

A Campaign for Life-Long Learning in Centralina

A Strategic Campaign Plan

March 2008



Section One

Introduction

This document is a strategic framework for a Campaign for Life-Long Learning in the seven North Carolina counties in the Centralina Region (i.e., Anson, Cabarrus, Iredell, Lincoln, Rowan, Stanly, and Union Counties) and provides common visions, goals, and strategies for effecting positive change on our workforce. The document was developed through a planning process held from October 23, 2007 and January 31, 2008 which included input from leaders in all seven counties, from a variety of subsectors including: economic and workforce development, business and industry, K-12 education, higher education, community-based service providers, and many others.

We would like to thank everyone who participated in the development of this plan for their time, effort, and insight (Appendix VIII has a complete list of planning partners).

Questions on the plan should be addressed to:

David Hollars
Executive Director
Centralina Workforce Development Board

Post Office Box 35008
1300 Baxter Street, Suite 450
Charlotte, NC 28235-5008

(704) 348- 2717
Fax: (704) 347- 4710
dhollars@centralina.org

Section Two

Campaign Vision and Structure

Campaign Vision

For all residents in Centralina to have opportunities to fully participate in the regional economy and to understand the importance of, and need for, life-long learning as a means of achieving greater economic prosperity.

Campaign Foci & Indicators of Success

The Centralina Life-Long Learning Campaign has four foci, which will have outsized impact on strengthening our workforce and economy:

- Promote a **certified, universal skill set** to businesses (current and prospective) and workers;
- **Communicate workforce resources** throughout the community;
- **Increase two-year degrees and trade program participants;** and
- **Sustain prosperity** by through financial literacy and other supports.

In addition to the goals set for each of the four pillars and strategy-level measures (found in sections three to six), the following will be indicators of the Campaign's progress and success:

- Increase in the number of Career Readiness Certificate holders
- Decreases in the number of people needing emergency financial assistance or repeat financial assistance
- Increase in the number of qualified workers
- Increase in the number and quality of jobs
- Increase in the literacy rate
- Increase in overall education levels including GED, high school diploma, and trade, two, and four year degree holders
- Increase in referrals to community-based literacy services

The Centralina Workforce Development Board's Role as Campaign Champion

The Campaign Champion will be the Centralina Workforce Development Board. The planning group believes the Board is best suited for this role because they are a passionate leader for workforce change, have relationships with, and the respect of leaders in different sectors in all seven counties, and significant experience as a regional convener.

The crucial roles for the Centralina Workforce Development Board, as Campaign Champion, will be:

- Providing overall leadership
- Leading marketing and communications efforts around the Campaign and its vision
- Reaching out to and recruiting potential campaign partners
- Sharing information on progress with partners and the community
- Ensuring timely execution of the plan, in the near and long term
- Convening campaign partners to communicate progress as well as share and replicating best practices
- Maintaining fidelity to and passion for the Campaign vision
- Identifying a high profile leader to chair the Campaign

To support them in this role, the Centralina Workforce Development Board will charter ad-hoc committees in each county composed of Centralina Board members and other leaders to support implementation. Additionally, the Centralina Workforce Development Board will seek support for up to three, dedicated staff members for coordinating and implementing strategies.

Campaign Mobilization & Responsibilities

Mobilization for the Campaign will occur at two levels:

- **Recruitment of Core leaders** - The early endorsement of the Campaign by key leaders will ensure easier implementation of the strategies. Leaders would be convened, jointly, by the Centralina Workforce Development Board and a peer within their group. Specifically the groups would be:

Group	Convener
Superintendents (Potentially at the regional superintendents council meeting on March 20, 2008)	Dr. Ed Davis, Union County Schools
Community College Presidents	Dr. Michael Taylor, Stanley Community College
County Economic Development Directors	Charlotte Regional Partnership
Chamber of Commerce Presidents and selected business leaders	To be determined in further conversations with regional leaders
United Ways	Bob Lippard, Rowan County United Way

- **Recruitment of Key Partners and Action Planning** - The lead organization for each strategy will recruit the key partners associated with each strategy. They will then engage them in action planning and the creation of interim goals and deadlines.

A strategic overview of the activities in the first year can be found in Appendix VII.

Section Three

Developing and Certifying Universal Skills

Vision and Goal

Vision: A workforce that has the fundamental skills to participate and prosper in the region's economy.

Rationale: Employers, both current and potential, are more willing to train employees who have proven sets of basic skills, including: reading, writing, numeracy, and “soft skills”, such as a capacity for inter-personal communication and basic work ethic. The Career Readiness Certificate (CRC) is an effective tool for certifying and communicating these recognized skills to employers.

Goal - To increase the number of CRC holders by 15% each year for five years.¹

¹ As of December 6, 2007, there are 2,057 CRC holders in the Centralina Region. This goal, over 5 years, would result in an estimated 4,138 CRC holders.

Strategies: Developing and Certifying Universal Skills²

Strategy 1: Add a “Soft Skills” certification test to the CRC, and dub it the “CRC+.”

Rationale: Businesses have benefitted from certified basic skills and are now expressing a need for certifying additional soft skills, including inter-personal communication, teamwork, and work ethic. WorkKeys already has a soft skills testing component that could be used to assess these skills and link workers with training as needed. By including this soft skills testing with the existing CRC, workers will be able to demonstrate their increased employability for the best jobs in Centralina.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Each Community College’s CRC Lead ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Adding the soft skills for the CRC+, will cost an additional \$9.00 per person. Over the next five years, assuming our current goal, an additional \$18,729 in funding would be needed (an average of \$3,746 per year). 	<ul style="list-style-type: none"> ▪ Year One, 1st quarter 	<ul style="list-style-type: none"> ▪ Convene the community college CRC leads to agree upon the use of the soft skills test and the wording of a Centralina Workforce Development Board Certificate of Completion. ▪ Reach out to prison re-entry programs already using the CRC to identify a path for transition to include the CRC+ testing ▪ Begin to implement the CRC+ test. 	<ul style="list-style-type: none"> ▪ All community colleges implement the CRC+ within 6 months. ▪ At least 25% of current CRC holders return to take the soft skills test to receive a CRC+.

² Please note, the sources and frequencies of measures for each strategy appear in Appendix I

Strategy 2: Develop a toolbox of communications resources to help Economic Development, Community College, JobLink, Chamber of Commerce, and other leaders talk about the CRC+.

Rationale: The CRC is an important tool for developing and certifying our workforce, yet many key players in the system don't know the answer to basic questions about the CRC (such as the cost for certification). This toolbox would also provide talking points and handouts for campaign partner's discussions with other business leaders who could adopt the CRC+.

Specifically the toolbox would include -

- A factsheet on WorkKeys and the CRC+, including the points of contact for each community college;
- Talking points for use with business leaders and elected officials on the benefits of the CRC+ and its costs; and
- A short PowerPoint presentation on the CRC+ and its benefits for use with member groups, such as at chamber of commerce luncheons.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Community College CRC Leads ▪ Economic Developers ▪ JobLink Directors ▪ Chamber of Commerce Presidents ▪ Directors of Career Readiness Certification 	<ul style="list-style-type: none"> ▪ Time to identify existing tools and develop new ones as needed. ▪ Vehicles for distributing tools. 	<ul style="list-style-type: none"> ▪ Year One, 1st quarter 	<ul style="list-style-type: none"> ▪ Identify what tools exist at the state and regional levels (already underway). ▪ Convene CRC leads and representatives from economic developers, workforce developers, and businesses to refine the communications tools as needed. ▪ Distribute the tools and identify a structure and timetable for update. 	<ul style="list-style-type: none"> ▪ Use of the presentation in at least four group meetings in each county (e.g., Chamber of Commerce, Rotary Club or other meetings).

Strategy 3: Enhance and promote the value of the CRC+ with High Schools throughout the region.

This strategy would have a four phase approach:

Phase I: In each district, convene the high school principals, their guidance department, career and technical program head, and two to three academic department heads to learn about the value of the CRC+ and how students can be connected with testing. The presentation would include selected business leaders who know, first hand, the value of the CRC+.

Phase II: Offer CRC+ testing at least once a year, on-campus at each high school. This could be done using community college staff or by training high school faculty to administer the exam (training could be done by the local CRC administrators).

