



Aligning Educational Efforts in Alexander, Burke, and Catawba Counties

A Plan for Establishing the Organization and Beginning the Work

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**The mountains define us;
our goals unite us.**

Dedication

We dedicate the past work and future success of the Aligning Educational Efforts initiative to the memory of Mark Story (1967-2020), without whom the living plan contained in this document never would have been more than a dream.

A Note about the Increased Importance of the Aligning Educational Efforts Initiative in a Post-Pandemic World

The information collected and the analyses conducted in the development of this Aligning Educational Efforts Plan took place in a pre-pandemic world, and we recognize that the region's economic and educational landscapes will be very different in the near future.

Rather than delaying the full implementation of this Plan until conditions normalize, we believe it has become even more important to move the Plan forward. The region now faces the possibility of a significant increase in the number of workers who will need to be re-trained, as well as an economic landscape in which new businesses and industries will emerge in response to federal and state economic stimuli and outbreak-related economic opportunities.

We recommend that the team tasked with implementing this Plan begin by reassessing the regional workforce pipeline needs and reset priorities for Plan actions accordingly.

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Summary

The purpose of the Aligning Education Efforts (AEE) project is to develop a data- and needs-driven Plan for establishing a regional initiative that will make the Unifour region a leader in urban-rural collaborative education. The Plan was developed by community representatives, K-12 representatives, and members of the Unifour business and industry communities between March 2019 and May 2020. The recommended Action Steps for the Plan include:

Establishing AEE

Defining the Organization

- DO1. Form the organization
- DO2. Identify existing regional assets
- DO3. Set education, workforce, business development, and AEE partnership goals for the region
- DO4. Reach consensus among partners on initial strategies for reaching AEE goals
- DO5. Identify measurable outcomes to track progress toward AEE goals

Making the Organization Visible

- VI1. Secure start-up funding
- VI2. Establish and enact a communication plan
- VI3. Establish physical headquarters for AEE

Making the Organization Viable

- VA1. Identify AEE champions in each participating county and at the state level
- VA2. Establish permanent, ongoing funding

Action Plan for AEE

Capacity-Building

- CB1. Educate the entire citizenry on AEE's common message/common goals
- CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan
- CB3. Reduce state regulations/increase flexibility for schools, local governments, and businesses

- CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials

Educational Improvement

- EI1. Develop a region-wide K-12 plan that responds to current and projected regional needs
- EI2. Enhance the presence and availability of non-degree, post-high school skill and talent development options
- EI3. Coordinate and reduce redundancies across community college offerings
- EI4. Offer four-year degrees via Community Colleges

Workforce Development Pipeline

- WD1. Better coordinate and create equitable career-focused opportunities for students across schools and Local Education Agencies
- WD2. Increase postsecondary enrollment in programs that contribute to regional economic needs and goals
- WD3. Improve within-region student retention (as they transition from K-12 to postsecondary)
- WD0. [Cross-cutting Workforce Development Pipeline Actions]

Workforce Retention

- WR1. Retain a larger number of qualified workers in the region
- WR2. Improve within-business employee retention
- WR0. [Cross-cutting Workforce Retention Actions]

Business Recruitment

- BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce
- BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce
- BR3. Attract new talent to the region / recruit a larger number of qualified workers
- BR4. Develop a pathway to business/industry diversification
- BR5. Increase housing stock at all income levels
- BR6. Develop a region-wide transportation network and encourage adoption

The Plan also includes recommended early actions and progress measures, budget considerations, and supporting resources.

Introduction and Scope of Work

The purpose of the Aligning Education Efforts (AEE) project is to develop a data- and needs-driven Plan for establishing a regional initiative that will make the counties served by two anchor public higher education institutions—Catawba Valley Community College (CVCC) and Western Piedmont Community College (WPCC)¹—leaders in urban-rural collaborative education.

Before the start of the AEE project, there was no comprehensive approach to coordinating all of the sectors across Alexander, Burke, and Catawba counties; each county's education, business, industry, government, and community organization sectors were working toward their own independent goals. Consequently, one of the aims of the AEE project was to develop an approach to sharing and better aligning each county's educational and economic goals. To do so, AEE planners sought to develop a long-range, comprehensive Plan for the region that:

- Leverages existing and emerging education, public, and private entities and initiatives in the region already engaged in similar work by coordinating their work;
- Serves the educational and workforce training needs of the community; and
- Establishes long-term, measurable outcomes.

In addition, the planners hoped to include elements that would allow for the Plan to serve as a model for other communities across the state with similar needs.

The first section of this document, **Plan Development Process**, details the process followed to create the AEE Plan. The second half of this document outlines the Plan itself in two sections: **Establishing AEE** and the **Action Plan for AEE**. The second half also includes supplemental materials designed to support Plan implementation, as well as recommendations for first steps and budget considerations.

