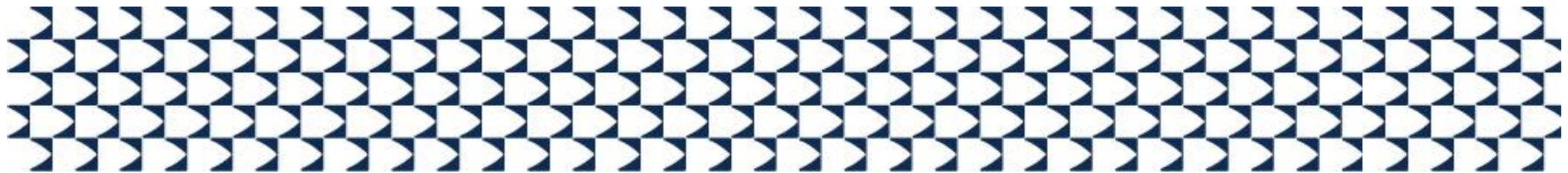


NC STATE UNIVERSITY

Dining Strategic Plan Final Report

October 2023



Overview

- Methodology
- Program Overview
- Guiding Principles
 - Campus Physical Master Plan
 - Dining Strategic Plan
- Thought Approach
- Recommendations
 - North Precinct
 - Central Precinct
 - South Precinct
 - Centennial Precinct
 - West Precinct
- Implementation
 - Project Cost Estimates
 - Phasing



Methodology

Initial Research and Campus Research
October 2021

Dining Discussion – Demand Analysis
December 2021

Dining Discussion – Benchmarking & Meal Plan Analysis
January 2022

Situational Analysis
March 2022

Initial Scenarios
April 2022

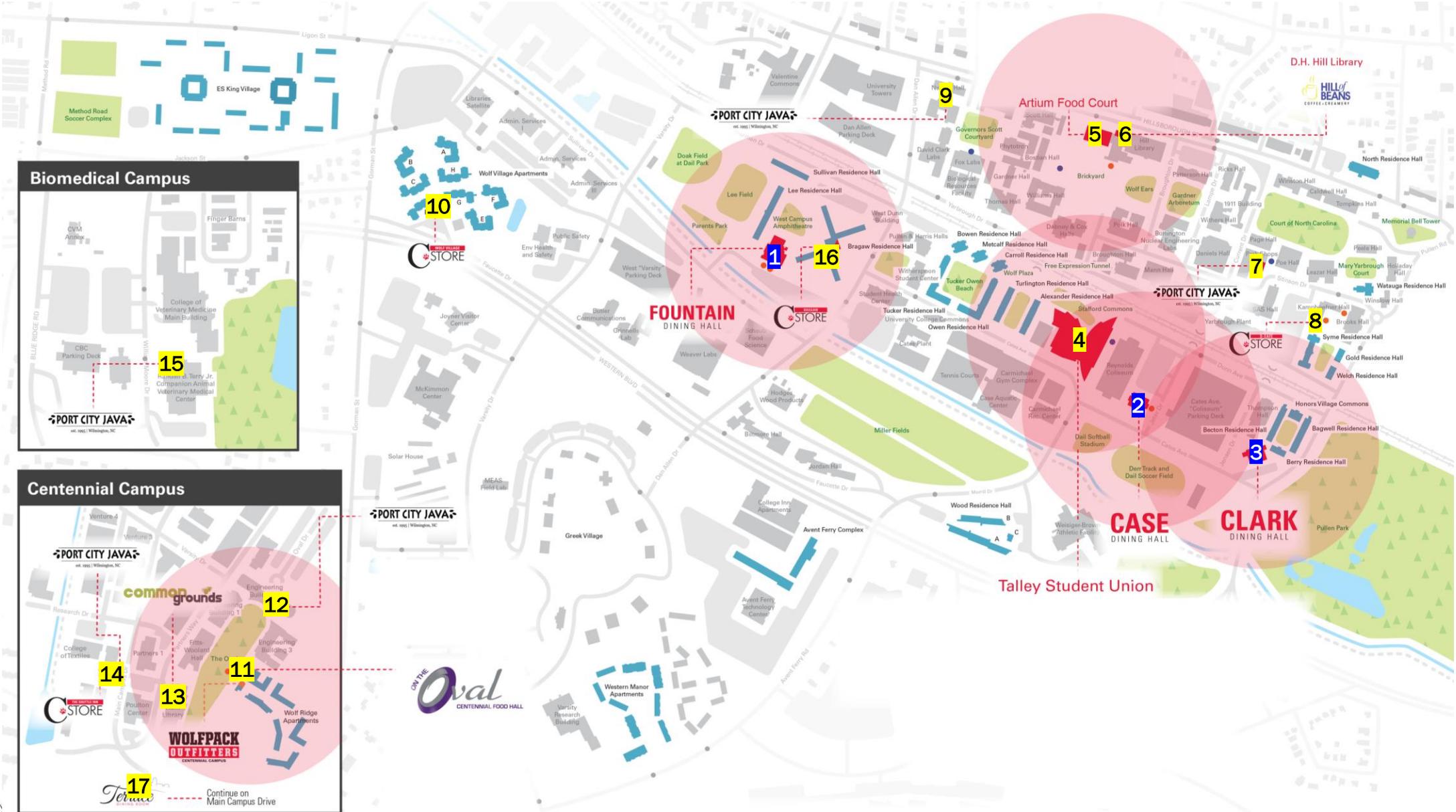
Scenario Refinement (Enrollment Verified)
December 2022

Scenario Phasing & Draft Report
January 2023

Updated Final Report
October 2023

FY22 Program Overview

Program Overview/Campus Dining (3-minute walk)



Biomedical Campus

This inset map shows the Biomedical Campus area, highlighting location 15 near the College of Veterinary Medicine Main Building and the Companion Animal Veterinary Medical Center. A PORT CITY JAVA logo is also present.

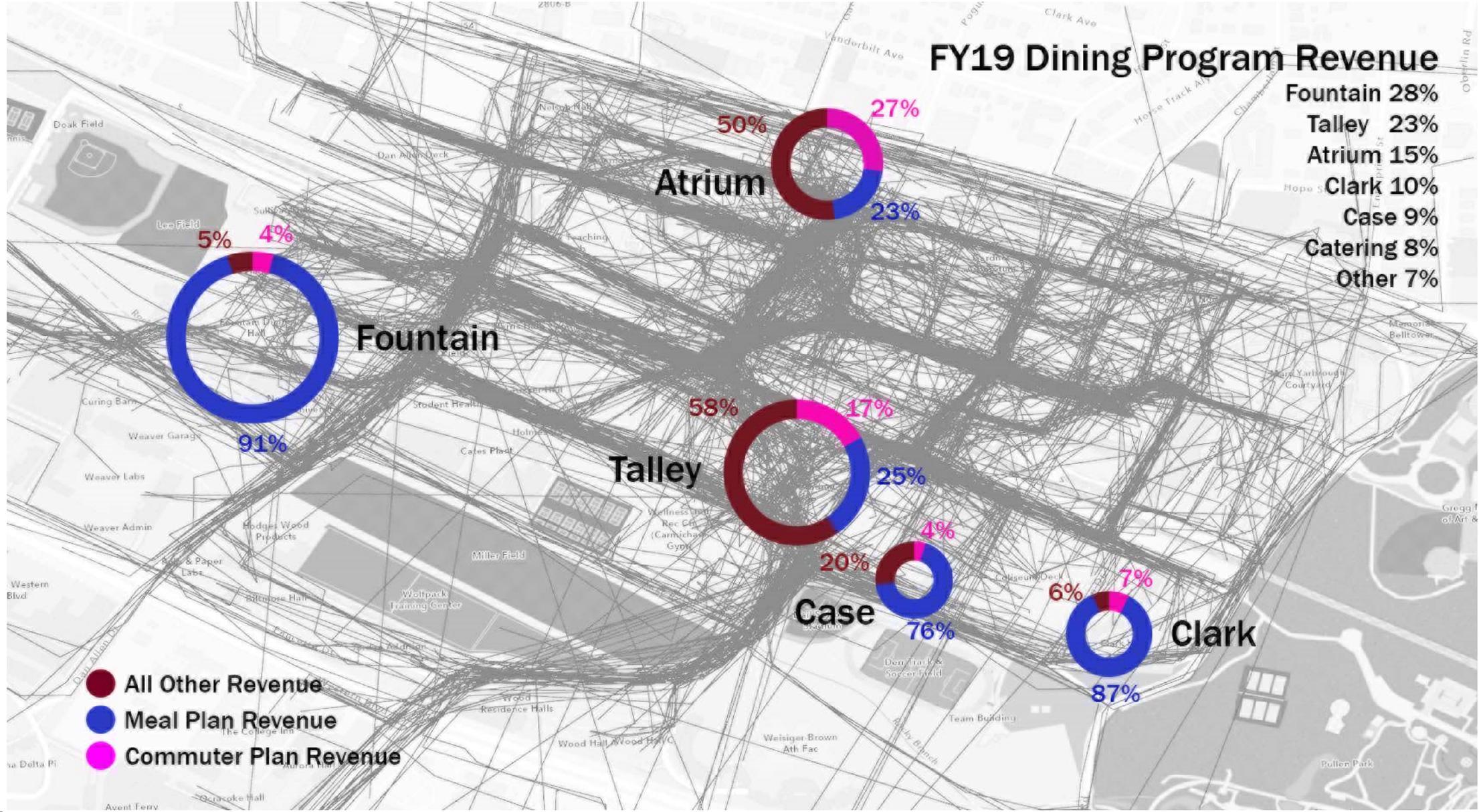
Centennial Campus

This inset map shows the Centennial Campus area, highlighting locations 11, 12, 13, 14, and 17. Key buildings like Engineering Buildings 1, 2, and 3, and Wolfpack Outfitters are shown. A PORT CITY JAVA logo and the text 'ON THE Oval CENTENNIAL FOOD HALL' are also included.