Phase III: Begin to have annual meetings with high school principals, directors of career and technical programs, guidance departments, and two to three academic department heads to update them on the CRC+ and to give them the opportunity to exchange best practices, successes and challenges.

Phase IV: Convene a meeting of career and technical education department heads to develop a crosswalk between their curricula and the CRC+.

Rationale: High school educators and counselors are the advisors and developers of the emerging workforce. However, many of them don't know about the CRC+ and how it can help youths enter the workforce. These strategies would work to inform high school staff about the CRC+, make it easier for students to connect with certification testing, and, by identifying where curricula match the CRC+ objectives, help educators, parents, and students understand where coursework directly ties into future career skills.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> Each School District 	<ul style="list-style-type: none"> School District personnel, specifically High School Administrators, Guidance Councilors, and Career and Technical Educators Community College CRC Points of Contact Selected Business Leaders in Each County Centralina Workforce Development Board 	<ul style="list-style-type: none"> The cost of grading the CRC+ (i.e., the three tests composing the CRC and the additional soft skills test) is \$24.00. Including staff time and materials, the cost would be \$40 per student. 	<ul style="list-style-type: none"> Phase I could commence in Year One, by mid-year. Phase II could commence by the end of Year One. Phase III could commence in Year Two. Phase IV could commence in Year Three. 	<ul style="list-style-type: none"> Gain commitment of school district superintendents. Convene community college CRC leads to identify or develop CRC+ presentations for school administration and staff. 	<ul style="list-style-type: none"> Within 2 years, at least 20% of all high school seniors will have taken the CRC+ Within 5 years, at least 25% of all students taking the CRC+ will receive a bronze certificate or higher

Strategy 4: Strengthen ties between CRC+ and Basic Skills programs at the community colleges.

Rationale: Basic Skills programs at the community colleges graduate GEDs and adult high school graduates at comparable numbers to high schools. Better coordination with the CRC+ programs would allow the certifications to be spread to a greater percentage of the community.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Rowan-Cabarrus Community College (Keri Allman-Young) 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ Basic Skills Directors ▪ CRC Leads 	<ul style="list-style-type: none"> ▪ Funding to score the tests (about \$24 for test grading per student; costs could be \$40 per student including materials and staff time). ▪ Staff to train and link Basic Skills administrators with CRC+ programs. ▪ Materials, software, hardware, and facilities. 	<ul style="list-style-type: none"> ▪ Colleges should have looked into coordinating and endorsing Basic Skills and CRC+ programs by the end of Year One. 	<ul style="list-style-type: none"> ▪ Endorse ties at the state level. ▪ Convene CRC Directors to discuss coordination. ▪ Explore using the CRC+ for community college entrance placement. 	<ul style="list-style-type: none"> ▪ At least 25% of graduating GED and adult high school graduates will hold a CRC+ in 5 years.

Strategy 5: Establish a learning community of community college CRC administrators to support implementation of the CRC+ through quarterly meetings and a listserv.

Rationale: Currently there is no formal vehicle for CRC administrators to exchange best practices. As we adopt new strategies around the CRC+, a quarterly opportunity for exchange of experiences will facilitate efficient and effective replication of the most successful strategies.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Rowan-Cabarrus Community College (Carol Allen) 	<ul style="list-style-type: none"> ▪ Community College CRC Points of Contact ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Meeting space and time to convene meetings. ▪ Computer support for a listserv. 	<ul style="list-style-type: none"> ▪ Year One, 1st quarter 	<ul style="list-style-type: none"> ▪ Convene first meeting. ▪ Launch listserv. 	<ul style="list-style-type: none"> ▪ Participation of all the community college CRC administrators.

Strategy 6: Help sustain community-based literacy services by creating a case for support based on their general contributions to workforce and economic development and specific contributions to the Life-Long Learning Campaign.

Rationale: Community-based literacy services (such as literacy councils) are key life-long service providers which help individuals improve their literacy level. These individuals are then better prepared for entering the workforce or for additional education in community colleges and other educational institutions. However, many community-based literacy service providers are often perceived as a social service, rather than a workforce developer, and as a result, have difficulty securing basic funding. This case for support would help the literacy service providers communicate their key role in the economy to business and community leaders.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Literacy Councils ▪ Community Colleges ▪ Public Schools 	<ul style="list-style-type: none"> ▪ Professional writing support for a case development. 	<ul style="list-style-type: none"> ▪ Year One, first half 	<ul style="list-style-type: none"> ▪ Identify writing support. 	<ul style="list-style-type: none"> ▪ Increased community financial support for community-based literacy providers.

Strategy 7: Convene a meeting of United Way, school district, community college, economic development, and literacy service providers in each county to explore their interest in creating, expanding, and improving literacy services as part of their life-long learning system.

Rationale: Community-based literacy services are an important part of the life-long learning system, especially for those at the lowest levels of literacy. The meeting would have a three part agenda:

- A short presentation explaining how community-based literacy services benefit the economy, life-long learning, and individuals, and also review existing models and services used in Centralina’s counties (for example, the use of student peer literacy mentors);
- A discussion on the interest in establishing and expanding services; and
- If there is interest, the designation of a lead organization to champion the new or expanded services with agreement on at least two of the next steps in the process.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board (regionally) ▪ Anson County Government (in Anson County) ▪ Stanly Community College (in Stanly County) ▪ Cabarrus Literacy Council (in Cabarrus County) ▪ Mitchell Community College (in Iredell County) ▪ Lincoln Literacy Council (in Lincoln County) ▪ United Way (in Rowan County) ▪ Union County Literacy Council (in Union County) 	<ul style="list-style-type: none"> ▪ United Ways ▪ Community Colleges ▪ JobLink Career Centers ▪ Economic Developers ▪ Literacy Providers ▪ Lincoln, Rowan-Cabarrus, Union Literacy Council Executive Directors ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Time and space for a meeting. 	<ul style="list-style-type: none"> ▪ Completed by the end of Year One. 	<ul style="list-style-type: none"> ▪ Identify an organization in Iredell County to engage other organizations and host the meeting (the Anson County government and Stanly County Community College have offered to be the preliminary host in their respective communities). ▪ Develop a presentation on the value of community-based literacy services and what exists in Centralina’s counties. ▪ Convene the meeting in each county. 	<ul style="list-style-type: none"> ▪ Every Centralina county adopting at least one new service or expanding an existing one.

Strategy 8: Hold an annual, invitation-only WorkKeys/CRC+ conference for human resources and training managers and line supervisors to learn more about how businesses can use the CRC+.

Rationale: A number of businesses are interested in the CRC (and now the CRC+) when they hear about it, but need more information on how it could be implemented before being able to decide on participation. Regional conferences of targeted, key managers can be a valuable, cost-effective way of providing this information. The events would be for businesses invited by the community colleges, economic developers, and Centralina Workforce Development Board.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Rowan-Cabarrus Community College (Carol Allen) 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ Economic Developers ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Location for and staff time to organize and promote the event. 	<ul style="list-style-type: none"> ▪ The first conference would be held by the end of Year One. 	<ul style="list-style-type: none"> ▪ Communicate the idea to community college CRC points of contact and economic developers so they understand the criteria for the invitees. ▪ Community college CRC points of contact and economic developers will identify appropriate businesses for invitation. ▪ Begin to plan the event. 	<ul style="list-style-type: none"> ▪ At least 15 businesses attend the conference and at least 1/3 in attendance commit to adopt the CRC+ after the event.

Strategy 9: Convene a committee of local experts (including trainers, community college leaders, and senior HR managers) to develop a catalog of soft skills programs including teamwork, leadership, work ethic, and interpersonal communications for use by a number of organizations throughout the region in a variety of settings.

Rationale: A recent survey by Centralina and other regional workforce development boards re-emphasized how critical soft skills are to produce a competitive workforce. At the same time, there are locally developed, proven curricula for developing soft skills, such as those developed by Ed Hosack and used by the Rowan-Cabarrus Community College. A regularly updated catalog of courses could help key players, such as economic developers and JobLink administrators, to connect businesses with programs. This catalogue could not only promote soft skills, but also tie into CRC certification and be used in incumbent worker training grants.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Community Colleges (particularly the human resources and business training departments) ▪ Senior HR Managers ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Time and space for a meeting. 	<ul style="list-style-type: none"> ▪ Could be completed in the first half of Year One. 	<ul style="list-style-type: none"> ▪ Identify who could inform the discussion. ▪ Convene the group to identify the programs and the structure for sharing the information and strategies to update the catalogue. 	<ul style="list-style-type: none"> ▪ An increase in the number of businesses implementing soft skills training.