¹ The counties currently served by these institutions include Alexander, Burke, and Catawba. Along with a fourth county—Caldwell, which is served by Caldwell Community College and Technical Institute (CCC&TI)—these counties comprise a region sometimes referred to as the Unifour region. While Caldwell was not a charter member of the planning process, the president of CCC&TI has been included in information about the development of AEE, with plans to bring Caldwell into AEE once it is established.

Plan Development Process

AEE contracted with the Friday Institute for Educational Innovation at North Carolina State University to facilitate the planning process. The Friday Institute has conducted several similar planning processes,² and, while each has been different, all of them incorporated the following elements, which also were applied to the AEE plan development process:

- Close collaborations with practitioner partners and representatives of stakeholder groups from across the region;
- Deep-dive site visits to gather on-the-ground information;
- Multiple meetings across the region with stakeholder groups; and
- Iterative formulations of the emerging Plan.

A key tenet of the process is the equal positioning of facilitators and stakeholders (in this case, educators, business leaders, and other community leaders). All partners contribute to the identification of regional and community-level needs for the Plan to address, the design of possible solutions, identification and analysis of relevant contextual information and data, and a plan for the sustainability and scaling of the strategies that emerge.

The development of the AEE Plan took place across three phases:

1. *Discovery* (March-September 2019), which included a short, intense series of comprehensive working meetings with CVCC and WPCC leadership and representative primary stakeholders³ (e.g., Alexander, Burke, and Catawba community representatives, K-12 representatives, and members of the tri-county business and industry communities; **Appendix A**) to refine our understanding of the stakeholders, key questions, and data sources needed to inform the Plan;
2. *Convening and Information-Gathering* (September-December 2019), which included stakeholder-focused data collection events and analyses to address key questions and create a working version of the AEE Plan; and

² Including plan development for the state's Digital Learning Plan, the North Carolina School of Science and Mathematics' design of its academic Plan for its new campus (in Morganton), and the myFutureNC Commission's development of a statewide attainment goal and associated recommended action areas.

³ Collectively, the initial leaders and the primary stakeholder group make up the AEE Planning Group.

3. *Collaborative Decision-Making* (December 2019-May 2020), which included refinement of specific alternatives and recommendations to inform the AEE Plan, based upon analyses of all the data collected during Phases 1 and 2.

AEE Vision & Goals

Comprehensive working meetings were the primary activity of the *Discovery Phase*. During these meetings, the AEE Planning Group agreed on a baseline vision and goals for AEE. These baseline versions provided the foundation for the Plan, as well as a starting point for generating feedback and for planning data collection in the *Convening and Information Gathering Phase*. The Vision and Goals in this document are the final versions approved by the Planning Group.

Vision

Aligning Education Efforts will promote a data- and needs-driven Plan for the Unifour region that will make the region a leader in urban-rural collaborative education. To make this vision a reality, schools, organizations, businesses, industry, governments, and individuals across the region will work together to:

- A. Provide the supports necessary to transition all counties into a new economic era; and
- B. Reimagine the region-wide education continuum.

Goals

Ultimately, success will be measured by the degree to which the Unifour becomes a community with a common focus and better coordination of efforts to develop educated minds—not just for the tri-county area but also for western North Carolina and for the state as a whole. In particular, success will be measured by AEE's progress toward supporting the region's accomplishment of the following specific goals:

1. Partner counties identify internally and externally as a cohesive region
2. Connections, contextual understandings, and trust are formed among and across educators, businesses, and local leadership
3. Cross-sector engagement of education, business, and economic development stakeholders is strengthened (e.g., stronger partnerships exist between K-12 and industry)
4. There is measurable improvement in in-migration
5. People already in the workforce feel empowered to enhance their employability in a dynamic work environment

6. Mechanisms are in place throughout the education continuum to connect students to real-world careers, employers, and related curriculum choices
7. Opportunities (educational, workplace, economic, development) across all counties are increased; for example, students across the region have equitable education opportunities, and all partner counties can provide infrastructure necessary for growth
8. There are measurable reductions in unfilled positions
9. AEE has a sustainable, flexible, living Plan

Data Collection

During the *Convening and Information Gathering Phase*, the Friday Institute team created opportunities (in the forms of a convening and a Listening Tour) to share the Vision and Goals beyond the Planning Group and to gather feedback about regional needs, both with representatives from similar initiatives across the state and with leaders, employees, and citizens throughout the region.

