



Charlotte International Cabinet Evaluation & Recommendations

October 2012

Prepared by:

THE LEE INSTITUTE

Collaborating for strong communities.



The Lee Institute is a non-profit consulting practice based in Charlotte, NC.
Our mission is to serve and strengthen the common good through the collective power of
public engagement, civic leadership and collaboration.

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**Charlotte International Cabinet
Evaluation & Recommendations
October 2012**

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CHARLOTTE INTERNATIONAL CABINET

October 2012

Background

Charlotte International Cabinet (CIC) was created in October 2008 with a merger of the Mayor's International Cabinet (MIC) and Charlotte Sister Cities (CSC). Merging the two distinct organizations into one entity created both opportunities and challenges. With the departure of the Executive Director in May 2012, the CIC Executive Board developed a transition plan that included hiring an external consultant to conduct an assessment of the organization.

In June 2012, The Lee Institute was engaged by CIC to conduct an assessment of the current mission and structure of CIC in order to create recommendations regarding:

- the mission, vision and objectives of the organization
- the optimal structure to support the mission and vision
- clarity around CIC's role in the community
- engaging Cabinet members in the work of the organization, and
- leadership needs for the organization.

From June through September 2012, The Lee Institute, working with CIC's Executive Board and Staff has:

- Conducted 20 interviews with CIC stakeholders (*Appendix A: Completed Interviews*)
- Researched International Cabinet/International Affairs Department best practices and conducted telephone interviews (*Appendix B: International Cabinet/International Affairs Department Research*)
- Researched Sister City best practices and conducted telephone interviews with Sister City organizations (*Appendix C: Sister Cities Research*)
- Offered an online survey for input from Charlotte City Council members and CIC Cabinet members (*Appendix D: City Council & Cabinet Member Survey*)

Research

In order to assess CIC's current mission and structure and prepare recommendations for going forward, The Lee Institute conducted interviews with CIC staff and stakeholders, compiled information on practices in other cities with International Cabinets or Offices of International Affairs and information on practices in other cities with active Sister City organizations, gathered data on other international organizations in Charlotte and assessed CIC's current programs and services. A summary of the research conducted and the findings is described below.

One of the purposes of compiling information on similar organizations in other cities is to look for best practices that can be used for an organization. In conducting the research on both International Cabinets and Sister City organizations, The Lee Institute found that there was not a set of best practices for either organization. In the absence of best practices, The Lee Institute focused on those things that worked best for organizations, and especially those practices that were common to more than one organization.

Interviews

The Lee Institute conducted 20 in-person and/or telephone interviews with city leaders and staff, CIC staff, CIC stakeholders and representatives of other organizations that work in the international community in Charlotte. A complete list of those interviewed is found in *Appendix A: Completed Interviews*. Interviews were conducted using a common set of questions, designed to assess the perception and understanding of CIC's mission and role, CIC's strengths and opportunities for improvement and solicit ideas for CIC's structure and role moving forward. Responses were recorded and then themed and summarized. A complete list of questions, themed responses and representative quotes is found in *Appendix E: Interviews - Theming Summary*.

When asked to describe the mission or work of CIC, a majority of respondents indicated that they were unsure of CIC's mission and vision and wondered if CIC had a clear mission. Others felt that CIC should support the economic development efforts of other organizations in the city, that it should be a resource and convener for all groups in the international arena and that CIC should be a resource for city leaders (Mayor, City Manager, City Council and staff).

"Not specifically defined...it seems like every time you turn around, they say 'We're thinking of doing this, we want to do that.'"

Overwhelmingly, those interviewed felt that one of the primary strengths of CIC was the MICA awards. It is a well-respected event that has raised the awareness of the international community and one that should be continued and strengthened. In addition, respondents felt that CIC's role as a neutral convener, their relationship building and volunteer leadership were also important strengths.

When asked what areas of CIC might need improvement, defining the mission was the most frequent response. In addition, the Sister Cities program, the structure of CIC (Board, committees and staff) and the engagement of Cabinet members were all cited as areas that need improvement.

“Economic development in the government to government role. International countries want to have a government to government relationship.”

Supporting economic development, encouraging collaboration and partnerships, serving as a resource for international companies in the region and the protocol function were specific areas identified that CIC should be addressing. When asked specifically about CIC’s role related to economic development, those interviewed responded that CIC should play a resource or supportive role.

The interviews pointed out that CIC serves as the entry point for many international organizations, including but not limited to, government to government interactions. These interactions can be the starting point for relationships that can develop into an economic opportunity for the city or region. Interviewees who discussed this type of interaction expressed the need for CIC to fill the role of acting as the initial point of entry and then identifying and engaging the appropriate partners throughout Charlotte – both inside and outside of government.

Those interviewed felt that the structure and organization of the Sister Cities program needs to be redesigned using practices from other successful Sister City organizations. In addition, it was suggested that CIC recommend and the City establish criteria for the addition of any new Sister City relationships. Those criteria should include a focus on business and economic development.

Those interviewed were asked about the size of the Cabinet, how Cabinet members are appointed, the optimal organization and staff structure for CIC and whether the Office of Protocol should be housed in the Mayor’s Office or with CIC. Respondents agreed that the current size of the Cabinet (30 members) is too large and that some of the appointments should be nominated or recommended by the Cabinet to the City Council and Mayor. Currently, the Mayor and City Council members appoint all members of the Cabinet. While there was a range of thinking regarding the organization and staff structure, the majority felt that either the CIC should become a city department or be totally restructured and given adequate resources to meet the important mission this organization could serve. The majority of respondents felt that the Office of Protocol should be part of the future structure of CIC or an International Affairs Department. It was felt that the City was missing opportunities that might occur as a result of the interface Protocol has with foreign visitors and dignitaries.

“Need to decide about mission and Board/Cabinet committee structure. They have 2 ½ FTEs – is that enough to run a defined strategy?”

International Cabinet Research

In order to determine how cities comparable to Charlotte structured the functions currently addressed by CIC, The Lee Institute conducted online research, followed by telephone interviews with selected cities:

- Seattle, Washington
- Atlanta, Georgia
- Phoenix, Arizona
- Austin, Texas
- Jacksonville, Florida
- Dallas, Texas
- Indianapolis, Indiana

In the research conducted, The Lee Institute found no other city with a structure similar to CIC – a separate 501(c)3 organization that addresses international affairs and houses the Sister City relationships. In five of the cities researched the international affairs function is a city department housed in the city manager’s or mayor’s office. Typically the primary function of the Office of International Affairs is to work with the city to promote and support economic development. Being a direct department of the government provides an immediate government to government relationship, a relationship that is important, if not necessary, for many international relationships.

In addition, The Lee Institute found that, in most cities, the protocol function is housed in the Office of International Affairs, providing a department that works collaboratively to establish and maintain international relationships.

In the majority of cities, the Sister Cities program is overseen by the International Affairs Office, although the structure of those programs varies. (See next section for the Sister Cities research.)

The Lee Institute did not find consistent practice around Board or Advisory Committee structure and organization of these departments. See *Appendix B: International Cabinet/International Affairs Department Research* for additional details.

Sister Cities Research

In order to determine best practices in cities with successful Sister City programs, The Lee Institute conducted online research, followed by telephone interviews with selected cities:

- Seattle, Washington
- Atlanta, Georgia
- Ft. Worth, Texas
- Tampa, Florida
- Phoenix, Arizona
- Chicago, Illinois

Although the structure and organization of the Sister Cities programs varies from city to city, in most cities the Sister Cities program is a separate 501(c)3 organization, or organizations, overseen by the city's Office of International Affairs. This organization allows oversight and coordination with a city department, while allowing the Sister City organization fundraising ability.

Most Sister City organizations receive some funding from the city, with additional funding coming through a variety of fundraising activities. These activities include membership dues, sponsorship opportunities for events and activities, international festivals and fees for participating in Sister City sponsored activities (i.e. student exchange programs).

Although the Sister Cities relationships retain a cultural aspect, the majority of cities have seen a shift in focus to economic development, especially when considering new Sister City relationships. The close affiliation with the Office of International Affairs supports this focus and promotes a collaborative approach to the international relationships.

Seattle has also developed a set of criteria that must be met for establishing a Sister City relationship, but also criteria that is used to evaluate the ongoing relationships. In order for a city to remain on "active" status, the following criteria that must be met or exceeded include:

- a minimum number (30) of paid memberships (the Sister City organizations are membership organizations with annual dues)
- a comprehensive work plan for the calendar year that demonstrates how the activities of the association will further the objectives of the Sister City program, activities, fundraising, etc.
- a calendar year budget for the association's activities that includes plans for funding its activities and how it will spend the City's funds
- non-profit status (each Seattle Sister City must register with the state of Washington as a non-profit organization authorized to solicit gifts or contributions)
- program activity – at least two program activities annually.