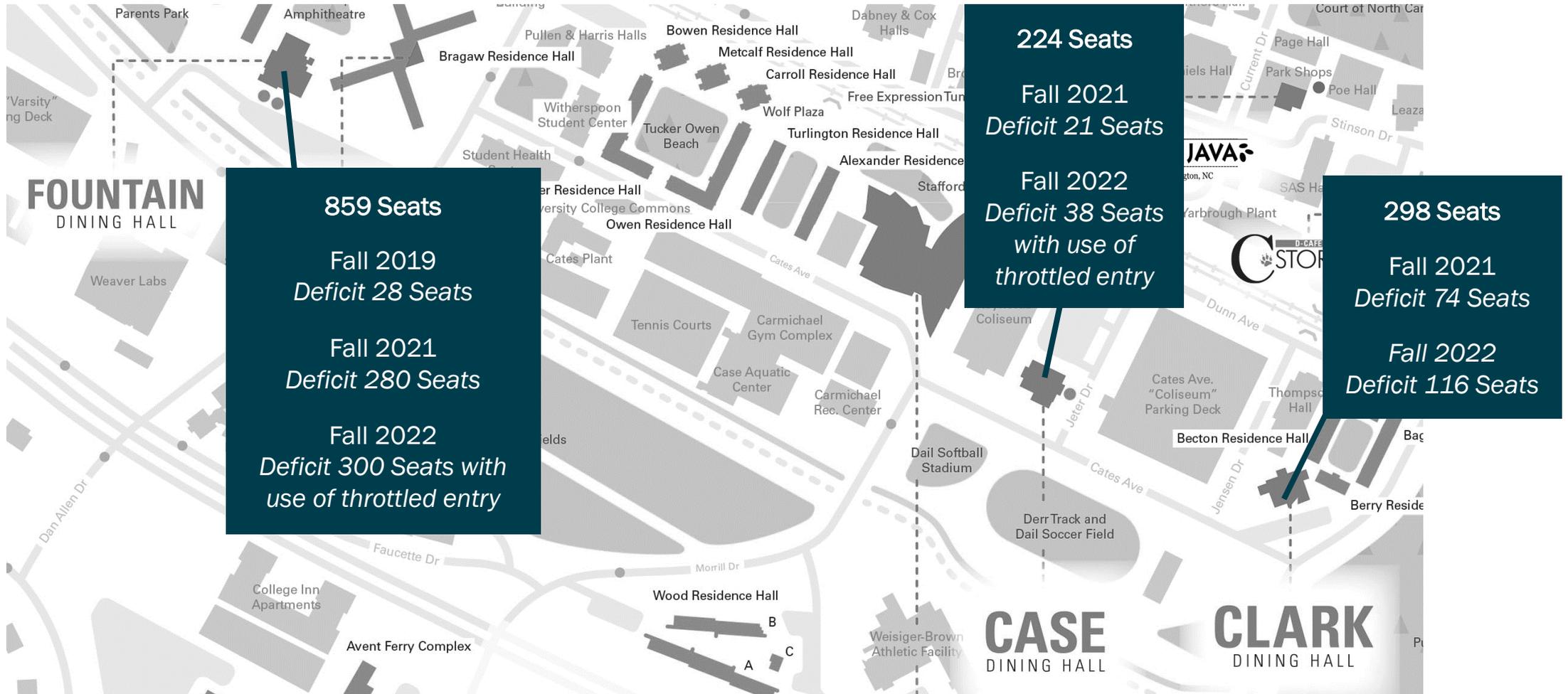
Program Overview/Dining Overview

MAP KEY	VENUE NAME	SERVICE FORMAT	BUILDING
1	Fountain Dining Hall	All You Care To Eat (Traditional)	Fountain Dining Hall
2	Case Dining Hall	All You Care To Eat (Traditional)	Case Dining Hall
3	Clark Dining Hall	All You Care To Eat (Traditional)	Clark Dining Hall
4	Jason's Deli	Quick Service - Counter	Talley Student Union
	Red Sky Pizza	Quick Service - Counter	
	Los Lobos	Quick Service - Counter	
	Tuffy's Diner	Quick Service - Counter	
	One Earth	Corralled Food Court	
	1887 Bistro	Café	
	Starbucks	Coffeeshop	
	Port City Java	Coffee Kiosk	
5	Chick-fil-a	Quick Service - Counter	Atrium Food Court
	Zen Blossom	Quick Service - Counter	
	Delirious	Quick Service - Counter	
	Wolfpack To-Go	Grab and Go	
	Brickyard Pizza & Pasta	Quick Service - Counter	
	Smoothie U	Quick Service - Counter	
6	Hill of Beans	Quick Service - Counter	D.H Hill Library
7	Port City Java	Coffeeshop	Park Shops
8	C-Store	Convenience Store	Kamphoefner Hall
9	Port City Java	Coffee Kiosk	Nelson Hall
10	C-Store	Convenience Store	Wolf Village
11	Cold Fusion	Quick Service - Counter	On The Oval Centennial Food Hall
	Fahrenheit Pizza & Rotisserie	Quick Service - Counter	
	Flashpoint Global	Quick Service - Counter	
	Newton's Grill	Quick Service - Counter	
	Gravity Café	Quick Service - Counter	
12	Port City Java	Coffee Kiosk	Engineering Bldg 2
13	Common Grounds	Quick Service	Hunt Library
14	Port City Java	Coffeeshop	Textiles Complex
	C-Store	Convenience Store	
15	Port City Java	Quick Service - Counter	R.B.T Vet Med Center
16	C-Store	Convenience Store	Bragaw Hall
17	Terrace Dining Room	Wait Staff Dining	Golf Course

Program Overview/Dining Overview



Program Overview/Traditional Dining Demand Overview (Dinner)



Program Overview/Traditional Dining Peer Benchmarking

Residential/Traditional Dining	North Carolina State University	University of Maryland	Ohio State University	University of Connecticut	University of Texas Austin	University of Georgia	Michigan State University	Univ. of Mass. Amherst	Cornell University
Residential/Traditional Dining Locations	3	4	3	8	3	5	9	4	10
Resident Headcount per Dining Location	3,225	3,010	5,168	1,537	1,068	1,905	1,668	3,817	811
Meal Plan Requirement	1st Year Resident	Resident	Resident	Resident	Resident	Voluntary	Resident	Resident	1st Year Resident

- Most peers have resident meal plan requirements
- Peer institutions have at least three residential/traditional dining locations (NCSU is on par)



Program Overview/Retail Dining Peer Benchmarking

Retail Dining	North Carolina State University	University of Maryland	Ohio State University	University of Connecticut	University of Texas Austin	University of Georgia	Michigan State University	Univ. of Mass. Amherst	Cornell University
# of Geographic Locations	14	14	19	6	7	12	13	18	17
Student Headcount per Geographic Location	2,574	2,908	3,230	4,536	7,211	3,262	3,823	1,758	1,389
Total Retail Locations	32	24	28	16	15	32	22	40	19
Student Headcount per Retail Outlet	1,001	1,696	2,192	1,701	3,365	1,223	2,259	791	1,243

- Most peers are serving more students at each geographic location.
- Most peers are serving more students at each retail location.
- Based on the above, peer benchmarking indicates NCSU may have too many retail locations.
- Most popular brands with peers include Chick-fil-A, Starbuck and Panda Express.



Guiding Principles

Guiding Principles

The Physical Master Plan Guiding Principles :

- Reinforce Culture and Place
- Steward Campus Resources
- Elevate the Campus Experience
- Align Facilities with Mission
- Strengthen Campus Connections
- Enhance Infrastructure Resiliency

Dining Program-Wide Planning Guidelines:

- Elevate student experience
- Elevate faculty experience to connect with students
- Multi-purpose spaces, especially within dining
- Mindful of labor requirements
- Sized to serve the Precinct
- Commissary-prepared foods support individual dining locations
- Intentional sustainability initiatives
- Intentional use of similar equipment (gas vs. electric) at campus dining locations



Planning Guidelines/Traditional Dining

- Size for the Precinct plus walk-in traffic
- Ideally within a 3-min walk from housing population centers and/or academic core
- Build a sense of community
- Scalability (open/close platforms)
- Food Hall layout – mix of platforms and dining
- Private dining rooms within dining halls with AV & technology for meetings
- Exhibition cooking / flexible platforms
- Dedicated allergen-free platform
- Design critically from staffing and for use of commissary products



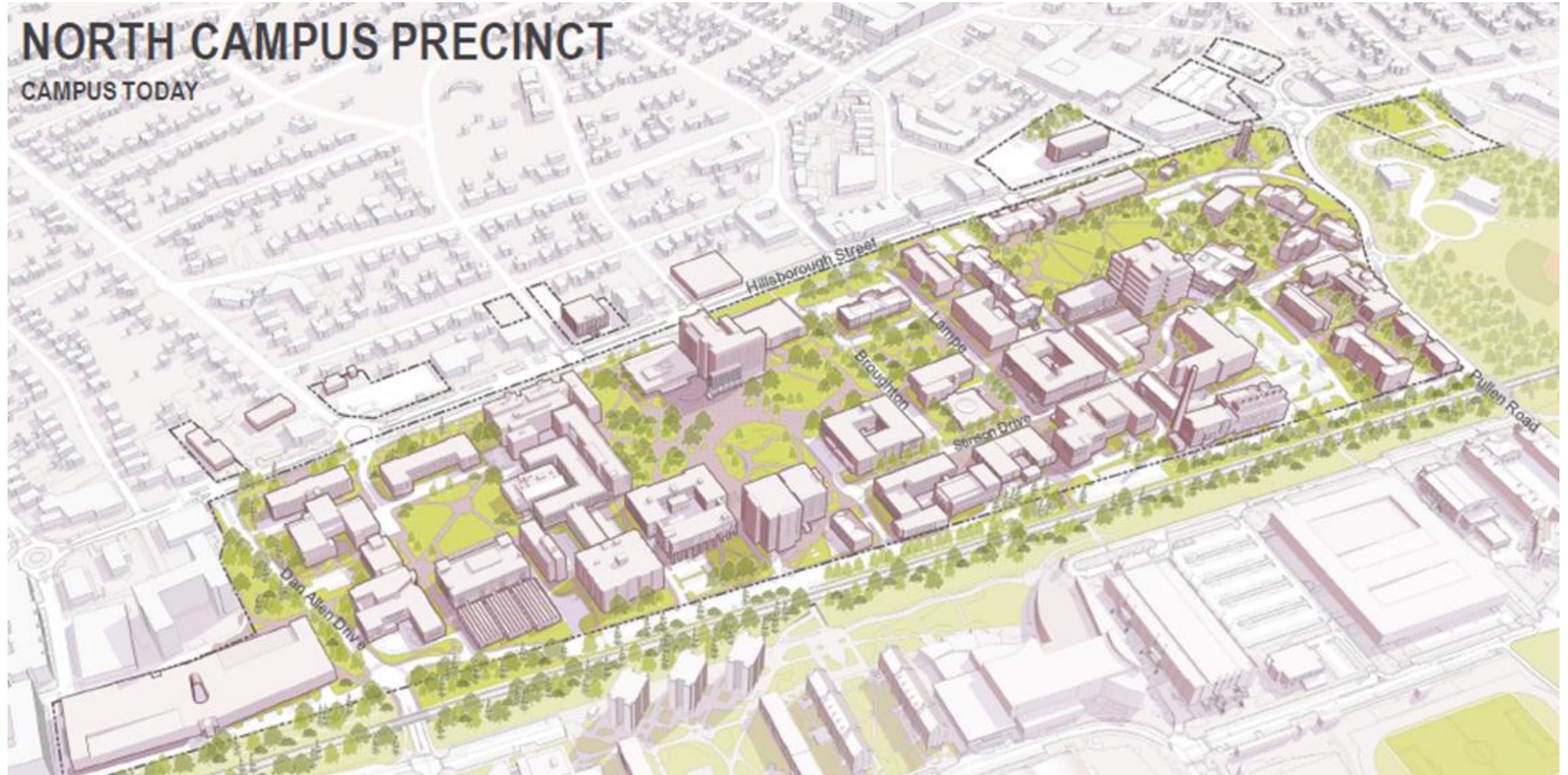
Planning Guidelines /Retail Dining

- Enhance polycentric buildings/developments
- Gain efficiencies by combining several location
- Maximize outdoor dining opportunities
- Each location = fiscally responsible
- Development of products that are an extension of NCSU brand (e.g. Howling Cow)
- Evaluate number of retail locations based on proposed meal plan changes