Convening

In August 2019, CVCC's Workforce Solutions Center was host to members of the Planning Group as well as practitioners from across the state who shared the lessons they learned as they launched initiatives similar to AEE. These practitioners included representatives from the Eastern Triad Workforce Development Initiative (in Alamance, Guilford, Randolph, and Rockingham Counties),⁴ Partners in Progress (Moore County),⁵ and the Strategic Twin-Cities Educational Partnership (in Edgecombe and Nash Counties).⁶ These initiatives were selected because their efforts shared at least two of three key similarities to AEE: the initiative serves multiple counties, has cross-sector support, and/or focuses both on education and workforce issues.

During the convening, guests presented information about their programs. Presentations were followed by an idea-sharing session in which small groups of Planning Group members met with initiative representatives to discuss topics closely aligned with the proposed work of the initiative. The central questions discussed in each small group were:

⁴ <http://cfdg.rwkdigital.com/initiatives/workforce/eastern-triad-workforce-initiative/>

⁵ <https://www.moorebusiness.org/>

⁶ <https://www.step-partnership.org/>

- How were you able to reduce redundancies among regional initiatives and create common spaces for bringing together regional voices? (Eastern Triad Workforce Development Initiative)
- What recommendations do you have for attracting new businesses and talent, based on the work that you've done in Moore County? (Partners in Progress)
- How have you been able to identify and create public-private shared spaces where students and industry can meet, interact, and work together? (Strategic Twin-Cities Educational Partnership)

The discussion topics spurred conversations beyond the questions asked that also contributed ideas to the final AEE Plan.

Listening Tour

In the month following the convening, the Friday Institute team expanded its data collection efforts by organizing a Listening Tour in Alexander, Burke, and Catawba Counties. The team facilitated three focus groups in each county: two open to the general public, and one hosted onsite at a local business.

To recruit attendees to the general public sessions, the Friday Institute team invited regional leaders in education, business and industry, and government, and encouraged them to share the invitation with their contacts. They also asked members of the Planning Group to recruit participants. In total, 64 people attended the six general sessions across the three counties. Members of the Friday Institute team facilitated discussions with attendees, asking them to reflect on the educational and workforce development challenges in the area, what is already being done to address those challenges, and what additional resources, programs, or partnerships are needed.

At the end of each session, participants were asked to fill out a brief survey about the most pressing challenges facing an organization focused on aligning regional education and workforce needs. The survey asked participants to rank priorities for AEE from a list of options, with the top three priorities being:

- Attract new businesses and new talent to the area;
- Promote acceptance of alternatives to a four-year college degree; and
- Identify/create more public-private shared spaces where students and industry leaders can meet, interact, and work together.⁷

⁷ The other priority options—most of which were added to the final Plan alongside the top priorities—included: Coordinate and reduce redundancies across community college offerings; Develop a region-wide transportation network and encourage adoption; Recruit a four-year

The workplace sessions were held during business hours and were attended by employees in non-management positions. The employee sessions were hosted by Catawba Valley Health System in Catawba County, Schneider Mills in Alexander County, and Meridian Specialty Yarn Group in Burke County; employees from Kellex joined the Burke County session. Thirty-six people attended these sessions. Questions for attendees of the workplace sessions focused on why they chose to live and work in the region, the experiences and supports that led them to their current jobs, and what supports were needed from the education and/or business communities to help them, their peers, and/or their children reach their educational and employment goals.

The discussions during these nine sessions provided more context for the Friday Institute's understanding of the strengths of the region and the challenges it faces. They also yielded a long list of suggested strategies for strengthening education-to-workforce pathways and for supporting business and workforce development, many of which appear throughout this document. A summary of the Listening Tour findings is included in **Appendix B**.

public university presence in the area; and Create a common space for bringing together regional voices to identify assets and challenges.



The Aligning Educational Efforts Plan

The final planning phase, *Collaborative Decision-Making*, allowed the Friday Institute team to reflect the findings from the *Convening and Information Gathering* Phase back to the core Planning Group, which enabled the Group to start to envision the full Plan.

The resulting Plan is divided into two sections: the first details considerations for establishing AEE as a regional entity, and the second outlines potential areas of focus for the organization's work.

Establishing AEE includes several components:

- The functions AEE will serve
- AEE's primary focus areas
- AEE's organizational goals
- Specific tasks for establishing AEE:
 - Defining the Organization
 - Making the Organization Visible
 - Making the Organization Viable
- Recommendations for measuring progress
- Resources needed to establish AEE

Given the complexity of coordinating and organizing multi-sector work across multiple counties, the **Action Plan for AEE** is more extensive, with specific actions clustered in five different component categories:

- Capacity-Building
- Educational Improvement
- Workforce Development Pipeline
- Workforce Retention
- Business Recruitment

A crosswalk of Actions, Measures, and Goals Addressed is included in **Appendix C**.