A summary of the research conducted can be found in *Appendix C: Sister Cities Research*.

Charlotte City Council and Charlotte International Cabinet Members Online Survey

An online survey was developed and administered for Charlotte City Council members and CIC Cabinet members. Four of 11 City Council members and 18 of 25 current CIC Cabinet members responded to the survey. The survey was designed to solicit feedback on the operating structure of CIC and to prioritize the programs and services that are either currently offered or could be offered by CIC. Those who responded stated:

- CIC should adopt best practice with regard to Cabinet size and structure – decrease the number of Cabinet members to 18 to 24 and structure the Cabinet so that the majority of work and policy making is done at the Cabinet level and not by the Executive Committee (22 of 22 responses)
- CIC staff and current Cabinet members should have input into Cabinet appointments so the Cabinet can be more strategic about adding members that are strongly engaged in the mission (18 of 22 responses)
- The following areas had the highest priority when asked which should be a part of the CIC’s mission and work (respondents were asked to select six out of the eleven listed):
 - Government to government gateway for international relationships - including trips (14 responses)
 - Support for Sister Cities committees and programming (14 responses)
 - Advocacy for Charlotte’s role as an international city (12 responses)
 - Convener of international organizations in the Charlotte community (11 responses)
 - Maintain close relationships with the Charlotte Chamber of Commerce, Charlotte Regional Partnership and International Chambers of Commerce (11 responses)
 - Develop and maintain a virtual portal and branding initiative for all international activities in Charlotte – Global Charlotte (11 responses)
 - Through government to government connections serve as an entry point for foreign economic development (11 responses)
- The Protocol Office for Charlotte should be housed with CIC (15 of 22 responses); a number of respondents were not familiar with the position

The final question addressed whether CIC should be a part of the City Economic Development Department. Of those who responded, 12 felt that it should be part of the City Economic Development Department, 7 felt that it shouldn’t and a number of comments expressed uncertainty or questioned whether this was the right department.

A complete summary of the results and comments can be found in *Appendix D: CIC Cabinet Members & Charlotte City Council Survey Summary*.

Current Roles of the International Organizations in the Charlotte Community

The World Affairs Council (WACC) is a non-profit, non-partisan organization supported by private funding from individual and corporate member dues and contributions. As a member of the World Affairs Council of America, their mission focuses on improving international education and encouraging citizens to participate in the national debate on world affairs. WACC conducts a variety of programs outlined in *Appendix F: Current Roles of International Organizations in the Charlotte Community*. WACC has a full time staff of three and a 22 member Board of Directors composed of individuals from the corporate and educational community.

International House is a non-profit organization supported by membership dues, grants and programming fees. International House promotes international understanding by serving as a center for diversity, advocating for people of diverse national backgrounds and facilitating professional and cultural exchange programs. They provide a variety of programs outlined in *Appendix F: Current Roles of International Organizations in the Charlotte Community*. International House has a full time staff of 12, a 14 member Board and a 21 member Advisory Board. The Board and Advisory Board are composed of members from the Charlotte corporate and international community.

Charlotte International Cabinet Programs and Services

To better understand the current focus of CIC and the programs and services currently offered, The Lee Institute thoroughly reviewed the FY 2013 Objectives prepared for the City of Charlotte (*See Appendix G: FY 2013 Objectives*). In addition, Lee facilitated an exercise with the CIC Executive Board to discuss accomplishments around each objective as well as to identify what else can be done or accomplished in each area.

The analysis of the objectives and discussion with the Executive Board reinforced and supported the findings of the research conducted via interviews and surveys – that CIC needs to find clarity around its mission, specifically define its role in the Charlotte international community and address its structure and organization. Once the mission and role of the organization are clearly defined it will be important for CIC to **focus** its energy and resources on those areas.

The Executive Board identified the following strengths of CIC:

- MICA,
- strong relationships established throughout the Charlotte International Cabinet,
- the strength and success of some of the Sister City relationships (Aeroquipa, Limoges),
- the December 2011 Beijing trip and
- the International Organizations Meeting.

The CIC Executive Board felt significant improvement could be made in many of the areas defined by the FY 2013 Objectives, specifically:

- Strengthen Neighborhoods
 - Goal 1: Identify issues of concern to community leaders with multicultural constituents. Once issues are identified, work with City staff and other nonprofit organizations to assess support or interventions needed – making sure that it is not work that fits under the mission of International House.
 - Further define CIC’s role in this area, making sure the focus is clear and discreet.
 - Define CIC’s role in organizing the International Organizations Meeting.
 - Goal 2: Conduct education outreach throughout the Charlotte community
 - Creating and maintaining a focus on educational outreach and student exchange programs (both incoming and outgoing) should be a priority for CIC.
- Promote Economic Development
 - Goal 1: Support economic development in Charlotte
 - Focus more attention on creating economic development opportunities with the established Sister Cities.
 - Better coordination and collaboration with the other organizations that operate in the economic development arena.
 - Act as a convening body to establish a collaborative for the organizations that operate in this arena.
 - Goal 2: Recognize the impact of foreign-owned business on the Charlotte community and the contributions of foreign-born Charlotteans
 - Continue to build on the strengths of MICA.
 - Rebuild collaborations with Charlotte Regional Visitors Association.
- Enhance Customer Service
 - Goal 1: Increase effectiveness of international relationships with Charlotte’s Sister Cities
 - Establish guidelines for Sister City relationships and committees.
 - Establish method and guidelines for accountability.
 - Formalize the structure of the Sister City Committees.
 - Create opportunities for collaboration among the Sister City committees and other international organizations.

Recommendations

Mission and Focus

Creating and maintaining working relationships that support and foster international economic development for the city of Charlotte and foster its stature as a global city, including oversight of the Sister Cities program should be CIC's primary focus. CIC should not play the primary role in economic development, but serve as an entry point for international relationships primarily government to government, supporting the work of and working collaboratively with the Charlotte Chamber of Commerce, Charlotte Regional Partnership and other organizations that work in the arena of international economic development. It is imperative that CIC be viewed as a neutral organization that works on behalf of both the City of Charlotte and Charlotte's international community. Acting as a convener of the international organizations – those that play an economic role as well as those that play a more cultural role – is an essential role for CIC.

- Recommended mission statement:
CIC's mission is to create and maintain working relationships with organizations and government entities that support and foster economic development and trade opportunities for Charlotte/Mecklenburg and maximize its stature as a global city with a robust Sister Cities program.

- Recommended areas of focus include:
 - External International Relations - working with other organizations involved in international affairs and programming in Charlotte/Mecklenburg
 - Economic Development – act as a point of entry and host in government to government interactions, support other economic development partners (Chamber and CRP), coordinate with economic development partners and Sister Cities Committees on Mayor or Council trips to support economic development
 - Sister Cities – a robust set of programs that focus on educational and economic development opportunities
 - Protocol - serve as a resource and primary point of contact with regard to protocol for international dignitaries, trade missions and visitors; the office would play a key role in hosting international delegations, trade missions, foreign dignitaries and country representatives.
 - Promoting Charlotte/Mecklenburg as a Global City in the region, nationally and internationally.

Structure and Organization

There are two primary options for CIC's structure and organization going forward:

- Maintain its current 501(c)3 status and quasi-governmental affiliation with the City of Charlotte. The Sister Cities organization would remain a part of CIC, with significant changes to structure and oversight as outlined below.
- Become an Office of International Affairs housed in the City Manager's or Mayor's office or in the Economic Development Department. In this model, the Sister Cities program would retain the 501(c)3 status, but would be a separate entity overseen and managed by the Office of International Affairs.

Maintaining the current 501(c)3 status and quasi-governmental affiliation with the City of Charlotte would allow CIC to continue to function within its current structure, based on the recommendations as outlined within this report. Significant reorganization of the Cabinet, Executive Board, Sister City committees and policies, and CIC programs and services would need to occur in order for CIC to become a more productive, focused and effective organization. Additional resources would be needed to support staff salaries and benefits, including adding a position dedicated to supporting the Sister Cities committees. If the organization is to effectively engage in the scope of work described in this report, the current staff structure and salary levels for key personnel are inadequate.

Becoming an Office of International Affairs housed in the City Manager's or the Mayor's office would allow a more seamless and integrated response to government to government interactions and requests. Many cities across the US have recently reinvigorated their international efforts, recognizing that establishing and maintaining an Office of International Affairs as a city department allows an entry point for creating and facilitating economic development connections. Establishing a city department for International Affairs would send the message that the City of Charlotte is actively promoting and supportive of international relationships – both economic and cultural. In addition, the Office of International Affairs would act as the primary focus for international businesses in the community on establishing “outgoing” relationships – facilitating local connections within the Charlotte region and the global market. It further elevates the work and mission of the organization as a partner with the Charlotte Chamber of Commerce and Charlotte Regional Partnership.