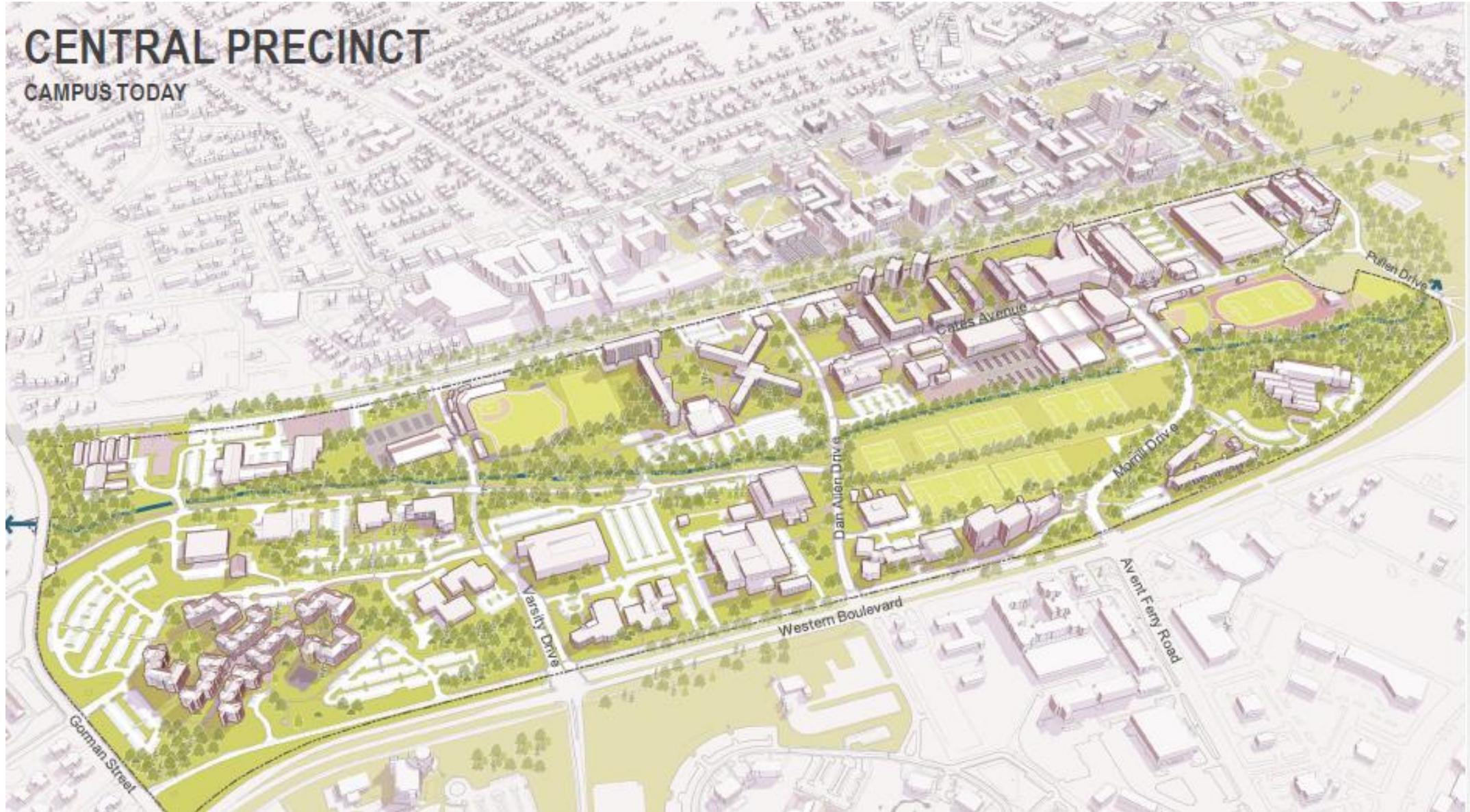


Thought Approach

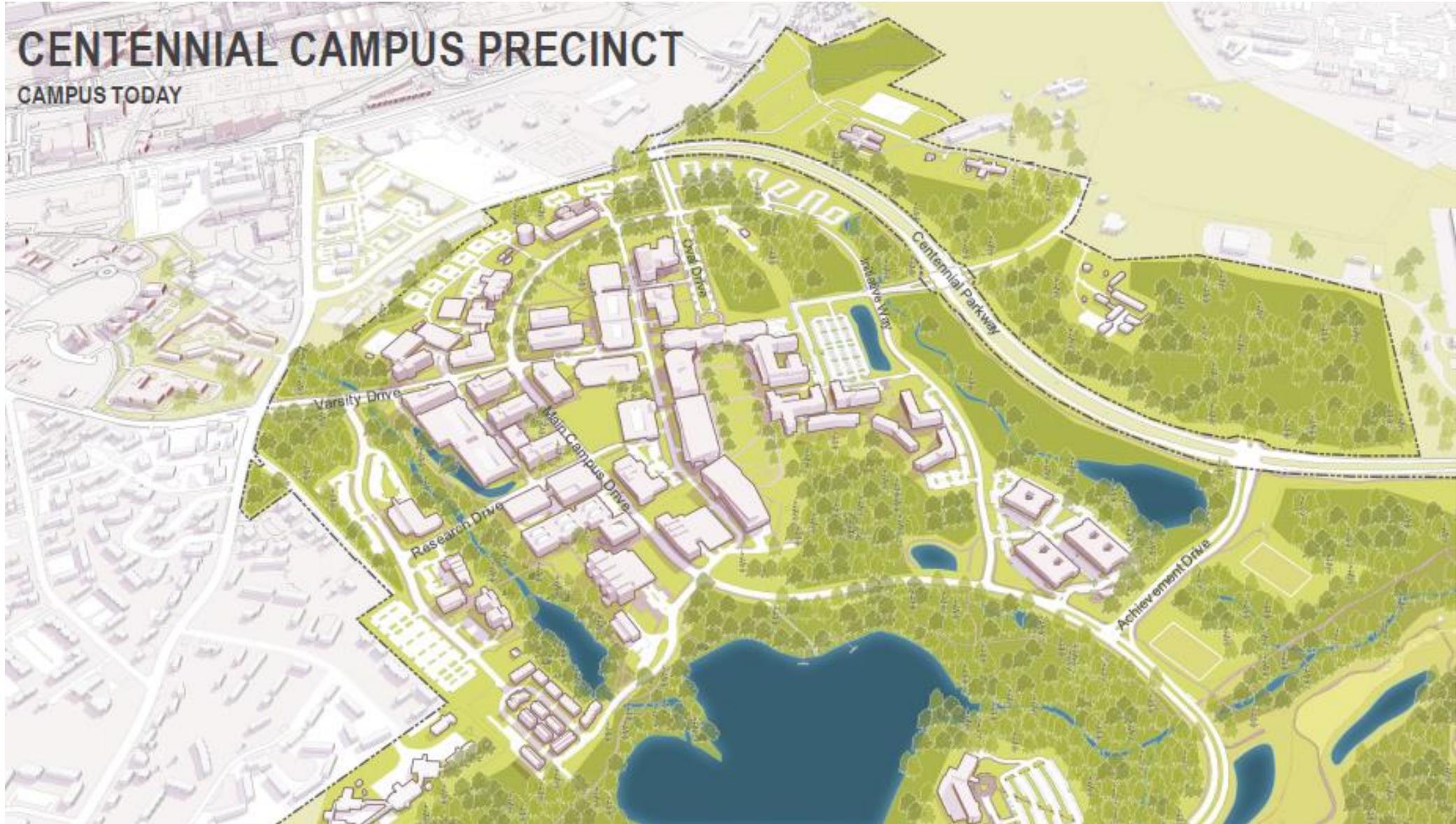
Precincts/North Campus



Precincts/Central Campus



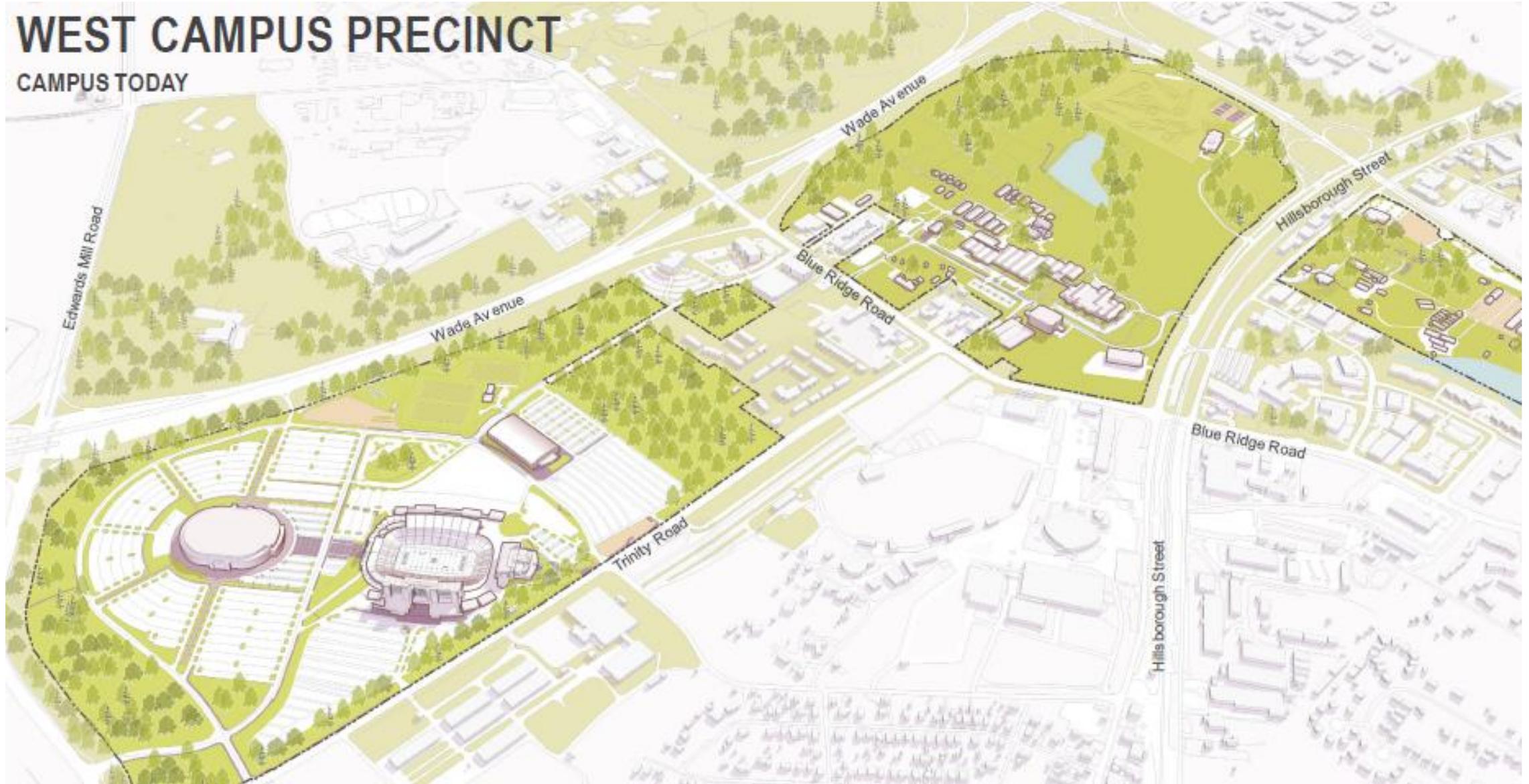
Precincts/Centennial Campus



Precincts/West Campus

WEST CAMPUS PRECINCT

CAMPUS TODAY



Demand Analysis

	2019		2022		2030	
Demand Analysis	Lunch	Dinner	Lunch	Dinner	Lunch	Dinner
Enrollment	33,595		33,595		43,049	
Beds	9,377		9,377		10,457	
Occupancy 92.9%	8,710		8,710		9,714	
Projected Traditional Resident Meal Plan Customers	4,092	4,969	4,984	5,276	4,889	5,541
Projected On-campus Resident Meal Plan Customers	1,143	370	1,288	429	1,603	606
Projected On-campus Resident NO Meal Plan Customers	95	28	77	23	107	71
Projected Off-campus Meal Plan Customers	1,579	168	1,631	458	3,214	400
Projected Off-campus NO Meal Plan Customers	2,278	228	2,280	228	5,281	2,347
Projected Faculty/Staff Customers	377	42	377	42	1,000	83
Projected Faculty/Staff NO Meal Plan Customers	116	58	116	58	269	45
Total Dining Customers (daily transactions)	9,680	5,864	10,752	6,515	16,362	9,093

- 2030 enrollment number provided by Provost
- 2030 number of beds based on Housing Master Plan (pg. 73)
- Maintained 2019 occupancy percentage in 2022 and 2030
- Currently, ~2/3 of student population are not meal plan holders. This may be driven by capacity challenges in Traditional Dining.

Dining Distribution by Precinct

Distribution Across Dining Venues	2019		2030 Projection	
	Lunch	Dinner	Lunch	Dinner
North Precinct				
Traditional Dining	0%	0%	0%	0%
Retail Dining	35%	17%	33%	18%
Central Precinct				
Traditional Dining	23%	55%	28%	57%