In addition, the Plan includes several supplemental materials with suggestions for supporting Plan implementation, including a **Budget Considerations** section and,

in **Appendices D** and **E**, Value Proposition statements for several different categories of AEE stakeholders and a sample Memorandum of Understanding.

A Note about Recommended Responsible Parties

For each proposed Action in both the **Establishing** and **Action Plan** sections below, we include a recommendation for the party or parties that should be responsible for overseeing that Action. At this stage in AEE's work, these recommendations are intentionally high-level: Ahead of formal appointment of AEE Leadership, an AEE Implementation Team, and a Steering Committee (see Recommended Action DO5, below) and identification of primary regional partners, it is not yet possible to make specific recommendations about who should fill those roles.

In the **Establishing** section, we limit recommendations for responsibility to a to-be-named AEE Leadership team and the current Planning Group, with the understanding that the second group may transition its responsibilities to other actors as AEE begins to identify a permanent staff and structure.

In the **Action Plan** section, we note only whether oversight of an Action should be primarily the responsibility of the AEE organization, of an as-yet-unidentified regional partner or partners, or a combination of the two.

As AEE is established and the Plan matures, we recommend that AEE Leadership periodically revisit and realign these responsibility recommendations.

Establishing AEE

As described above, the establishment of AEE has been under way for over a year (as of this writing), but there is much work still to be done to transition the organization from an idea to an initial reality to a sustainable, credible, and vital educational and economic development actor in the region. This section outlines not only a broad definition of what AEE is and will do but also key steps AEE will need to take over its first three years in order to achieve its internal and region-wide goals.

Functions of AEE

Stakeholders across the region shared a common sentiment regarding AEE's potential role: Above all else, it should *not* try to join the long list of initiatives and agencies already working on specific challenges in each county. Instead, AEE should focus its efforts on *bridging existing efforts*—both within the region and between the region and the rest of the state. To that end, stakeholders identified several related functions for AEE to serve.

A Convener

AEE brings together citizens, educators, politicians, organizations, institutions, and other groups working on initiatives related to AEE's goals for the region to promote alignment of efforts and goals and to share and support implementation of the strategies necessary to reach those goals.

An Advocate

AEE promotes and lobbies for new policies, statutes, and programs that support the region's move toward achievement of the AEE goals; AEE promotes and lobbies for changes to and reductions in existing state regulations that will provide AEE counties with the flexibility they need to implement the plan

A Connector (Coordinator)

AEE connects people and groups—from grassroots- to state-level—that are working on local and regional activities related to AEE goals, both in the Unifour region and beyond. AEE learns and stays up-to-date about initiatives, resources, and opportunities across the region and shares that information both with other regional partners and with groups in other regions that can benefit from learning more about the AEE model. AEE facilitates region-wide efforts to identify and solve shared problems

A Capacity-Builder

AEE builds the capacity of stakeholders to carry out all aspects of the AEE Plan. In addition to providing opportunities for stakeholders to grow in their leadership, AEE also acts as a liaison between stakeholders and potential regional, state, and national funders

A Storyteller

AEE shares stories about the successes and challenges experienced by goals-focused people and groups from across the region

A Tracker

AEE holds the region accountable for progress toward its goals by tracking and reporting on the region's and each county's outcomes related to those goals

AEE's Organizational Goals

A. AEE will have a Plan of Action that guides its efforts (this document). Plan ingredients will include:

- Leadership & Governance;
- Goals;
- Strategies;
- Responsible Parties;
- Measurable Outcomes;
- Recommended Timelines; and
- Funding.

B. Representatives from every AEE community will have meaningful roles in AEE and/or in components of the Plan.

C. A common space (physical or metaphorical) will exist for bringing together regional voices to identify and solve regional challenges.

AEE Areas of Focus

Many of the actions outlined in both sections of the Plan address more than one aspect of regional development. The Plan includes tag labels to help identify the areas of regional development each action supports.



Bridging & Coordination

Actions that strengthen communication across and connections among business, education, governmental, and citizen stakeholders and initiatives.



Education

Actions that directly impact the quality and accessibility of educational opportunities across all participating communities.



Economic Development

Actions that directly contribute to economic development efforts at a regional level.



Regional Infrastructure

Actions that help to improve critical regional infrastructure assets in support of the AEE Plan.



Messaging

Actions that promote a common and consistent narrative about AEE work.



Workforce Development

Actions that directly contribute to workforce development efforts at a regional level.

Defining the Organization

Defining what AEE is and does beyond the broad brush strokes of the Functions and Goals stated above is important for helping stakeholders not only to understand what to expect from AEE but also how to engage with AEE and make the most of the presence of the organization.