The Sister Cities organization would be a separate entity, maintaining the 501(c)3 status, but would be overseen by the Office of International Affairs. We would strongly recommend that a person on the International Affairs staff be dedicated to support of Sister Cities. This structure would allow Sister Cities to maintain the necessary fundraising capability, while benefiting from the structure and support of the city office.

Board Structure

The current CIC Board structure and organization results in a group that is too large. Cabinet members do not have a clear sense of their roles and responsibilities. The 6 to 8 member Executive Board carries out the work that is typically addressed by a full Board, resulting in further separation between the Cabinet and the work of CIC. In addition, the current committee structure does not address the needs of the organization. The Lee Institute recommends the following Board structure for CIC:

- The current Cabinet and Executive Board structure would be restructured to form one Board (CIC Board).
- The CIC Board would be composed of 18 to 24 members, in accordance with nonprofit board best practices.
- The CIC Board would have the following standing committees:
 - Sister Cities
 - Finance
 - MICA and Fundraising
 - Nominating
 - ProgramsAdditional committees appointed as needed.
- The CIC Board would have a Chair, Vice-Chair, Treasurer and Secretary.
 - The Mayor and current Chair appoint the incoming Chair.
 - The remaining officers will be nominated and elected by the full CIC Board.
- CIC Board members would be nominated by the sitting Board via a Board Nominating Committee. The Nominating Committee would consider individuals that had submitted applications to the City Clerk's Office expressing interest in the CIC as well as recommendations from the Mayor and City Council. The slate of nominees would be passed on to the Mayor and City Council for their consideration. Nominees would meet some number of the following criteria:
 - Their profession is directly related to international business or international education (60 to 70% of the Board should meet this criteria)
 - They are foreign nationals or serve on a Sister City Committee
 - At least 3 Board members would be chairs of the Sister City Committees
 - Two slots would be held for a Charlotte Chamber of Commerce Representative and a Charlotte Regional Partnership Representative
- CIC Board meetings would be held six times per year with a focus on the work and mission of CIC. Additional public, informational and/or networking meetings would be scheduled separately.
- Once approved for the CIC Board, new members would attend a new member orientation conducted by the Executive Director and staff as needed. The new member orientation would provide detailed information about CIC as well as outline the expectations and responsibilities of Board members.

If the City of Charlotte establishes an Office of International Affairs, The Lee Institute recommends that the Office create an Advisory Board similar in structure to the CIC Board described above, with one significant change. The Sister City organization would have a separate Board, as required by the 501(c)3 status, composed of the Chairs of each Sister City Committee, a representative from the Advisory Board of the Office of International Affairs and 5 to 6 representatives from the community at large, including a representative from the Charlotte Chamber of Commerce and Charlotte Regional Partnership . In addition, the chair of the Sister City Board should be a member of the Office of International Affairs Advisory Board.

Sister City Structure

Charlotte has eight Sister City relationships with a separate Sister City committee for each relationship. Current CIC policy states that the Chair for each committee is appointed by the International Relationships Committee Co-Chairs after completing an application process and being approved by the Executive Board. Once appointed, the Chair selects a Vice-Chair and committee members from a volunteer pool.

While some Sister Cities have strong, functioning committees with an active relationship with their city, others do not. There are no official guidelines or policies beyond those outlining the Chair and Vice-Chair. In addition, there is no regular meeting of the Sister City committee chairs with one another or with CIC staff or Cabinet. Without policies and guidelines or any regular meetings, there is a lack of accountability for the Sister City committees and relationships.

The Lee Institute makes the following recommendations for the Sister Cities program:

- A Sister Cities Committee of the Board
 - Each Sister cities Committee chair is a member of the Sister Cities Committee
 - At least three Sister City Committee chairs are full Board members
 - The Sister Cities Committee meets at least 6 times per year
- Develop guidelines and policies for the Sister Cities programs and relationships based on best practices from around the country
- Develop guidelines and policies for establishing any new Sister Cities relationships – any new relationships should have an economic development component
- A full-time or part time staff member to coordinate the Sister Cities committees and relationships
- Encourage Sister Cities to establish programs or activities for fundraising opportunities

If the City of Charlotte establishes an Office of International Affairs with the Sister Cities organization maintaining the 501(c)3 status, the organization would be required to have a full Board. The Lee Institute recommends that this Board be composed of the Chairs of each Sister City Committee, a representative from the Advisory Board of the Office of International Affairs and 5 to 6 representatives from the community at large, including a representative from the

Charlotte Chamber of Commerce and Charlotte Regional Partnership. In addition, the chair of the Sister City Board should be a member of the Office of International Affairs Advisory Board.

Staff Structure

In order to adequately support the activities of a highly functioning International Cabinet or Office of International Affairs, The Lee Institute makes the following staff recommendations:

- **Executive Director**— a full-time Executive Director (ED) whose primary responsibility is to build relationships within the Charlotte community and within the international community. The ED should have experience in the international arena and experience in building and developing collaborative partnerships with a variety of people and organizations.
- **Program and Events Director** —a part-time or full-time Program Director to oversee and manage the CIC/Office of International Affairs programs and events.
- **Sister Cities Director/Coordinator** – a full-time Director or Coordinator with fundraising experience to oversee and manage the Sister City relationships and committees and organize and support fundraising efforts.
- **Protocol Officer** – a part-time Protocol Officer to work in partnership with the Mayor’s Office, Charlotte Regional Partnership, the Chamber of Commerce, World Affairs Council of Charlotte, International House, educational institutions, and corporations allowing effective coordination of international visits and relationships.
- **Administrative Assistant** – a part-time or full-time Administrative Assistant to support the work of the office.
- **Interns** –interns currently play an important role in the work of both the International Cabinet and Sister Cities. This program should be continued and used to support specific programming and the Sister Cities committees.

In 2010-2011, CIC staff evaluated their time spent on various activities, and while this is hard to accomplish as an estimate after the fact, they estimated they were using over 3,000 hours per year in time by interns and that both full-time staff members were working over 50 hours per week. Hours allocated directly to Sister Cities work, which included chaperoning trips, was over 1000 hours annually – an average of 20 hours per week. This does not include any of the data base management, newsletter work or board support related to Sister Cities.

While Protocol is not housed within CIC, but in the Mayor’s office, the position is currently part-time. The current protocol officer estimates she spends more than 20 hours per week on protocol.

In our estimation, it does not appear CIC has excess capacity to add new programming. The Lee Institute does feel that by refining the mission and providing a focused plan of work supported by the above recommended positions the organization can become a valuable and important contributor to the international business and economic development area and to building a

strong and connected Sister Cities program. Without adequate staff support both in terms of the number of people and an elevation of the Executive Director position in terms of experience and therefore, pay range this organization will probably continue to limp along without significant improvement in their ability to support a revised mission and a robust Sister Cities program.

Programs

In its current structure, it can be difficult to identify and define the specific programs and services offered by CIC. The Lee Institute recommends that CIC focus on the following programs:

- **Sister City Relationships** – see Sister City Structure for additional information
- **MICA Awards** – community awards gala focused on recognizing corporate and individual giving, philanthropy and commitment to the Charlotte Regional community; this event should also showcase CIC or Charlotte International Affairs office and be restructured and strengthened to become a fundraising event for CIC or Sister Cities.
- **CIC Forums** – meetings open to the public, focused on a specific issue and used for an exchange of ideas and/or raising awareness; these forums should be separate from the CIC Board meetings
- **International Organization Meeting** – a meeting for the organizations that work with Charlotte’s international community, primarily designed as a community outreach event
- **International Entrepreneur and Small Business Owners Meeting** – a meeting or entrepreneurs and small business owners in Charlotte’s international community, includes workshop and speakers focused on a particular sector of the business community; designed to help those who attend learn more about growing their business in the international community
- **Student Exchange Program** – establish a student exchange program for Charlotte area high-school students structured around the Sister City programs; a student exchange program is one of the centerpieces of Sister Cities programs throughout the country
- **Beaujolais Festival** - restructured to become a fundraiser for the Sister Cities committees

Resources

In fiscal year 2011-12, the CIC profit and loss statement shows:

Income from sponsorships and programs	\$136,690
City Funding	<u>153,060</u>
Total Funding	\$289,750
Expenses related to sponsorship and programs	\$129,190

Payroll expenses* (2 FT plus \$8,400 for consultant)	95,755
Rent, Technology, Telephone	29,389
Payroll processing, bookkeeping, audit	7,032
Postage, printing, office supplies, website, on-line services	6,480
Sister Cities membership	<u>1,665</u>

Total expenses **\$267,186**

**Does not include any benefits as part of compensation*

CIC also has a reserve fund of \$79,000 these funds are reserved for specific programs.