Retail Dining	26%	23%	21%	20%
Centennial Precinct				
Traditional Dining	0%	0%	0%	0%
Retail Dining	15%	5%	17%	5%
West Precinct				
Traditional Dining	0%	0%	0%	0%
Retail Dining	1%	0%	1%	0%
Total	100%	100%	100%	100%

North Precinct Recommendations

NORTH & CENTRAL CAMPUS PRECINCTS

PRELIMINARY PLAN

1. Hillsborough St Development Opportunities



North Precinct/Retail Dining

Brickyard HUB

- Expand & renovate Atrium Food Court (first floor) to include multiple food concept offerings, including specialty coffee
- Renovate Hill of Beans (second floor) to a hybrid market/café
- Integrative Sciences Building Coffee House (new dining location)
- Add additional outdoor dining
- Close Port City Java Nelson

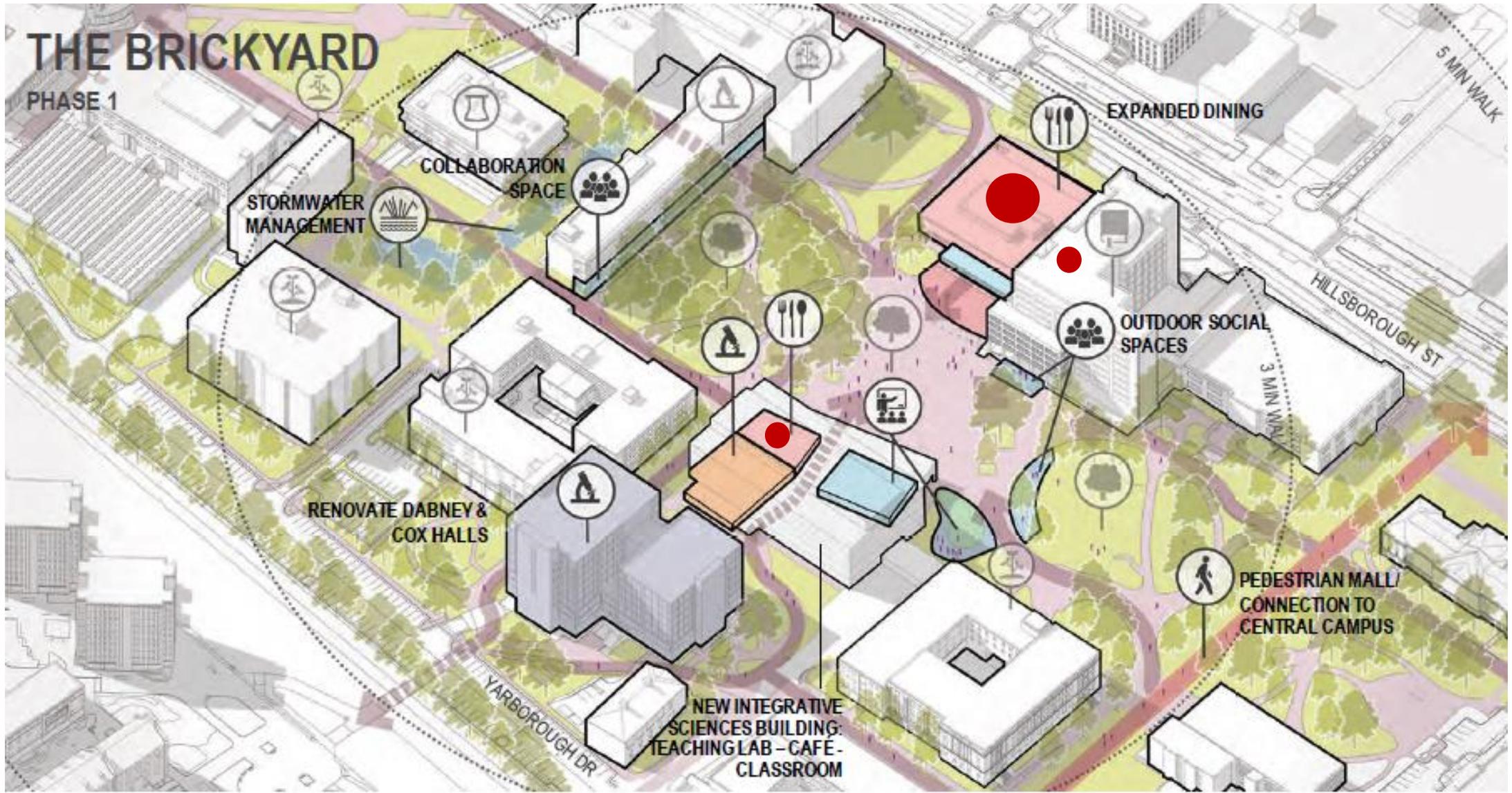
Riddick HUB

- Expand & renovate Park Shops



North Precinct/Retail Dining Demand

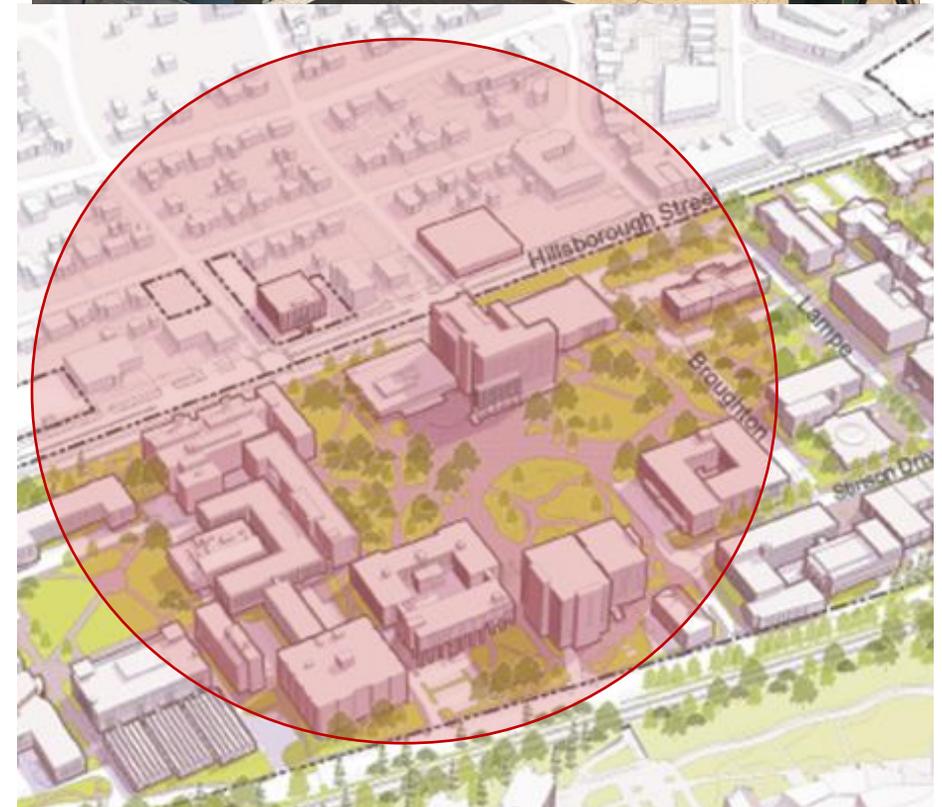
NORTH PRECINCT					LUNCH (11 am - 2 pm)				
Location	Port City Java Park Shops+	Integrative Sciences Building Coffee House	Atrium+	Erdahl Cloyd 2nd Floor	TOTAL				
Type of Venue	Café Coffee	Coffee	Food Court & Coffee	Hybrid Market/Café					
Demand Analysis									
Peak Meal Customer Count	540	324	4,212	324	5,400				
% of Total Precinct Meals	10%	6%	78%	6%	100%				
Estimated Take-Out Factor	50%	50%	50%	50%					
Average Length of Stay at Meal	30 Minutes	30 Minutes	30 Minutes	30 Minutes					
# of Seating Turnovers at Average Half Hour	1	1	1	1					
Seating Efficiency Factor	70%	70%	70%	70%					
Total # of Seats Required	104	58	812	62	1,037				
Existing Seats	69	0	392	46					
Assignable Square Feet Required	3,228	2,100	25,180	2,500	32,958				