DO1. Form the organization



Specific actions to consider:

1. Establish an **oversight entity** (for example, a Steering Committee or Advisory Board)
2. Appoint existing staff in AEE partner organizations to **AEE Leadership** roles, or hire to fill those roles⁸
3. Identify (and hire, as necessary) an AEE **Implementation Team**
4. Reach consensus among partners on an agreed-upon **organizational (AEE) focus** that will help recruit the widest array of potential stakeholders while also promoting fiscal and programmatic efficiency

Recommended Responsible Party/-ies: AEE Planning Group

Organizational Goal(s) Addressed: C. A common space exists for bringing together regional voices to identify and solve regional challenges

DO2. Identify existing regional assets



Specific actions to consider:

1. Identify **potential active partners** among identified regional assets
2. Target **organizations/individuals in Alexander County** who can lead AEE-related efforts similar to those already underway in Burke and Catawba

Recommended Responsible Party/-ies: AEE Leadership (responsible for coordinating and directing these efforts, but may contract with a third party to complete the work)

Organizational Goal(s) Addressed: B. Representatives from every AEE community have meaningful roles in the AEE Plan

⁸ See **Budget Considerations** for recommendations related to staffing AEE Leadership and Implementation Team roles.

Note: Actions DO3, 4, and 5 are top-level summaries of the major components of the AEE Action Plan. Each is developed in greater detail in the **Action Plan for AEE** section of this document.

DO3. Set education, workforce, business development, and AEE partnership goals for the region



Specific actions to consider:

1. Develop or adopt an existing postsecondary **attainment goal**
2. **Define key AEE terms** (e.g., What does AEE mean by "soft skills," and which soft skills are worth targeting? etc.)

Recommended Responsible Party/-ies: AEE Planning Group, with input from regional leaders in all sectors

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

DO4. Reach consensus among partners on initial strategies for reaching AEE goals



Tag(s): [CRD]

Specific actions to consider:

1. Formalize **partnerships** (identified as a result of DO2, above), and reach agreement about **responsible parties** for each AEE Plan strategy (i.e., ensure that partners know their roles when they join AEE)⁹
2. Develop a **three-stage roll-out** for actions in the AEE Plan: 1) priority tasks for each major outcome category (no more than one or two) that focus on currently-identified, data-driven, high-priority regional educational and economic needs; 2) tasks to pursue after AEE is established (Years 2 and 3); and 3) aspirational tasks (Year 3 and beyond)

Recommended Responsible Party/-ies: AEE Leadership

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

⁹ The importance of developing (DO2) and formalizing (DO4) a robust list of potential active partners will become more evident in the **Action Plan for AEE** section, in which AEE Partners often are identified as the recommended primary responsible party for several Plan Actions.

DO5. Identify measurable outcomes to track progress toward AEE goals



Specific actions to consider:

1. Review and revise the measurable outcome **recommendations** in the **Action Plan for AEE** section of this document
2. Separate **measurable outcomes** into 1-to-2-year and 3+-year goal categories
3. Establish a process for regularly collecting, analyzing, and sharing key data

Recommended Responsible Party/-ies: AEE Leadership

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

Recommendations for Measuring Progress toward Defining the Organization

- AEE has a dedicated leadership team (Year 1)
- AEE has a formal Steering Committee or Advisory Board (Year 1)
- The AEE Plan of Action identifies short- (1- and 2-year) and longer-term (3-through 10-year) regional goals (Year 1)
- The AEE Plan of Action identifies measurable outcomes for AEE goals (Year 1)
- Elected officials from each participating county endorse the Plan's top goals and advocate for the Plan (Year 2)
- AEE has developed and maintains an up-to-date list of regional assets (Year 2)

Making the Organization Visible

Especially early on (during its first year), a critical component of AEE's success will be the degree to which the organization achieves market saturation across all stakeholder groups (all education sectors, business and industry sectors, each local government entity, and the general public in each community).

VII. Secure start-up funding



Specific actions to consider:

1. Develop relationships with **at least two organizations** that can commit start-up funding

2. Seek fiscal support **directly from the North Carolina General Assembly** by requesting grant funds to support one or more AEE-related regional functions or initiatives¹⁰

Recommended Responsible Party/-ies: AEE Planning Group

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

VI2. Establish and enact a communication plan



Specific actions to consider:

1. Develop a **central communication hub** for AEE information and channel all workforce development news and information through this hub
2. Generate region-wide **awareness** of the realities and challenges of successfully navigating the entire preschool-through-postsecondary (sometimes abbreviated as P-20) continuum
3. Identify and promote current **local and regional successes** related to AEE goals
4. Identify and implement high-visibility actions that can be promoted as **early AEE successes**; for example:
 - With education and business sector support, create a public campaign focused on promoting soft skills development beyond the classroom and workplace
 - With private foundation support, develop a community asset shared by all AEE communities (e.g., connecting greenways throughout the region; coordination of a “local breweries trail” or library services across counties; etc.)
5. Disseminate and promote AEE’s target **measurable outcomes** publicly
6. Find two or more county- or community-based groups that work together across municipal boundaries and **share their partnership story** publicly
7. Meet separately with and **create separate materials** for communicating the Plan to each sector in sector-relevant language

¹⁰ As the [Eastern Triad Workforce Initiative](#) did; in 2018, it was awarded \$3.2 million by the General Assembly to support apprenticeships and on-the-job training.

