respondents still considered college affordability a "big problem," given high tuition and living costs.

Increased student competition for enrollment spaces poses another major obstacle. Though the proportion of high school students meeting entrance requirements is steadily rising, thousands of qualified applicants are being rejected due to the limited number of spaces available. Unless access to high-quality affordable four-year education is expanded, California will face a severe labor market imbalance in the coming years. Though the demand for skilled workers is growing precipitously in most economic sectors, California is anticipated to have a deficit of one million college-educated workers by 2025 should current trends continue (which includes both degree and non-degree programs). This projected shortage indicates that the State's higher education system is neither responding to nor keeping pace with the changing needs and priorities of its economy.

UC IN-STATE FRESHMEN ADMISSIONS

Admission rates for applicants from California fell in 2018 at some of UC's elite campuses.





EMERGING PARADIGM SHIFTS

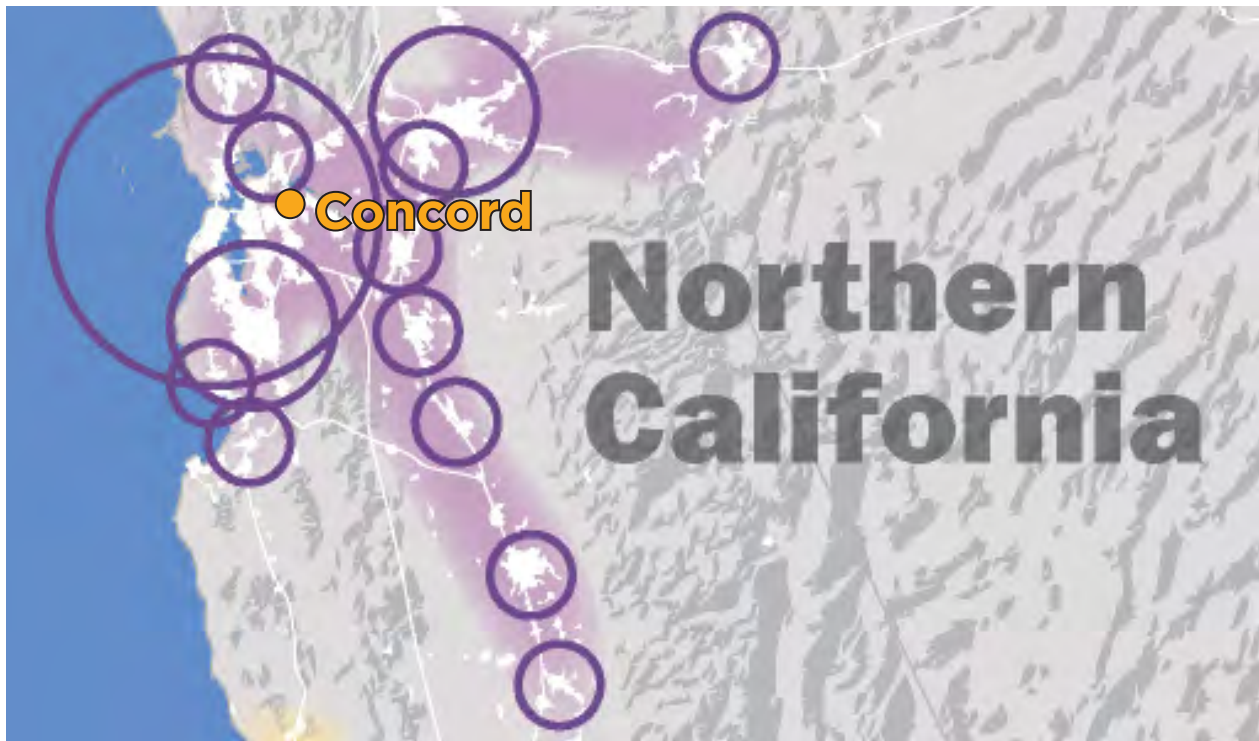
The very nature of higher education will itself undergo significant changes as societal needs, desires, and trends continue to evolve through the years. The proportion of national college students classified as non-traditional—that is, already in the workforce but lacking a post-secondary credential—is anticipated to increase through at least 2026. This growing trend should compel higher education institutions to expand their target demographics and cater to the unique needs of individuals of all ages and backgrounds.

Traditional higher education curricula are also growing increasingly outdated and out of touch. Although the dominant narratives surrounding education suggest that individuals should pursue a college degree, approximately one-fifth of all graduates ultimately occupy jobs that do not require a degree. The implication is not that academic degrees are unimportant, but rather that they are not

always necessary to achieve success in certain professions. Rather than continue to promote solely the pursuit of a degree(s), the higher education system must adapt to destigmatize skills-based competency training and promote their continued value in today's multi-faceted economy.

In addition, non-traditional students desire and require access to specific types of campus amenities. This includes onsite healthcare and child care that is accessible and affordable. Having these amenities available either on or near a campus dramatically improves the academic experience for non-traditional students and their ability to efficiently take classes and courses.





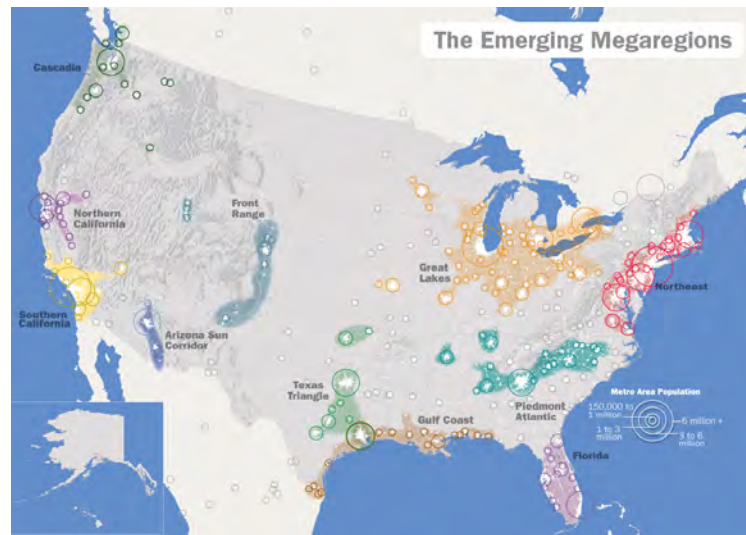
Regional Demand

The need to establish a new higher education campus in Concord is clear. Not only is there a strong desire to serve local academic needs for residents of all ages, but the booming regional economy demands local research and partnerships that can support innovative companies and emerging industries.

DEFINING THE “MEGAREGION”

Northern California comprises a network of clustered metropolises in which the people, firms, and labor markets of four distinct regions—San Francisco Bay Area, Sacramento Area, Monterey Bay Area, San Joaquin Valley—are functionally interconnected and interdependent. This economic and cultural agglomeration has created one of the nation's fastest growing “Megaregions,” with Gross Regional Product (GRP) growing at an annual rate of at least 5% since 2010.

As the Northern California Megaregion continues to evolve and grow over the coming decades, it is imperative that innovation remains at the forefront of this change. In order to sustain this, higher education needs to continue to partner with industry in new, creative ways. Concord, as shown in the diagram to the left, is strategically located in the center of the Northern California Megaregion, well-positioned to have easy access for students, affordable housing for academics and professionals, and physical connections to all major urban centers.

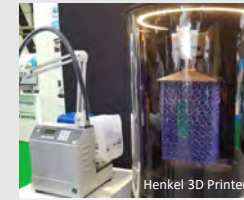


EXISTING AND EMERGING INDUSTRIES

Constant innovations are creating high demand for various evolving technical positions. The jobs with the highest growth potential in the coming decades are predominantly found in technology-related sectors, such as blockchain development, machine learning engineering, and data science. The demand for such positions has grown so precipitously in recent years (e.g., 650% demand increase for data scientists since 2012) that it is difficult for the supply of qualified candidates to keep pace. These estimates notwithstanding, the continuously evolving nature of technological innovation renders it difficult to appropriately forecast the nature of jobs in the future. Indeed, it is estimated that 65% of children currently enrolled in primary school will ultimately hold jobs that do not exist today.

Recent technological innovations have also contributed to a national resurgence in manufacturing. The emerging advanced manufacturing industry—also known as “Maker Tech”—is defined by the use of interdisciplinary, cutting-edge technologies to stimulate product and/or process innovations, bringing together scientists, engineers, skilled trade workers, and production line operators. Though Maker Tech firms are generally relatively small in size and contract to larger corporations, they have contributed steady growth in the manufacturing sector since 2010.

Concords Existing and Emerging Industry Sectors



ADVANCED MANUFACTURING

Henkel
Bishop Wisecarver
Pulse Systems
Telemetry Solutions
Pacific Instruments
Bazell Technologies



HEALTHCARE AND BIOTECH

John Muir
BioRad
Fresenius
Sigray
Biocare Medical
BioZone
BioMicroLab



AGRISCIENCE AND FOOD

Ramar Foods
Naia Gelato
Black Diamond
C&H
Dow/Corteva



TRANSPORTATION TECHNOLOGY

GoMentum
Toyota
Lyft
Uber
BART



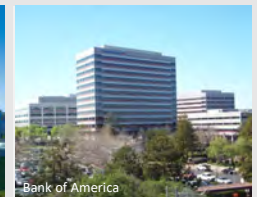
CLEAN TECHNOLOGY

MCE Solar
Chevron
GE Digital



CONSTRUCTION/ BUILDING MATERIALS

Gilbane Building Company
UC ANR



BANKING AND FINANCE

Wells Fargo
Bank of America

Concord Snapshot

Changes in the past five years

Job growth
over last 5 years:

10.2%



Population growth
over last 5 years:

4.3%



House price growth
over last 5 years:

76%



This growing demand for technical expertise does not, however, diminish the significance of so-called “soft skills.” Demonstrated proficiency in oral communication, business management, and leadership underpin a variety of emerging positions across economic sectors, such as sales representatives, customer success managers, and brand managers.

DEMOGRAPHIC AND ECONOMIC TRENDS

Public colleges and universities contribute greatly to the civic and economic vibrancy of a region. At one level, they spur economic development by producing applied research that may contribute to industry innovation—training skilled graduates who help meet regional employment demand, and employing thousands of local workers in various technical and service-oriented capacities. Critically, these institutions also serve local community needs by offering educational access to those with insufficient means to either commute or relocate from their hometowns. This is especially true for lower-income individuals and adult learners with family or other employment obligations.

Contra Costa is the most populous County in California without a public four-year college that offers a complete array of degrees, constraining the ability of many prospective local students from pursuing a Bachelor’s degree or higher. The Contra Costa Community College District (CCCD) encompasses three academics institutions—

Contra Costa College, Diablo Valley College, and Los Medanos College—where students pursue up to two years of education in a wide array of technical, certificate, and credential programs, but cannot obtain a Bachelor’s degree or higher. This limited access to four year degrees is likely partially responsible for a relatively low rate of educational attainment. While approximately 46% of eligible workers in the Bay Area have a Bachelor’s degree or higher, the proportion falls to 40% in Contra Costa and even lower to 33% in Concord.

Despite the county’s limited public higher education infrastructure, Concord is nonetheless considered an attractive destination for corporate firms seeking relocation or new opportunities for growth. Concord is home to 5.8 million square feet of industrial space, 4 million square feet of Class A office space, and 690,00 square feet of research and development (R&D) space, all of which are significantly more affordable than comparable facilities in nearby markets of Silicon Valley, San Francisco, San Ramon, and Walnut Creek. These financial advantages, coupled with the city’s array of business-friendly policies, relative housing affordability, and strong transit infrastructure, have increased Concord’s desirability for firms across a wide range of economic sectors. Overall vacancy in Concord’s industrial, warehousing, and R&D markets is at an historic low of 5.1%.



Furthermore, Concord's economic base is approaching a technological transition that could provide an ideal foundation for new growth and industry innovation. Traditionally a stronghold of the healthcare and service sectors, Concord has also emerged as a national hub for autonomous technology testing.

Established in 2014, the internationally-renowned GoMentum Station provides vehicle testing grounds for innovative firms such as Uber, EasyMile, Baidu, and Honda to test their new and emerging technologies. In 2017, the City also approved two pilot programs to operationalize sidewalk-roving personal delivery devices (PDDs) that transport parcels, groceries, and food orders to customers across Concord within 30 minutes.

These prevailing conditions make Concord an ideal home for a new, world-class higher education institution. The socioeconomic benefits of this endeavor would be manifold.

Expanding access to world-class public education would, at one level, help train the next generation of industry professionals in a dual effort to both replenish California's labor pool and provide a local resource for residents with few academic options. Attracting California's best and brightest minds to the region would also expand possibilities for collaborative partnerships to spur further advancements in competitive economic sectors, such as high-technology.





Strategic Local Assets

Several large planning efforts are being concurrently developed in the study area's immediate vicinity. Each of these projects and assets can further support and benefit from a higher education campus in Concord. And, through the BRC Visioning Process, there have already been connections and initial partnership discussions around ways to leverage local resources to support the Campus District.

BART STATION AREA DEVELOPMENT

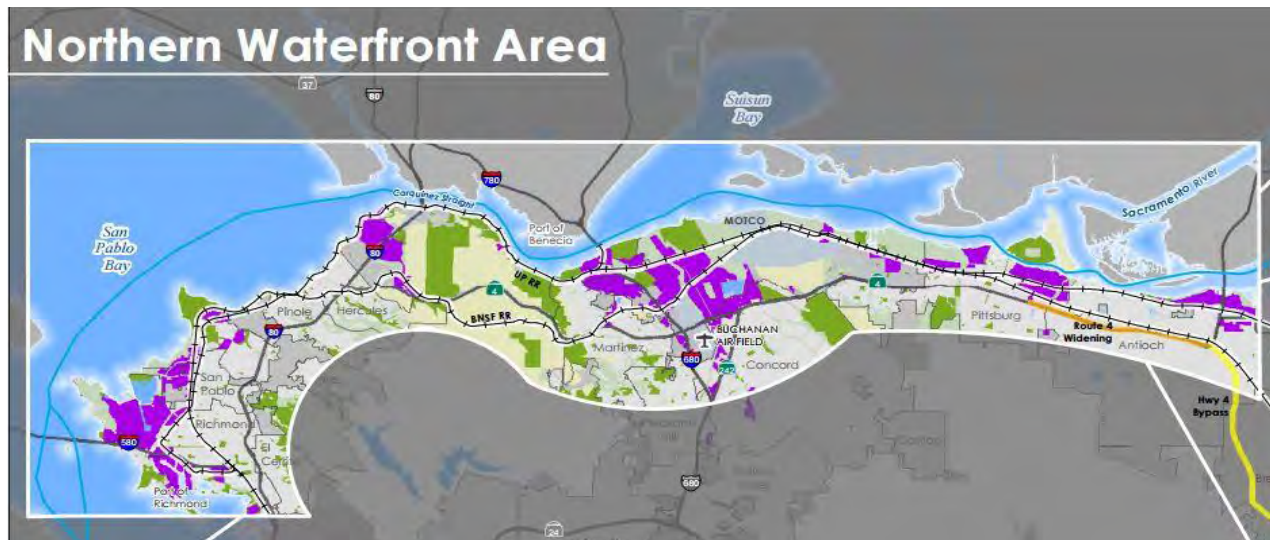
The Campus District is purposefully located within a comfortable walking distance to the North Concord/Martinez BART station. In late 2018, the BART Board formally solicited developer proposals to construct a transit-oriented community on the 20-acre parking lot next to the station. This project will potentially create housing and commercial uses as an initial catalytic effort to create energy and interest in not only the Reuse Specific Plan area but also the Campus District site.

NORTHERN WATERFRONT ECONOMIC DEVELOPMENT INITIATIVE

Contra Costa County established a strategic action plan in 2019 to transform its northern shoreline into a competitive economic hub that aims to create 18,000 jobs by 2035. The Initiative focuses on attracting firms in the advanced manufacturing, transportation technology, biotechnology, clean technology, and agriscience and food sectors.

CONCORD INDUSTRIAL AREAS

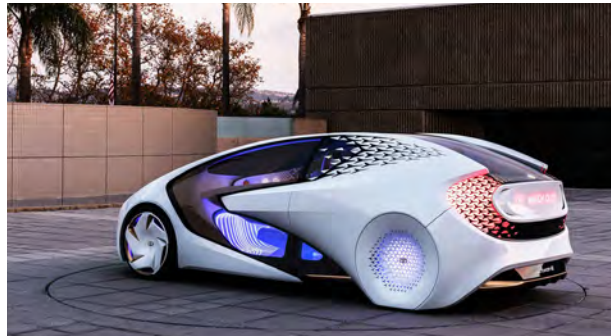
Concord has well-established industrial areas that are involved in manufacturing, logistics, storage, and operations for a diverse array of companies. Many of these facilities are located along the Highway 4 corridor near the Campus District site. In addition, the Reuse Specific Plan has identified new industrial areas immediately adjacent to the Campus District. There is a tremendous opportunity to leverage these industrial areas so they can manufacture the products and ideas that originate from the future research done at the campus.





BUCHANAN FIELD AIRPORT

The airport, located adjacent to Concord, is a full-service public regional airport operated by Contra Costa County. It is a significant aviation resource that serves the region's growing business community. It currently provides corporate jet service, daily scheduled commercial service to Southern California and Las Vegas, executive and general aviation hangars, and a staffed FAA air traffic control tower. The airport provides a strategic resource to the campus not only for convenient commercial service, but it also can easily accommodate feeder cargo aircraft.