Mayor's travel fund	\$18,677
Arequipa School funds (SC funds for Arequipa school projects)	6,818
Mica awards (excess from past programs to be used for MICA)	27,607
Queens Friends with Music (for SC exchange around music)	2,614

Current funding levels for CIC prevent a robust Sister Cities organization and active roles in both the economic development area and as a connector and convener of the international community. The Lee Institute recommends that any additional funding for CIC first be directed to:

- staff salaries to more adequately reflect the revised mission and that are competitive,
- inclusion of benefits, and
- stronger support for Sister Cities functions, with fundraising experience required for this position.

Charlotte International Cabinet Recommendations

The Lee Institute recommendations were presented to the Charlotte International Cabinet at the October 4, 2012 Cabinet Meeting and the City Council on October 8, 2012. At a specially called Cabinet Meeting on November 15, 2012, the Charlotte International Cabinet (CIC) voted:

1. to formally accept the Charlotte International Cabinet Evaluation & Recommendations, dated October 2012, prepared by The Lee Institute (the Evaluation); and
2. with respect to the Evaluation, to recommend that:
 - a. the CIC staff become an office of international affairs within the appropriate department of the City of Charlotte;
 - b. the CIC itself become an advisory board to the office of international affairs; and
 - c. the current NC nonprofit corporation continue, with a focus on developing and nurturing relationships between the City of Charlotte and other cities and regions (i.e., not limited to Sister Cities).

The CIC Executive Board, at a meeting immediately following the Cabinet meeting, approved the votes set forth in items 1 and 2 above.



APPENDIX A – COMPLETED INTERVIEWS

Completed Interviews

- **Ronnie Bryant**, President & CEO, Charlotte Regional Partnership
- **Nancy Carter**, Executive Board, Charlotte International Cabinet
- **John Chen**, Chair, Board of Directors, Carolinas Asian American Chamber of Commerce
- **Denise Cumbee-Long**, Executive Director, International House
- **Terri DeBoo**, Former Sister Cities Chair
- **Jeff Edge**, Senior Vice President, Economic Development, Charlotte Chamber of Commerce
- **Mayor Anthony Foxx**
- **Maha Gingrich**, Chair, Charlotte International Cabinet
- **Alexis Gordon**, Program Director, Charlotte International Cabinet
- **Catherine Hansen**, Chief of Protocol, Charlotte
- **Dana Hicks**, Honorary Canadian Consul and President, Huber Technology
- **Councilman David Howard**, Charlotte City Council
- **Ron Kimble**, Deputy City Manager, City of Charlotte
- **Charles Lansden**, Vice-Chair, Charlotte International Cabinet
- **Dennis Marstall**, former Assistant to Mayor Pat McCrory, current Vice President Community Investment and Impact, United Way of Central Carolinas
- **Kim McMillan**, Director of Corporate Communications and Marketing/Staff Liaison for Charlotte International Cabinet, City of Charlotte
- **Tracy Montross**, Aide to Mayor, City of Charlotte
- **LJ Stambuk**, President, World Affairs Council
- **Kurt Waldthausen**, Honorary Consul of the Federal Republic of Germany and Partner, Waldthausen & Associates
- **Curt Walton**, City Manager, City of Charlotte

**Appendix “B”
International Cabinet/International Affairs Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes/Comments
Atlanta	<p><u>Office of International Affairs</u></p> <ul style="list-style-type: none"> • Division of the Mayor’s Executive Offices • Provides staff support to the Atlanta Sister Cities Commission • Abolished in 2008, no funding again until 2012-2013 	No Board or Advisory Board – Sister Cities Commission only	Currently funded through the Mayor’s Chief of Staff’s office; separate operating budget forthcoming	<p>Three (3)</p> <ul style="list-style-type: none"> • Director/International Affairs Specialist • Protocol Officer • Analyst/Administrative 	<p>Areas of focus:</p> <ul style="list-style-type: none"> • Economic Development – working with Invest Atlanta, Chamber of comer and trade commissions and consultants • Government to government relationships • Protocol 	<ul style="list-style-type: none"> • Established to create and maintain working relationships with the consular and diplomatic corps, bi-lateral chambers of commerce, international trade offices and international organizations to maximize the City’s opportunities to impact public policy, increase revenues, and foster its growing stature as a global city and key player in trade and commerce. <p>Works closely with Ga. Dept of Commerce.</p>
Austin	<ul style="list-style-type: none"> • No department dedicated to international affairs • <u>Economic Growth and Redevelopment Services Office</u> addresses international issues through an economic lens to enhance local prosperity • City Department • Oversees Sister Cities program 	No Board or Advisory Board	Completely funded by Austin Energy – a city electric company	<p>Five (5)</p> <ul style="list-style-type: none"> • Two (2) focused on Economic Development • Two (2) focused on International Development • One (1) to support Sister Cities 	Economic Development	<p>Economic development is a small part of Economic Growth and Redevelopment Services Office. The department does a lot with redevelopment and arts/culture. Works closely with all Chambers of Commerce.</p> <p>Office’s role in international economic development is to promote Austin's role in the global marketplace by attracting foreign direct investment, encouraging international cultural exchange and helping Austin companies access international markets.</p>

Appendix “B”
International Cabinet/International Affairs Research

Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	NOTES/COMMENTS
<p>Dallas</p> <ul style="list-style-type: none"> • No Office of International Affairs • Protocol Office is housed at the World Affairs Council and is a public/private partnership between the City of Dallas and the World Affairs Council 		<p>Protocol function is funded by the City of Dallas, World Affairs Council of Dallas/Fort Worth and corporate and individual supporters.</p>	<p>Two (2)</p> <ul style="list-style-type: none"> • Chief of Protocol • Director of International Protocol Services 		<p>The City of Dallas’ Protocol Office functions as:</p> <ul style="list-style-type: none"> • The City's liaison for visiting international government dignitaries, as requested. • Official secretariat to the Consular Corps of Dallas-Fort Worth. • A resource base for the mayor, city officials and citizens on international issues and protocol. • The city's liaison to Dallas' sister cities. • Point of contact with the state and federal governments for diplomatic matters.
<p>Jacksonville</p> <p>GlobalJax – a 501(c)3 organization Founded in 1990 as International Resource Center of Jacksonville, name changed in 2004 to International Visitors Corps of Jacksonville, name changed in 2011 to GlobalJax</p>	<p>Board of Directors 19 members, 8 compose the Executive Council</p>	<p>US Department of State Bureau of Educational and Cultural Affairs sponsors some GlobalJax programs. Membership dues, advertising, sponsorships, grants and donations are other revenue sources.</p>	<p>Three (3) full-time</p> <ul style="list-style-type: none"> • Executive Director • Assistant Director • Program Director <p>Three (3) interns</p> <ul style="list-style-type: none"> • Communications & Events • Program interns (2) 	<p><u>Global Perspectives Series</u> – talks by visiting emerging world leaders. <u>Global Exchange</u> - co-hosted with WACC, opportunity for Young Professionals to engage in roundtable discussions with visiting emerging world leaders . <u>Going Global Summit</u> – discussions on the local impact and responsibilities of global citizens, skills necessary to compete in global economy and opportunities to pursue international careers and business relationships. <u>Citizen Diplomacy</u> – grassroots approach to diplomacy through the International Visitor Leadership Program.</p>	<p>Does not have an affiliation with the Jacksonville Sister Cities organization. Jacksonville does not appear to have a City Office of Protocol. GlobalJax does not have a protocol function.</p>

Appendix "B"
International Cabinet/International Affairs Research

Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	NOTES/COMMENTS
<p>Phoenix</p> <p>Office of International Relations is a part of the City of Phoenix Community & Economic Development Department, under the City Manager’s Office, oversees Sister Cities organization. Protocol is housed in Sister Cities organization.</p>	<p>No Board or Advisory Board for Office of International Relations (There is a Sister Cities Commission and a Sister Cities Board of Directors)</p>	<p>\$425,000 (not including Sister Cities)</p>	<p>One (1) staff member (Administrator) in Community & Economic Development Department for International Relations</p>	<p>International Relations Sister Cities Protocol</p>	<p>Not affiliated with International Relations is the Phoenix Committee on Foreign Relations (PCFR) is an independent and non-partisan membership organization designed to assist leaders in Metro Phoenix to respond more effectively to a rapidly changing world. Founded in 1976 as an outgrowth of the Council on Foreign Relations, the Committee is dedicated to positioning Metro Phoenix as a major regional, international policy center. Its objectives are to make leaders more fully aware of international developments and promote more effective action in addressing a rapidly changing world; inform and improve policy making in both the private and public sectors; promote better understanding of global trends and their implications; enhance international communications on vital economic, social and political issues; help enrich, develop and align the international community; and promote collaboration among international interests.</p>