8. Form a **Parent Steering Committee** or work with existing PTAs to promote community-wide acceptance of the value of multiple postsecondary pathways
9. Create one **overarching AEE visual** with the AEE macro-goal and top-level Plan elements and disseminate widely

Recommended Responsible Party/-ies: AEE Leadership

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

VI3. Establish physical headquarters for AEE



Specific actions to consider:

1. **Designate space at each participating community college** (including the CVCC Alexander campus) for AEE convenings and flexible office space AEE staff can use when traveling the region
2. Approach key stakeholders about **donating space for a headquarters** for the organization to use during its first five years of operation

Recommended Responsible Party/-ies: AEE Planning Group

Organizational Goal(s) Addressed: C. A common space exists for bringing together regional voices to identify and solve regional challenges

Recommendations for Measuring Progress toward Making the Organization Visible

- Start-up funding for the first year of operations has been secured (Year 1)
- A communications plan has been established (Year 1) and implemented (Year 2)¹¹
- AEE has a physical headquarters (Year 1)

¹¹ See also the *Capacity-Building* section of the **Action Plan**, below.

Making the Organization Viable

Initial enthusiasm and energy alone can carry AEE through its first year, but longer-term sustainability will require deeper support and funding networks.

VA1. Identify AEE champions in each participating county and at the state level



Specific actions to consider:

1. Establish early connections with **NCSU** (College of Textiles/Textiles Engineering Program) and **NCSSM** and provide ways for them to become early AEE goal adopters and advocates of AEE strategies/programming
2. Strengthen relationships with state and local elected officials by identifying/appointing an AEE **government liaison/lobbying entity**
3. Identify **on-the-ground leaders** with experience in education and workforce development who can share the AEE vision publicly

Recommended Responsible Party/-ies: AEE Planning Group

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts; B. Representatives from every AEE community have meaningful roles in the AEE Plan

VA2. Establish permanent, ongoing funding



Specific actions to consider:

1. Solicit startup and ongoing **fiscal support from Commissioners** in each AEE county
2. **Develop mission-relevant, paid services** AEE can offer to area businesses and other partners for a nominal fee

Recommended Responsible Party/-ies: AEE Planning Group

Organizational Goal(s) Addressed: A. AEE has a Plan of Action that guides its efforts

Recommendations for Measuring Progress toward Making the Organization Viable

- At least two AEE champions have been *identified* from each participating county and have begun advocating for the plan (Year 1)
 - County-level AEE champions have begun *advocating* for the AEE Plan locally (Year 2)

- At least three state-level AEE champions have been *identified* and have begun advocating for the plan (Year 1)
 - State-level AEE champions have begun *advocating* for the AEE Plan at the state level (Year 2)
- A plan for permanent, ongoing funding has been established (Year 2)

Additional Resources Needed for Establishing AEE¹²

- Baseline data on regional educational outcomes,¹³ existing regional assets, and workforce needs
- Identification of any previously-established community, county, or regional attainment goals
- Public relations/communications support
- Web development support

¹² This list and the other Additional Resources list in the next section include suggestions for resources that could support multiple actions across Component areas, in addition to specific resources listed under each Action step.

¹³ For example, the [county-level outcomes reports](#) being produced by [myFutureNC](#)

Action Plan for AEE

While AEE must establish a presence in the region, as Planning Group and Listening Tour participants all noted, the primary, overriding purpose of the organization is not to become another initiative or agency that works directly on solving a sector-specific challenge or set of challenges; instead, its purpose is to **support existing efforts and partnerships** and to **encourage the development of new ones** that will solve those challenges.

The Action Plan outlines steps AEE can take in five different areas—**Capacity-Building, Educational Improvement, Workforce Development, Workforce Retention**, and **Business Recruitment**—to enhance the breadth and depth of the work already under way across the region and to create platforms for new initiatives to emerge.

Capacity-Building

A key component of AEE's Plan is the development of tools and strategies for increasing the capacity of individuals and organizations across the region to make a greater impact on education, business, and industry, both separately and at multiple intersection points for those sectors.