GOMENTUM STATION

GoMentum Station is located on the CNWS site and utilizes the base's former roads as a full-scale secure test facility for connected and automated vehicle (CAV) technology. Owned and operated by AAA Northern California, Nevada and Utah, its goal is to assist members and the public in adapting to the fast-changing mobility landscape, while continuing to focus on traffic safety.



The innovative technology being explored and tested at GoMentum Station will redefine the next generation of transportation, bring unprecedented mobility options to people, and help advance traffic safety towards zero fatalities. This facility can provide an invaluable hands-on experience to local students. In turn, the strength of this emerging technology cluster will serve to attract more pioneering firms to the region, spawning regional growth, industry innovation, and human development.

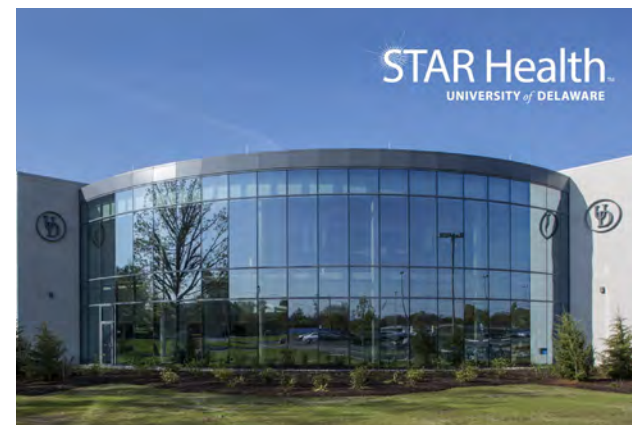
Campus Case Studies

To help generate both ideas and best practices, several hybrid educational district case studies were presented to the BRC for their consideration and evaluation. These precedent models offered a wealth of strategic information that was leveraged to help inform the vision and guiding principles for the Concord Campus District. While nearly a dozen models were discussed, six specific case studies were examined in detail that provided a particular element applicable to Concord:

- **Clemson University International Center for Automotive Research (CU-ICAR):** An applied automotive research campus and innovation hub offering skills programs and graduate degrees.
- **Spokane University District:** A multi-institutional academic and applied research campus specializing in health science innovations that includes public and private institutions.
- **Auraria Campus:** A multi-institutional education district that includes all levels of public higher education in Colorado, with shared-use facilities.

- **CSU San Marcos/University District:** A creative public-private partnership campus closely aligned with the development of a new downtown neighborhood for San Marcos.
- **STAR Campus:** A hybrid innovation district with a creative public-private partnership approach that allows the University of Delaware to retain ownership of land while industry partners the ability to develop highly-customized buildings that serve their specific needs.
- **University Center of Lake County:** An integrated campus that includes high school, community college, and four-year education on a campus with nearly two dozen academic partners.

The following pages provide a summary of each campus model and how they are addressing the emerging hybrid campus of the future.





CASE STUDY

CU-ICAR

CU-ICAR is a partnership between Clemson University, BMW, and other automotive industry partners to create the premier automotive research, innovation, and educational enterprise in the world. Started in the early 2000s, the campus will eventually include five technology neighborhoods, each designed for optimizing an innovative and collaborative environment.

At the core of the campus is the CU-ICAR Autopark and Innovation Place, a four-story multi-tenant facility, including classrooms and research labs for Clemson University.

How did it get started?

The campus started as a large family-owned parcel of land that was gifted to Greenville County under the condition that a technology center be created. The County worked closely with Clemson University to identify a development plan for the campus. Once a plan was in place, BMW approached the County and Clemson University with a partnership concept.



CASE STUDY

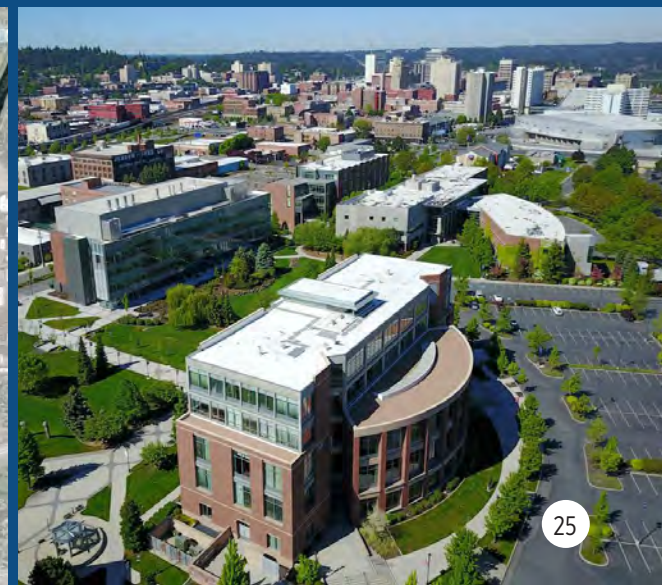
SPOKANE UNIVERSITY DISTRICT

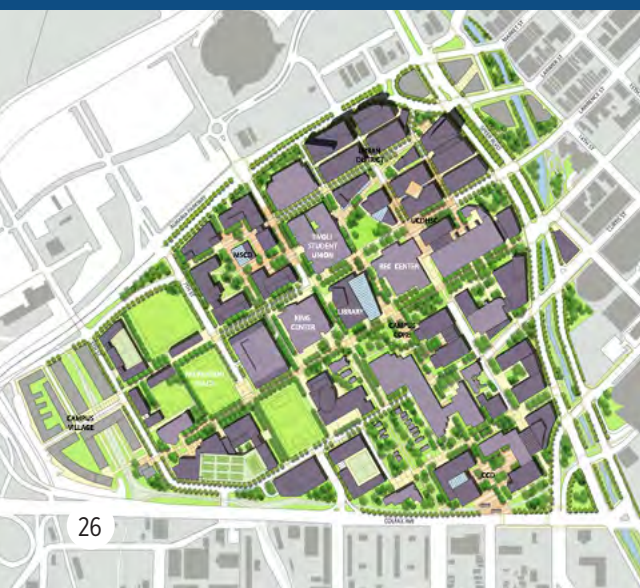
The Spokane University District was created to provide better connections and interactions between several higher education institutions and private healthcare providers. It is home to six different institutions which together enroll more than 11,000 students. Proximity to these urban campuses, and the ability to attract the best and brightest graduating from them, have presented tremendous opportunities to the region and beyond.

The District includes individual campuses or facilities for the Community Colleges of Spokane, Eastern Washington University, Gonzaga University, University of Washington, Washington State University Health Sciences, and Whitworth University.

How did it get started?

The campus district started as a repurposing of an existing industrial neighborhood near Gonzaga University. The synergy of the University and other existing medical providers and institutions allowed the City of Spokane to formulate a long term land use plan for the Health Sciences campus.





CASE STUDY

AURARIA HIGHER EDUCATION CENTER

The Auraria Campus is a dynamic and vibrant higher education community located in the heart of downtown Denver. The 150-acre campus is shared by the Community College of Denver, Metropolitan State University of Denver, and University of Colorado Denver.

The Auraria Higher Education Center is a separate state entity whose role is to provide and manage shared services, facilities, and property to support these prominent institutions in achieving their goals. The Center includes its own planning department, maintenance staff, and security/police force. This approach has allowed for the efficient governance of a range of shared uses. The collective student population is approximately 42,000, with an additional 5,000 faculty and staff.

How did it get started?

The Auraria Higher Education Center was started as a repurposing of an existing neighborhood adjacent to Downtown Denver. The City worked closely with academic partners to co-locate facilities in the Auraria Neighborhood.

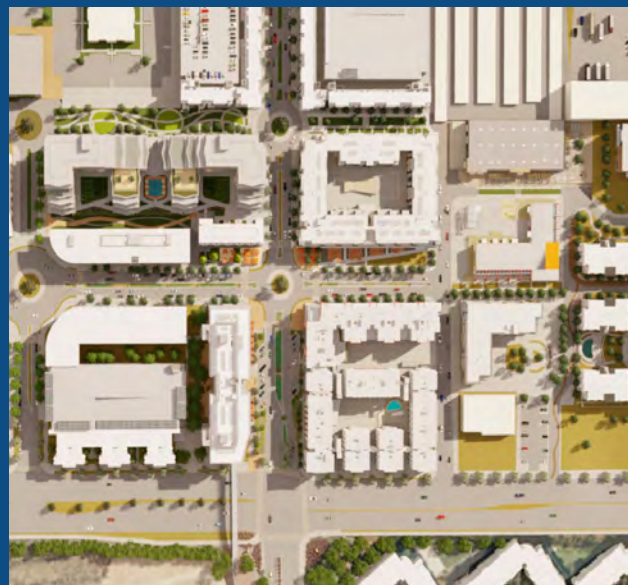
CASE STUDY

CSU SAN MARCOS / UNIVERSITY DISTRICT

CSU San Marcos and the City of San Marcos worked together to seamlessly blend a new State University with a new Downtown district. Through the creation of an advisory committee and the adoption of the San Marcos Creek District and North City (University District) Specific Plans, they have created a comprehensive downtown core in the heart of San Marcos. In order to finance many of the public university buildings, the University, City and private developers worked together to form creative public-private partnerships (P3)—including California's first P3-funded academic building (currently under construction).

How did it get started?

The CSU San Marcos campus and Downtown district started through an advisory committee process that created a clear vision and planning principles for area. Over time, the committee was able to coordinate public, university, and private interests to help spur investment and buildout of both the campus and the new Downtown district.





CASE STUDY STAR CAMPUS

The Science, Technology, and Advanced Research (STAR) Campus is a 272-acre innovation hub built on Chrysler's former Newark assembly facility that combines academic training and applied research needs. It serves as a research cluster for firms in health, energy, finance, and environmental sectors. The campus also includes a publicly accessible health clinics and a variety of community-focused uses.

The University of Delaware is building out much of the campus through collaboration with outside private entities. The University owns the land and leases it to industry partners. Current and future tenants build facilities that suit their individual needs while simultaneously fitting the University's vision of a mixed-use, urban development with vibrant street life.

How did it get started?

The STAR Campus started as an opportunity to repurpose a former large-scale industrial site adjacent to existing transit. The University of Delaware acquired the site and worked with the City of Newark to create a planning



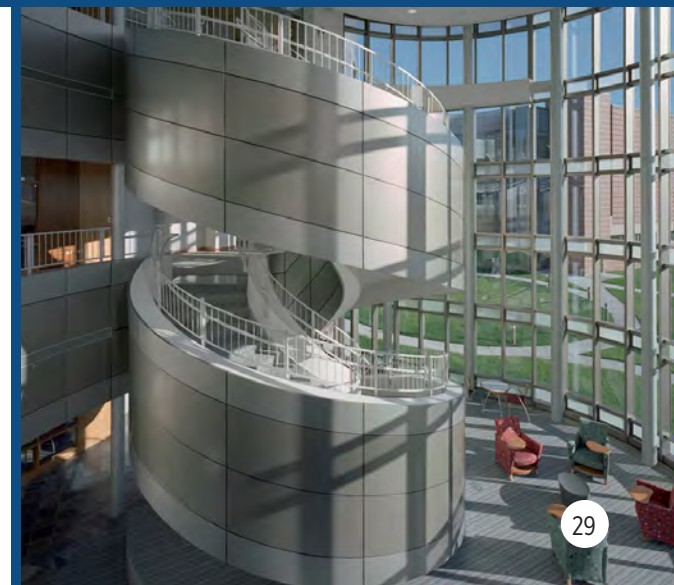
CASE STUDY

UNIVERSITY CENTER OF LAKE COUNTY

The University Center of Lake County is a consortium-based academic center comprising a partnership between eight public and ten private institutions. Combined, these institutions provide more than 130 degrees, certificates, and professional development courses. The center is located on a portion of the College of Lake County (community college) property. The property also includes Lake County Tech Campus—a multi-school campus for tech focused high school education.

How did it get started?

The University Center of Lake County was created on a portion of an existing community college campus. The driving force behind the center was a desire by the State of Illinois to allow Lake County students to pursue an education without needing to commute or relocate.





Creating an Innovation District

As shown in the Case Studies, there are many different ways campus districts are formed. However, the academic and economic drive to form these types of districts are enormous. As the United States slowly emerges from the Great Recession, a remarkable shift is occurring in the spatial geography of innovation. For the past 50 years, the landscape of innovation has been dominated by places like Silicon Valley—suburban corridors of spatially isolated corporate campuses, accessible only by car, with little emphasis on the quality of life or on integrating work, housing and recreation.

A new complementary urban model is now emerging, giving rise to what we and others are calling “innovation districts.” These districts are geographic areas where leading-edge anchor institutions and companies cluster and connect with start-ups, business incubators and accelerators. They are also physically compact, transit-accessible, and technically-wired and offer mixed-use housing, office, and retail.

Innovation districts are the manifestation of mega-trends altering the location preferences of people and firms and, in the process, re-conceiving the very link between economy shaping, place making and social networking. Our “open innovation” economy rewards collaboration, transforming how buildings

and entire districts are designed and spatially arrayed. Our diverse population demands more and better choices of where to live, work and play, fueling demand for more walkable neighborhoods where housing, jobs and amenities intermix.

Innovation districts are emerging in dozens of cities and metropolitan areas in the United States and abroad and already reflect distinctive typologies and levels of formal planning. In the United States, districts are emerging near anchor institutions in the downtowns and midtowns of cities like Atlanta, Baltimore, Buffalo, Cambridge, Cleveland, Detroit, Houston, Philadelphia, Pittsburgh, St. Louis and San Diego. They are developing in Boston, Brooklyn, Chicago, Portland, Providence, San Francisco and Seattle where underutilized areas (particularly older industrial areas) are being re-imagined and remade. Still others are taking shape in the transformation of traditional exurban science parks like Research Triangle Park in Raleigh-Durham.

Innovation districts have the unique potential to spur productive, inclusive and sustainable economic development. At a time of sluggish growth, they provide a strong foundation for the creation and expansion of firms and jobs by helping companies, entrepreneurs, universities, researchers and investors—across sectors and disciplines—co-invent and co-produce new discoveries for the market.

Potential Funding and Financing Approaches

Funding for new higher education campuses and/or innovation districts can be a daunting challenge. Increasingly, large-scale development projects like these incorporate public-private partnerships (P3)—coalitions formed between government and non-governmental entities in which partners pool their resources and expertise to help achieve a common goal. These joint initiatives are useful to the extent that they distribute the burdens of funding, design, development, and operations amongst various institutions to create new financing mechanisms, transfer risk, and increase speed-to-market.

Though private developers have traditionally served as the most common nongovernmental partner, P3s have evolved to incorporate other institutional actors such as health care providers, educational institutions, nonprofit associations, and intermediary groups (e.g., business improvement districts).

P3's can have a flexible structure to meet the context-specific needs of a project. For innovation districts, for example, a central “anchor institution” typically serves as the fulcrum around which other privately-owned supportive uses—such as housing, retail amenities, and event centers—are subsequently established.



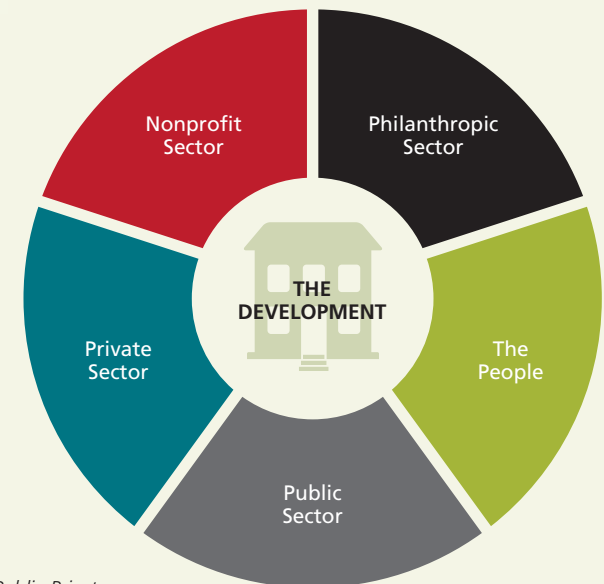
Summary of PPP Benefits and Limitations

Potential benefits

- Project risks transferred to private partner
- Greater price and schedule certainty
- More innovative design and construction techniques
- Public funds freed up for other purposes
- Quicker access to financing for projects
- Higher level of maintenance
- Project debt kept off government books

Potential limitations

- Increased financing costs
- Greater possibility for unforeseen challenges
- Limited government flexibility
- New risks from complex procurement process
- Fewer bidders



Source: Legislative Analyst's Office, *Maximizing State Benefits from Public-Private Partnerships*, November 8, 2012.

3





VISION AND GUIDING PRINCIPLES

Overview

Vision Elements

Guiding Principles

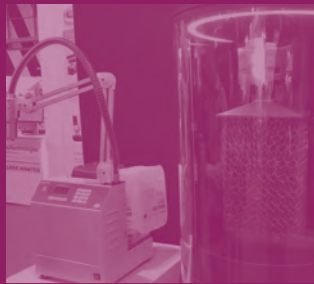
Overview

A successful Campus District needs an inspired vision and a strategy for achieving it. The BRC-defined vision and guiding principles, as articulated on the following pages, establishes the conceptual framework that will shape the future planning and development of Concord's hybrid education district. Much thought and discussion has gone into the framing of these ideas, with the ultimate goal of ensuring that the campus fully serves the needs of Concord and the region, while also becoming a model for future public-private partnerships and innovation.