Strategy 10: Develop a resource pool of pilot funding for job profiling.

Rationale: WorkKeys and the CRC+ can help to certify basic skills in the workforce. Employers can then use the certification for criteria in hiring. If a job is profiled using WorkKeys, businesses can then legally use WorkKeys testing results to pre-screen applicants, thereby streamlining their hiring process. However, WorkKeys profiling is approximately \$3,000 per job and businesses are hesitant to spend this money because they can not correlate the expense to local cases of success. A pool of funds for pilot profiling could help to establish the “local case studies” needed to build interest around job profiling and using the CRC+ as a screening tool. The preference would be given for positions that have high personnel turnover or have the largest numbers applicants (i.e., ones where a profile will have the greatest impact on a business’s recruitment costs).

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ To profile three jobs per county (each at \$3,000), a pool of \$63,000 would be needed. ▪ Staff time to identify sources of support and select businesses for awards. 	<ul style="list-style-type: none"> ▪ Planning could commence in Year Two. 	<ul style="list-style-type: none"> ▪ Convene resource development teams from the community colleges to identify potential sources of support. 	<ul style="list-style-type: none"> ▪ An established pool of funding. ▪ Increase the number of companies requesting profiles (outside of the funding pool).

Section Four

Increasing Trade and Two-Year Degree Holders

Vision and Goal

Vision: Youth and adults throughout Centralina will regard trade and two-year degree programs as potential paths to a rewarding career.

Rationale: There are well paying jobs available throughout Centralina that require a trade or two-year degree. However, youth, parents, and other adults often don't perceive the potential career opportunities and benefits of completing a trade or two-year degree program because of their preconceptions on the importance of four-year degrees. As a result, many people don't enter these programs, and employers have a difficult time recruiting local talent for their positions.

Goal: Doubling enrollment in trade and two-year degree programs to lead to a 50% increase in positions filled by local residents.

Strategies: Increasing Trade and Two-Year Degree Holders³

Strategy 11: Establish an Education/Business Forum to develop on-going strategies and communication for education (K-12 and Community College) and business partnership.

Specifically the group would:

- Explore and develop at least two strategies where businesses and educators could work together for at least three years (such as apprenticeships, Business and Industry Collaborative Education Partnerships [BICEPS], and e-mentoring); or links between CRC+ certification and job opportunities);
- Work to crosswalk curricula to the needs of businesses; and
- Identify policy barriers (such as limitations of curricula and state mandates) that could feed into a joint policy agenda.

Rationale: Business and education do not have a formal mechanism to connect and communicate on where they can develop partnerships. Additionally, they have few opportunities to understand where policy change could forward their mutual goals.

This forum will have three agenda points:

- Crosswalk curricula to business needs;
- Identify at least two strategies in each county where business and education can collaborate to better prepare students (such as apprenticeships, BICEPS, or e-mentoring); and
- Identify the state and local policy limitations of educational institutions as a starting point for a common policy agenda.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Lead Curriculum Administrator for each K-12 system and Community College ▪ A selection of Small and Large Businesses ▪ Career and Technical Education Directors and Educators. ▪ Chambers of Commerce ▪ Employment Security Commission ▪ JobLink Career Centers 	<ul style="list-style-type: none"> ▪ Time and space for a meeting ▪ Facilitation services 	<ul style="list-style-type: none"> ▪ Convene first meeting by the end of the first half of Year One. 	<ul style="list-style-type: none"> ▪ Gain approval of the business CEOs, superintendents and community college presidents to empower their senior executives. ▪ Convene the first meeting. 	<ul style="list-style-type: none"> ▪ The number of businesses and educational systems that participate. ▪ Production of a written crosswalk of business needs and curricula. ▪ The implementation of at least two shared strategies per county.

³ Please note, the sources and frequencies of measures for each strategy appear in Appendix I

Strategy 12: Establish a JobReady Coordinator and Partnership in every school district.

Rationale: Connecting schools and business can lead to important synergies that will change perceptions about the economy, including, educator career awareness programs and work-based learning opportunities for youth. A full-time, dedicated position provides critical infrastructure for developing and maintaining these relationships. The Union County Schools could support the effort by describing their existing partnership, its benefits, costs, and funding sources.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Union County JobReady Partnership 	<ul style="list-style-type: none"> ▪ Superintendents in each School District ▪ Centralina Workforce Development Board ▪ Chambers of Commerce ▪ Employment Security Commission ▪ JobLink Career Centers 	<ul style="list-style-type: none"> ▪ 1 full-time coordinator for each school district and materials (approximately \$80,000 to \$100,000 per year). 	<ul style="list-style-type: none"> ▪ Convene an informational forum for superintendents and selected administrators by the end of Year One. 	<ul style="list-style-type: none"> ▪ Develop a presentation on the benefits, costs, and funding sources for the JobReady Coordinator position. ▪ Gauge the interest of superintendents in replicating the project using existing funding or by jointly identifying alternative funding streams. 	<ul style="list-style-type: none"> ▪ Implementation or plans to implement an on-going JobReady Coordinator in at least three new school districts.

Strategy 13: Implement school faculty and business outreach programs (such as the Business and Industry Collaborative Education Partnerships [BICEPS]) that link classrooms with accessible workplace learning opportunities in every county and develop a year-long engagement for teachers.

Rationale: Programs like BICEPS effectively help K-12 educators to connect with local businesses, increase their awareness of the workplace, and tie workplace skills to their lesson plans. These programs could be implemented in each county. Existing programs would be strengthened by a longer engagement of teachers to help reinforce and share what they have learned with peers.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Job Ready Broker in Union County ▪ Union County Public Schools ▪ County Public School Systems ▪ Local Area Businesses 	<ul style="list-style-type: none"> ▪ Program costs for staff and materials (for limited projects this would be around \$10,000 per year) 	<ul style="list-style-type: none"> ▪ Gather information and resources for future implementation by the end of the first half of Year One. ▪ Establish existing capacity by the first half of Year One. ▪ Hold meetings with school system administrators to gauge interest and viability by the end of the first half of Year One. ▪ Establish a program in each county by the end of Year Two. ▪ Examine longer teacher engagements for existing programs by the end of Year Two 	<ul style="list-style-type: none"> ▪ Gather information on existing capacity and available resources. ▪ Hold meetings with school system administrators to gauge interest and feasibility as well as potential obstacles. ▪ Contact the JobReady broker in Union County about mentoring and sharing of program implementation. 	<ul style="list-style-type: none"> ▪ All counties will have self sustaining faculty business outreach programs by the culmination of the project.

Strategy 14: Provide recipients of a CRC+ with a packet of options for possible career tracks, trade programs, and additional two-year degrees.

Rationale: As residents obtain the CRC+ they will have a sense of achievement and a greater focus on life-long learning. Information on trade and two-year degree programs (in-person as well as virtual) can help to provide a suggested “next step” on the path of life-long learning. Over time, specialized materials could be developed, specifically marketed to new CRC+ holders.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ The community college CRC Points of Contact 	<ul style="list-style-type: none"> ▪ Community College CRC Points of Contact ▪ Community College Marketing and Communications Staff ▪ JobLink Staff 	<ul style="list-style-type: none"> ▪ Initially, meeting time and space. ▪ Long term, specialized materials marketing specifically to new CRC+ holders. 	<ul style="list-style-type: none"> ▪ Hold initial meeting on each campus by the end of Year One. 	<ul style="list-style-type: none"> ▪ Convene CRC points of contact, community college marketing and communications staff, and JobLink staff to make initial connections about how information could be shared. 	<ul style="list-style-type: none"> ▪ At least 10% of new CRC+ holders who receive the packet will choose to attend a trade or two-year program.

Strategy 15: Examine the feasibility of requiring two-year degree graduates to earn a CRC+.