● Brickyard HUB: Expand & Renovated Atrium Retail Dining (including coffee), Renovate Hill of Beans (Erdahl Cloyd 2nd floor) and new Integrative Sciences Building Coffee House

Atrium + Opportunity

- Target market: commuter student & Faculty/Staff within 3-minute walk.
- Concept theme: multi-concept retail with each concept having good physical exposure; opportunity for one to have individual exterior access for late night options; one concept could be a rotation of local restaurants.
- Service style: each concept to have point of sale capabilities and functional production. Concepts to share common back of house support areas with individual lockable storage areas as, needed.
- Menu orientation: variety of concepts that compliment offerings in Talley. Concept selection should consider offerings within a 3-minute walk on Hillsborough Street. Coffee concept should be pick-up oriented (as depicted in top image)
- Brand orientation: continuation of a destination brand (Chick-fil-A) is an important anchor concept.



Atrium + Opportunity

- Hours of operation: support the hours of the D.H Hill Jr. Library with the number of concepts open dependent upon the demand. An exterior entrance would allow for extended hours after closure of the library.
- Design: Expansion of existing Atrium food concepts within both levels of the Erdahl-Cloyd West Wing. Design should support the opening and closing of individual concepts, create a well-organized overall flow and function with designed internal pathways and provide a coordinated approach wayfinding within dining and for the building. Provide appropriately sized space for dining functions (dining, servery, kitchen, storage and support). Outdoor adjacent three-season dining should be developed.
- Pricing strategy: competitive to local market but provide a ‘campus meal deal’ at each concept for budget friendly dining.



Erdahl Cloyd 2nd Floor

- Target market: campus community within a 3-minute walk for quick grab n' go meals/snacks.
- Concept theme: hybrid market/café with 1-2 designated food concepts (counters).
- Service style: self-service market with full service at food concepts/counters.
- Menu orientation: pre-packaged convenience products in market with pre-made grab n' go handheld sandwiches, small salads and variety of commissary baked goods. Food concepts/counter orientation to be determined after funding identified.
- Brand orientation: dependent upon menu orientation of food concepts but in-house brands would be recommended.
- Hours of operation: support Erdahl Cloyd hours
- Pricing strategy: competitive to local market



Integrative Sciences Building Opportunity

- Target market: campus community within a 3-minute walk desiring specialty coffee in a coffee house/lounge atmosphere.
- Concept theme: specialty coffee and accompanying beverages and grab n' go offering in an inviting lounge atmosphere to encourage customers to linger. Ideal 67 total seats considering indoor and outdoor dining.
- Service style: made to order beverages
- Menu orientation: base beverage menu supplemented by seasonal limited time offers along with pre-made grab n' go handheld sandwiches, small salads and variety of commissary baked goods.
- Brand orientation: consideration should be given to a NCSU branded coffee or well-know local/regional brand.

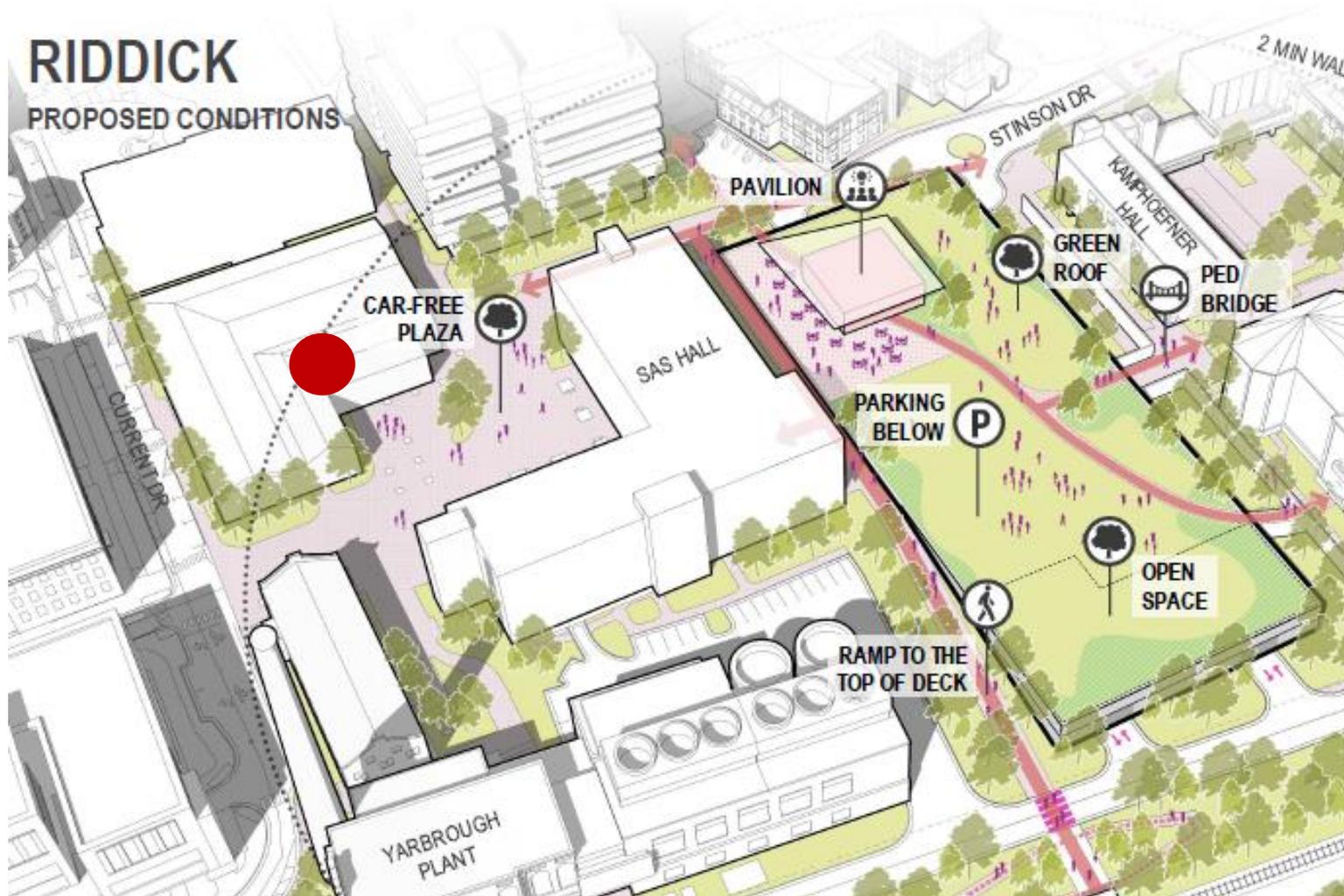


Integrative Sciences Building Opportunity

- Hours of operation: support the Integrative Sciences Building as extended hour coffee to be available in Atrium.
- Outdoor: Outdoor covered three season dining and lounge opportunities should be available. Consider similar strategy as the outdoor area at Park Shops (pictured below).
- Pricing strategy: competitive to local market. Consider standard service as a variety of mismatched mugs to further the 'coffee house' experience.



North Precinct/Riddick HUB



- Expand Park Shops concept footprint, possibly into DELTA office space, to add additional food concept.
- Back of House functions and Front of House service spaces should be expanded, not just seating capacity.
- Add additional outdoor dining.

 Riddick HUB: Expanded Park Shops Footprint and additional outdoor dining

Park Shops + Opportunity

- Target market: campus community within a 3-minute walk desiring specialty coffee in a coffee house/lounge atmosphere.
- Concept theme: specialty coffee and accompanying beverages, sandwiches, salads and baked goods offering in an inviting lounge atmosphere to encourage customers to linger.
- Service style: made to order beverages
- Menu orientation: base beverage menu supplemented by seasonal limited time offers along with pre-made/displayed handheld sandwiches, small salads and variety of commissary baked goods.
- Brand orientation: consideration should be given to a NCSU branded coffee or well-know local/regional brand. Explore in house roasting.
- Hours of operation: Allow for purchase prior to 8:30am classes and closing in late afternoon.
- Pricing strategy: competitive to local market. Consider standard service in reusable mug as a variety of mismatched mugs to further the 'coffee house' experience.



North Precinct/Other

University Towers

- FY 23/24: NCSU plans to enter a lease to own option. Dining Services will operate the existing 400 seat All You Care To Eat (Traditional) dining location on the top floor.
- FY 24/25: NCSU anticipates the entire facility (housing & dining) to be taken offline for renovations.
- FY 25/26 and beyond: NCSU Anticipates operating as housing facility and continued operation of All You Care To Eat (Traditional) dining as swing/temporary dining until Cates West Dining Hall is operational or if other major dining operations need to be offline for renovation.