Appendix "B"
International Cabinet/International Affairs Research

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	NOTES/COMMENTS
Seattle	The Office of Intergovernmental Relations (OIR)			Currently a staff of one (1). Previously staff of four (4), two (2) people left that had Economic Development focus and formed the Trade Development Alliance (TDA). City pays \$70,000 in TDA dues and they handle trade component.	Protocol Sister Cities Economic Development	

**Appendix “C”
Sister Cities Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes/Comments
Atlanta	<p>City of Atlanta Office of International Affairs houses <u>Atlanta Sister Cities Commission</u></p> <p>18 Sister City affiliations</p>	<ul style="list-style-type: none"> • Sister Cities Commission <ul style="list-style-type: none"> ○ 23 members composed of Chair, three mayoral appointees, two City Council appointees and the Chairperson of each Sister Cities Committee • Monthly meetings • Commission members elect Vice-Chair, Secretary and Treasurer • Elected officers serve one-year terms and are restricted to two consecutive terms in office • Standing Committees <ul style="list-style-type: none"> ○ Executive ○ Fundraising ○ Nominating ○ Economic Development ○ Education ○ Public Relations ○ New Cities 	<p>City pays Sister Cities dues and provides some staff support. Other funds raised internally (in-kind donations, grant funding)</p> <p>Note: International Affairs activities are currently funded from the Office of Chief of Staff. Atlanta is in the process of reestablishing the International Affairs office with a separate operating budget.</p>	<p>The Sister Cities Commission itself does not have any employees. All members are volunteers.</p> <p>International Affairs office (staff of 3)</p> <p>Commission is supported by members of the Mayor’s Office staff who participate in monthly and special meetings, help shape the Commission’s policy and act as liaison with the Mayor.</p>	<ul style="list-style-type: none"> • Monthly meeting scheduled by Mayor’s Office • Best Practice Exchange - conference of 100 people on a “best practice” topic; partner with Invest Atlanta, Chamber of Commerce and State of Georgia • International Student Super Exchange – hosted 30 exchange students from Atlanta Sister Cities • Sister City Committees are very active – each host events throughout the year (see ASCC 2011 Annual Report: http://www.atlantaga.gov/modules/showdocument.aspx?documentid=3722) 	<ul style="list-style-type: none"> • Mission: To increase the knowledge, goodwill and understanding of the world through people-to-people diplomacy, education, cultural and economic exchanges and humanitarian assistance.

**Appendix “C”
Sister Cities Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes
Fort Worth	<p>Stand-alone 501(c)3 organization</p> <p>8 Sister City affiliations</p>	<ul style="list-style-type: none"> • Mayor is Honorary Chair • City Council Members are liaisons to each Sister Cities Committee • Executive Committee – 18 members (including Chairs of each Sister City Committee) • Board of Directors – 25 members • Advisory Board – 13 members • Director Emeriti – 6 • Ex-officio – 12 (representatives from other international and economic development organizations) 	<p>Current budget: \$1.6M</p> <p>4% of current budget is funded by the City of Fort Worth</p> <p>Remaining budget is raised through memberships – individuals and corporations, foundations and special events</p> <ul style="list-style-type: none"> • 1500 individual members, 10-15 corporate members • Major Events – Mayor’s International Event (\$250K) • Major Gift Campaign (\$140K) • Programming income – all travel participants pay a program fee (\$300 to \$400K/per year) 	<p>Five (5)</p> <ul style="list-style-type: none"> • President & CEO • Vice-President & COO • Vice-President • Senior Program Manager • Executive Assistant 	<ul style="list-style-type: none"> • Mayor’s International Event (fundraiser) • <u>Extensive</u> Youth & Adult Exchange trips throughout the year 	<ul style="list-style-type: none"> • Mission: To advance peace through lasting relationships and international understanding. • Strategic Plan calls for establishing three additional Sister City affiliations by 2015 – must include economic development opportunities in criteria for selecting cities • Have submitted proposal to City of Fort Worth to provide Protocol function to City; Fort Worth does not currently have a Protocol Officer
Phoenix	<p>501(c)3 organization overseen by City of Phoenix – Mayor’s Office/International Relations Office</p> <p>9 Sister City affiliations</p>	<p>Board of Directors – 20 members</p> <ul style="list-style-type: none"> • Mayor appoints Board members, City Council approves • Chair of each Sister City Committee sits on Board <p>City Council Members are liaisons to each Sister City committee.</p>	<p>\$550,000 budget</p> <p>All programs funded by donations</p> <p>Staff paid by City of Phoenix</p>	<p>International Relations serves as staff (3) plus interns</p>	<p>Economic Development is not a key program component</p>	<p>9 Sister Cities</p> <p>2-4 Exchange Students per year per Sister City</p>

**Appendix “C”
Sister Cities Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes
Seattle	<p>Part of the City of Seattle Office of Intergovernmental Relations (OIR)</p> <p>21 Sister City Associations – <u>each Sister City establishes and maintains 501(c)3 status</u></p>	<p>Sister Cities Coordinating Council – 20 members</p> <ul style="list-style-type: none"> • Representative from each of ten Sister City associations • City Council representative • Representative from OIR • Representative from Greater Seattle Trade Development Alliance or Chamber of Commerce or Port of Seattle (appointed by Mayor, confirmed by City Council) • Four representatives from educational or cultural institutions with ongoing involvement in Sister City programs (appointed by Mayor, confirmed by City Council) • Three representatives from corporate sector (appointed by Mayor, confirmed by City Council) <p>City Council Members are liaisons to Sister Cities Sister City Communications Committee – Chairs of each Sister City Association meet on monthly basis</p>	<ul style="list-style-type: none"> • Sister Cities coordinated by OIR staff • City of Seattle gives each Sister City Association \$2000 per year • Grant application system for funding for special projects • Annual fundraiser provides remainder of funding for Sister City Associations 	<p>Office of Intergovernmental Relations staff member (one) provides support</p>	<p>Annual Fundraiser to benefit all Sister City Associations Each Sister City Association conducts fundraising events</p>	<ul style="list-style-type: none"> • Criteria established by City of Seattle for establishing Sister Cities affiliations <u>and</u> for maintaining active status to receive city funding (see: http://clerk.seattle.gov/~public/RESN1.htm and enter Resolution #29865) • There is currently a moratorium on adding new Sister Cities

**Appendix “C”
Sister Cities Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes
Chicago	<p>Chicago Sister Cities was originally managed from within the City’s department of Cultural Affairs. In 1991 it was incorporated into a separate 501c3 corporation and is considered a city related agency established by mayoral executive order, as a private/public partnership to execute the agreements which Chicago has signed with its 28 sister cities worldwide.</p> <p>They are a 501c3 corporation. Each sister city’s activities are organized by a committee of volunteers who have an interest or an ethnic tie to that part of the world. These committees are each chaired by a local business or community leader who is appointed by the Mayor of Chicago.</p> <p>Note: The most active Sister City in the world.</p>	<p>Board of Directors</p> <ul style="list-style-type: none"> • 28 members; each committee chair is a member of their Board and the Mayor of Chicago is the Honorary Chairman. <p>Executive Committee</p> <ul style="list-style-type: none"> • Chair • Honorary Chair (Mayor) • 6 members 	<p>Comes in part from the City of Chicago. They receive a grant of about \$520,000. They also receive private donations from the local community.</p> <p>Total budget is around \$1.1 million</p>	<p>Eight (8) including:</p> <ul style="list-style-type: none"> • Executive Director • International Program Manager • Director of Finance and Administration • Senior Manager of International Programs (2) • 12 is considered to be fully staffed 	<ul style="list-style-type: none"> • Hosted 6th Annual Richard J Daley Global Cities Forum in April of 2010 • Chicago SC International Soccer Cup • Consular Balls • Global Citizens Award • Student Exchange and Educational programs 	<p>Mission: committed to promoting Chicago as a global city, developing international partnerships and networks, and sharing best practices on a city-to-city basis.</p> <p>Goals:</p> <ul style="list-style-type: none"> • Develop & expand community, education & partnerships between Chicago and its sister cities • Create opportunities for citizens and city officials to experience and explore other cultures through long-term partnerships • Stimulate environments through which communities will creatively learn, work and solve problems together through reciprocal cultural education, municipal, business and technical exchanges and projects • Collaborate with organizations within the US and other countries with similar goals

**Appendix “C”
Sister Cities Research**

	Organization/Structure	Board/Board Structure	Funding & Budget	Staff	Key Programs & Events	Notes
Tampa	501(c)3 organization 7 Sister City affiliations	16 Member Board	Funded by membership dues, private and corporate contributions and grants for specific programs and projects. No city funding	Volunteer organization with no dedicated staff	<ul style="list-style-type: none"> • Quarterly meetings hosted by Sister City Committees • Student Exchange Programs • Teacher Exchange Program • Arts Programs (sponsor visiting artists) 	<ul style="list-style-type: none"> • Mission: to foster and encourage mutual understanding, friendship and peace through cultural, economic, educational and professional exchanges between the people of Tampa and the people of our Sister Cities. • Described as not-for-profit citizen volunteer program • Student Exchange Program

**APPENDIX D:
CIC CABINET MEMBERS & CHARLOTTE CITY
COUNCIL SURVEY SUMMARY**

Currently, Charlotte International Cabinet has 30 members and is structured such that the majority of the work and policy making is done by a seven member Executive Board. Best practice recommends that Boards of Directors have 18 to 24 members and are structured so that the majority of work and policy making is done at the Board level and not by an Executive Committee. Do you feel Charlotte International Cabinet should adopt best practice with regard to Board size and structure?