Rationale: Currently, trade and two-year degree graduates, who could use the CRC+ as a distinguishing certification, are not required to obtain one. This requirement will reinforce the importance of attaining a CRC+, increase the number of certified employees in the community, and build the career readiness skills of students.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ The Community College CRC Points of Contact 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Time and space for a meeting. ▪ Funding for exam costs (about \$24 for test grading per student; costs could be \$40 per student including materials and staff time). 	<ul style="list-style-type: none"> ▪ Hold first meeting on each campus by the end of Year One. 	<ul style="list-style-type: none"> ▪ Hold an initial meeting of key senior administrators on each campus to gauge the interest in establishing the CRC+ requirement and what internal policy changes or coordination would be required. 	<ul style="list-style-type: none"> ▪ At least two community colleges will adopt a CRC+ requirement within five years.

Strategy 16: Develop or expand the articulation agreements between high school career and technical education programs and community college programs.

Rationale: These articulation agreements will give students a head start to go onto trade and two-year degree programs in their local community colleges.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Community Colleges 	<ul style="list-style-type: none"> ▪ High School Administrators ▪ Community College Administrators 	<ul style="list-style-type: none"> ▪ Time and space for a meeting ▪ Convener and facilitator for a meeting 	<ul style="list-style-type: none"> ▪ Implemented by the end of Year One. 	<ul style="list-style-type: none"> ▪ Community college and K-12 administrators to meet at the local level to decide to how and when to implement the articulation agreements. 	<ul style="list-style-type: none"> ▪ Articulation agreements increase by 10% per year.

Section Five

Sustaining Prosperity

Vision and Goal

Vision: Centralina residents will have increased financial independence and stability.

Rationale: Family financial stability is important for life-long learning. It affects the family's ability to afford educational opportunities, or to take advantage of new jobs or opportunities, since they are usually constrained to "making the next payment."

Goal: Double the number of citizens receiving financial education within five years. ⁴

⁴ Programs would have to conform to the principles set by the Financial Literacy Partnership.

Strategies: Sustaining Prosperity⁵

Strategy 17: Establish the Financial Literacy Partnership, a regional network of Centralina organizations that would; provide financial literacy services, identify core principals of high quality, effective, financial literacy; exchange best practices, and expand the region's financial literacy services.

The group would:

- Develop a set of core principles defining “high quality financial education” that could be used for selecting effective financial literacy programs;
- Create a catalog of all available programs and courses meeting the defined core principles that could be taught in a variety of settings (including online) around the basic concepts of budgeting, savings and banking, and purchasing a home;
- Identify service gaps and local programs that could be replicated to fill the respective gaps in other counties;
- Develop inter-agency mentoring plans to aid replication in different counties (participating agencies would agree to offer four hours of mentoring a month to other participating agencies to help them successfully replicate the programs); and
- Identify solutions from outside the community or develop our own curricula for financial literacy gaps where no programs exist.

Rationale: Many financial literacy service providers do not know what other services exist and therefore what local, successful programs could be replicated within Centralina. The Financial Literacy Partnership would provide an infrastructure for understanding and exchanging strong programs regionally, thereby expanding services and impact. By identifying programs for replication, financial literacy could be more easily implemented in other settings such as human services organizations and faith communities.

⁵ Please note, the sources and frequencies of measures for each strategy appear in Appendix I

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Federal Reserve Bank of Richmond, Charlotte, NC Branch ▪ United Ways ▪ NC Jumpstart ▪ UNC Economics Department ▪ North Carolina Department of Public Instruction ▪ North Carolina Council on Economic Education ▪ Community-based organizations providing financial literacy services ▪ Faith-based Organizations with existing knowledge programs and curricula that are part of the mission ▪ Cooperative Extension Service in each county ▪ SHARE Network ▪ Centralina Youth Council ▪ Banks and other financial institutions 	<ul style="list-style-type: none"> ▪ Time and space for a meeting. ▪ Facilitation services. 	<ul style="list-style-type: none"> ▪ Hold first meeting by the end of the first quarter of Year One. ▪ Develop the core principles by the end of the first half of Year One. ▪ Implement the remainder of the agenda by the end of Year Two. 	<ul style="list-style-type: none"> ▪ Convene first meeting to identify core principles. 	<ul style="list-style-type: none"> ▪ Establishment of the network with representation from each county. ▪ Development of core principles. ▪ Identification of curricula.

Strategy 18: Mobilize the faith community to offer financial literacy programs by:

- *Reviewing the “case of financial literacy;”*
- *Mobilizing a pool of resources for financial literacy; and*
- *Implementing financial literacy programs in congregations.*

Rationale: Faith communities are safe, trusted, organizations that could provide critical new venues for instilling financial literacy in the region. Any strategy aimed at promoting financial literacy in the faith-based community must channel its efforts of outreach through the pastors of the congregations. To gain their support it will be important to present them with diverse, yet simple ways to implement or link to successful financial literacy programs.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Ed Hosack, Cooperative Christian Ministries 	<ul style="list-style-type: none"> ▪ NC Council of Churches ▪ Local Ministerial Associations ▪ Centralina Workforce Development Board ▪ SHARE Network 	<ul style="list-style-type: none"> ▪ Time and space for meetings both regionally and within each congregation. ▪ A pool of funds to support implementation in small or underfunded congregations. 	<ul style="list-style-type: none"> ▪ Implement this strategy after the formation of core principals by the Financial Literacy Partnership (Strategy 17) but before the conclusion of Year One. 	<ul style="list-style-type: none"> ▪ Establish Core Principals. ▪ Alert Judicatories to our work and gauge their interest and resources they could bring to the table. Focus on reaching racially and economically diverse congregations by making sure that the core principals also address their specific needs and values. 	<ul style="list-style-type: none"> ▪ At least three congregations in each county provide financial literacy programs.

Strategy 19: Gather human services organizations to help develop their wealth building services.

Specifically, the group would

- Gain perspective on the value of financial literacy and other strategies for sustaining prosperity, including a semantic shift to promote “building wealth” instead of “addressing poverty”;
- Receive information on Individual Development Accounts (IDAs) and the Earned Income Tax Credit (EITC) and discuss interest in integrating them into the programs;
- Review ways that human services organizations can identify clients needing financial literacy support and how to refer them to providers or online classes; and
- Identify ways to embed financial literacy into existing human services programs.

Rationale: Human services providers throughout the region support numerous residents who could benefit from increased financial literacy and other wealth building programs (such as IDAs). However, these organizations often don’t know how to identify those in need or the appropriate programs that could provide them with services. Additionally, IDAs and EITC programs are almost non-existent in this region and not well understood by human services providers. As a result they are rarely pursued. Additional information on these programs could lead to their propagation.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ United Way of Rowan County 	<ul style="list-style-type: none"> ▪ United Ways ▪ Social Services Association ▪ Centralina Workforce Development Board ▪ Financial Literacy Partnership ▪ State business schools 	<ul style="list-style-type: none"> ▪ Time and space for meetings. ▪ Contacts or resources to collect information on IDA and EITC models, their benefit, and costs. 	<ul style="list-style-type: none"> ▪ Convene first meeting by the end of Year One. 	<ul style="list-style-type: none"> ▪ The United Way of Rowan County would convene other local United Way leaders to gauge interest in a regional forum. ▪ Collect information on IDA and EITC models. ▪ Hold a regional forum and identify the next steps for collaboration. 	<ul style="list-style-type: none"> ▪ At least 25% of participating Human Service agencies begin to assess and refer for financial literacy services or adopt another wealth building service or program.

Strategy 20: Tie financial literacy to CRC+ training.

Rationale: As the CRC+ expands it could be a platform for exposing residents to financial literacy, thereby helping them to accumulate and preserve their wealth for use in life-long learning or unexpected costs. For businesses, this economic security would result in greater employee stability away from the workplace, resulting in less lost time. A group of key partners would work to identify ways to link financial literacy to workforce training at community colleges using existing resources (including community college programs and FDIC courses) and new ones, as needed.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Rowan-Cabarrus Community College (Jeanie Moore & Carol Allen) 	<ul style="list-style-type: none"> ▪ Community College CRC Points of Contact ▪ Financial Literacy Partnership ▪ Chambers of Commerce ▪ JobLink 	<ul style="list-style-type: none"> ▪ Space and staff time for meetings and training. 	<ul style="list-style-type: none"> ▪ Convene CRC leads to gauge interest and implementation requirements by the first quarter of Year One. ▪ Gather information on current resources available at the community college level by the first quarter of Year One. ▪ Identify an appropriate model with the Financial Literacy Partnership and work with CRC points of contact to develop an implementation plan in the second, third and fourth quarters of Year One. 	<ul style="list-style-type: none"> ▪ Convene the CRC points of contact to gauge interest and requirements. 	<ul style="list-style-type: none"> ▪ Community colleges adopt some principals of financial literacy in their workforce training.