The City of Concord, institutional and industry partners, and other stakeholders will use the vision and guiding principles to **evaluate future proposals and initiatives for new uses, facilities, and programs located within the Campus District**. While much interest in the Concord campus has already been generated, there is an ongoing need to ensure that all ideas match the ultimate desires for the campus as outlined in this document.



Flexible and Collaborative Classroom



Henkel Industries 3D Printer



Cyber Security Center



Wood Technology Maker Space



Bio Technology



Competency Building



Community Arts Center



Inclusive Classroom



Public/Private Financial Partnerships



Donor Funded Projects



GoMentum Station



Concord Regional Community

VISION ELEMENT A MULTI-INSTITUTIONAL EDUCATIONAL DISTRICT

The Concord Campus District will offer the opportunity for an integrated master planned area, including a combination of academic programs from K-12 through graduate, providing competency building that addresses the needs of the evolving economy.

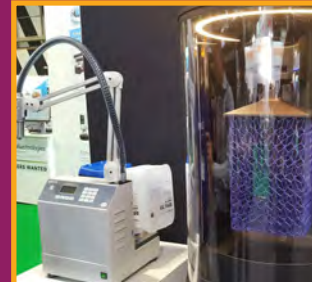
VISION ELEMENT B

STRONG PUBLIC-PRIVATE PARTNERSHIPS

There will be strong partnerships with private companies, public institutions, and NGOs/non-profits to support experiential learning, research and development, technology, production, job creation, and workforce development.



Flexible and Collaborative Classroom



Henkel Industries 3D Printer



Cyber Security Center



Wood Technology Maker Space



Bio Technology



Competency Building



Community Arts Center



Inclusive Classroom



Public/Private Financial Partnerships



Donor Funded Projects



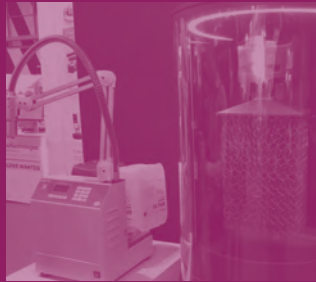
GoMentum Station



Concord Regional Community



Flexible and Collaborative Classroom



Henkel Industries 3D Printer



Cyber Security Center



Wood Technology Maker Space



Bio Technology



Competency Building



Community Arts Center



Inclusive Classroom



Public/Private Financial Partnerships



Donor Funded Projects



GoMentum Station



Concord Regional Community

VISION ELEMENT C BLENDED SEAMLESSLY WITH CONCORD AND CALIFORNIA

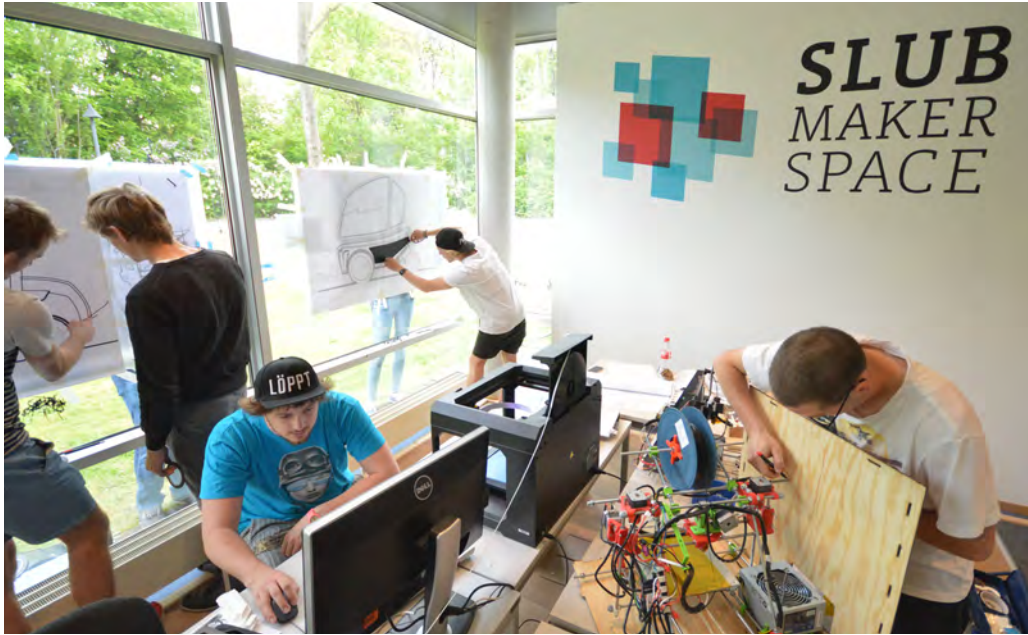
The campus will blend seamlessly in a physical and programmatic sense, creating a place that engenders economic, social, and cultural interaction with the surrounding neighborhood, the city of Concord, and the region. It will become one of many new models for integrating higher education with industry in California and beyond.



GUIDING PRINCIPLE #1 HYBRID MODEL APPROACH

- A. Encourage a **campus that can serve all ages and skill sets**, including K-12, competency building, career tech, associate's degrees, bachelor's degrees, professional degrees, graduate/post-graduate degrees, and research.
- B. Form an **innovation ecosystem** that holistically serves many industries (Maker Tech, robotics, drone delivery, health care, biomass, cyber security, etc.).
- C. Blend **higher education with local industry**, including research and development, workforce training, technology, and academic research.





GUIDING PRINCIPLE #2 STATE-OF-THE-ART

- A.** Consider creative **online learning** approaches to expand the reach of the campus and offer a flexible learning experience to students of all backgrounds, allowing students to attend classes "anytime" and at "anyplace."
- B.** Attract **innovative manufacturing** and **Maker Tech** businesses that benefit from campus research.
- C.** Include a "**competency building**" approach that allows students to efficiently complete academic programs based on their existing skills and experiences.
- D.** Ensure that the Campus District is well-connected with **high bandwidth internet**, and flexible and expandable telecommunications infrastructure.



GUIDING PRINCIPLE #3 CONCORD REGIONAL CONNECTION

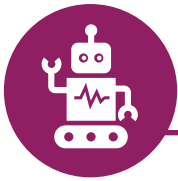
- A. Create a **strong identity** that highlights the Campus District's connection to Concord and the Northern California megaregion.
- B. Focus on hiring **workers, students, apprentices, and residents** from the Concord region in all aspects of the campus.





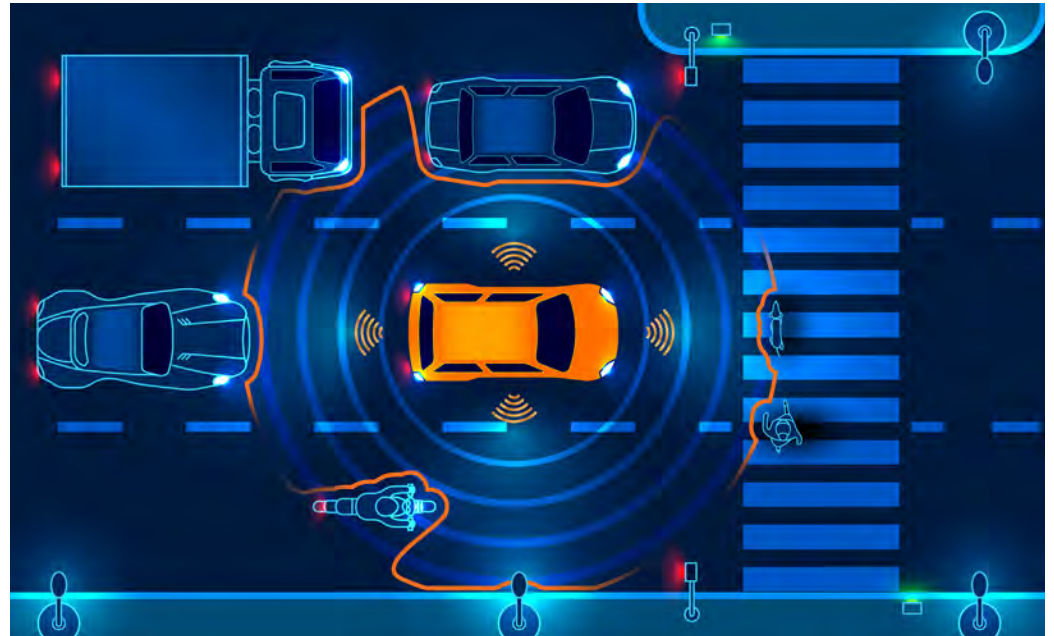
GUIDING PRINCIPLE #4 EQUALITY AND INCLUSIVITY

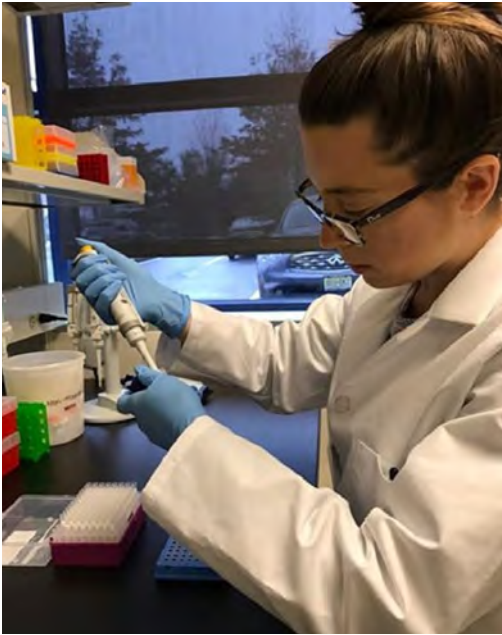
- A.** Build on the **diversity of Contra Costa County** while improving social equity and removing access barriers to higher education.
- B.** Make the higher education programs offered on the campus **accessible** and **affordable** to local and regional residents.
- C.** Identify strategies for **recruiting top intellectual talent** to the campus through various incentives or other citywide programs (e.g., housing, local schools, community amenities, etc.).
- D.** Encourage a **culture of diversity and inclusion** within public institutions and private industries located at the Campus District.



GUIDING PRINCIPLE #5 JOBS OF THE FUTURE

- A. Include a **broad array of specializations** to meet the diverse industry needs of today and tomorrow, while leveraging distance learning opportunities.
- B. Work with academic and industry partners to **align training and educational courses/programs** with existing and emerging industries in the region.





GUIDING PRINCIPLE #6 INDUSTRY ATTRACTION AND GROWTH

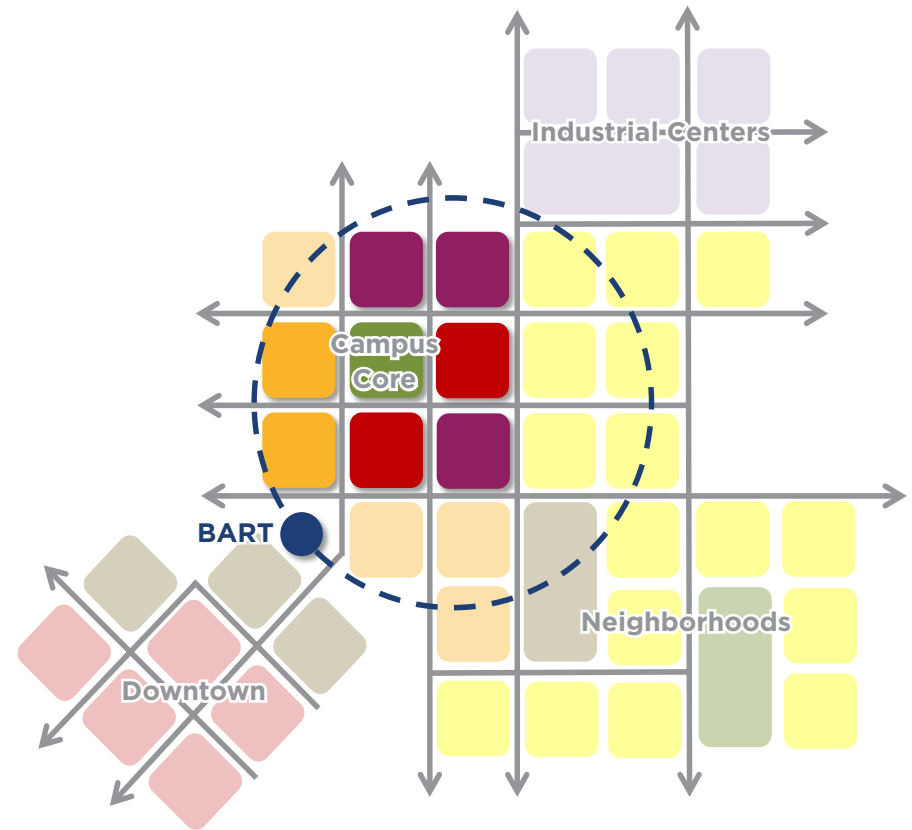
- A.** Use the **design** and **programming** of the campus to promote Concord and the broader region as an academic and industry epicenter.
- B.** Pursue **international collaborations** to expand the reach and reputation of the campus.
- C.** Include **incubator space** and **access to research** that will help grow local start-ups.

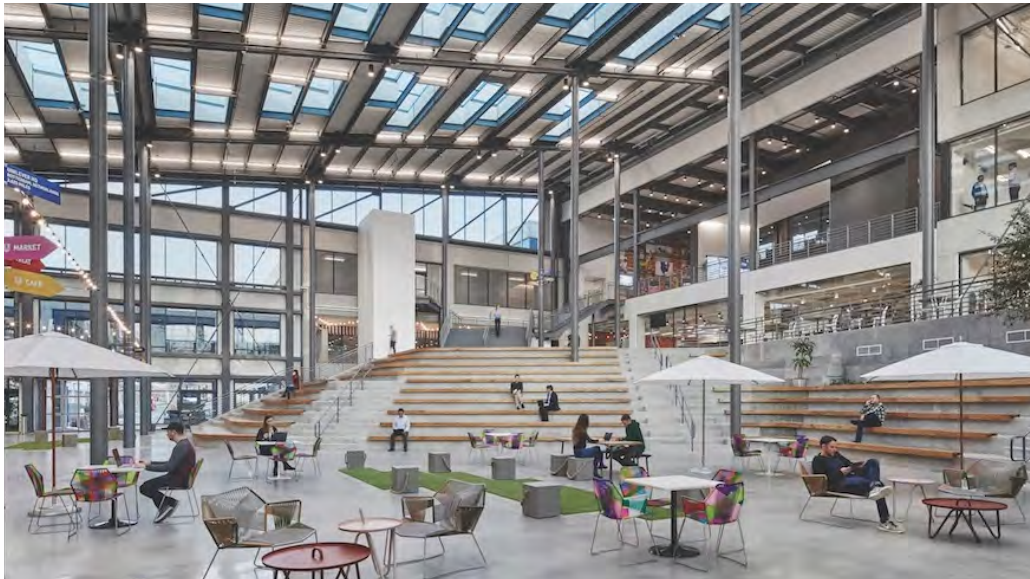




GUIDING PRINCIPLE #7 SEAMLESS INTEGRATION

- A.** Ensure the Campus District **blends with surrounding development** so education and research uses are adjacent to, and integrated with, surrounding mixed-use, residential, commercial, and civic uses.
- B.** Include well-located and visible **commercial-oriented uses** within or adjacent to the campus, including research and development.
- C.** Create convenient and safe **pedestrian and bicycle connectivity** to the North Concord/Martinez BART station and adjacent employment and residential neighborhoods.
- D.** Create a **central, open space area** that becomes the focal point for campus gatherings, events, art, and performances.





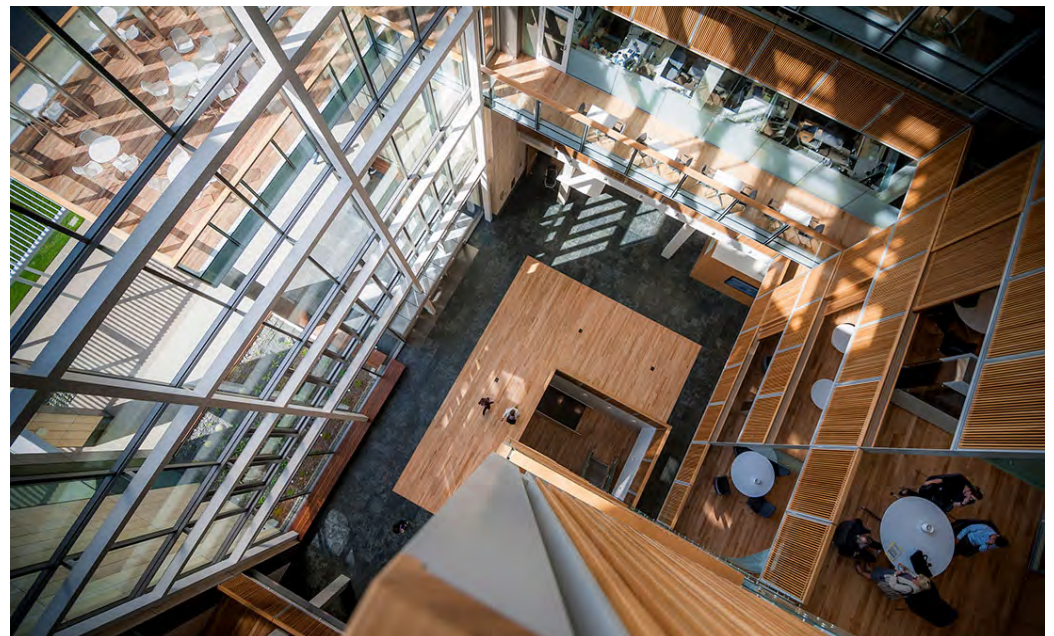
GUIDING PRINCIPLE #8 FUNCTIONAL DESIGN

- A.** Offer **cutting-edge facilities** with modern equipment and amenities to make the campus an educational and research destination.
- B.** Create a **flexible physical campus** that can adapt to new industries and the services of the future.
- C.** Create **smart buildings** that have flexible interior layouts and high floor plates to allow a variety of future users.
- D.** Identify opportunities to locate educational, research, and **other complementary uses** beyond the 120-acre campus.