CIC Cabinet Members

Yes	18
No	0

Charlotte City Council

Yes	4
No	0

Comments:

- Yes, to the extent that goals are clear and focused.
- I believe this is an excellent idea as currently I feel as if I bring no value to the Cabinet except to sit and listen to the same members being a part of the various projects and ongoing relationship building with our Sister Cities and other countries.
- Board membership is on the high side, but it is the nature of the organization (semi-government) that may dictate board numbers with ethnic representation. We also should not forget that CIC represents 2 merged organizations – Sister Cities and Mayor’s Cabinet. I believe decisions should be shared by both the executive committee and the general board.
- Many Board members are currently not utilized and feel that they don’t offer any value.
- The CIC Board should emulate best practices adopted at other non-profit boards.
- With intentional recruitment for specific needs filled by Board members who would recognize that part of their duties would be fundraising.
- 18 to 24 may still be too big
- This should be a working Board where everyone has an opportunity to contribute ideas and initiate processes to grow our international footprint

Currently, 20 Charlotte International Cabinet members are appointed by the Mayor and 10 are appointed by City Council members. Should the CIC staff and current Cabinet members have input into the appointments so the Cabinet can be more strategic about adding members that are strongly engaged in the mission?

CIC Cabinet Members

Yes	16
No	2

Charlotte City Council

Yes	2
No	2

If yes, how should this be accomplished?

- It is still appropriate that the Mayor and City Council make the appointments. Input could consist of specifying need areas and/or skills desired as openings occur. This would move CIC in the direction of having the right mix to achieve the goals and objectives.
- The CHIC should have the authority to present a slate of candidates from which the Mayor or the City Council, as applicable, selects as appointees.
- Input is important but one must be careful that the Cabinet is representative of the whole city.
- Every organization has core functional needs (sales, accounting, resource management, etc). Board selection/bench strength should reflect this first. Community leaders with these talents/experiences, who also have an apparent interest/correlation to the mission should be approached to join the board.
- The CIC board should have a membership committee that will help identify members that may be a good fit for the organization and select board members that are more engaged in the CIC mission and its strategies
- Firstly they need to be aligned to a mission statement and specific goals, which are somewhat lacking at the moment. Secondly we should clearly define key initiatives and then survey the board to see if we have the right skills and know how to execute on these initiatives.
- Once the City of Charlotte receives the application, it should be forwarded to the Cabinet members for review and if the number of candidates exceeds 15, depending on the number of openings, it would then be narrowed down to the top 5 based on criteria of what the goals and objectives are of the Cabinet. Those top 5 individuals would then come before the Cabinet and be able to speak for 5-7 minutes about themselves and why they believe they should become a part of the Cabinet. Once the presentations are completed, the Cabinet members would vote to fill open seats.
- The CIC executive director should make recommendations to the Cabinet members and the Board which will, in turn, vote for inclusion of this person. In doing so, the political aspect is removed. Another option is to create a Nominating Committee who brings names to the group for consideration and voting.

**APPENDIX D:
CIC CABINET MEMBERS & CHARLOTTE CITY
COUNCIL SURVEY SUMMARY**

- The Mayor and City Council members should be advised of the problems that arose due to past appointments and why carefully picking new board members will help the CIC and Charlotte.
- Discuss these during Bi-Monthly meetings.
- The Mayor and Councilmembers should do a better job of appointing all of its boards and commissions.
- Staff should not be a part of the appointment process

During the research phase of this project, the following areas have been suggested as being part of the mission and work of the Charlotte International Cabinet. Please select the 6 areas you feel have the highest priority with regard to the work of CIC.

	<u>Cabinet Members</u>	<u>City Council Members</u>
• Covener of international organizations in the Charlotte community	11	1
• Maintain close relationships with the Chamber of Commerce, Charlotte Regional Partnership and international Chambers of Commerce	11	1
• Government to government gateway for international relationships (including trips)	14	4
• Advocacy for Charlotte’s role as an international city	12	4
• Support for Sister Cities committees and programming	14	4
• MICA awards program	9	2
• Develop and maintain a virtual portal and branding initiative for all international activities in Charlotte (Global Charlotte)	11	1
• Through government to government connections serve as an entry point for foreign economic development	11	1
• Through government to government connections serve as an advocate for export of Charlotte businesses	6	1
• Create opportunities for cross-cultural dialogue	6	2
• Provide small international small businesses with the opportunity to participate in City contracts	4	1

Are there other roles that you feel it is critical for CIC to have as part of their plan of work?

- Some of the above 'mission areas' overlap/are redundant or will be by products of some of the other areas of work. Example: Advocacy and branding are part of the same thing. Also if you are entry point for foreign econ. dev. and advocate for export, you need to be a gateway for int'l relationships (business or other). Trips should have a purpose tied to one of the other work areas, not just a general excuse for a trip.
- MICA Awards was my 7th selection above. However, that seems like an event that can be hosted/planned/paid for by another entity – perhaps the Chamber
- Portal can serve as notifier re: gov't opportunities...jobs, contracts, as advocacy for international activities, as entry for issues and needs
- Work hand and hand with The International House in supporting those being transplanted from other countries to the Charlotte area due to employment moves.
- Serve as a resource for people with international backgrounds in Charlotte.
- Relationship building with the various Chamber groups and the Regional Partnership would be a task related to the other categories.
- Do more things with The International House.
- Expanding our African City relationships

The Protocol Officer for Charlotte reports directly to the Mayor’s office. Should this part time position be housed with CIC?

CIC Cabinet Members

Yes	12
No	4

Charlotte City Council

Yes	3
No	0

Comments:

- I do not have enough information
- Not really sure what that role is for.
- It all depends on what future role and strategy will CIC assume under the Mayor and the city. If CIC's role will take a leading position in the local international community, then this will strengthen the position of CIC. We need some active staff besides volunteers.
- It would be a great way to leverage the networking power and capacities of the CIC
- Unsure as to the function and duties of this position as this is my first time hearing of it.
- This position, in all likelihood, is not a full-time position. Funds are limited and should be used more wisely in the Mayor's office specifically as opposed to CIC.
- This position, if it is needed, should be better coordinated with city government. Some council members don’t even know about the position.
- Only if CIC became a city department and its role evolves.

**APPENDIX D:
CIC CABINET MEMBERS & CHARLOTTE CITY
COUNCIL SURVEY SUMMARY**

Charlotte International Cabinet is currently a nonprofit 501(c)3 organization which is 90% funded by the City of Charlotte. In the course of interviewing stakeholders and researching practices in other cities, it has been suggested that CIC should be part of the City Economic Development Department. Do you feel this is something that should be considered at this time?

CIC Cabinet Members

Yes	10
No	6

Charlotte City Council

Yes	2
No	1

Comments

- MAYBE – Perhaps Economic Development is not the only option. Consider also Neighborhood and Business Services or the Airport (they have money!!)
- An advisory board, made up of appointees with relevant backgrounds, would be necessary.
- I believe Economic Development should be the primary purpose of this organization (frankly, I thought it was when I joined after going to my first MICA Awards a few years ago). It seems we could work alongside the Chamber's foreign outreach/development team and serve as somewhat of a welcome wagon to the companies they are hosting. We could also serve as an common connection between the various Chambers (German, Latin, British, Asian, etc), the Charlotte Chamber ED team, Charlotte MSA ED teams, and the various International Organizations that are gaining strength and popularity around town (WACC, International House, etc). Our events and meetings should be attended by leaders within those groups - to make sure they all know what the others are up to and to formalize the opportunity for them collaborate their efforts. I think that happens a bit now, but it appears to be ad hoc.
- This is a point that should be researched further especially ensuring the CIC mission remains intact and its role clearly defined. It may be helpful to be part in future ED department
- Other options might include, the Charlotte Chamber or Charlotte Regional Partners
- Yes, that would need to stay in place as I believe all communities in Charlotte should have an opportunity for economic development.
- Yes, as fund raising arm for Sister Cities activities and connection with the international community and issues.
- I believe the CIC should consider becoming a totally separate 501(c)3 apart from the Mayor's office securing a grant from the Mayor's office. In doing so, CIC could consider a vast array of possibilities with minimal limitations. I believe the Mayor's office could be a part of the Advisory Board as could the Chamber, Charlotte Regional Partnership, etc.
- Economic development may not entirely capture the mission and values of CIC.
- If CIC is to include the Sister Cities program, which goes beyond economic development, it would seem that the cabinet is still necessary. Also the cabinet is composed of community members who reflect diverse viewpoints and considerable international experience. The city would lose valuable input and contacts.
- Worth considering. Other City organization may be discussed in this vein.
- Not sure about this. I don't think the CIC should be heavily involved in economic development and would want to know how N&BS and ED feel about this.