CB1. Re-educate the entire citizenry on AEE's common message/
common goals



Connections to Other Action Steps: VI2

Specific actions to consider:

1. Because it likely will require the most time and attention, focus first on promoting community-wide **acceptance of alternatives to the traditional high school-to-college-to-work pathway**
2. Other specific public education actions to consider are detailed in VI2 (*Establish and enact a communication plan*) in the **Establishing AEE** section, above

Recommended Responsible Party/-ies: AEE

Goal(s) Addressed: 1. Partner counties identify as a cohesive region; 8. There are measurable reductions in unfilled positions; 9. AEE has a sustainable, flexible, living Plan

CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan



Specific actions to consider:

1. **Connect** regional, state-level, and national **fundors to** current and emerging local and regional **initiatives** that support AEE goals
2. **Identify** non-financial, **in-kind resources** (e.g., personnel, equipment, expertise) that stakeholders can commit to AEE-related efforts
3. **Increase community-wide engagement** and **expand capacity across advocates and volunteers** by assigning narrowly defined, achievable tasks with clear and measurable expectations to various stakeholder groups

Recommended Responsible Party/-ies: AEE

Goal(s) Addressed: 1. Partner counties identify as a cohesive region; 2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 9. AEE has a sustainable, flexible, living Plan

CB3. Reduce state regulations/increase flexibility for schools, local governments, and businesses



Specific actions to consider:

1. Propose **policy and statutory changes** to allow community colleges to offer four-year degrees
2. Lobby for more **local autonomy and funding flexibility for local schools**
3. Lobby for more **local autonomy and flexibility for local governments** that will support AEE-relevant goals and outcomes

Recommended Responsible Party/-ies: AEE

Goal(s) Addressed: 7. Education, workplace, and economic development opportunities are increased; 9. AEE has a sustainable, flexible, living Plan

CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials



Connections to Other Action Steps: EI2, WD0

Specific actions to consider:

1. Work with all stakeholder groups to **develop a shared definition of workforce-valued credentials** that resonates with current and future regional economic needs¹⁴

Recommended Responsible Party/-ies: AEE

Goal(s) Addressed: 5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 8. There are measurable reductions in unfilled positions

Recommendations for Measuring Progress on Capacity-Building Actions

- A communications plan has been established (Year 1) and implemented (Year 2)¹⁵
- **[TBD]**^{16,17} external funders and in-kind contributors have committed to supporting AEE (Year 2)
 - **[TBD]**¹⁸ external funders and in-kind contributors have committed to supporting AEE (Year 3+)
- A list of state regulations slowing regional progress for which waivers will be sought has been identified (Year 1)
 - Progress has been made on getting flexibility on at least **[TBD]**%¹⁹ of the regulations identified as slowing progress (Year 3+)
- AEE has adopted a broadly-supported definition of a regional workforce-valued credential (Year 1)

¹⁴ This work could be coordinated with the statewide effort being led by [myFutureNC](#) and national efforts sponsored by groups like the Lumina Foundation.

¹⁵ See also the *Making the Organization Viable* section of **Establishing AEE**, above.

¹⁶ Per DO5, this and all other **bold italic red** outcome measure targets identified in this document are to be determined by AEE Leadership in Year 1.

¹⁷ AEE Planning Group recommendation: 2 Alexander County funders; 3 Burke County funders; 4 Catawba County funders

¹⁸ AEE Planning Group recommendation: Double the Year 2 targets

¹⁹ AEE Planning Group recommendation: 50%

Educational Improvement

A hallmark of the AEE region is the strength of its five K-12 school systems (local education agencies, or LEAs), but in order to help the region meet AEE goals, each system not only will need to identify specific within-LEA actions to take, but also will need to identify ways in which LEAs can coordinate their work. Similarly, while coordination across the two community colleges in the AEE counties is strong, there is more to be done to ensure that both institutions are using their resources as effectively as possible. Finally, the Unifour region remains the largest metropolitan statistical area in the Southeast without the formal presence of a state-supported four-year institution.

E11. Develop a region-wide K-12 plan that responds to current and projected regional needs



Connections to Other Action Steps: WD1

Development of a region-wide plan for K-12 education will require within-LEA, cross-LEA, and state-level actions. Specific actions to consider:

1. Coordinate LEA leadership **joint planning meetings** for representatives from all 5 AEE LEAs
2. Develop a **plan** (including but not limited to Workforce Development Pipeline elements, below) that:
 - a. Identifies top programmatic and decision-making flexibilities needed across all LEAs in the region;
 - b. Identifies each LEA's barriers to successfully transitioning their students into postsecondary experiences;
 - c. Identifies local and regional initiatives that have been most successful at supporting students as they set and reach their educational goals; and
 - d. Outlines steps for a comprehensive regional approach to improving successful student transitions from K-12 to postsecondary to careers
3. Seek **state support** for enacting the collaborative plan