GUIDING PRINCIPLE #9 ELEGANT DESIGN

- A. Build a **thematic identity** for the campus that attracts students, industries, and partners.
- B. Ensure the new campus fits the **scale** and **character** of the broader specific plan area.
- C. Focus on **placemaking** so the campus can become a gathering space for the entire community to enjoy and celebrate.





GUIDING PRINCIPLE #10 SUSTAINABLE CAMPUS

- A.** Consider the **physical** and **natural environment** of the Bay Area in the design of the new campus.
- B.** Capitalize on adjacent **transit connections** and walking distances to future **mixed-use** and **housing**.
- C.** Incorporate **sustainability** into the design and operations of the campus.
- D.** Create **complete neighborhoods** that include a mix of uses, activities, and bicycle/pedestrian connections that are seamlessly integrated between the Campus District and new neighborhoods in the specific plan area.
- E.** Through the Base Reuse Specific Plan, identify **appropriate housing types and densities** near the Campus District to allow for affordable student housing near the core campus area and the North Concord/Martinez BART station.



GUIDING PRINCIPLE #11 CULTURE AND COMMUNITY

- A.** Incorporate **cultural and arts** programs and facilities that support the campus, Concord, and the broader region.
- B.** Ensure the Campus District contains key **community amenities** and quality of life elements, including a combination of the following uses:
- Public Library
 - Event Center
 - Performing Arts Center
 - Conference Center
 - Museum

Encourage additional community amenities, including dining, indoor recreation and fitness, and additional entertainment uses.

- C.** Include **liberal arts curriculum and programs** to ensure a well-rounded education and opportunities for leadership training.





GUIDING PRINCIPLE #12 STRATEGIC IMPLEMENTATION

- A. Integrate **infrastructure** being developed as part of the broader specific plan with the campus to make a more cost-efficient project.
- B. Develop a clear **phasing approach**, tied to the broader specific plan, that will allow the campus to incrementally grow.





GUIDING PRINCIPLE #13 PARTNERSHIPS

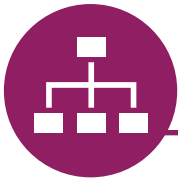
- A. Identify and **nurture partnerships** between different education providers (CSU East Bay, UC, community colleges, private colleges and institutions, high schools, international connections, etc.), and top local industries.
- B. As partnerships begin to form, work strategically to identify and secure a **key anchor partner/user** who can provide the initial energy, innovation, and funding to initiate investment and momentum in the Campus District area.





GUIDING PRINCIPLE #14 FINANCIAL FEASIBILITY

- A.** Identify a **range of funding sources** and **financing strategies** to ensure flexibility as the vision and development of the campus mature over time.
- B.** Identify different ways to create public-private partnerships (P3, P4, and P5) that will allow many different users and industries to **share costs burdens and revenues**.



GUIDING PRINCIPLE #15 GOVERNANCE

- A.** Once the primary and secondary partners/users are identified and confirmed, consider establishing an **operating entity** for the Campus District that could perform the following functions:
- Development:** Identify, review, and approve all new capital projects, including buildings, roads, infrastructure, outdoor space, recreation facilities, etc.
 - Operations:** Organize spaces and facilities so they are efficiently programmed and maintained, making sure that all academic and industry partners benefit from the campus.
 - Management:** Ensure that mechanisms are in place to protect the long-term financial health of the campus, as well as the ongoing maintenance and operations of all facilities.
- B.** Remain **flexible and adaptable** in the overall governance approach to ensure that future end users (academic, institutional, and industry partners) have the ability to tailor operational structures and financial agreements to meet their needs, while also ensuring the Vision and Guiding Principles included in this document are met.



4



A black banner with white text that reads "AURARIA CAMPUS" is hanging from a pole. In the background, there are trees and a building.

PROGRAMMATIC PRIORITIES

Overview

Concord Campus District Vision Action Plan

Emerging Potential Partners

Overview

The bold vision outlined in this document will require many **individual actions**—some relatively small and others much more complex—to take place over the coming years. Coordination between the City of Concord, campus institutional and industry partners, and the community will be critical to ensuring momentum is maintained and the campus is created. The following pages outline several key strategic action items that will be taken in partnership over the coming years. These lists are intended to be a starting point, and additional actions may be added by the City in the future as the vision matures and partners are identified and secured.



Marketing and Communications

- M-1** Develop a comprehensive and coordinated **Marketing Strategy** to promote the Concord campus.
- M-2** Prepare **digital and physical collateral** that can be used by the City to engage the community and interested partner institutions and companies. This could include a dedicated website, briefing book, pamphlet, or other similar materials. The City, BRC members, and other partners will use these materials to promote the Campus District to potential partners/users.
- M-3** Create **targeted outreach** that is specifically focused on major existing and emerging industries in Contra Costa County, as well as larger institutional partners (UC, CSU, CCC, etc.)
- M-4** Conduct **site tours** for potential partners so they can visit and learn more about the Campus District potential.
- M-5** Consider creating **videos, renderings, and graphics** other materials to further articulate the ideas expressed in this framework.
- M-6** Solicit **feedback on the Vision Framework** from local and regional academic and industry leaders through a roadshow and/or direct one-on-one meetings.
- M-7** Do something unique that will catch the attention of local media and institutional/business leaders. Consider hosting an **Innovation Conference** or **Speakers Bureau** in Concord as a way for different potential partners to meet and exchange ideas.



Campus Model Research and Refinement

- C-1** Create a national **image of innovation** through the ultimate design, programming, and partnerships created on the Campus District.
- C-2** Coordinate all **core campus planning** with the broader Reuse Specific Plan process to ensure a seamless and integrated development process.
- C-3** Research **additional campus models** as needed that can help further refine the Vision Framework. Consider providing the Vision Framework to these campuses for their input and feedback.
- C-4** Research the **specific needs of non-traditional students** as a way to refine the programming, types of uses, and amenities that will be located at the Campus District.
- C-5** Consider a **Master Developer** as a method for organizing and managing the development of the Campus District.
- C-6** Consider **touring campus models** either in-person or online to learn more about how they were formed and their programming, and to ask questions to key staff.
- C-7** Work closely with the **Reuse Specific Plan process** to ensure the specific plan is adopted and the associated Environmental Impact Report (EIR) is certified by the City of Concord.
- C-8** Include **young adults, college students, and non-traditional students** in the discussion about how to refine the campus model. Consider focused surveys to both traditional and non-traditional local students.



Financing

F-1 Work closely with campus partners and financing/development specialists to evaluate different **public-private partnership approaches** that is equitable, profitable, and sustainable for all partners.

F-2 Identify a **preferred financing approach** and structure based on the following general concepts:

- Identify anchor institution(s) with whom the City can evaluate the market and develop solicitation for supportive uses, where private partnerships will have the strongest role to play.
- Refine the vision as new partners are identified to help guide the marketability of the Campus District.
- Ensure that the economics work for the City and all project partners.
- Strategically tap into the unique expertise and resources offered by the private sector to make a vision more successful.

F-3 Establish **funding agreements** for new major capital projects and infrastructure investments.

F-4 Establish **long-term operations agreements** to ensure the fiscal health of the Campus District for generations to come.

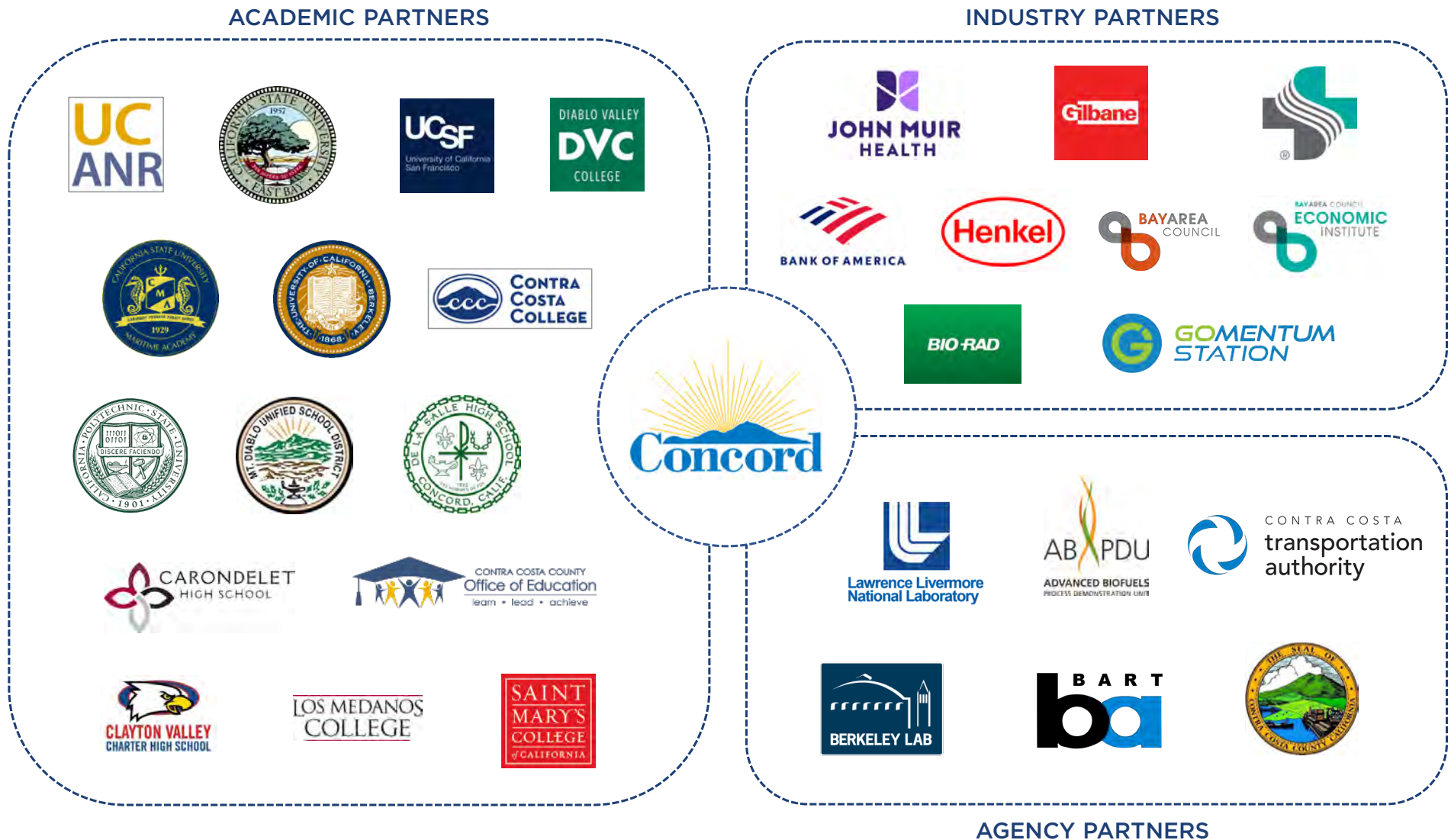


Partnerships

- P-1** Consider creating a **Launch Team** to help accelerate the process. This would include dedicating resources (staff and budget), identifying a point person who can quickly respond to questions or calls, and establishing a team that can evaluate individual proposals.
- P-2** Execute a **pilot program** with an existing academic partner where they can hold classes or research activities at or near the campus site.
- P-3** Identify **key academic and industry anchor partners** that can create catalytic projects on the campus (see the following page for a list of potential partners identified by the BRC).
- P-4** Identify **key anchor user(s)** early in the process. Once identified and secured, have them help refine the campus vision to ensure both the campus and building elements address their needs.
- P-5** Develop a **student enrollment phasing strategy**, working closely with academic and industry partners, to ensure facilities are adequately sized and phased.
- P-6** Identify other **“support” partners** that would benefit from being on the campus.
- P-7** As partnerships form and mature, develop an **organizational structure** and **governance system** for the Campus District, ensuring the City of Concord continues to play a major role in the planning and operations of the area.

Emerging Potential Partners

As a launching point for creating the Campus District, the BRC identified a broad range of potential academic, industry, and agency partners. While this list represents a strong starting point for initiating discussions—it is not a comprehensive list and the City should continuously engage new partners as the vision evolves over the coming years.



Acknowledgements

BLUE RIBBON COMMITTEE MEMBERS

Dominic Aliano, Concord Councilmember
Susan Bonilla, Council for Strong America
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CONCORD CAMPUS DISTRICT VISION FRAMEWORK

www.concordreuseproject.org/183/Campus-District



Campus District Visioning Project

Blue Ribbon Committee

Summary of Meeting #7
April 18, 2019



Summary of Discussion Topics

Introduction

The seventh Blue Ribbon Committee (BRC) meeting of the Concord Campus District Visioning project was held on April 18, 2019, at the Concord Senior Center. The mission and charge of the BRC is to:

- **Review, evaluate and discuss** information and concepts for developing a higher education campus at the former Concord Naval Weapons Station.
- **Assess** the feasibility of a range of campus development options, opportunities, and strategies.
- **Develop** recommendations for the future campus district for consideration by the Concord City Council.

The objectives of this seventh BRC meeting were to: respond to information requests and questions from BRC members; review additional hybrid campus models; elicit feedback on the initial draft of the Concord Campus District Vision Framework document; and further refine the vision, guiding principles, and implementation priorities for the Campus District. The additional case studies included:

- University Center of Lake County, Grayslake, IL
- University of Delaware STAR Campus, Newark, DE

This was the seventh in a series of eight meetings that will be conducted between September 2018 and May 2019. All meetings are open to the public and facilitated by MIG, a planning and urban design firm which specializes in process design and stakeholder facilitation. The MIG facilitators graphically recorded comments of the BRC members and members of the public. A photo-reduction of the wallgraphic is included at the end of this document. This summary synthesizes the key discussion topics and questions raised during the meeting; it is not intended to serve as a transcription of the meeting.

The members of the Blue Ribbon Committee were appointed by the Concord City Council and includes the following individuals:

- Dominic Aliano, Concord Councilmember
- Susan Bonilla, Council for Strong America
- Edward Del Beccaro, East Bay Regional Manager, TRI Commercial
- Greg Feere, Trades, Retired
- Dr. Glenda Humiston, UC Division of Agriculture and Natural Resources
- Randell Iwasaki, CCTA
- Sharon Jenkins, John Muir Health
- Buck Koonce, Lawrence Livermore National Laboratory
- Bob Linscheid, Cal Poly San Luis Obispo
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- Dr. Nellie Meyer, Mt. Diablo USD
- Carlyn Obringer, Concord Mayor
- Victor Tiglao, Student Representative
- Dr. Peter Wilson, Retired Dean, CSUEB
- Dr. Fred Wood, CCCC
- Jim Wunderman, Bay Area Council

Discussion Topics

BRC members shared their input on background information, the draft Campus District Vision Framework document, and implementation priorities necessary to advance the process for the Campus District. The key discussion points raised at the meeting are summarized below by theme.

Refinements to the Guiding Principles

- **Guiding Principle #1, "Hybrid Model Approach"**: Add language regarding Associates and career-tech education to round out the offerings.
- **Guiding Principle #2, "State-of-the-Art"**: Include a discussion on high-quality internet and telecommunications. Ensuring the campus has access to high bandwidth is essential.
- **Guiding Principle #4, "Equity and Inclusivity"**: Highlight the importance of a campus culture that promotes diversity and inclusivity.
- **Guiding Principle #10, "Sustainable Campus"**: Promote the development of "complete neighborhoods" surrounding the Campus District to enhance overall quality of life for students and residents. Highlight the inclusion of bicycle and pedestrian connections.
- **Guiding Principle #11, "Culture and the Arts"**: Expand the list of potential facilities to be developed (e.g., Library, Performing Arts Center, Conference Center, Museum).
- **Guiding Principle #15, "Governance"**: Define this principle more broadly to allow for maximum flexibility as the eventual anchor and other partners are identified.

Refinements to the Implementation Priorities

- Consider whether a successor entity to the BRC will be required to advance the implementation process. If so, consider what its composition and role will be.
- Once completed, send the Vision Framework document to ICAR, Spokane, and other hybrid campus entities to elicit their feedback.
- Prepare a marketing package that includes a convincing “case statement” and describes Concord’s locational advantages.
- As in comparable district models, attract an “anchor institution” around which the campus will be built.
- Test pilot programs at other existing institutions and, if successful, transfer them to the Concord Campus.
- Host an innovation conference to launch an oblique marketing campaign, helping to spread awareness through word of mouth.
- Lead guided walking (and virtual) tours of the campus site.
- Produce a “visual” to elicit excitement.
- Involve students (traditional and non-traditional) throughout the planning and development process.