- The caveat is that they identify other funding sources to reduce the dependency from the City of Charlotte.

Please add any additional comments that you might have.

- I feel the CIC mission and role should be better clarified with the stakeholders.
- Much potential is housed here. We should be attuned to the municipal national level as well (NLC).
- CIC is a crucial part of Charlotte. It's strength is only as good mighty as we are allowed to become. There are businesses in our community who should be a part of our "army", so to speak, and they are not even on our team. Why is that? We should be asking that question to ourselves. What is holding us back, and once we have that answer, we should strive to push forward. For what it worth, I have been asking these questions for several years, and no one has been able to give me answers.
- I came on this board as a member of Charlotte Sister Cities and am probably one of the few remaining board members who had experience with Sister Cities prior to the reorganization. In my opinion, Sister Cities is now largely defunct. CIC needs to decide if it wants to actually have a vibrant and active Sister Cities program or not. As it is, CIC makes claim to having the program but, in actuality, there is no substance there. For a community volunteer who wants to be a part of the Sister City organization in the hopes of actually "doing something", there is little more to do than attend bi-monthly meetings. It is a real shame, as formerly there was an active committee, activities and engaged volunteers.
- In order to be relevant, CIC has to understand who its stakeholders are, and who in the community would seek the CIC's help. Devising a mission and goals in vacuum will not help if they have no relevance to the community we serve.

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>1. HOW WOULD YOU DESCRIBE THE MISSION OR WORK OF CIC?</p>	
<ul style="list-style-type: none"> • No clear mission or vision • Support economic development • Resource, convener, coordinator for all groups in international arena • Resource for city leaders (Mayor, City Manager, City Council and staff) 	<p><i>“The mission has changed under different Mayors.”</i></p> <p><i>“It seems to me that there are two distinct missions – MIC and Sister Cities – because the organizations never truly integrated.”</i></p> <p><i>“Not specifically defined...it seems like every time you turn around, they say ‘We’re thinking of doing this, we want to do that.’”</i></p> <p><i>“CIC should play a resource role, not an economic development role.”</i></p> <p><i>“CIC can be a facilitator for economic development but not the lead entity.”</i></p> <p><i>“CIC is the sole international organization in Charlotte that brings together the business, nonprofit, cultural an academic elements in Charlotte.”</i></p> <p><i>“CIC’s job is to look at the goals of the City and be a resource for the city leaders so they can make informed decisions around those goals [in international area].”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>2. WHAT ARE THE STRENGTHS OF CIC?</p>	
<ul style="list-style-type: none"> • MICA • Neutral convener • Relationship building • Volunteer leadership 	<p><i>“The MICA event – has raised the awareness of the international community and how valuable it is.”</i></p> <p><i>“Annual MICA – it’s a terrific model that has been copied and emulated at the state level and in other communities.”</i></p> <p><i>“CIC is the convening organization, with broad entry to the international community, and is seen as neutral.”</i></p> <p><i>“Bringing people together in a room, being the convener of some very disparate groups – this is a real strength, although the potential hasn’t been maximized.”</i></p> <p><i>“Building relationships over time...CIC has built up a lot of relationship capital and they are known for that.”</i></p> <p><i>“Very passionate group of volunteer leadership – very interested in pushing international dialogue, with an awareness of international affairs in Charlotte.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
3. ARE THERE AREAS OF CIC THAT MIGHT NEED IMPROVEMENT?	
<ul style="list-style-type: none"> • Defining mission • Sister Cities program • Funding • Structure – Board, Committees & Staff • Engagement of Board/Cabinet 	<p><i>“The integration of the Sister Cities program, which is a terrific program, was bungled. It has become a program without a champion.”</i></p> <p><i>“The structure (employees and Board) should reflect the goals of the organization. There isn’t much of a committee structure. By-laws need to be revised.”</i></p> <p><i>“Cabinet is big – people say the Board isn’t engaged, but the structure isn’t set up for them to be engaged. CIC manages tactically, not strategically.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>4. WHO IS CIC’S CONSTITUENCY?</p>	
<ul style="list-style-type: none"> International community: business community, foreign businesses, businesses with international connections, international nonprofits Mayor, City Council and City leadership 	<p><i>“The stakeholders are the folks that are involved: the international academic community, the economic development community, nonprofit and social service organizations and the business community.”</i></p> <p><i>“Any company that does international business and any organization – for profit or nonprofit – that helps or works with the international community in Charlotte and the region.”</i></p> <p><i>“City Council and the community. City Council is their primary constituency and council expects them to represent the international business community.”</i></p> <p><i>“CIC is really a branch of government, so I see the Mayor, City Council and City leadership so they can deliver the right services and be responsive to constituents in the community.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>5. ARE THERE SPECIFIC ROLES OR AREAS THAT CIC SHOULD BE ADDRESSING THAT ARE NOT CURRENTLY PART OF THEIR WORK?</p>	
<ul style="list-style-type: none"> • Supporting economic development • Encouraging collaboration and partnerships; alliances or linkages with international organizations • Resource for international companies in the region • Protocol 	<p><i>“Economic development in the government to government role. International countries want to have a government to government relationship.”</i></p> <p><i>“(I) think it’s important for Charlotte to have an entity like CIC – to encourage collaboration and partnerships and if only that much was happening at a higher level than it currently is, that would be fine.”</i></p> <p><i>“CIC should become the resource for all the international companies in the region – helping to provide what they need in order to sustain and retain those companies.”</i></p> <p><i>“CIC and Protocol could be the place that documents the contacts with international governments and business and manages the follow-up.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>6. WHAT SHOULD CIC’S ROLE BE RELATED TO ECONOMIC DEVELOPMENT? WHAT WOULD BE A COMPLEMENTARY ROLE FOR CIC THAT DOESN’T DUPLICATE THE WORK YOUR ORGANIZATION (OR OTHER ORGANIZATIONS) IS DOING?</p>	
<ul style="list-style-type: none"> • Resource, supportive role 	<p><i>“Economic development, but I believe in the current structure CIC can’t operate in the economic development role, it needs to be a city department.”</i></p> <p><i>“CIC is a resource – it doesn’t have the chief recruiter role, it’s part of the packaging.”</i></p> <p><i>“Don’t try to create a role that is value added but ends up duplicating what is already being done – leave the business to the pros.”</i></p>
<p>7. HOW DOES CIC’S WORK FIT WITH THE OTHER ORGANIZATIONS IN THE INTERNATIONAL COMMUNITY? WHAT WOULD BE A COMPLEMENTARY ROLE FOR CIC THAT DOESN’T DUPLICATE THE WORK YOUR ORGANIZATION (OR OTHER ORGANIZATIONS) IS DOING?</p>	
<ul style="list-style-type: none"> • Collaboration and connection to international visitors program (through International House) • Act as a connector/conduit for collaboration with businesses with international employees and families 	<p><i>“CIC needs to define this. Because they are attached to government, they are an entry point. They need to decide how to leverage that position.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>8. HOW DOES CIC’S WORK FIT WITH THE CHARLOTTE CHAMBER AND THE CHARLOTTE REGIONAL PARTNERSHIP?</p>	
<ul style="list-style-type: none"> • Should be complementary • CIC should not be in their space 	<p><i>“The Chamber and CRP should do the recruiting; CIC should be there to provide the best environment once the decision has been made to relocate to Charlotte.”</i></p> <p><i>“CIC should be there to help make connections.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>9. WHAT ARE YOUR THOUGHTS REGARDING THE SISTER CITIES PROGRAM?</p>	
<ul style="list-style-type: none"> • Structure and organization of the program needs to be reviewed and evaluated, including Cabinet involvement and oversight • Develop criteria for establishing new Sister Cities relationships, especially around business/economic development • CIC should more closely oversee the program 	<p><i>“Needs to be looked at ‘a to z’ around organization.”</i></p> <p><i>“Have to question the value of some of the Sister City relationships.”</i></p> <p><i>“Would like to see the Sister Cities relationships leveraged for a true economic benefit, rather than just a cultural mindset.”</i></p> <p><i>“What do we get from these relationships? We need to know why we add them and with the current ones see where there may be opportunities.”</i></p> <p><i>“Since the merger, the Sister Cities program seems to be the stepchild – it doesn’t get as much attention as the rest of the CIC agenda.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>10. CIC CURRENTLY HAS A BOARD/CABINET OF 30 PEOPLE APPOINTED BY THE MAYOR AND CITY COUNCIL. NONPROFIT BEST PRACTICE WOULD SUGGEST A SMALLER BOARD. DO YOU THINK THE CITY AND THE MAYOR SHOULD CONSIDER CHANGING THE SIZE AND HOW BOARD/CABINET MEMBERS ARE APPOINTED? WHAT TYPES OF PEOPLE WOULD BE IDEAL BOARD/CABINET MEMBERS?</p>	
<ul style="list-style-type: none"> • Smaller Board/Cabinet • There needs to be a job description for Board/Cabinet members • Some appointments should be nominated or recommended by the Board/Cabinet 	<p><i>“In current system, when people are appointed, do they really know what they are getting in to?”</i></p> <p><i>“CIC needs a combination of members of the international community, strategic thinkers, fundraisers and ambassadors.”</i></p>