Strategy 21: Collaboratively strengthen financial literacy in K-12 education.

Specifically, representatives from the Financial Literacy Partnership would meet with financial educators from school districts to:

- Identify current school-based financial literacy programs;
- Inform school staff about existing community programs; and
- Identify 2 - 3 strategies for community schools to partner on financial literacy education.

Rationale: The earlier we can provide financial literacy to students, the greater impact it will have on them. Currently, schools and community-based providers are providing youth financial education, but don't appear to do so in a coordinated or complementary way. This strategy would bring the two sectors together to plan joint projects.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Federal Reserve Bank 	<ul style="list-style-type: none"> ▪ The School Districts ▪ Centralina Workforce Development Board ▪ Federal Reserve Bank of Richmond, Charlotte, NC Branch ▪ Financial Literacy Partnership 	<ul style="list-style-type: none"> ▪ Staff time and meeting space to prepare for, and to hold the sessions for teachers and staff. ▪ Materials and staff support, as needed, for resulting programs. 	<ul style="list-style-type: none"> ▪ Convening the participants would occur late in Year One, after the Financial Literacy Partnership has had the opportunity to identify available resources. 	<ul style="list-style-type: none"> ▪ Convene superintendants to determine interest in participation. 	<ul style="list-style-type: none"> ▪ At least three school districts opt to participate. ▪ Successful pre- and post-tests of participating students to gauge their financial literacy level before and after intervention.

Strategy 22: Include financial literacy in prison re-entry transition programs.

Rationale: Hundreds of men and women transition back into Centralina each year from prison re-entry programs, yet many of them still lack financial literacy training. Providing them with budgeting and financial management information while they are incarcerated will equip them to be more productive members in their communities upon their return. Each successful participant will receive a certificate of completion.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Each county's Prison Re-Entry Program (Rickey Brown of Cabarrus Reentry Initiative, will lead the initial convening) 	<ul style="list-style-type: none"> ▪ NC Department of Correction (DOC) ▪ Project Safe Neighborhoods ▪ Community Service programs ▪ Community Colleges ▪ Job Link Centers 	<ul style="list-style-type: none"> ▪ Contact person in the prisons ▪ Class materials ▪ Instructors 	<ul style="list-style-type: none"> ▪ An approach to the DOC could be made early in Year Two, after the Financial Literacy Partnership has had the opportunity to identify available resources. 	<ul style="list-style-type: none"> ▪ Secure DOC approval and buy in. ▪ Identify instructors and programs. ▪ Identify a committed "inside" coordinator. 	<ul style="list-style-type: none"> ▪ Number of individuals completing training increases.

Strategy 23: Convene Community College leaders to discuss the incorporation of financial literacy in college programs.

Rationale: Graduates from higher education often have high levels of educational and correspondingly high consumer debt. This debt inhibits their ability to further their life-long learning and accumulate wealth. Accordingly, financial literacy could be provided to incoming students to help them better manage their finances. Additionally, faculty could also be included in the programs.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board ▪ Federal Reserve Bank 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ Financial Literacy Partnership 	<ul style="list-style-type: none"> ▪ Staff time and space for a meeting. 	<ul style="list-style-type: none"> ▪ Begin discussions by the first quarter of Year Two (to allow time for the Financial Literacy Partnership to be convened and identify curricula). 	<ul style="list-style-type: none"> ▪ Convene community college leaders to determine if there are ways to incorporate financial literacy into orientation packets or training. 	<ul style="list-style-type: none"> ▪ Adoption by each community college. ▪ Creation of courses and workshops about financial literacy. ▪ Inclusion of financial literacy in Financial Aid applications. ▪ Production of campus newspapers or websites.

Section Six

Communicating the Campaign

Vision and Goal

Vision: Increased awareness among business leaders about the campaign and the development of vehicles for their participation.

Rationale: Business leaders are key actors in the system. By focusing communications efforts on them, we can gain partners in:

- Implementing campaign strategies both directly (for example, agreeing to certify their existing workforce) or indirectly (for example providing on site access to employees);
- Lobbying for key policies;
- Recruiting other business leaders; and
- Sustaining the campaign.

Goal: Communicate the changes to the economy, the new path to prosperity, and how regional change can be effected by taking action on the strategies in this campaign.

Strategies: Communicating the Campaign⁶

Strategy 24: Contact business leaders through associations (such as chambers of commerce) or one-on-one meetings. Business leaders would be asked to participate directly in campaign strategies or to provide access to employees.

The strategy would be implemented in three phases:

Phase I: We will identify participants and gain consensus on talking points for use with business leaders (the draft based on the Communicating the New Economy sub-group's input can be found in Appendix II). Any other tools or talking points that are required will be developed (for example, the CRC talking points mentioned in Strategy 2). Additionally, a presentation will be created to communicate with employees (assuming a business provides access). The presentation would be short (5-10 slides) and cover the following outline:

- The changing economy and how life-long learning is needed to help employees stay competitive and, in turn, to retain and expand their employment capacity;
- The key to life-long learning is being adaptable and teachable;
- The benefit that obtaining a CRC+, trade or two-year degree, or other higher education will have on their career options, advancement, and income; and
- How to take the next step in life-long learning.

Phase II: Centralina will convene interested partners with initial outreach training to review the talking points and other materials and how to use them effectively. The group will identify connections and approaches to the leaders of key businesses that have been identified as potential early adopters of one or more of the campaign strategies (Appendix III has a list of business identified by the Communicating the New Economy sub-group for early conversations and recruitment). Additionally, the group will discuss what requests could be made of specific businesses. (As a starting point, the sub-group rated the campaign strategies by the amount of effort required from the businesses compared to their possible return on effort; the results appear in Appendix IV). There will also be a discussion of how best to convey the campaign kickoff, messages, and successes through stories released to key media outlets used by businesses leaders (a preliminary list of outlets can be found in Appendix V).

Phase III: Participants will convene three months after the initial outreach meeting to review the progress being made, identify ways to improve the tools, and designate new businesses for recruitment in the campaign. Also, we will develop a tactic for "branding" those companies that adopt one or more "high intensity" strategies as a core partner in the regional effort to improve life-long learning.

⁶ Please note, the sources and frequencies of measures for each strategy appear in Appendix I

Rationale: Business leaders and their firms will be key partners in the campaign. The businesses themselves have a number of potential direct and indirect roles in a majority of the strategies. They also can provide a venue for talking with their employees about how the economy has changed, and the new paths to prosperity for themselves and their children. The participants in the planning of the campaign have multiple ties to businesses. By coordinating on the same message, these existing relationships can be used to bring the Campaign’s call to action to businesses throughout Centralina.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ School Districts ▪ Economic Developers ▪ Community Colleges ▪ United Ways ▪ Selected business leaders in each county ▪ Community-based provider partners ▪ JobLink Career Centers ▪ Faith-based communities ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Staff time to develop products and training. ▪ Staff time and a facility for meeting. ▪ Materials as needed. 	<ul style="list-style-type: none"> ▪ Initial communications products would be created in the first half of Year One. ▪ The initial training and second meeting would occur by the end of Year One. 	<ul style="list-style-type: none"> ▪ Refine business leader talking points and develop the employee presentation. ▪ Convene training for outreach partners. 	<ul style="list-style-type: none"> ▪ Contacting 100% of the priority partner businesses and recruiting at least 50% of the businesses to adopt one of the strategies in the campaign or providing access for communicating with employees.

Strategy 25: Develop a website to communicate critical life-long learning information to the community and campaign partners.

The site would have three components:

- A section explaining the campaign and how to participate;
- A projection of a database of literacy providers for use by the community and referring organizations (Appendix VI includes more specifics on this component); and
- A space for campaign partners to access support materials and information (such as talking points and presentations).