General Document Feedback

- Conduct research to better understand both traditional and non-traditional student needs and desires. It is difficult to advance concrete recommendations without first understanding these points.
- Focus on needs and benefits beyond Concord to ensure that the campus district is a “regional asset.”
- Avoid excessive focus on “higher education.” For example, frame campus development as an opportunity to do something “new” rather than an opportunity to finally create a public higher education institution in Contra Costa County. Emphasize that we have an opportunity to leverage regional assets (e.g., industry, health care) to create something special.
- Research other major universities who are looking to create a presence in the Bay Area.
- Change page three to have a more positive quote.
- Create synergy with the tournament sports complex.
- Ensure that programming includes liberal arts.
- Encapsulate the range of potential partners in the Implementation chapter.
- Present each implementation strategy on a two-page spread.
- Add international partnerships to the Guiding Principles.
- Make the chart on page 18 more robust and accurate.
- Add an Executive Summary.

Public Comment

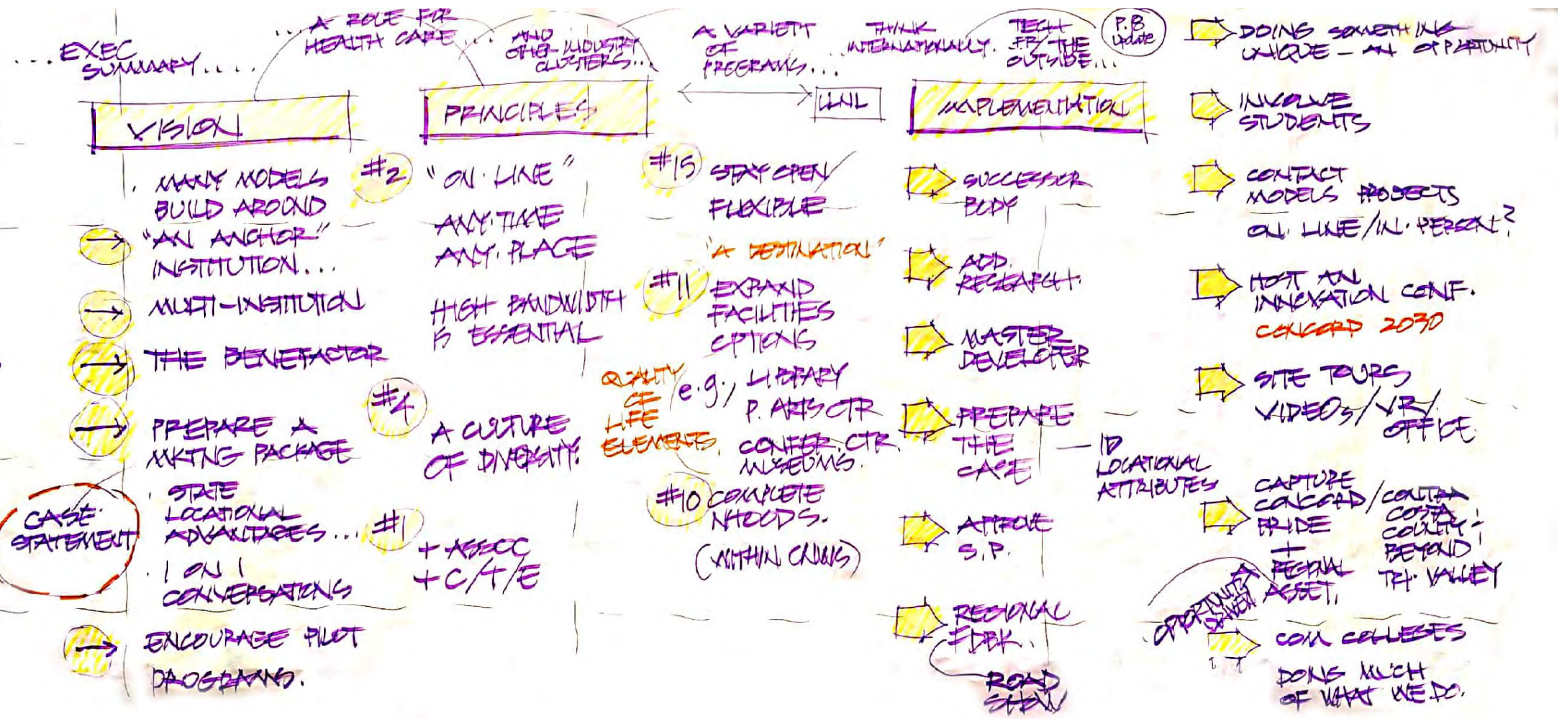
Members of the public attended the BRC meeting and were given the opportunity to comment on the content covered in the meeting. However, no comments directly related to the document were made.

Concord

B.R.C
4.18.19

2 SURVEY BOTH
TRAD + NUTRAD
STUDENTS?

→ SAN DIEGO
CAMPUS...



Campus District Visioning Project
Blue Ribbon Committee
Meeting #7, April 18, 2019
Wallgraphic

Prepared by
M I G

Concord

B.R.C
4.18.19

2 SURVEY BOTH
TRAD + NONTRAD
STUDENTS?

→ SAN DIEGO
CAMPUS...

CASE
STATEMENT

→ ENCOURAGE PILOT
PROGRAMS.

EXEC
SUMMARY...

VISION

MANY MODELS
BUILD AROUND
"AN ANCHOR"
INSTITUTION...

→ MULTI-INSTITUTION

→ THE BENEFACTOR

→ PREPARE A
MARKING PACKAGE

STATE
LOCATIONAL
ADVANTAGES...
1 ON 1
CONVERSATIONS

#2

"ON-LINE"
ANYTIME
ANY PLACE

HIGH BANDWIDTH
IS ESSENTIAL

#4

A CULTURE
OF DIVERSITY

#1

+ ASSECC
+ C/T/E

PRINCIPLES

#15

STAY OPEN/
FLEXIBLE

"A DESTINATION"

#11

EXPAND
FACILITIES
OPTIONS

QUALITY
OF
LIFE
ELEMENTS

e.g.; LIBRARY
P. ARTS CTR
CONF. CTR
MUSEUMS.

#10

COMPLETE
NEEDS.
(WITHIN CIRCLES)

A VARIETY
OF
PROGRAMS...

LINK

IMPLEMENTATION

→ SUCCESSOR
BODY

→ ADD.
RESEARCH.

→ MASTER
DEVELOPER

→ PREPARE
THE
CASE

→ APPROVE
S.P.

→ REGIONAL
FIRM.

ROAD
SHOW

THINK
INTERNATIONALLY.

TECH.
OFF THE
OUTSIDE...

P.B.
Update

→ DOING SOMETHING
UNIQUE - IN A PARTIALITY

→ INVOLVE
STUDENTS

→ CONTACT
MODELS PROJECTS
ON-LINE/IN-PERSON?

→ HOST AN
INNOVATION CONF.
CONCORD 2030

→ SITE TOURS
VIDEOS/VR/
OFFICE

ID
LOCATIONAL
ATTRIBUTES

→ CAPTURE
CONCORD/CONTRA
COSTA COUNTY
BEYOND
TR. VALLEY
+ FEDERAL
ASSET.

OPPORTUNITY
SAVEN

→ COM COLLEGES
DOES MUCH
OF WHAT WE DO.

THE CHRONICLE
of Higher Education

TECHNOLOGY

What's Really Behind Employers' Interest in Education?

By Goldie Blumenstyk | APRIL 23, 2019

I'm Goldie Blumenstyk, a senior writer at *The Chronicle of Higher Education* covering innovation in and around academe. Here's what I'm thinking about this week.

Is there more than self-interest behind employers' interest in education?

Employers aren't shy when it comes to complaining about colleges' faults in preparing students for the workplace. Isn't that more than a little tiresome sometimes? The lack of specificity. The nostalgia for the days when college grads supposedly showed up at their first jobs fully ready to tackle their assignments. And when did all of this become the job of colleges? Don't employers have some responsibility, too?

I wrestled with these issues in writing the new *Chronicle* report, "Career Ready Education: Beyond the Skills Gap, Tools and Tactics for an Evolving Economy." Even if I weren't the author, I would tell you that this report is a really useful guide for understanding and responding to the changing landscape of hiring and credentials, with practical advice for college leaders and employers alike on how to collaborate on programs, services, and even facilities that will improve students' employability. My bottom line: Colleges can make these adaptations without becoming overly reactive or reductive. And they need to.

That doesn't mean employers should be let off the hook. But I'm not holding my breath.

Want Goldie's insights delivered to your inbox each week?

Get The Edge Newsletter

For a section of the report called “Voices of Employers,” we asked business leaders to weigh in on how colleges could work more effectively with employers. That’s in the report. But I also wondered what they were doing on their own.

So with the help of Sara Lipka, a *Chronicle* senior editor (and the editor of the report), we also posed this question: *What one thing should employers do to ensure that new hires and existing staff members get the skills they need to be successful?*

Here’s what we heard.

Michael Bokina, vice president and head of human resources, Siemens USA:

Employers should invest in their people and provide platforms that help employees own their careers. Siemens does this by investing \$50 million annually in continuing education for U.S. employees. We also leverage our advanced manufacturing apprenticeship program to help both new and existing staff access technical and classroom training.

Scot McLemore, manager of talent acquisition and deployment, Honda:

Employers must actively engage their employees and provide learning opportunities that allow their employees to continue to develop higher-level skills. The learning should be aligned with skills and knowledge required in positions within the organization. If possible, an industry-recognized certificate or credential should be an outcome of the learning.

Glenn E. Johnson, head of work-force development, BASF North America:

Provide a structured training program that is based on competency modeling and job and task analysis instead of learn-as-you-go training that is wholly time-based, and provide those analyses and models to the education programs in their community that develop future workers.

Mohamad Ali, president and chief executive officer, Carbonite:

Providing ongoing employer-sponsored skills training both internally and externally not only helps develop and retain talent, but it also helps drive innovation within those

companies to remain competitive on a local and global scale.

Marie Artim, vice president for talent acquisition, Enterprise Holdings:

Employers must prove their commitment to developing employees and providing internal opportunities for growth. As a promote-from-within organization, we believe in the concept of building versus buying talent, and we recognize the importance of consistently training and developing individuals as they take on new roles.

Obviously, that is a small sample, but the self-interest implicit in the answers is telling. Likewise, even as companies like Starbucks, McDonald's, Uber, and Walmart pay for college courses for employees (and as colleges maneuver to capture a slice of that market), it's clear that many employers see investing in education as a way to benefit themselves — improving employee retention, for example. No crime in that, but let's also be clear about how significant it really is.

Tuition benefits for employees are nice, but they go only so far. I was reminded of that this weekend when I spotted a stream of comments that lit up Twitter from Abigail Disney, a documentarian who is a granddaughter and grandniece of the Disney Company's two founders. As part of a longer thread that criticized the inequity of the company's overall salary structure, she highlighted just how difficult it can be for low-wage workers to take advantage of the company's tuition benefit.

What's more, only about half of all employers even cover the cost of college tuition for their employees, per the latest survey from the Society for Human Resource Management. And according to Ryan Craig, an author and investor, half of all spending on education for people over the age of 25 comes from a select group of large companies; employees who work elsewhere are on their own.

Many in the education world paint a sunnier picture. At the ASU GSV Summit this month, I heard Frank Britt, CEO of the education company Penn Foster, declare that employer-providing training for middle-skills workers is now "the new normal." OK, but that's a sector where job openings now exceed the supply of job seekers.

I found myself agreeing much more with one of his fellow panelists, Deval Patrick, a former governor of Massachusetts, who recalled how the last recession had shown so many people how vulnerable they were to job losses and wage stagnation. He reminded the audience that all this talk about employer-provided training wouldn't help workers who don't have an employer "or may no longer have one."

All of which is to say, employers may continue to play a role in promoting education and training, and the more of that the better. But let's not fool ourselves into counting on that support as any kind of replacement for the public commitment to broad education that we need, as a society, to keep our democracy strong. As useful as employers can be in helping to shape curricula and services (as I learned in reporting "Career-Ready Education") their interests can also be narrow. And if economic conditions darken, employers can become fickle patrons.

When we talk about college parents, often that means students, too

Is it any wonder we're hearing more and more about a "two generation" strategy designed to improve access to higher education for older students by providing child care and other assistance?

More than one in five college students — 22 percent of all undergraduates — are parents, according to new analysis of data from the National Postsecondary Student Aid Study. Of the 3.8 million students who are raising children while in college, roughly 2.7 million are mothers and 1.1 million are fathers. Among the mothers, 62 percent are single parents.

The number of students who are parents has declined since 2011-12 by 20 percent — more than the decline in enrollment overall during the same period. But as this report from the Ascend program at the Aspen Institute and the Institute for Women's Policy Research shows, the reasons are mixed.

Some parents, it says, probably chose not to enroll because they found jobs after the recession and were deterred by "the rising cost of college in combination with the continued high cost of non-tuition expenses like child care, housing, and transportation." For them, the benefits of working won out over college.

Also, the report notes, “the closure of more than 100 for-profit colleges between 2012 and 2016 probably also contributed to parents’ decreased share of the student body.” For more, [click here](#) to download the full analysis.

Got a tip you’d like to share or a question you’d like me to answer? Let me know at goldie@chronicle.com. If you have been forwarded this newsletter and would like to see past editions, or sign up to receive your own copy, you can do so [here](#).

This article is part of:

The Edge: Newsletter Archives

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1255 23rd Street, N.W.
Washington, D.C. 20037

Adult Learners

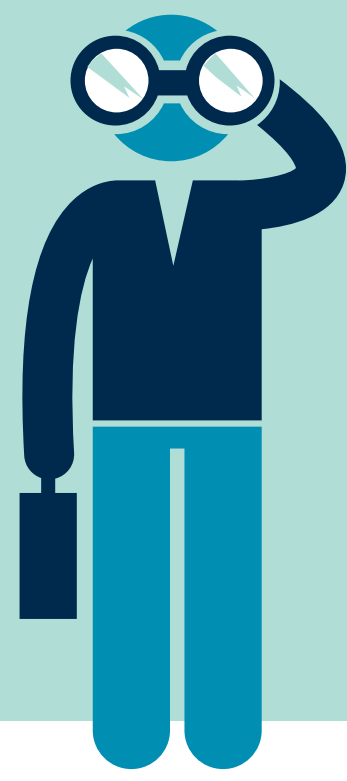
Sharpening *Employability Skills* for a Changing Workplace

A Study on Adult Learner Motivations and Expectations in 2016



Adult learners see the job market shifting around them.
They know what they need to do—build employability skills and improve career readiness.

#1 Driver: *Career Readiness*



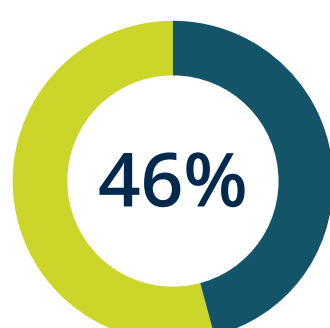
Many adult learners see the **employment landscape** as relatively stable for the next year. However, the majority think that it **will change significantly in the next five years:**

72% say they'll **need more education** to keep up with their fields

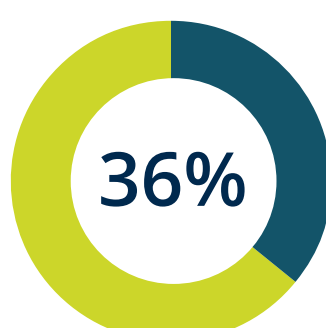
69% believe **technology advances** will make their job significantly different

51% expect to **change fields**

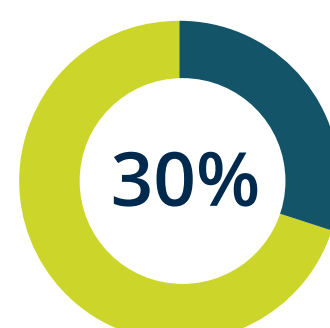
Adult learners recognize many ways continuing education can help them build a better life.