APPENDIX F: INTERVIEWS – THEMING SUMMARY

THEMES	QUOTES
<p>11. WHAT ORGANIZATION AND STAFF STRUCTURE WOULD YOU RECOMMEND TO SUPPORT THE MISSION/WORK YOU DESCRIBED?</p>	
<ul style="list-style-type: none"> • City Department reporting to City Manager – similar to Community Relations Committee • Organization and structure dependent on mission 	<p><i>“Ideally it would be a city function and the staff would be city employees.”</i></p> <p><i>“Need to decide about mission and Board/Cabinet committee structure. They have 2 ½ FTEs – is that enough to run a defined strategy?”</i></p>
<p>12. SHOULD THE PROTOCOL POSITION BE ROLLED INTO CIC’S STRUCTURE?</p>	
<ul style="list-style-type: none"> • Yes 	<p><i>“I think it would be a good idea because right now the protocol person does not have a formal structure.”</i></p> <p><i>“Before decision is made, need to know the benefit of incorporating position into CIC.”</i></p>

Appendix F: Current Roles of International Organizations in Charlotte

	WORLD AFFAIRS COUNCIL OF CHARLOTTE	INTERNATIONAL HOUSE
MISSION/VISION	<p>The World Affairs Council of Charlotte (WACC) as founded in 1983 as an outreach program of UNC Charlotte and its Office of International Programs.</p> <p>As a regional center for education and discussion of world affairs, the Council seeks to provide leadership for global thinking, believing that broad perspective is necessary for effective competition in the global economy and for responsible citizenship in an increasingly interdependent political world.</p> <p>The Charlotte Council is a member of the World Affairs Council of America and together with approximately 100 other such World Affairs Councils and affiliates across the country, our mission focuses on improving international education and encouraging citizens to participate in the national debate on world affairs.</p>	<p>International House promotes international understanding by serving as a center for diversity, advocating for people of diverse national backgrounds and facilitating professional and cultural exchange programs. We accomplish our mission through these focus areas:</p> <p>Ginter Immigration Law Clinic International House empowers individuals to navigate toward permanent residency, citizenship and family unity.</p> <p>Cultural Programs Showcasing multiculturalism through a variety of activities that range from our annual Gala to children’s programs, we bring an exciting international flavor to Charlotte.</p> <p>Educational Programs International House enhances language and cultural competency through diverse learning opportunities.</p> <p>Citizen Diplomacy International House works with the U.S. State Department to arrange visits of foreign leaders and dignitaries, many of whom are current or rising leaders in government, politics and education.</p>
STRUCTURE	<p>Non-profit 22 member Board, 11 ex-officio members</p>	<p>Non-profit 14 member Board, 21 member Advisory Board</p>
FUNDING	<p>Membership, programming fees</p>	<p>Membership, grants, programming fees</p>

	WORLD AFFAIRS COUNCIL OF CHARLOTTE	INTERNATIONAL HOUSE
STAFF	3 full-time staff, interns, volunteers	12 full time staff, interns, volunteers
PROGRAM AREAS	<ul style="list-style-type: none"> • <u>World Citizen Award</u> Award dinner that features recipients and organizations from the Carolinas with prominent influence in international development, international affairs and/or international education. • <u>Speaker Series Program</u> Selected speakers present on diverse topics to include the global economic crisis, energy policy and climate change, current events, global health, national and global security, foreign policy, public diplomacy and international affairs. • <u>CEO Series</u> CEOs from organizations headquartered in the greater Charlotte area share information about their respective companies from a global perspective, the role they play in economies worldwide and their views of the global economy and financial markets across the world. • <u>Business Breakfast Series</u> Charlotte-area business experts and key decision-makers provide insight about the impact of global events on North Carolina and the Charlotte community. • <u>Magellan Society</u> Young professionals (ages 21-35) network. • <u>Great Decisions</u> Co-sponsored with UNC Charlotte, the Great Decisions program highlights eight of the 	<ul style="list-style-type: none"> • <u>Immigration Law Clinic</u> Provides affordable immigration assistance to low-income individuals. • <u>Cultural Programs</u> International House enriches the community through cross-cultural programs, events and volunteerism. <ul style="list-style-type: none"> ○ Global Identity Forums ○ International Book Club ○ Doorways – International Women’s Group ○ Language Conversation Hours • <u>Education</u> International House enhances language and cultural competency through diverse learning opportunities. <ul style="list-style-type: none"> ○ English Tutoring ○ Youth English Tutoring ○ English Classes ○ English Conversation Hours ○ Language Classes ○ Citizenship Classes ○ Children’s Programs • <u>Citizen Diplomacy</u> Each year, International House welcomes hundreds of distinguished visitors from around the world to Charlotte. <ul style="list-style-type: none"> ○ Community Connections ○ International Visitor Leadership Program ○ Open World

	WORLD AFFAIRS COUNCIL OF CHARLOTTE	INTERNATIONAL HOUSE
<p>PROGRAM AREAS (continued)</p>	<p>most thought-provoking foreign policy challenges facing Americans each year. Great Decisions provides background information, current data and policy options for each issue and serves as the focal text for discussion groups.</p> <ul style="list-style-type: none"> • <u>Voyagers Club</u> Club that meets regularly for dialogue about international issues facilitated by local experts. • <u>Academic WorldQuest</u> Teams from local businesses, schools and other organizations compete for prizes in this international knowledge competition with questions relating to current events, geography, international politics, world history and foreign policy. • <u>Travel Advantage Program</u> Through the WACC Travel Advantage Program, members are able to participate in international travel opportunities that include sightseeing highlights, in addition to special briefings and “behind the scene” tours presented by political leaders and local experts. 	



Appendix G: FY 2013 Objectives
Charlotte International Cabinet
FY 2013 Objectives (Original and Revised)

Strengthen Neighborhoods	
Goal	Initiative
Identify issues of concern to community leaders dealing with multicultural constituents	Create opportunities for cross-cultural dialogue
Conduct education outreach throughout the Charlotte community	Strengthen relationships with K-12 schools Strengthen relationships with colleges/universities in the region
<i>Identify and encourage participation from a broad spectrum of organizations in the Charlotte international community</i>	
<i>Offer opportunities for cross-cultural dialogue within the Charlotte community</i>	
Promote Economic Opportunity	
Goal	Initiative
Support economic development in Charlotte	Provide small businesses the opportunity to participate in City contracts Maintain close relationships with Charlotte Chamber and International Chambers in Charlotte
Recognize the impact of foreign-owned business on the Charlotte community and the contributions of foreign-born Charlotteans	Award corporate philanthropy from foreign-owned firms and outstanding individuals in the international community
<i>Develop and maintain the Global Charlotte concept: a virtual portal and branding initiative for all international activities in Charlotte</i>	
<i>Promote Charlotte to businesses in each sister city and with other international partners</i>	
<i>Enhance tourism potential with international partners</i>	



Appendix G: FY 2013 Objectives
Charlotte International Cabinet
FY 2013 Objectives (Original and Revised)

Enhance Customer Service	
Goal	Initiative
Increase effectiveness of international relations with Charlotte's sister cities	Reinvigorate sister city relationships Encourage knowledge exchange on municipal practices to safeguard the environment
<i>Serve as the City's central point of contact and customer service liaison for City departments and critical partners interacting with the international community.</i>	
<i>Serve as the City's central point of contact and liaison for international organizations in the Charlotte region</i>	
Develop Collaborative Solutions	
Goal	Initiative
Serve as a point of contact for international visitors to the region	Assist as needed with international visitors to the region
<i>Explore ways to partner with other international organizations to centralize and streamline city government response to international issues</i>	
<i>Serve as a resource for other City departments to enhance services for the international community</i>	
Increase the Perception of Safety	
Goal	Initiative
<i>Continue to work with CMPD, CFD and other law enforcement agencies in international exchange programs</i>	