Central Precinct Recommendations

Central Precinct/Traditional Dining

Well executed Traditional Dining contributes to NCSU's purpose and overall student success

- Contributes to students' self-efficacy by creating a sense of belonging
 - 'Cult' following @ Fountain
- Encourages student involvement and engagement
- Strengthens recruitment, retention, and graduation rates of the University
- Supports students' overall health and wellness
- Enhances greater student satisfaction
- Provides robust, diverse, and inclusive offerings for students to feel at home
- Enhances the NCSU brand
- Comparisons with peer & cross applicant institutions shows a NCSU Traditional Dining facilities (age, capacity and offerings) are not competitive



2011

NORTH & CENTRAL CAMPUS PRECINCTS

PRELIMINARY PLAN

1. Hillsborough St Development Opportunities



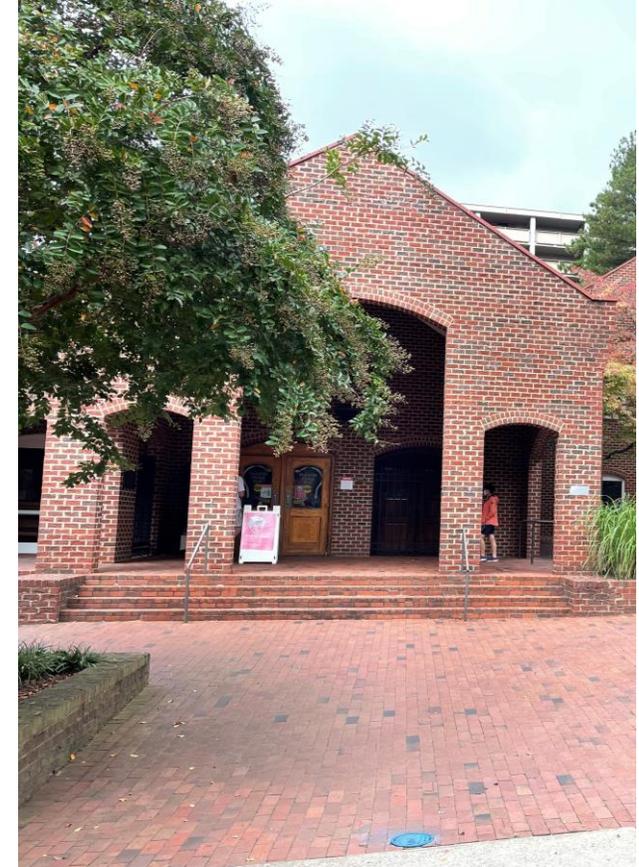
Central Precinct

Cates West HUB

- New dining-oriented building to replace Fountain Traditional Dining designed to include a dedicated space for 'To Go' that would also operate for late night functioning as the Bragaw c-store replacement.

Cates East HUB

- New dining-oriented building to replace Case & Clark Traditional Dining locations
- Supports commissary/catering kitchen
- Supports athletic dining needs



Central Precinct

Talley/Temporary Traditional Dining

- To meet demand, a 'temporary' location for Traditional Dining is needed. One Earth in Talley offers current dedicated dining spaces and expansion opportunities. Temporary dining should be utilized until the demand is met with the opening of Cates West HUB and Cates East HUB.
- As University Towers, One Earth (as Traditional Dining) and Cates West Dining Hall come online, retail consolidation will need to occur and be strategically located.
- Re-evaluation of dining mix in Talley should occur in conjunction with Cates East HUB planning.



Central Precinct / Demand

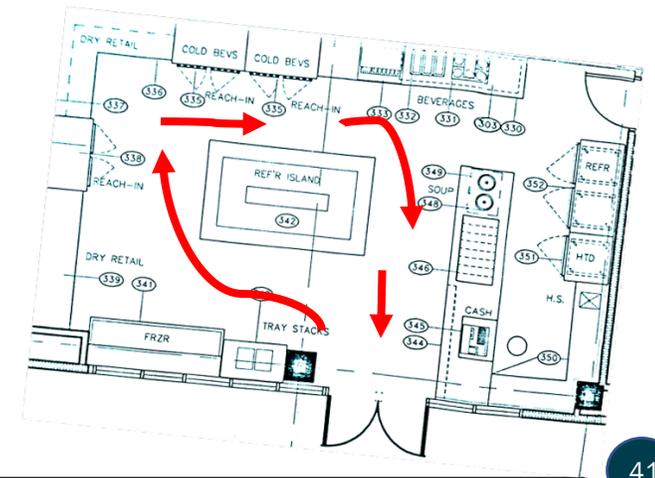
CENTRAL PRECINCT		DINNER (5pm - 8 pm)			
Location	New Cates West (Traditional Dining plus Late-Night)	New Cates East Combo Clark/Case Traditional Dining + Commissary/Catering	Cates West Grab n' Go/Late Night Venue	Talley (Temp Traditional Dining & Existing Retail)	
Type of Venue	All You Care To Eat	All You Care To Eat	Grab n' Go Retail	All You Care To Eat & Retail	
Demand Analysis					
Peak Meal Customer Count	3,112	2,074	55	1,765	7,002
% of Total Traditional Precinct Meals	60%	40%	0%	0%	100%
% of Total Retail Precinct Meals	0%	0%	3%	97%	100%
Estimated Take-Out Factor	3%	3%	100%	45%	
Average Length of Stay at Meal	40 Minutes	40 Minutes	30 Minutes	30 Minutes	
# of Seating Turnovers at Ave Half Hour	0.7	0.7	1	1	
Seating Efficiency Factor	70%	70%	70%	70%	
Total # of Seats Required	1,931	1,287	0	472	3,690
Assignable Square Feet Required	65,654	49,158	3,000	Existing	117,812
SmithGroup Gross Square Feet	70,000	Not Available	Included	Not Available	

Central Precinct/Cates West HUB



Cates West HUB

- Traditional Dining facility
- Large portion of seating area designed for multi-use including programming from a variety of NCSU departments
- Conveniently located dedicated space that offers 'To Go', c-store products, quick coffee and functions as the late-night dining operation. This multi-functional facility would be part of the Bragaw c-store replacement and more.



Cates West Dining Hall

- Target market: meal plan holders
- Concept theme: Food Hall multi-station
- Service style: each platform has service counter with variety of self-serve and full-service.
- Menu orientation: variety of platforms to offer nutritional variety including Global Kitchen, Allergen Sensitive, Grill, Plant Forward, Deli/Wrap, Wood Fired Pizza/Pasta, Salad/Fruit Bar, Smokehouse, Desserts. Additional concepts for consideration at Cates West or Cates East include Home Station, Asian and/or Latin.
- Brand orientation: in house platforms that replicate some platforms at Cates East, yet each Dining Hall needs to highlight a special feature station that is the differentiator (i.e. wood fired pizza).
- Production system: Large batch par cooking in kitchen with exhibition finishing in front of customer.
- Hours of operation: consider cluster of platforms, near entrance or with separate exterior entrance, open for breakfast & afternoon service without having to open the other platforms. All platforms open for lunch and dinner.
- Pricing strategy: new facility and new offerings could support a meal plan price increase and subsequent 'door price'.

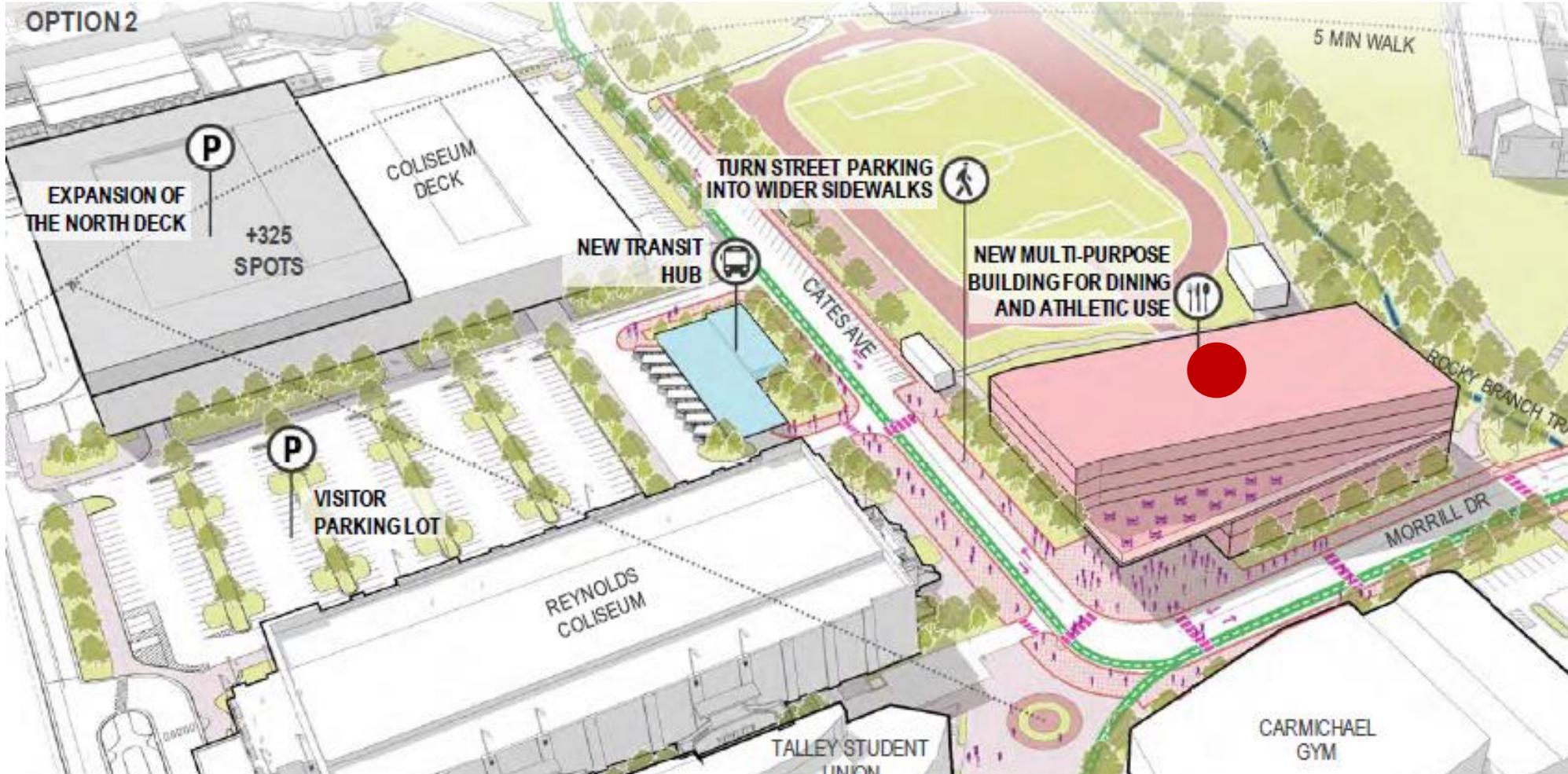


Cates West 'To Go'/Late Night

- Target market: residents of Cates West area
- Concept theme: a separate concept within the Cates West building that offers prepacked 'To Go' items and 1-2 hot entrée items in multi-use location that is conveniently located on a pedestrian path with dedicated exterior entrance or entrance within building lobby.
- Service style: 'To Go'
- Menu orientation: serves day-part appropriate foods packaged for quick, 'To Go'. Foods served to be purchased via meal plan.
- Brand orientation: in house brand
- Production system: production occurs primarily from Traditional Dining kitchen/platforms and the commissary/bakery. Late night service is either supported as other day-parts or has limited production capabilities.
- Hours of operation: 'To Go' service for breakfast, lunch and dinner. Late night service available after dining hall closes until midnight-1am.
- Pricing strategy: competitive to street pricing



Central Precinct/Cates East HUB



- Combine Case & Clark Traditional Dining Halls into one large dining hall with commissary/catering kitchen. Include Athletic dining needs with reservable private dining room (200 ppl), clean eating platform, etc.