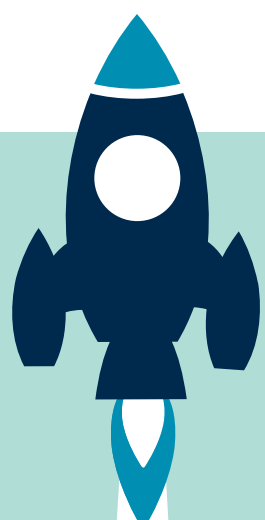
say to **"improve my earning potential"** is their primary reason to get more education



believe it will help them **"create a better life for my family"**



think it will help them **"advance in my current job"**

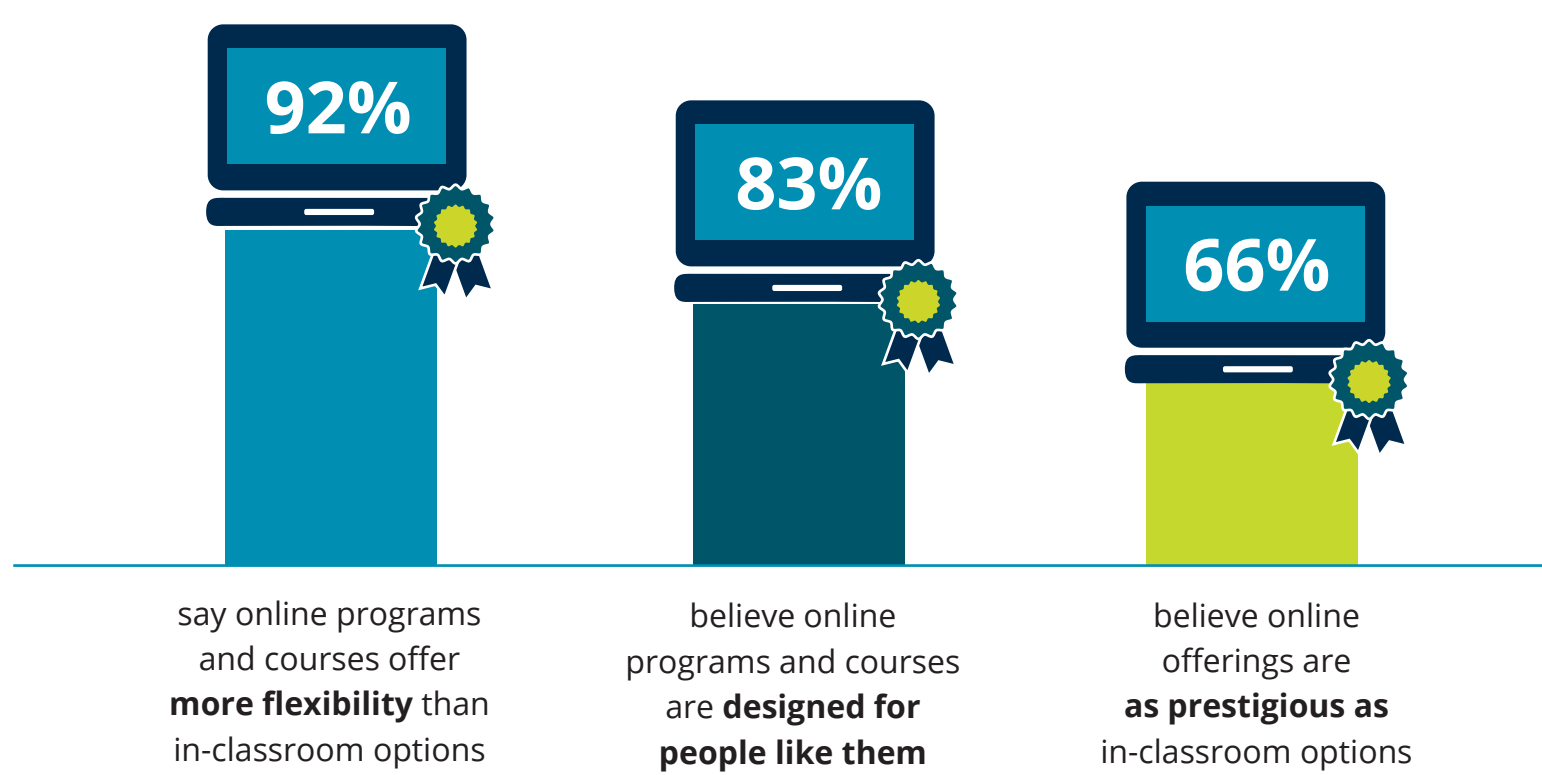


Healthcare, Management, and IT are *on the Rise*

Adult learners report **rapidly-increasing interest in skillsets** that will help them succeed in these growing fields.

Online Learning: *Flexible, Respected, Relevant*

Sizable majorities say online courses are more flexible, **just as prestigious**, and designed for people like them.



#1 Obstacles: *Money and Time*

Adult learners' primary obstacles to enrollment relate to **cost, scheduling, and time commitment.**



80% point to limited availability of classes that fit their schedules

80% cite program/course tuition and fees

79% worry about the total time needed to complete

78% aren't sure programs offer sufficient value for their cost

The Time is *Now*

Adult students want flexible, high-value education programs that accelerate their career progress and help them prepare for change.

Higher education institutions and employers that deliver those programs have an enormous opportunity.



Get more insights...

Read the full report at pearsoned.com/adult-learner-report

About this survey: Pearson partnered with Penn Schoen Berland to conduct a quantitative survey to understand the motivations and expectations of adult learners currently pursuing or intending to pursue continuing education programs. This report is based on 1634 online interviews of US adults aged 25-64 who were either enrolled in a degree or certificate program or planning on enrolling in one in the next 60 days.



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Patti Barsotti, City Treasurer
Valerie J. Barone, City Manager

May 7, 2019

The Honorable Gavin Newsom
Governor, State of California
1303 10th Street, Suite 1173
Sacramento, CA 95814

Dear Governor Newsom:

I was very pleased to learn that your proposed budget includes \$2 million to evaluate the feasibility of a new state university campus in Northern California. I wanted to share with you a decades-long mission to bring a campus to Contra Costa County and the East San Francisco Bay Area, a region well in excess of a million people and no public university to obtain a four-year degree.

The City of Concord has been committed to hosting a new university campus since the Department of Defense closed the Concord Naval Weapons Station and designated the City Council in 2006 as the Local Reuse Authority for the decommissioned base. Following extensive community input, the City Council designated land in both the federal Reuse Plan and the Council-adopted Area Plan specifically intended to support higher education.

Called the Campus District, a Blue Ribbon Committee has been evaluating opportunities to develop this 120 acres. The Committee comprises regional stakeholders, including educational partners at all levels, from primary education to the Contra Costa County Community College District, the UC Department of Agriculture and Natural Resources, CSU, and Cal Poly San Luis Obispo. In addition, representatives from major industries, the Bay Area Council, labor, economic development advocates, and real estate experts have all come together to explore innovative trends in higher education and identify opportunities to leverage public-private partnerships to bring this vision to fruition.

More than just a traditional university setting, the Committee is evaluating a hybrid academic, research, and competencies-focused consortium centered on economic development clusters that would educate and train the regional workforce consistent with regional industry needs. The goal is to prepare our region not just for today, but the future, by developing competencies from primary education through doctorate programs. Students could enter and exit integrated, industry-focused academic pathways such as cybersecurity, health sciences, and autonomous and connected mobility modes, to name a few. The vision is exciting, adaptive, and responsive to rapidly changing trends in higher education, creating momentum early in primary education, and building skill

sets and competencies in concert with industry and societal needs. We anticipate the Committee's final report will be delivered to the City Council this June.

More information on Concord's long-standing commitment to higher education on behalf of this entire region can be found at the Local Reuse Authority's website www.concordreuseproject.com and the Blue Ribbon Committee's landing page under Planning.

It is my sincere hope that the funding already proposed to evaluate a campus in the Stockton area can also be allocated to evaluate the Campus District in the City of Concord. Should you or your staff need any additional information or have an interest in discussing the Concord campus location, please contact me at Carlyn.Obringer@cityofconcord.org or call my assistant Trish Beirne at (925) 671-3158.

Thank you very much for your consideration.

Sincerely,



Carlyn S. Obringer
Mayor

Cc: Concord City Council
Valerie Barone, City Manager
Kathleen Tropa, Assistant City Manager
Guy Bjerke, Local Reuse Authority Executive Director
Campus District Blue Ribbon Committee Members



UNDERSTANDING THE

Shifting Adult Learner Mindset

Insights for Growth from
EAB's Adult Learner Survey



Understanding the Shifting **Adult Learner Mindset**

Insights for Growth from EAB's Adult Learner Survey

Executive Summary

Understanding Adult Learners Is Critical to Growth

As projections for undergraduate enrollment wane, many colleges and universities are looking to adult learner programs for growth and revenue. However, the adult learner market is complex, and adult learners' mindsets are shifting. In order to gain market share and effectively recruit students, institutions need to understand how today's adult learners think.

To help our partners better understand this mindset, EAB recently conducted a survey of current and prospective students of graduate, undergraduate degree completion, online, and certificate programs. As we will elaborate in the following pages, the responses indicate that today's adult learners are savvy, digital consumers who approach their education with a consumer-like mindset.

Summary of Key Findings

- **Adult learners require a return on their education.** Before enrolling, students want evidence that the investment they'll make in their education will result in a substantial, positive impact on their lifestyle.
- **Adult learners are digital consumers—with high expectations.** With the rise of smartphones and advanced consumer analytics, adult learners' expectations for brand interactions have been transformed. When researching and applying to schools, they expect to be able to find relevant information and complete tasks quickly and conveniently using digital resources.
- **Adult learners are extremely pragmatic.** Adult learners are savvy navigators of the application process, approaching it with purpose and focus, strategically limiting the number of steps and amount of time involved.
- **Adult learners require flexible options.** To ensure that they can balance school with existing personal and professional obligations, many adult learners are interested in flexible options in program format and schedule, such as online, part-time, and hybrid programs.



Adult Learners Require a **Return on Their Education**

THEME

1

Cost Concerns Loom Large for Prospective Students

A Climate That Drives Cost-Consciousness

Total student debt in the United States hit 1.5 trillion dollars in 2018, which amounts to more than two and a half times the sum owed just a decade earlier. Throughout this period, national media have widely reported on the student debt crisis, shaping public perceptions—and concerns—about the cost of higher education.

At the same time, robust economic recovery has made the prospect of leaving the workforce less appealing than ever for many potential adult learners. The price of an education now includes not just tuition and fees, but also the opportunity cost of abandoning a well-paying job. Our research indicates that today's prospective adult learners approach their options highly focused on perceived value, both in terms of enrollment costs and expected career benefits.

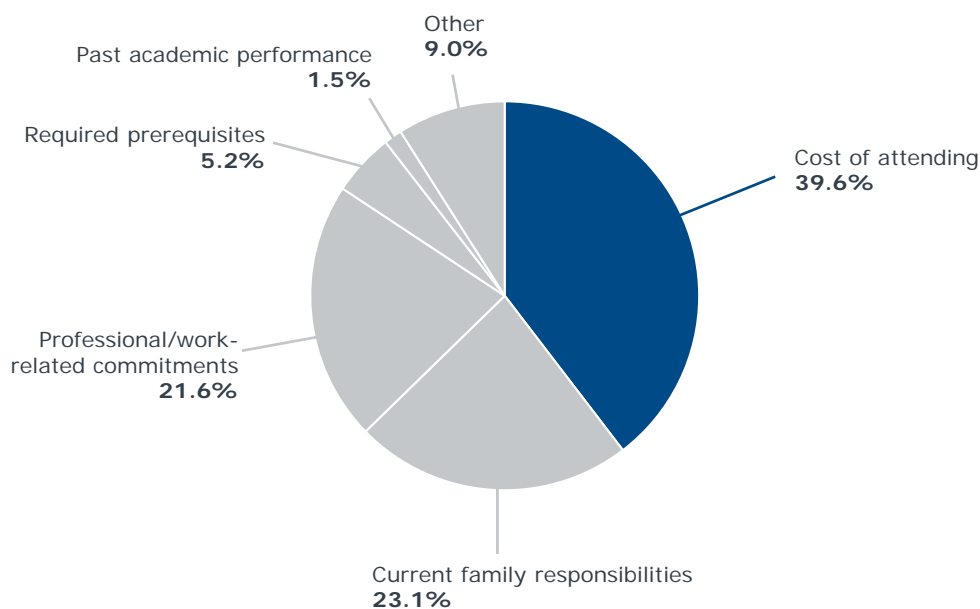
Cost Is the Top Reason for Not Returning to School

All survey participants were asked whether they planned to continue their education within the next two years by enrolling in an undergraduate, graduate, professional degree, or certificate program. Those who indicated that they either did not plan to continue their education or that they had not yet decided whether they would continue were then asked what would change their plans. Financial factors topped the list, with 49.6% of participants saying that they would change their plans and consider going back to school if tuition were more affordable, and 29.3% of participants saying they would do so if it gave them the opportunity to earn more money.

Participants who had indicated a general interest in enrolling, but not within the next two years, were asked the primary reason they were not pursuing more education at this time. Cost was the top reason, named by 39.6% of participants.

Figure 1: Cost Is the Top Factor Preventing Interested Prospects from Enrolling

Q: What would you say is the primary reason you are not pursuing more education at this time?



Sources: https://www.federalreserve.gov/releases/g19/HIST/cc_hist_memo_levels.html, EAB research and analysis.

Finances Govern Where and Whether Prospects Enroll

Financial Factors Are Central to Students' Enrollment Decisions

Not only do financial considerations inform adult learners' general interest in returning to school, but they also influence whether and where students choose to enroll. Participants who were either planning to enroll or were currently enrolled were asked to rank the importance of a list of factors in their enrollment decision. Aside from program accreditation, they named financial considerations as most important.

This data aligns with the finding that the majority (68.5%) of this group had considered enrolling in public institutions, where tuition and fees tend to be lower than at their private counterparts. By contrast, a total of 41.1% of participants considered private or independent institutions.

Figure 2: Cost and Financial Aid Rank Highly in Enrollment Decisions

Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.

Most Important Factors	Mean	Least Important Factors	Mean
Program accreditation	4.32	Physical facilities	2.82
Cost of attending	4.08	No prerequisites to enroll in the program	2.72
Financial aid/scholarships	3.82	Size of the school	2.44

Many Students Rely Heavily on Financial Support from Institutions

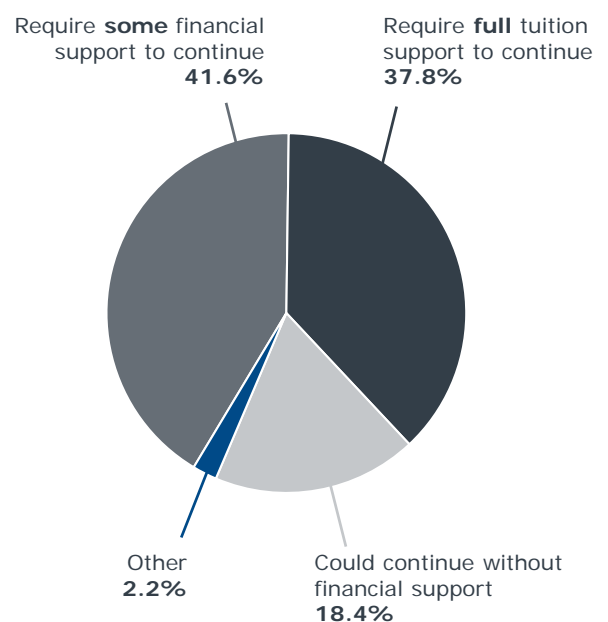
While the strong economy and public rhetoric about student debt undoubtedly feed into concerns about enrollment cost, our research underscores the fact that program tuition and fees represent a substantial investment for adult learners and one that most couldn't afford on their own.

The majority of participants who were enrolled or who had plans to enroll indicated that they would receive financial support from institutions and/or employers:

- Financial aid/loans and grants (54.6%)
- Scholarships (39.7%)
- My employer/tuition reimbursement plan (21.7%)
- Graduate assistantships (11.5%)
- Other institutional support in the form of tuition stipends (6.2%)

Of the students who were receiving financial aid and/or scholarships from an institution, 79.4% indicated that they would need at least some financial support to continue their education.

Figure 3: One in Three Financial Aid Recipients Requires Full Tuition Support



Source: EAB research and analysis.

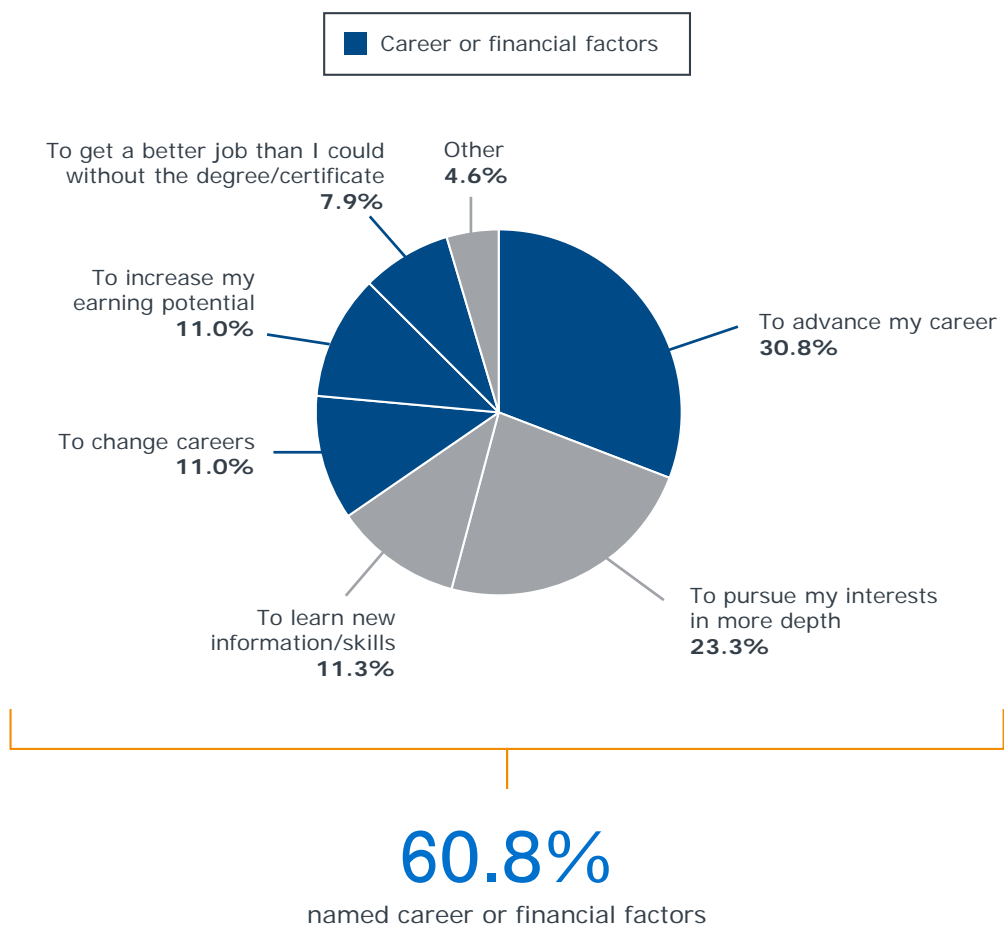
The Flip Side: Finances and Career Are Top Motivators

Career and Financial Growth Are the Main Drivers for Pursuing Education Further

The weight of financial factors is reflected not just in adult learners’ concerns about their education but also in their motivations for enrolling and their definitions of successful post-enrollment outcomes. Of the students who were planning to enroll or were currently enrolled, 60.8% named career or financial factors as the primary reason for their interest in furthering their education, as represented in blue in Figure 4. These findings indicate a strong desire from adult learners to see a direct return on their investment in education, either in terms of career mobility or earning potential.