Rationale: The Campaign will encompass seven counties and numerous partner organizations. A common website could enable easy communication within the campaign and region.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Community Colleges ▪ United Ways ▪ Community-based provider partners ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Web programming support. ▪ Potentially, server space. 	<ul style="list-style-type: none"> ▪ Commence development in the first quarter of Year One. 	<ul style="list-style-type: none"> ▪ Identify local resources for web programming support (potentially one of the community colleges). ▪ Identify a server location for the site. ▪ Begin development of site. 	<ul style="list-style-type: none"> ▪ Number of site "hits." ▪ Number of referrals from the site to life-long learning organizations.

Strategy 26: Convene a summit of campaign leaders to explore a potential joint public policy agenda.

Specifically, the group would

- Review public policy issues identified in other Campaign strategies;
- Identify which strategies would have the greatest positive impact; and,
- Identify strategies that jointly express and pursue the agenda, including the publication of a joint statement, convening regional legislators, and connecting with existing public policy efforts.

Rationale: This Campaign seeks to make substantial change throughout the Centralina region. At the same time, we recognize that some of our work can only be expanded, enhanced, or sustained through public policy change.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ School Districts ▪ Economic Developers ▪ Community Colleges ▪ United Ways ▪ Selected business leaders in each county ▪ Community-based provider partners ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Staff time and space for an initial meeting. ▪ Materials and staff support for resulting strategies. 	<ul style="list-style-type: none"> ▪ Convene first meeting by the end of Year Two. 	<ul style="list-style-type: none"> ▪ Convene the first meeting. 	<ul style="list-style-type: none"> ▪ Determination of the need for a joint policy effort and elected officials willing to champion the effort.

Strategy 27: Develop a marketing campaign to change the perceptions of parents, students, and guidance counselors on the opportunity afforded by the CRC+, trade and two-year degree programs, and life-long learning programs.

The strategy would include:

- Convening public relations contacts from school districts, community colleges, and workforce and economic development agencies to develop a catalog of existing, local market studies related to community perceptions of educational programs and the resulting career options. Also, the group would develop questions for the focus groups;
- Holding focus groups of parents, youth, and guidance counselors to understand their current perceptions of the CRC+ and trade and two-year degrees and how they currently receive their information on the degree programs;
- Identifying primary and secondary target audiences and establishing outreach goals for each audience;
- Developing messages and tools that would be implemented throughout the region by the public relations contact and their organizations.

Rationale: We need to change mass perceptions about life-long learning, but before we can develop communications tools, we need to better understand current perceptions and how people receive their information.

Lead Organization	Key Partners	Resource Needs	Timeframe	Next Steps	Measures of Success
<ul style="list-style-type: none"> ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ School Districts ▪ Economic Developers ▪ Community Colleges ▪ Selected business leaders in each county ▪ Centralina Workforce Development Board 	<ul style="list-style-type: none"> ▪ Funding for focus groups and media development and placement. ▪ Staff time to steward the process. 	<ul style="list-style-type: none"> ▪ Begin identification of resources by the end of Year Two. 	<ul style="list-style-type: none"> ▪ Identify resources to support the strategy. 	<ul style="list-style-type: none"> ▪ Increases in CRC+ and trade and two-year degree participation. ▪ Changes in perception about the opportunities provided by trade and two-year degree programs.

Appendix I: Sources and Frequency of Strategy Measures

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Collection</u>
<i>Strategy 1: Add a "Soft Skills" certification test to the CRC, and dub it the "CRC+."</i>	All community colleges implement the CRC+ within 6 months.	CRC Points of Contact	Once after 6 months
	At least 25% of current CRC holders return to take the soft skills test to receive a CRC+.	CRC Points of Contact	Annually
<i>Strategy 2: Develop a toolbox of communications resources to help Economic Development, Community College, JobLink, Chamber of Commerce, and other leaders talk about the CRC+.</i>	Use of the presentation in at least four group meetings in each county (e.g., Chamber of Commerce, Rotary Club or other meetings).	Self-Reported by participants	Once after 6 months
<i>Strategy 3: Enhance and promote the value of the CRC+ with High Schools throughout the region.</i>	Within 2 years, at least 20% of all high school seniors will have taken the CRC+	Reported from testing attendance sheets	Annually
	Within 5 years, at least 25% of all students taking the CRC+ will receive a bronze certificate or higher		Annually
<i>Strategy 4: Strengthen ties between CRC+ and Basic Skills programs at the community colleges.</i>	At least 25% of graduating GED and adult high school graduates will hold a CRC+ in 5 years.	Community College Basic Skills Programs	Annually
<i>Strategy 5: Establish a learning collaboration of community college CRC administrators to support implementation of the CRC+ through quarterly meetings and a listserv.</i>	Participation of all the community college CRC administrators.	Attendance Sheet from 1st Meeting	Once after meeting

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Conformation</u>
<i>Strategy 6: Help sustain community-based literacy services by creating a case for support based on their general contributions to workforce and economic development and specific contributions to the Life-Long Learning Campaign.</i>	Increased community financial support for community-based literacy providers.	Private and Government Support Levels from Literacy Council Annual Reports	Annually
<i>Strategy 7: Convene a meeting of United Way, school district, community college, economic development, and literacy service providers in each county to explore their interest in creating, expanding, and improving literacy services as part of their life-long learning system.</i>	Every Centralina county adopting at least one new service or expanding an existing one.	Reported by Each Work Group	Once after meeting
<i>Strategy 8: Hold an annual, invitation-only WorkKeys/CRC+ conference for human resources and training managers and line supervisors to learn more about how businesses can use the CRC+.</i>	At least 15 businesses attend and at least 1/3 in attendance commit to adopt the CRC+ after the event.	Sign in sheets from meetings, with follow up phone calls to find out if the CRC was adopted	Once with calls 3 months after each event
<i>Strategy 9: Convene a committee of local experts (including trainers, community college leaders, and senior HR managers) to develop a catalog of soft skills programs including teamwork, leadership, work ethic, and interpersonal communications for use by a number of organizations throughout the region in a variety of settings.</i>	An increase in the number of businesses implementing soft skills training.	Survey of regional HR managers	Annually
<i>Strategy 10: Develop a resource pool of pilot funding for job profiling.</i>	An established pool of funding.	Pool Established	One Time
	Increase the number of companies requesting profiles (outside of the funding pool).	CRC Points of Contact to confirm data entries	Annually

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Conformation</u>
<p><i>Strategy 11: Establish an Education/Business Forum to develop on-going strategies and communication for education (K-12 and Community College) and business partnership.</i></p>	<p>The number of businesses and educational systems that participate</p>	<p>Sign in Sheets from meetings</p>	<p>Check after meetings (within 6 months)</p>
	<p>Production of a written crosswalk of business needs and curricula</p>	<p>Crosswalk developed</p>	<p>One Time</p>
	<p>The implementation of at least two shared strategies per county</p>	<p>Call to each School District and Community College Representative</p>	<p>Once at the end of Year One</p>
<p><i>Strategy 12: Establish a JobReady Coordinator and Partnership in every school district.</i></p>	<p>Implementation or plans to implement an on-going JobReady Coordinator in at least three new school districts.</p>	<p>Calls to school district points of contact</p>	<p>Once at the end of Year One</p>
<p><i>Strategy 13: Implement school faculty and business outreach programs (such as the Business and Industry Collaborative Education Partnerships [BICEPS]) that link classrooms with accessible workplace learning opportunities in every county and develop a year-long engagement for teachers.</i></p>	<p>All counties will have self sustaining faculty business outreach programs by the culmination of the project.</p>	<p>Calls to school district points of contact</p>	<p>Once at the end of Year Four</p>
<p><i>Strategy 14: Provide recipients of a CRC+ with a packet of options for possible career tracks, trade programs, and additional two-year degrees.</i></p>	<p>At least 10% of new CRC+ holders who receive the packet will choose to attend a trade or two-year program.</p>	<p>New mechanism through established student services data collection tools</p>	<p>Annually</p>