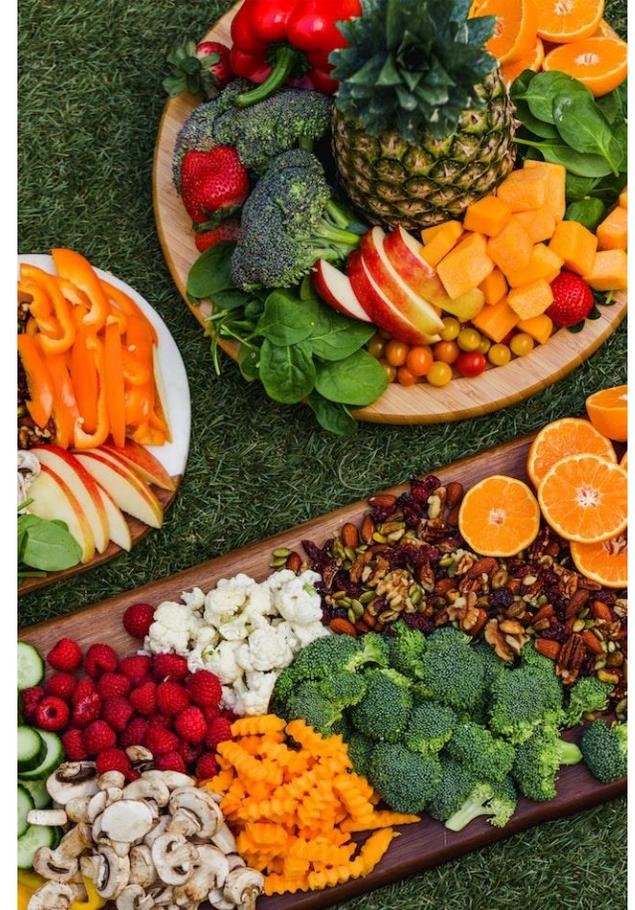
Cates East HUB

- Target market: meal plan holders
- Concept theme: Food Hall multi-station with private dining rooms available for athletic team meals
- Service style: each platform has service counter with variety of self-serve and full-service options
- Menu orientation: variety of platforms to offer nutritional variety including Performance/Grain Bowls, Allergen Sensitive, Rotisserie/Grill, Plant Forward, Deli/Wrap, Pizza/Pasta, Salad/Fruit Bar, Bakery. Additional concepts for consideration at Cates West or Cates East include Home Station, Asian and/or Latin.
- Brand orientation: in house platforms that replicate some platforms at Cates West, yet each Dining Hall needs to highlight a special feature station that is the differentiator (i.e. Performance/Grain Bowls and Rotisserie).



Cates East HUB Continued

- Production system: Large batch par cooking in kitchen with exhibition finishing in front of customer. Facility to also include commissary for bakery products, sauces/soups, pre-made sandwiches/salads, packaged fruit/vegetables, etc.
- Hours of operation: consider cluster of platforms, near entrance or with separate exterior entrance, open for breakfast & afternoon service without having to open the other platforms. All platforms open for lunch and dinner.
- Pricing strategy: new facility and new offerings could support a meal plan price increase and subsequent 'door price'.



Central Precinct/Traditional Dining Other Considerations

- Allergen Sensitive platforms need to be self-supporting with all prep, production, service & sanitation occurring within the platform to avoid cross-contamination. Separate storage areas are needed near the platform.
- Vegan/Vegetarian production needs to have separate equipment & utensils, as part of a larger production area.



Central Precinct/Talley Temporary Traditional Dining

- A two-phased ‘temporary’ solution may be needed prior to the full Central Precinct Physical Master Plan implementation. Phase 1 temporary dining is anticipated to be an All You Care To Eat location in Talley. NCSU may need to develop a Phase 2 temporary dining plan depending upon Physical Master Plan project implementation schedule and student participation/usage of meal plans.
- As Traditional Dining facilities improve, more students may choose to be meal plan holders as well as increase their usage of the meal plan increasing the need.
- During planning of Cates East HUB, re-evaluate the mix of dining operations (retail and Traditional) in Talley to accurately size Cates East HUB. If All You Care To Eat dining remains in Talley, Cates East Traditional Dining may not require as many seats.
- Continue to evaluate the product mix for the Talley Market providing pre-made, pre-packaged popular items.



South Precinct Recommendations

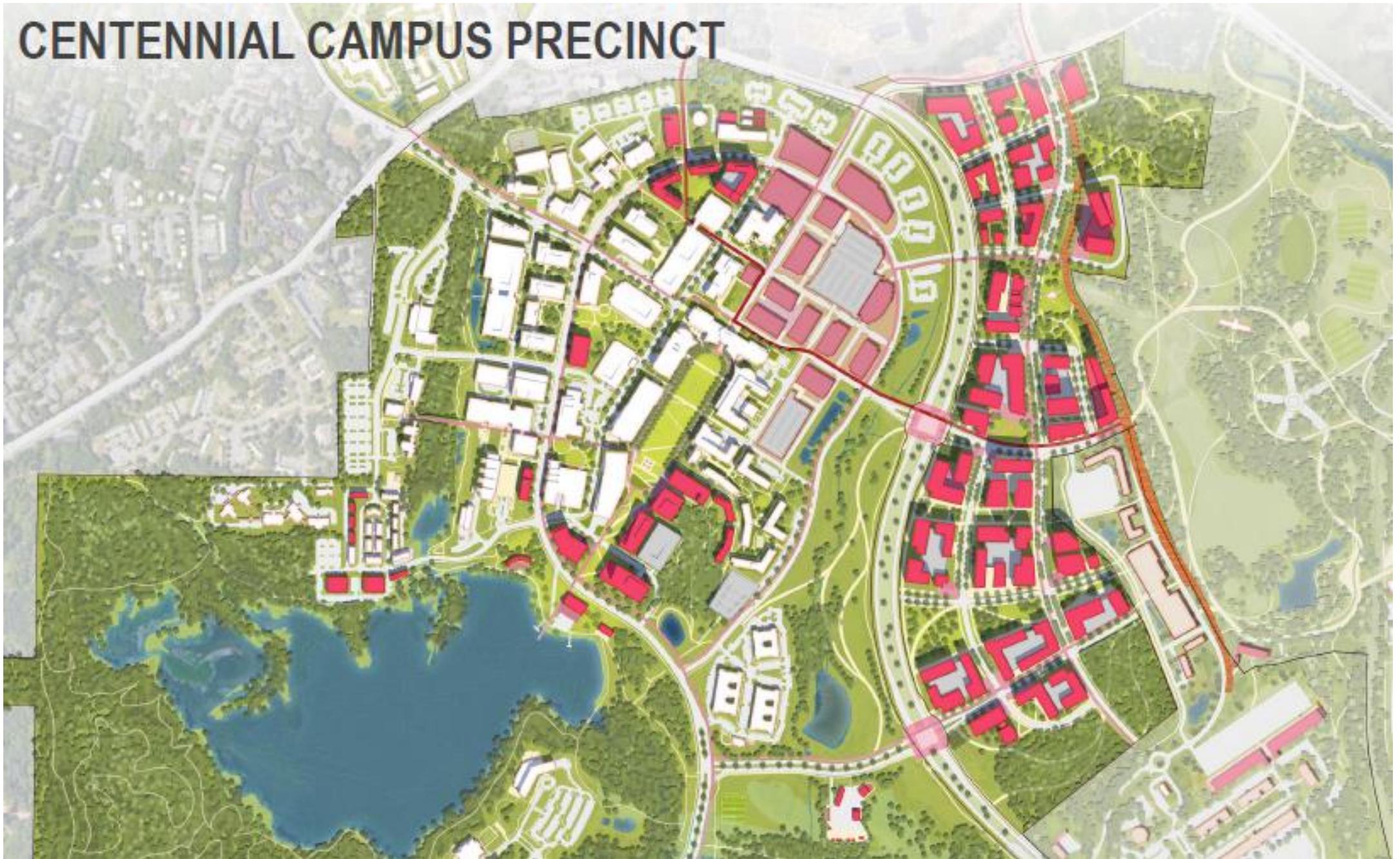
South Precinct

- Jordan Café should remain as the dining operation that services the South Precinct.