Figure 4: Interest in Education Is Primarily Driven by Career and Finances

Q: What would you say is your primary reason for furthering your education?





Adult Learners Are **Digital Consumers—** with **High Expectations**

THEME

2

Heightened Expectations for Brands and Schools

Today's Consumers Expect Brands to Anticipate Their Intent and Facilitate Action

With the rise of sophisticated mobile apps and advanced consumer analytics, consumers' expectations of brands have been transformed in recent years. Whether they're ordering groceries for at-home delivery via a mobile app, browsing streaming movie options, or completing an online banking transfer, today's consumers have heightened expectations for the speed and convenience with which they can access useful information and complete tasks. For example, research by Google found that only 9% of users will stay on a mobile site or app if it doesn't satisfy their needs (e.g., to find information or navigate quickly). Furthermore, 53% of mobile site visits are abandoned if the site takes longer than three seconds to load.

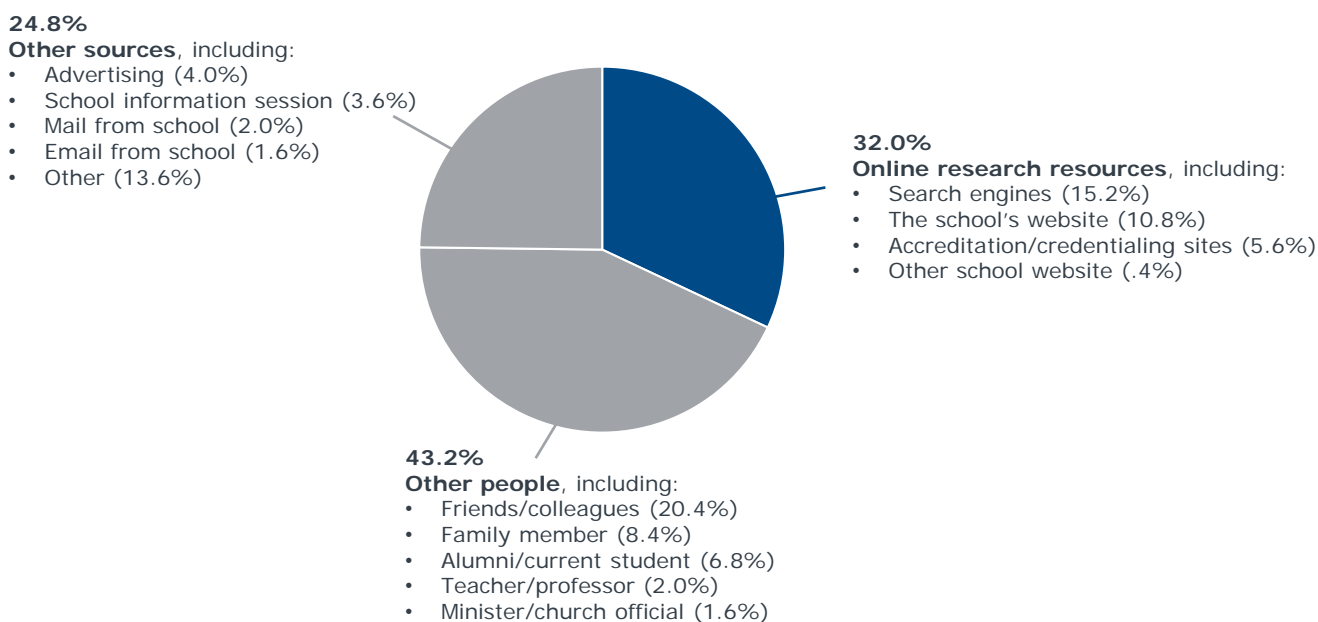
Our research indicates that these trends apply to adult learners as well. Throughout the research, application, and enrollment processes, adult learners expect to find relevant information and complete required tasks quickly and conveniently using digital resources.

Cater to Prospect Intent at the Discovery Phase with Robust Online Research Resources

Currently enrolled survey participants were asked how they first learned of their institution. We found that 43% of currently enrolled students discovered their school via individuals, including friends, colleagues, family, and alumni, and 32% first learned of their school via online research resources, including search engines, the school's website, and accreditation websites. This data indicates that the availability and quality of self-serve online resources at the start of a student's enrollment journey can have a significant impact on program selection. Furthermore, it's important to note that, while word of mouth is the top source of discovery, after students first hear about schools from any source, they are likely to conduct online research as a next step.

Figure 5: Most Students Discover Schools via Online Research or Word of Mouth

Q: Where did you first learn of the school where you are enrolled?



Sources: <https://www.thinkwithgoogle.com/marketing-resources/micro-moments/how-to-beat-consumer-tune-out-with-useful-content/>, <https://www.thinkwithgoogle.com/consumer-insights/consumer-immediate-need-mobile-experiences/>, EAB research and analysis.

Deliver the Right Information at the Right Time

Students Demand Responsiveness and Accessibility as They Research Programs

As students continue to gather information about prospective programs, the accessibility of relevant information remains important. Survey participants who either planned to enroll or who were currently enrolled were asked to rank the importance of a variety of contacts and communications in their program search. The factor that was named as most important was a school's responsiveness to the student's inquiries, with a mean score of 4.05, or "very important."

Other top responses to this question indicate that adult learners expect schools not only to respond quickly, but also to proactively anticipate their interest and intent by making relevant information readily available at opportune times. This is illustrated by the second-most important response, the resources available on the school's website, and the third-most important response, email communications from the school. Both contacts and communications had mean scores of "important" to "very important." Given the prevalence of stealth shopping behavior in adult learner recruitment, this data illustrates the critical need for institutions to provide high-quality, self-serve resources online and to respond promptly to inquiries.

Figure 6: Prospects Value Responsiveness and Accessibility of Information

Q: Indicate how important the following contacts and communications were when searching for information about your current institution/have been in your search for information about furthering your education.

Contacts and Communications with a Mean Score of 3 or Higher	Mean	
School's responsiveness to my inquiries	4.05	School responsiveness
Resources available on the school's website	3.99	
Email communications from the school	3.71	Helpful information from the school
Individual communication with faculty in my program of interest	3.66	
Online resources (e.g., search engines, banners, and directories)	3.53	
Recommendations from professionals working in intended area of study	3.44	
Communications with financial aid representatives	3.40	
Information session	3.13	
Mobile-enabled communications from the school	3.08	

Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.

How Negative Experiences Can Influence Enrollment

An Illustration of Poor Customer Experience

Survey participants were asked to describe their experiences with the application process and issues they encountered. Several of these responses demonstrate the impact that a student's recruitment experience can have on their perception of an institution. While these examples represent the extreme end of the spectrum of student experiences, they illustrate the ways insufficient or delayed communication from institutions can be a source of frustration for applicants and even influence their enrollment decisions.

“

We were told we would hear back about the status of our applications within 10 business days. When we did not hear I reached out, and was told I would have to wait for longer.

It was at least a month before I got a response, and by that time I reached out to say I was no longer interested in attending their school.

This was due to the fact that I was accepted elsewhere, felt good about that offer, and felt disrespected by the other school. **I did not think this was a good reflection of how they treat students.**

—Adult Learner Survey Participant

”

“

The application process was fine. **My only concern was how long it took to hear back from someone.** I started to feel like I must not have made it in.

—Adult Learner Survey Participant

”



Adult Learners Are **Extremely Pragmatic**

THEME

3

Approaching the Application Process Strategically

Concerns About Value and Time Lead to a Pragmatic Approach

Given the strong economy and students' reservations about finances, many prospective adult learners are uncertain about whether the value of pursuing their education outweighs the cost of getting a degree. As they navigate the search and application process, many aim to minimize wasted time and resources put toward applying to institutions when they may not ultimately end up deciding to enroll anywhere. Our research indicates that adult learners are savvy navigators of the application process, approaching it with purpose and focus, strategically limiting the number of steps and amount of time involved.

Almost Half of Applicants Applied Only to One School

Adult learners' pragmatism is evident in the low number of schools to which the majority apply. Survey participants who had applied to one or more schools were asked to provide the number of school or program applications they had completed. Over 43% percent had applied only to a single school or program, and over 75% had applied to three or fewer schools or programs. Despite the low number of schools to which students ultimately applied, it's important to note that prospects may be considering and researching significantly more options, which reinforces the need for effective marketing outreach at this stage.

Our data also indicated variation in application behavior by age. Students under the age of 26 were much more likely to have applied to more programs than were their older counterparts. This data reinforces the notion that employment is often the top competitor to adult learner enrollment because older applicants, who were more likely to be established in their careers, were more likely to be applying to a single school.

Figure 7: Most Applicants Submit Two or Fewer Applications

Q: To how many schools/programs did you apply?

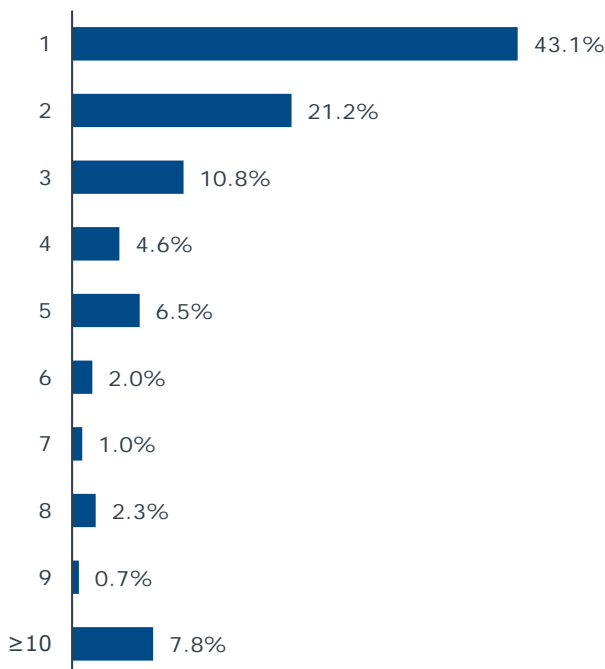
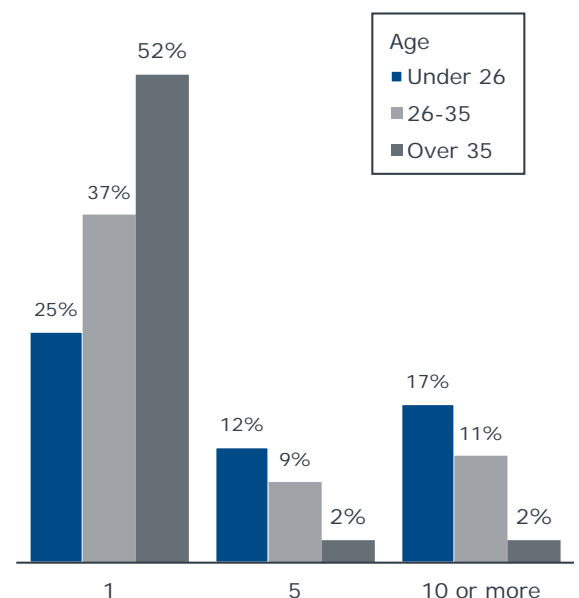


Figure 8: Younger Students Apply to More Schools Than Older Students Do

Q: To how many schools/programs did you apply?



Source: EAB research and analysis.

A Downward Trend in Test-Taking

A Large Share of Students Are Not Taking Graduate Admissions Tests

Our research indicated further pragmatism in adult learners' approach to graduate admission tests. Participants who were either planning to enroll or who were currently enrolled were asked which graduate admission tests they had taken, if any. Among the respondents, 40.5% had not taken a single test, and 11.3% indicated that they did not plan to take any tests.

By contrast, when EAB asked the same question of a comparable group of adult learners in a 2016 survey, only 20.5% of participants responded that they had not yet taken a graduate admission test, indicating a downward trend in test-taking over the past two years.

Figure 9: Four in Ten Adult Learners in 2018 Had Not Taken an Admission Test

Participants Who Planned to Enroll or Were Currently Enrolled

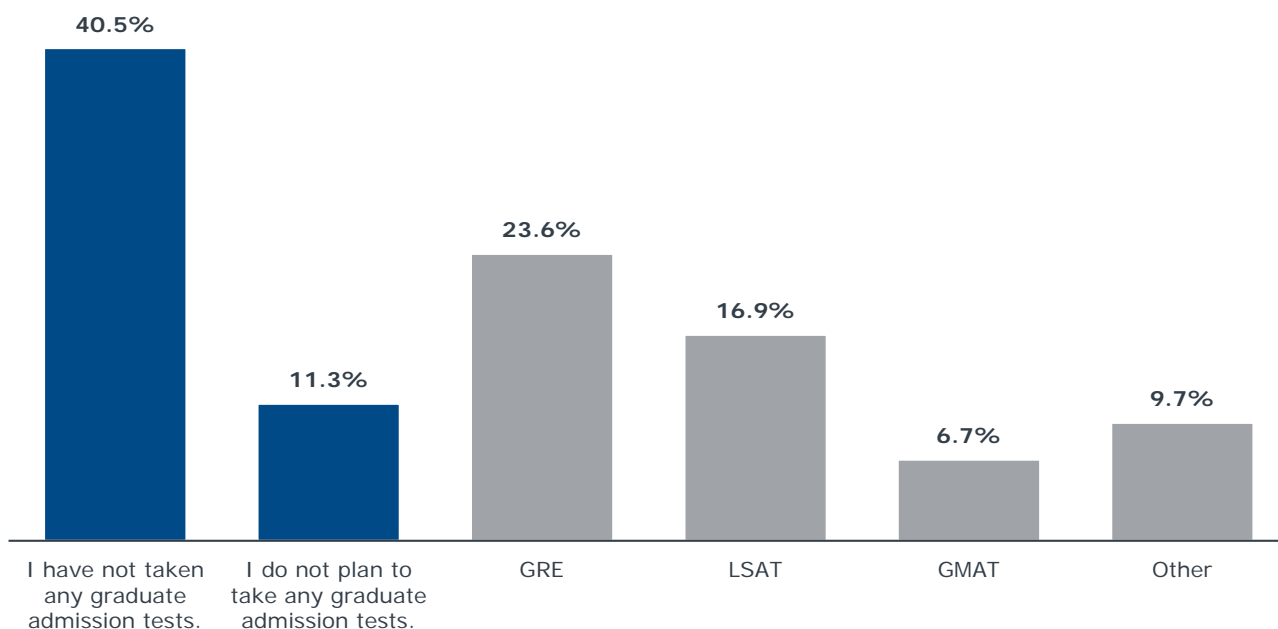
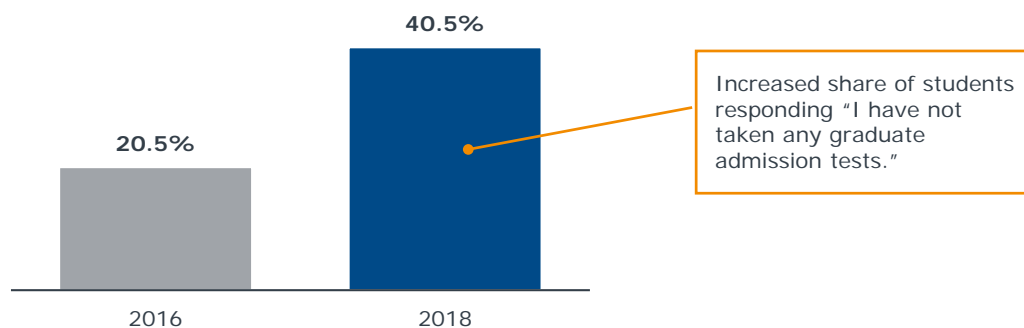


Figure 10: A Decrease in Test-Taking Since 2016

EAB 2016 Survey vs. EAB 2018 Survey



Approaching Tests with a Plan in Mind

Test-Takers Have Researched Options and Tend to Enroll Within One Year

Not only are adult learners limiting the number of tests they're taking, but the majority are taking tests only after they've identified their top institutions. Of the students who had taken an exam, 69.2% already knew where they would be applying before taking a graduate admission test.

Furthermore, about half of students enrolled in their current institution within six months of taking an exam, and over three-quarters enrolled within one year. These findings indicate that by the time adult learners took an exam, they had already researched options and formed a notion of where they might be applying. Past EAB research has shown that 1 in 5 adult learners changes the program he or she is considering during the recruitment process. Paired together, these findings indicate that, while adult learners may approach the application process with a plan, many will still change their mind, illustrating the importance of effective marketing at this stage.

Figure 11: Over 2/3 of Students Knew Where They Would Apply Before Taking a Test

Q: Did you already know where you would be applying before you took a graduate admission test?