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Conformation</u>
<i>Strategy 15: Examine the feasibility of requiring two-year degree graduates to earn a CRC+.</i>	At least two community colleges will adopt a CRC+ requirement within five years.	Conformation from Community College CRC points of contact	Once at the end of Year Four
<i>Strategy 16: Develop or expand the articulation agreements between high school career and technical education programs and community college programs.</i>	Articulation agreements increase by 10% per year.	Survey of Career and Technical Education Directors	Annually
<i>Strategy 17: Establish the Financial Literacy Partnership, a regional network of Centralina organizations that would; provide financial literacy services, identify core principals of high quality, effective, financial literacy; exchange best practices, and expand the region's financial literacy services.</i>	Establishment of the network with representation from each county.	Sign in Sheets from meeting	Once after meeting
	Development of core principles.	Principles Produced	One Time
	Identification of curricula.	Curricula Produced	One Time
<i>Strategy 18: Mobilize the faith community to offer financial literacy programs</i>	At least three congregations in each county provide financial literacy programs.	Calls to participating congregations	Once 6 months after meeting
<i>Strategy 19: Gather human services organizations to help develop their wealth building services.</i>	At least 25% of participating Human Service agencies begin to assess and refer for financial literacy services or adopt another wealth building service or program.	Calls to participating Human Service Agencies	Once with calls after 6 months

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Conformation</u>
<i>Strategy 20: Tie financial literacy to CRC+ training.</i>	The number of community colleges that adopt some principals of financial literacy in workforce training.	CRC Points of Contact and community college Points of Contact	Once with calls after 6 months
<i>Strategy 21: Collaboratively strengthen financial literacy in K-12 education.</i>	At least three school districts opt to participate.	Meeting notes from kickoff	Once after meeting
	Successful pre- and post-tests of participating students to gauge their financial literacy level before and after intervention.	New survey to be developed	Pre-and post intervention
<i>Strategy 22: Include financial literacy in prison re-entry transition programs.</i>	Number of individuals completing training.	Reported at re-entry programs	Annually
<i>Strategy 23: Community College leaders to discuss the incorporation of financial literacy in college programs.</i>	Adoption by each community college	Calls to community college Points of Contact	Once with calls after 6 months
	Creation of courses and workshops about financial literacy.	Calls to community college Points of Contact	Once with calls after 6 months
	Inclusion of financial literacy in Financial Aid applications.	New Applications	One Time
	Production of campus newspapers or websites.	Produced Newspapers and Websites	One Time

<u>Strategy</u>	<u>Goals and Measures of Success</u>	<u>Source</u>	<u>Frequency of Conformation</u>
<i>Strategy 24: Contact business leaders through associations (such as chambers of commerce) or one-on-one meetings. Business leaders would be asked to participate directly in campaign strategies or to provide access to employees.</i>	Contacting 100% of the priority partner businesses and recruiting at least 50% of the businesses to adopt one of the strategies in the campaign or providing access for communicating with employees.	Self-reported by participants	Quarterly
<i>Strategy 25: Develop a website to communicate critical life-long learning information to the community and campaign partners.</i>	Number of site "hits"	Webmaster	Once after 6 months
	Number of referrals from the site to life-long learning organizations	Survey of key organizations	Annually
<i>Strategy 26: Convene a summit of campaign leaders to explore a potential joint public policy agenda.</i>	Determination of the need for a joint policy effort and elected officials willing to champion the effort.	Reported in the meeting minutes	One Time
<i>Strategy 27: Develop a marketing campaign to change the perceptions of parents, students, and guidance counselors on the opportunity afforded by the CRC+, trade and two-year degree programs, and life-long learning programs.</i>	Increases in CRC+ and trade and two-year degree participation.	CRC Points of Contact	Annually
	Changes in perception about the opportunities provided by trade and two-year degree programs.	Include on existing school parent surveys	Annually

Appendix II:

Draft Talking Points for Conversations with Business Leaders

- Our economy has changed, we are now:
 - Competing globally;
 - Relying on high technology more than ever;
 - Operating leaner;
 - Relying more on brain rather than brawn; and
 - Having to constantly adapt to changes in the global economy.

- The result - we need workers who can adapt to new techniques, technologies, and processes.

- Our workforce is what gives us our competitive edge and affects our bottom line.

- Participating in this campaign will help you to create an adaptable workforce.

- At the same time, you are helping to develop our region economically by showing other business leaders we are committed to creating a 21st century workforce.

- You can help by supporting one or more of our strategies (suggest strategies) and/or by providing us with an opportunity to talk about the campaign with your employees.

Appendix III:

Potential Early Business Partners

These potential partners were identified by the working group addressing “Communicating the New Economy.” The businesses were rated on two values:

- The impact on the workforce, if they participated (i.e. the numbers of workers who would be effected); and
- The impact the Campaign’s strategies could have on the business’s profitability.

Based on these ratings, the businesses were divided into two priority cohorts.

First Priority

- Allvac, Inc.
- Brooks Food Group, Inc.
- Charlotte Pipe and Foundry
- Carolinas Medical Center – Northeast
- Davis Regional Medical Center
- Greiner Bio-One
- Hendrick Motorsports
- Michelin
- Perdue Farms, Inc.
- Shoe Show, Inc.
- Snyder Packaging, Inc.

- SYSCO Food Services
- Turbomecca (will open in late 2008)
- Wayne Brothers, Inc.

Second Priority

- ASMO North Carolina, Inc.
- Blum, Inc.
- Cataler North America Corp.
- CESI
- Chip Ganassi Racing
- CMH Flooring Products, Inc.
- CTC/Wind Stream
- Coffing Hoists, Inc.
- National Starch and Chemical
- Nucor Corporation
- OTR Rental Polymer Group, Inc.
- Propst Brothers Distributors Inc.
- RSI Home Products
- Storm Technologies, Inc.
- The Timken Company
- Time Warner Cable
- Vanguard Supreme

Appendix IV: Initial Rating of Strategies Requiring Business Involvement by Intensity of Effort and Return on Effort

High Intensity and High Return

(i.e., will require significant effort and commitment on the part of participating businesses)

- Strategy 1: Add a “Soft Skills” certification to the CRC, and dub it the “CRC+.”
- Strategy 11: Establish an Education/Business Forum to develop on-going strategies and communication for education (K-12 and Community College) and business partnership.
- Strategy 26: Convene a summit of campaign leaders to explore a potential joint public policy agenda.

Medium Intensity and Medium Return

(i.e., will require moderate effort on the part of participating businesses)

- Strategy 3: Strengthen ties between the CRC+ and High Schools throughout the region.
- Strategy 8: Hold an annual, invitation-only WorkKeys/CRC+ conference for human resources and training managers and line supervisors to learn more about how businesses can use the CRC+.
- Strategy 9: Convene a committee of local experts (including trainers, community college leaders, and senior HR managers) to develop a catalog of soft skills programs including teamwork, leadership, work ethic, and interpersonal communications.

- Strategy 13: Implement school faculty and business outreach programs (Business and Industry Collaborative Education Partnerships [BICEPS]) that link classrooms with accessible workplace learning opportunities in every county and develop a year-long engagement of teachers.

Low Intensity and Low Return

(i.e., will require minor effort and commitment on the part of participating businesses)

- Strategy 7: Convene a meeting of United Way, school district, community college, economic development and literacy service providers in Anson, Stanly, and Iredell Counties to explore their interest in expanding literacy services as part of their life-long learning system.
- Strategy 24: Contact business leaders through associations (such as Chambers of Commerce) or one-on-one meetings. Business leaders would be asked to participate directly in campaign strategies or to provide access to employees.

Appendix V: Key Media Outlets for Communicating with Business Leaders

- Charlotte Business Journal
- Greater Charlotte Business Magazine
- Each Community's Local Newspapers
- Employers Association
- WFAE (radio station)
- Independent Tribune
- Channel 22 - Local Cable Access in Cabarrus

Appendix VI:

Requirements for a Life-Long Learning Provider Web Database

To support the campaign's objectives and partners, a separate web site will be created. The site's portal will link to three separate sections for the community, service providers, and campaign partners.

Community Page

The community page will be the access point for the general public. There will be a summary of the overall Life-Long Learning Campaign and its objectives. Links will lead to:

- A page for services – will open a page providing the contact information of the key referral organizations in each county:
 - The JobLink Career Center
 - The Community College
 - One Community-Based Human Services Provider

Users will be encouraged to contact these organizations first as an initial step in connecting with services. A link will also allow them to go to the broader database and search by keyword, category of services, organization name, or county to identify additional service providers. The community page will return the organization name, address, email, website, and main number as well as a description of their services.