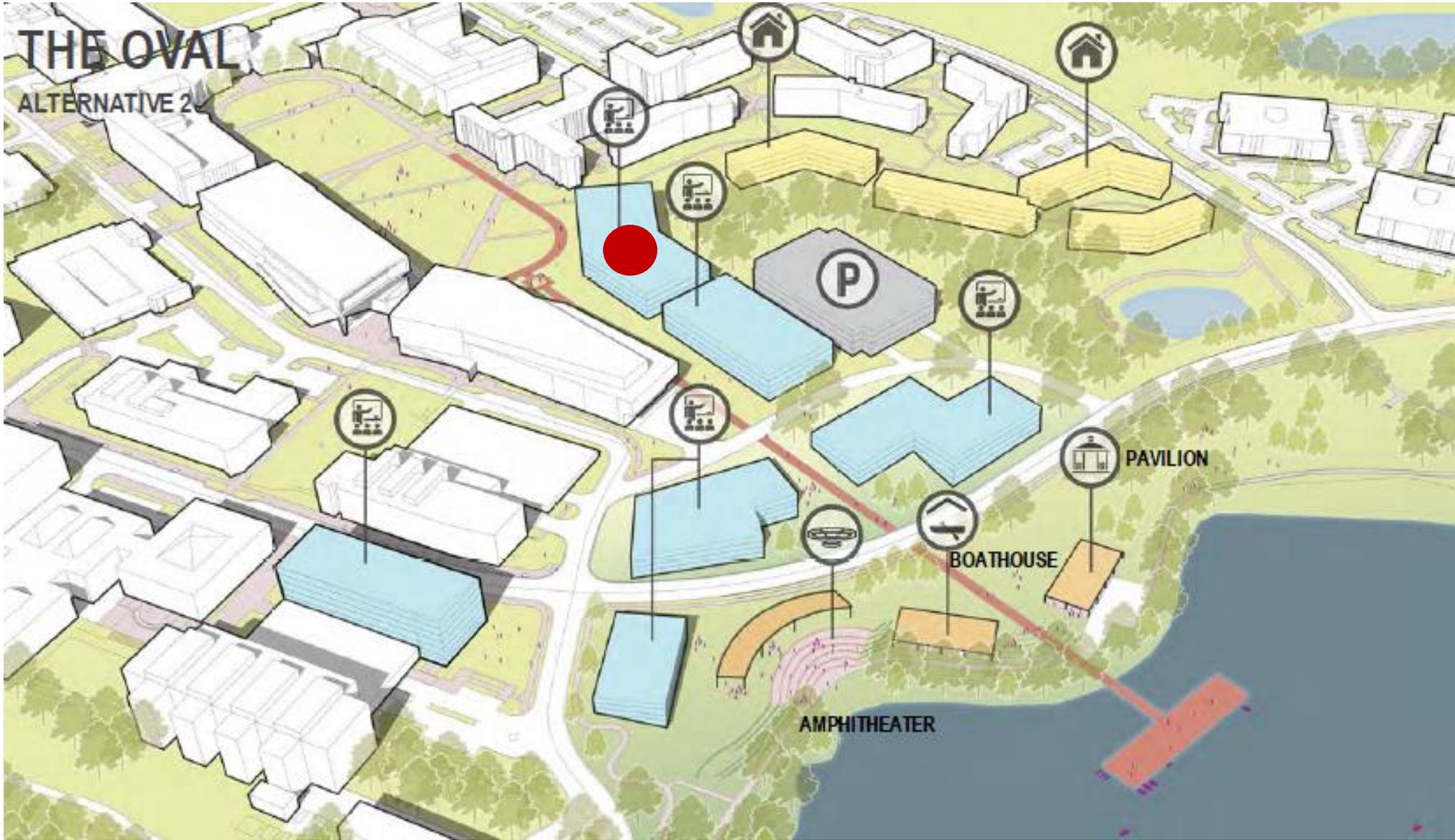
Centennial Precinct Recommendations

CENTENNIAL CAMPUS PRECINCT



Centennial Precinct/Retail Dining

CENTENNIAL PRECINCT		LUNCH (11 am - 2 pm)				
Location	Textiles Coffee & Convenience Store	Oval (Renovate to expand platforms)	Common Grounds	Port City Java Engineering Building 2	New Engineering Building or HUB	TOTAL
Type of Venue	Coffee & Convenience Store	Retail	Coffee	Coffee	Café	
Demand Analysis						
Peak Meal Customer Count	389	1,669	195	250	278	2,782
% of Total Precinct Meals	14.0%	60.0%	7.0%	9.0%	10.0%	100%
Estimated Take-Out Factor	60%	25%	60%	60%	25%	
Average Length of Stay at Meal	30 Minutes	30 Minutes	30 Minutes	30 Minutes	30 Minutes	
# of Seating Turnovers at Average Half Hour	1	1	1	1	1	
Seating Efficiency Factor	70%	70%	70%	70%	70%	
Total # of Seats Required	66	420	28	40	104	658
Existing Seats	72 (combined)	398	26	4	0	
Modification	Combine into one location by moving the coffee concept into the existing convenience store space to share staffing and other operational functions	Renovate existing food service space to expand the number of service platforms within the servery.	No modification	Expand Footprint to 1,500 ASF	New Food Service Space 3,100 ASF	



 Possible new dining retail location

Port City Java Engineering Building II

- Target market: north side of Centennial campus faculty, staff, students and visitors
- Concept theme: coffee house
- Service style: full-service made to order beverages
- Menu orientation: coffee/tea, smoothie, prepared sandwiches/wraps and baked goods.
- Brand orientation: offer coffee diversity on Centennial Campus, so balance brand offerings
- Production system: made to order beverages and commissary produced baked goods and pre-packaged offerings.
- Hours of operation: support area buildings with complimentary hours.
- Pricing strategy: competitive to local market
- Other: current location is undersized and invisible to guests even though it is located near a high traffic bus stop. As the campus grows, The viability of this location is dependent upon a new exterior entrance or a new location north of the Engineering complex.



On the Oval Food Hall

- Target market: students & Faculty/Staff within 3-minute walk.
- Concept theme: Food Hall multi-station. Work with local restaurants to provide sub-lease opportunity for platforms in effort to reduce operating costs. Increase platforms/offerings as population increases.
- Service style: each concept to have point of sale capabilities and functional production with storage and prep support in common back of house.
- Menu orientation: variety of concepts that do not compete with concepts developed in the Innovation District. Consider annual preference surveys to keep offerings on point.
- Brand orientation: based on preference survey and/or local partnerships.
- Production system: local partners should have dedicated storage space and access to prep areas, as needed.
- Hours of operation: Provide full compliment of platforms for lunch and dinner. Determine most efficient breakfast service (one platform, grab n' go kiosk, etc.). Coordinate with other departments to allow for programming in dining area during off peak meal periods.



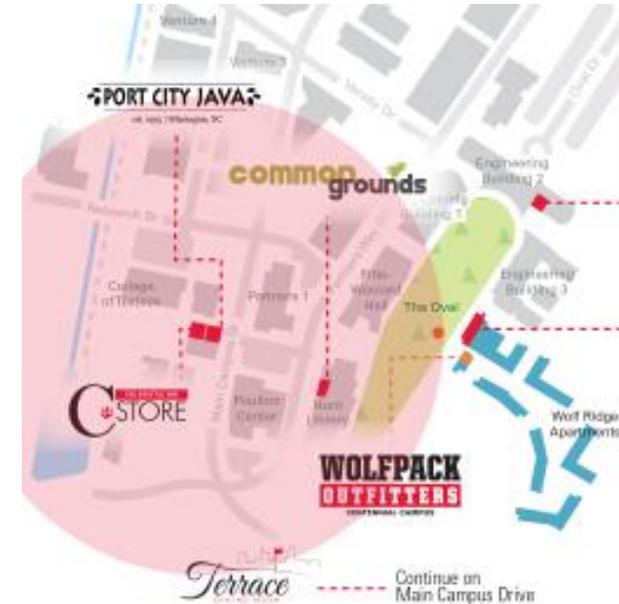
On the Oval Food Hall

- Pricing strategy: competitive to local market but provide a ‘campus meal deal’ at each concept for budget friendly dining.
- Design: Interior aesthetics should provide students feeling of comfort. Dining area should allow for programming opportunities for NCSU departments during non-peak usage or when dining is ‘closed’.
- Outdoor dining: provide outdoor dining opportunities in area near entrance.
- All You Care To Eat: Physical Master Plan team along with NCSU discussed the need for All You Care To Eat on Centennial Campus and determined that based on the type of housing (apartments) existing and planned that a Traditional Dining location is not the best and highest use of dining spaces.
- As Centennial campus develops, a food service location may be desired in a student centric/HUB building. This location may not be needed to meet demand but should be considered to create additional student engagement opportunities.



Textiles Port City Java Coffee & Convenience Store

- Target market: students & Faculty/Staff within 3-minute walk.
- Concept theme: Combination coffee house and smaller convenience store. An alternative would be to keep the coffee house and use automation/unmanned technology in a reduced size convenience store.
- Service style: made to order beverages in coffee house and self-service in convenience store.
- Menu orientation: coffee/tea, smoothie, prepared sandwiches/wraps and baked goods.
- Brand orientation: offer coffee diversity on Centennial Campus, so balance brand offering with coffee brand at Common Grounds Cafe.
- Production system: made to order beverages and commissary produced baked goods.
- Hours of operation: support area buildings with complimentary hours.
- Pricing strategy: competitive to local market.



West Precinct Recommendations

WEST CAMPUS PRECINCT

PRELIMINARY PLAN



West Precinct



- Combine Terry Café and Wolves Den into a new facility with a more centralized location to support the College of Veterinary Medicine.
- Café should support gathering space objectives with variety of seating options, creating activation and providing dining options for the West Precinct campus community.
- Coordinate concept, construction costs and operating cost expectations with Veterinary Medicine for subsidy requirement.

Implementation

Phasing

PROJECT	FY 23/24	FY 24/25	FY 25/26	FY 26/27	FY 27/28	FY 28/29	FY 29/30	FY 30/31
North Precinct Integrative Sciences Building Coffee	Planning & Construction			Open				
North Precinct Atrium Renovate/Expand							Planning & Construction	
North Precinct Park Shops Renovate/Expand		Planning & Construction		Open				
Central Precinct Traditional Dining in Talley	Open			Planning & Construction		Open		
Central Precinct Cates West (incl. Grab n' Go/Late Night)			Planning & Construction				Open	
Central Precinct Cates East							Planning & Construction	
Centennial Precinct Oval Renovate			Planning & Construction			Open		
Centennial Precinct Textiles Coffee/Convenience Store Combo	Construction	Open						
Centennial Precinct Port City Java Engineering Building II Renovate/Expand			Construction	Open				
West Precinct - New Café								Planning

Project Space Allocations

- Assignable Square Feet (ASF) provided includes Dining Functional Areas: Dining, Serverly, Kitchen, Storage and Support.
- Assignable Square Feet (ASF) does not include any dock spaces, public spaces or required building spaces (mechanical rooms, shafts, etc.)

PROJECT RECOMMENDATIONS TO MEET 2030 DEMAND	~Assignable Square Feet
North Precinct Integrative Sciences Building Coffee (new space)	2,100
North Precinct Atrium Renovate/Expand (existing 15,000 SF)	26,150
North Precinct Erdahl Cloyd 2 nd Floor Hybrid Market/Cafe	2,500
North Precinct Park Shops Renovate/Expand	3,900
Central Precinct Cates West (new building)	65,660
Central Precinct Cates West Grab n' Go/Late Night (part of the new building)	3,000
Central Precinct Cates East (new building)	49,160
Centennial Precinct Port City Java Engineering Building II Renovate/Expand	1,500
Centennial Precinct Oval Renovate	Existing Square Feet
Centennial Precinct Textiles Coffee/Convenience Store Combine/Renovate	Existing Square Feet
Centennial Precinct New Engineering or HUB (located within a new building)	3,100
West Precinct - New Café (expand existing space or develop new space)	2,500

Project Cost Estimates

- Supply chain issues and construction/equipment costs have been erratic since 2021.
- Cost range estimates include Office/Admin/Student Life space information from SmithGroup.

Cates West New Dining & Student Services Building	Gross Square Feet (Provided by SmithGroup)	Cost Range/Gross Square Feet		Total Cost Range	
Dining Hall					
Kitchen, Servery, Dishwash	25,600	\$750	\$950	\$19,199,751	\$24,319,685
Dining	31,200	\$600	\$750	\$18,719,940	\$23,399,924
Storage, Support	9,901	\$450	\$550	\$4,455,323	\$5,445,395
Dining Hall Subtotal	66,700			\$42,375,014	\$53,165,004
Late Night					
Servery	2,750	\$750	\$950	\$2,062,500	\$2,612,500
Support	550	\$450	\$550	\$247,500	\$302,500
Late Night Subtotal	3,300			\$2,310,000	\$2,915,000
Student Life					
		Provided by SmithGroup			
Office/Admin/Student Life	86,900	\$550	\$650	\$47,795,000	\$56,485,000
Entire Building					
Total	156,900			\$92,480,014	\$112,565,004