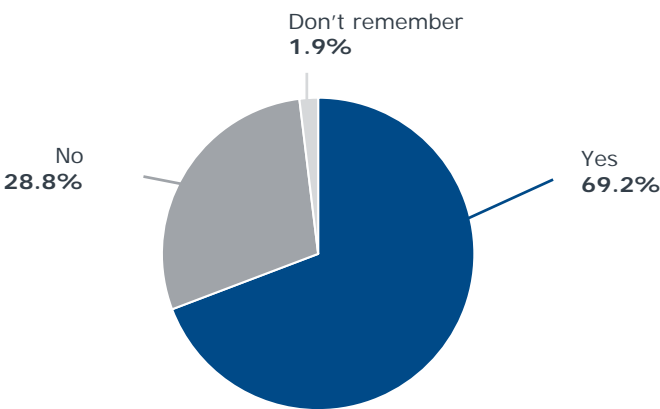
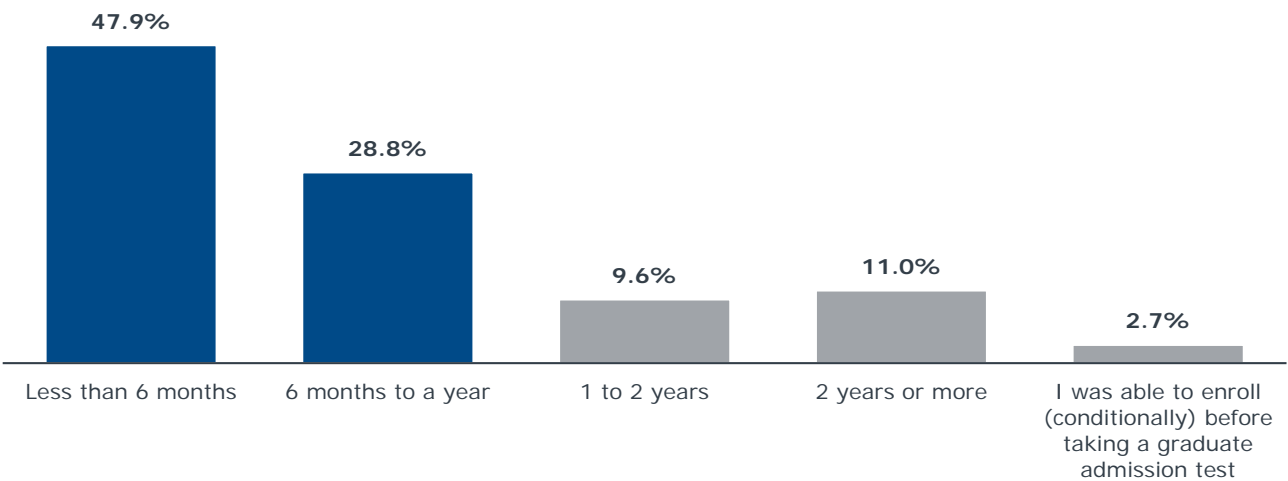


Figure 12: Over 75% of Students Enrolled Within One Year of Taking an Admission Test

Q: Approximately how long after you took your most recent graduate admission test did you enroll in a program?



Source: EAB research and analysis.

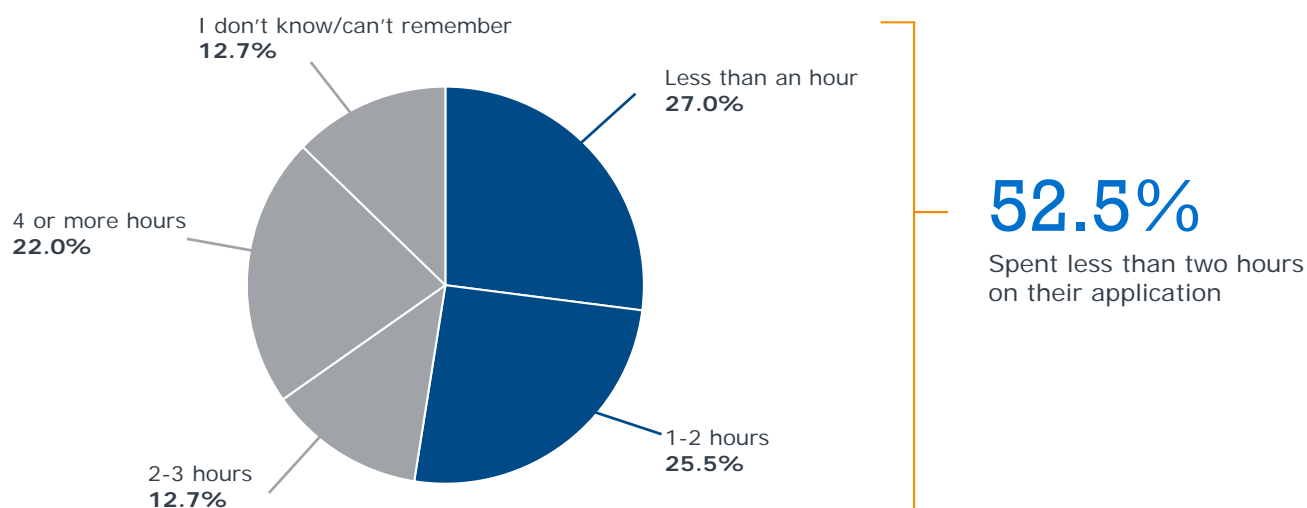
Valuing an Expedient Application Process

Adult Learners Seek Speed and Convenience When Applying

Adult learners' pragmatism in the application process is further evidenced in the amount of time students are spending on their applications. The majority of students (52.5%) spent less than two hours on their application. In addition, 52% of students responded that being able to complete applications on a mobile device was at least somewhat important. Both data points indicate that many adult learners require a quick and convenient application experience.

Figure 13: More Than Half of Students Complete Their Application in Less Than Two Hours

Q: How long did it take you to complete your application?



Seeking Mobile Options



52%

of students indicated that being able to complete applications on a mobile device was at least somewhat important



Adult Learners Require **Flexible Options**

THEME

4

Growth in Online Courses Reflects Need for Flexibility

Offering Competitive Choices to Meet Adult Learners' Needs

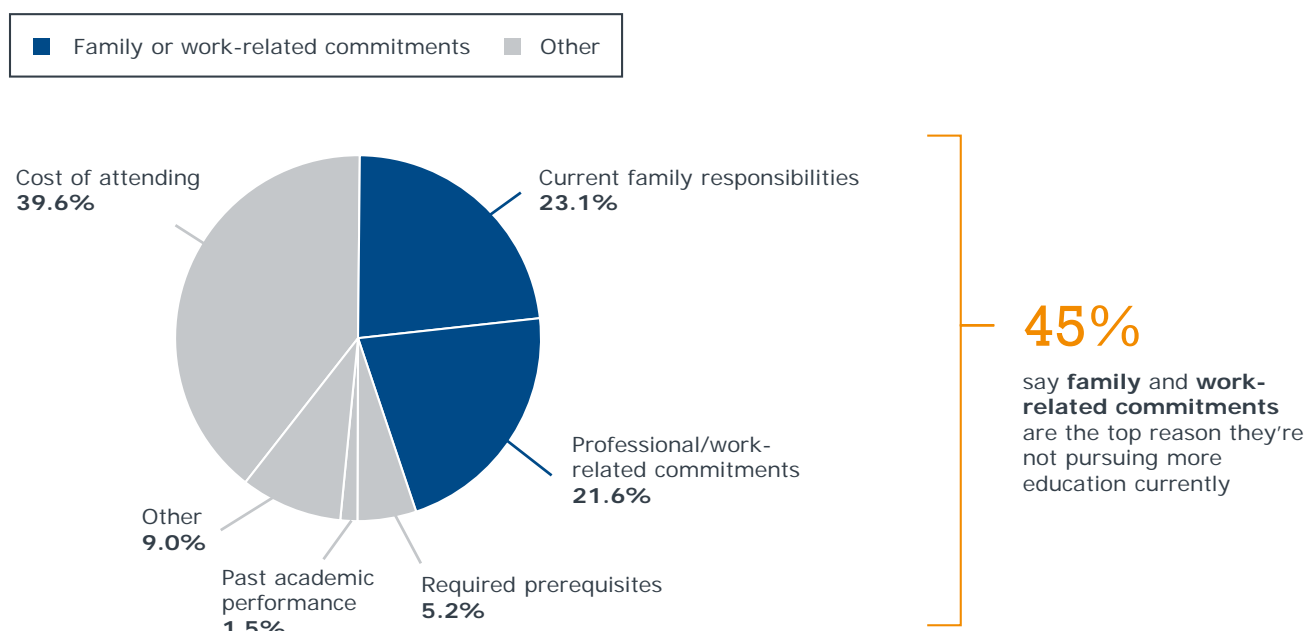
Between 2012 and 2017, the number of graduate students taking at least one distance-learning or online course increased by 46%. This growth is evidence of the appeal of flexible options for many adult learners. With varied program modalities, including online, part-time, and flexible options, adult learners can balance personal and career obligations while continuing to go to school. Our research indicates that, given the wide range of choices that are currently available to adult learners as they search for schools, flexible options appeal to a significant portion of prospects. In order to attract a wide swath of prospects and position themselves for growth in this competitive landscape, institutions need to offer flexible options that will fit with students' lifestyles.

Family and Work Commitments Prevent Prospects from Enrolling

Participants who indicated that they were thinking about going back to school but had no definite plans to do so within the next two years were asked for the primary reason they were not pursuing more education at this time. While the cost of attending was the top single reason named, family and work-related commitments were the primary barrier to enrollment for almost half of all interested prospects, with 23.1% of participants citing current family responsibilities and 21.6% naming professional or work-related commitments.

Figure 14: Almost Half of Interested Prospects Don't Pursue Further Education Due to Family and Work-Related Commitments

Q: What would you say is the primary reason you are not pursuing more education at this time?



Source: EAB research and analysis.

Accommodating Options Appeal to Adult Learners

Almost Half of Adult Learners Considered Online Options

Online and flexible options can offer adult learners a way to pursue their education while maintaining family and work obligations. Among the participants who were planning to enroll or who were currently enrolled, about half (46.6%) had considered online options. Older students were more likely to be considering online college options than were younger students, with 55.4% of participants above age 35 considering online options, compared to 20% of students under age 26 who were considering online programs.

Adult Learners Value Flexibility in Program Modality

Participants who were planning to enroll or who were currently enrolled were asked to indicate the importance of a variety of factors in their enrollment decision. A number of factors related to flexibility had mean scores of 3 or above, indicating that participants found them to be at least somewhat important in their enrollment decision. These factors included the total length of time required to complete a degree; the option for flexible, weekend, or part-time scheduling; and the availability of online or hybrid programs.

In line with the finding that older students were more likely to consider online college options, we also found that older students placed more importance on flexible scheduling, online courses, and joint/hybrid programs.

Figure 15: Flexibility and Online Options Are Important in Enrollment Decisions

Q: Indicate the importance of the following factors in your enrollment decision.

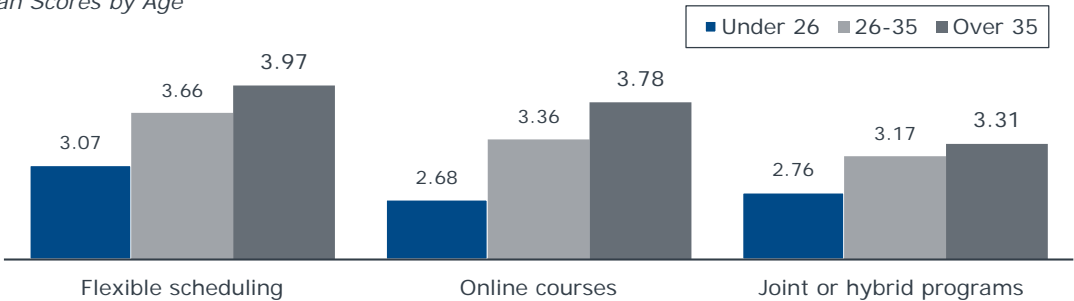
Factor	Mean
Length of program/time required for degree completion	3.79
Online support services (e.g., application for admission, payments, class registration)	3.78
Flexible scheduling (e.g., part-time, evening, weekend)	3.70
Online courses	3.43
Full-time program	3.25
Joint or hybrid programs (e.g., online and in class)	3.14
Designed for executives/professionals (e.g., weekend program)	3.09
Expedited program	3.06

1 in 2 prospects considered online options when researching programs

Mean scores are based on a 5-point scale, where 5 = extremely important and 1 = not at all important.

Figure 16: Older Adult Learners Value Flexibility More Than Younger Students Do

Mean Scores by Age



Source: EAB research and analysis.



Implications for **Recruitment Strategy**

Implications for Recruitment Strategy

Today's prospective adult learners are increasingly savvy and consumer-like. Our research suggests that the following strategies can help institutions better attract, communicate with, and enroll these students.

1 Ensure That Your Marketing Effectively Articulates Return on Education

Concerns about cost and value were among the most important factors in students' decisions about whether, and where, to enroll. To address prospects' reservations about their potential return on education, ensure that value messaging is thoroughly and deliberately incorporated into your multichannel messaging strategy. Create integrated, multichannel campaigns that highlight program value, including by discussing speed to degree, skills gained, and flexible modalities. For maximum effect, tailor value and cost messaging to prospects' mindsets and intents at each stage of the recruitment journey. Furthermore, ensure that your multichannel marketing develops awareness and affinity to better position conversations about spend on education.

2 Use Data to Better Understand Your Prospects and Tailor Marketing to Their Intent

Our research indicates that today's adult learners have heightened expectations for the recruitment "customer experience." We expect this trend to continue, meaning that sophisticated, student-centric marketing will become increasingly critical to enrollment strategy. To better meet the expectations of today's adult learners, start by developing robust, data-driven prospect personas that you can use to understand prospects' motivations, interests, and preferences, and then market to them accordingly. As you communicate with prospects, craft and deploy messages that are tailored to students' questions and intent at each stage of recruitment.

3 Reach Students Early with Awareness Campaigns and Multichannel Marketing

Our findings suggest that the share of prospects taking graduate admission tests has decreased and that, of the students who are taking exams, the majority have identified their top options by the time they complete the test. These findings highlight the importance of building awareness for your program and reaching students early in their consideration process. To maximize your pool of right-fit prospects, augment any test-taker lists with other methods of identifying and reaching prospects, including consumer data and digital ad targeting. To effectively engage students early, ensure that messaging is closely tied to students' known interests and motivations. In addition, make sure that your website is search engine-optimized so that prospects can discover and learn about your school when conducting their own research.

4 Craft Messaging That Conveys School-Life Balance

Our research demonstrates that adult learners typically have significant family or work commitments that necessitate flexible education options. To appeal to these prospects, institutions should ensure that marketing messaging effectively addresses concerns about school-life balance and highlights flexible options, including online and expedited courses of study. To further illustrate the potential for school-life balance, create campaigns that accurately reflect target prospects' interests and lifestyles. Craft imagery and text that incorporate their known preferences and reflect their hobbies, preferences, and lifestyles to foster an authentic connection with your school.

To learn how EAB can help you leverage these and other adult learner insights to meet your growth goals, visit eab.com/ALR or email jocelynpowers@eab.com.

About the Study

Overview of Study

EAB's Enrollment Services conducted a survey of current and prospective adult learners in fall 2018. The study investigated a variety of topics related to graduate, professional, and undergraduate degree programs and certificate programs. Topics explored included prospects' motivations for pursuing education further, sources used to gather information about programs, key decision criteria, preferred communication channels, and plans for financing education. The results reported include responses from 772 participants. In addition to the survey data, these findings reflect the insights from EAB research based on our partnership with 70+ graduate, continuing, and online programs.

Participant Profile

Gender	Percentage
Female	67.0%
Male	32.4%
Other	.6%

Age	Percentage
25 or under	13.9%
26-40	40.9%
41 or over	45.2%

Region	Percentage
Northeast	18.0%
South	32.5%
Midwest	25.0%
West	15.7%
Outside the United States	8.8%

Ethnicity	Percentage
African/African American/Black	18.4%
Asian (Central/South/East/Southeast) /Pacific Islander	6.0%
Hispanic or Latino	13.2%
Middle Easterner/West Asian	2.3%
Native American	2.3%
White/Caucasian	65.3%
Other	0.8%

Employment	Percentage
Employed full-time	55.5%
Employed part-time	18.5%
Not employed	26.0%

Education

- In terms of highest level of education completed, 4.0% had completed high school, 9.2% had completed some college, 10.% had completed an associate degree, 30.4% had completed a bachelor's degree, 10.9% had completed some graduate studies, 27.1% had completed a master's degree, 4.8% had completed a doctoral degree, and 3.5% had completed some other professional credential.
- In terms of plans to pursue education further, 45.5% were either considering enrolling or planning to enroll in a program, 35.5% were currently enrolled in a program, 2.0% were enrolled at one time but were no longer enrolled, and 17.1% did not plan to continue their education.
- The participants who planned to enroll or were currently enrolled were considering or pursuing the following degrees and programs:

Other master's degree (e.g., MA, MS, MFA): 30.6%
Doctorate (e.g., PhD, EdD): 22.0%
Bachelor's degree: 15.8%
Law (e.g., MA, JD, LLM): 7.3%

Certificate: 6.0%
Master's of Business Administration (MBA): 5.0%
Medicine (e.g., MD, DDS, DPT): 4.0%
Other: 9.4%



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