- A list of campaign partners – including all those organizations and businesses supporting the Life-Long Learning Campaign and their web site addresses,

Provider Page

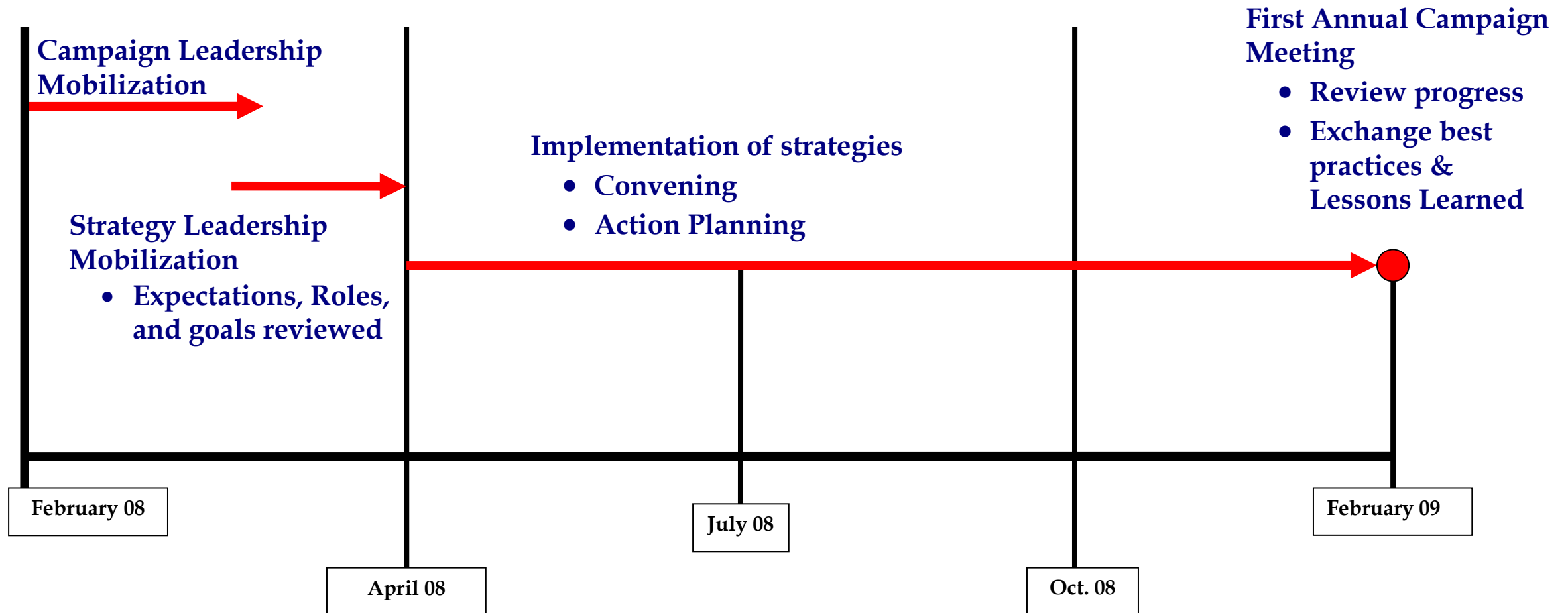
The provider page will serve the organizations wanting to refer clients for services or link to other peer organizations within the region. The Provider entry point, will have the same search functions as the community point, but show multiple points of contact for each organization as well as all the fields and information available in the database.

Campaign Partner Page

This page will provide partners with:

- News about the campaign, including progress towards the goals;
- Contact information for the champion organization's key staff;
- Contact information for each strategy's lead; and
- Downloadable communications tools for talking with business and community leaders.

Appendix VII: Strategic Campaign Schedule - First Year of Implementation



Appendix VIII: Planning Process & Partners

In October 2007 through 2008, Centralina Workforce Development Board convened a series of five meetings composed of leaders from workforce developers, economic developers, community colleges, K-12 education systems, community-based organizations, and business to develop this plan. In the first meeting, the team developed a draft vision for the campaign. In the next two meetings, breakout groups focused on goal and strategy development for the campaigns for pillars. In the last two meetings, the whole group re-convened to review the subgroups' work and develop a campaign champion structure. In between the sessions, a number of participants also provided input via one-on-one meetings focused on particular issues, questions, or strategies. DCA, Inc. designed and facilitated the planning process.

Planning Meeting Participants

Carol Allen

Rowan-Cabarrus Community College

Keri Allman-Young

Continuing Education

Cristina Arlow

Lincoln County Literacy Council

Rick Brown

Cabarrus Reentry Initiative

Vail Carter

Centralina Workforce Development Board

Emily Clamp

Centralina Workforce Development Board

Lorraine Collins

Union County School District

Lisa Conger

Cabarrus County Schools

Jim Cook

The Cabarrus County Department of Social Services (retired)

Ed Davis

Union County School District

Katrina Duke

Cabarrus County Literacy Council

Bryan Duncan

I-Care, Inc.

Yolanda Ferguson

Charlotte Branch Federal Reserve Bank of Richmond

Elizabeth Fields

Salisbury Rowan Community Service Council

David Hollars

Centralina Workforce Development Board

Ed Hosack

Cooperative Christian Ministry

Gina Howard

Charlotte Regional Partnership

Janet Hudson

Brooks Food Group

Carol Johnson

Mitchell Community College

Marion Kinley

Stanly Community College

Bob Lippard

Rowan County United Way

Andy Lucas

Anson County

Barry Matherly

Lincoln Economic Development Association

Carolyn Mays

Cabarrus County JobLink Center

Dr. John McKay

South Piedmont Community College

Mike Miller

Miller Davis Studios, Inc.

Jeanie Moore

Rowan-Cabarrus Community College

Judi Morton

Lincoln County JobLink Career Center/ESC

Linda Moyer

Literacy Council of Union County

Sandra Noel

Union County Public Schools

Curtis Parker

Stanly Early College

Natasha Pender

Centralina Workforce Development Board

Mary Ann Rasberry

Union County Smart Start

Richard Rhoades

Kimball Lutheran Church

Linda Smith

Union County School District

Dick Storm

Storm Engineering

Jeff Stutts

ASMO North Carolina, Inc.

Michael Taylor

Stanly Community College

Bob VanGorden

BVG Consulting

Heidi Whitesell

Rowan Cabarrus Community College

2007 Centralina Workforce Development Board

Anson County

Bob Stowe

Coffing Hoists Company

Dr. Lawrence Elliott

READ, Inc.

Dr. Don Altieri

Anson County United Way

Cabarrus County

Centralina WDB Chair

Bob VanGorden

BVG Consulting

Pat Woods

Kannapolis City Schools

Beth Wanke

Team Red Bull Racing

Iredell County

Carol Johnson

Mitchell Community College

Jan Comer

Engineered Sintered Components

Barry Goldstein

Textile Tape Weavers, Inc.

Jean Manall

Iredell County JobLink Career Center/ESC

Lincoln County

Shelly McCraw

Carolina Trust Bank

Tom Miltier

Actavis

Susan Gentry

Commscope

Rowan County

Elizabeth Fields

Salisbury-Rowan Community Action Agency, Inc.

Pan Cordts

WA Brown & Son, Inc.

Nancy Bilson

International Paper Company

Stanly County

Justin Burr

Re/Max Town and County Realty

Sharon Scott

Stanly County Department of Social Services

Tom Ramseur

Stanly County Chamber of Commerce

Union County

Centralina WDB Chair

Janet Hudson

Brooks Food Group

Mary Ann Rasberry

Union Smart Start

Mary Walls

NC Vocational Rehabilitation

Centralina WDB Consortium

Consortium Chair

Sara Tice

Iredell County

Jim Simms

Anson County

Grace Mynatt

Cabarrus County

Jim Klein

Lincoln County

Tina Hall

Rowan County

Lindsey Dunevant

Stanly County

Allan Baucom

Union County

Centralina WDB Staff Participants

David Hollars

Vail Carter

Emily Clamp

Natasha Pender

DCA, Inc.

Gary Romano

Jonathan Payne