Recommended Responsible Party/-ies: AEE and partners (LEA Leadership)

Goal(s) Addressed: 7. Education, workplace, and economic development opportunities are increased

EI2. Enhance the presence and availability of non-degree, post-high school skill and talent development options



Connections to Other Action Steps: CB4, WD0

Specific actions to consider:

1. Develop **recommendations for pathways for high school graduates** who are not going directly into higher education
2. Work with employers and community colleges (and, if possible, other institutes of higher education) to develop **short-term courses** designed to increase the most sought-after skills for non-degree employees
3. With support from stakeholders, establish a **scholarship fund** that sponsors certifications/training opportunities for non-degree-holding employees

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions

EI3. Coordinate and reduce redundancies across community college offerings



Connections to Other Action Steps: BR6

Specific actions to consider:

1. Audit courses and programs across all AEE community colleges to identify redundancies and **promote multi-campus offerings and program partnerships**. Considerations should include:
 - a. Relative success (in terms of graduates produced, graduate placement, job satisfaction, employer satisfaction, etc.) of programs with the greatest potential regional economic impact at each college;
 - b. Projected impact on campus-level enrollments; and
 - c. Projected economic benefits (both specific campus cost savings and general regional economic development benefits) of each proposed cooperative program

2. Create a **bus line** that connects WPCC and CVCC (eventually also including CVCC's Alexander Center for Education to connect all three counties)

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 7. Education, workplace, and economic development opportunities are increased

EI4. Offer four-year degrees via Community Colleges



Connections to Other Action Steps: WD3

Specific actions to consider:

1. Recruit a **four-year public university presence** into the area and develop partnerships between that public university and existing higher education entities

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 5. Workers feel empowered to enhance their employability; 7. Education, workplace, and economic development opportunities are increased

Recommendations for Measuring Progress on Educational Improvement Actions

- A region-wide K-12 plan that responds to current and projected regional needs has been developed (Year 2)
 - The plan has been implemented in all five participating AEE LEAs (Year 3+)
- Redundancies across regional community colleges have been identified (Year 1)
 - A plan for phasing out cross-campus redundancies has been established (Year 2)
- A plan for offering four-year degrees via community colleges has been drafted and submitted to NCCCS (Year 2)
 - At least one four-year degree program has been approved and is operational (Year 3+)

Workforce Development Pipeline

Developing a strong workforce for the region is about more than just providing additional ways for people to earn degrees or credentials; it is also about coordinating offerings across a region to reduce overlap, maximize efficiency, and improve equitable availability of those offerings, as well as aligning offerings with current and projected workforce needs.

WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs



Connections to Other Action Steps: E11

Specific actions to consider:

1. Create **sharing opportunities** for K-12 educators to learn from industry and for industry to learn about K-12 opportunities and challenges
2. Create structures to more formally **coordinate** existing and future K-12 and industry programs, goals, and work region-wide
3. Give students opportunities to develop strong **mentor-mentee relationships** with professionals at all levels in the industry growth path
4. Identify/create more physical and virtual **public-private shared spaces** where students and industry can meet, interact, and work together
5. Create opportunities for **deeper learning related to area industries** so high school and college students and prospective employees are matched with jobs for which they have the skills and interest (e.g., visits to off-site facilities, hands-on learning, etc.)
6. Offer **enrichment experiences** that enhance student learning experiences (e.g., opportunities to connect with industry learners and employees on campus, experiential learning opportunities, etc.)

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions

WD2. Increase postsecondary enrollment in programs that contribute to regional economic needs and goals



Specific actions to consider:

1. Coordinate **public information campaigns** about pathways for developing high-demand workforce skills
2. Develop guidance about **time-to-job** in key fields in order to:
 - Promote enrollment in related training programs; and
 - Encourage in-migration to the area to fill vacancies
3. Provide **guidance to parents** about:
 - Available jobs in the area;
 - What is required to get those jobs (training/education);
 - How much it will cost to get the training/education; and
 - How much the jobs realistically pay (e.g., on average, as opposed to top-end pay)

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions

WD3. Improve within-region student retention (as they transition from K-12 to postsecondary)



Connections to Other Action Steps: EI4

Specific actions to consider:

1. Help potential workers **calculate net costs/benefits** of work opportunities

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 3. There is strong, cross-sector engagement across education, business, and economic development; 6. Mechanisms are in place to connect students to real-world careers and curricula

WD0. [Cross-cutting Specific Actions that address two or more WD General Actions, above]

1. Cross-Cutting [WD1, WD2, WD3]: Identify funding to support **Shared Transition Counselor** positions (community college employees who provide counseling to students in grades 9-12; see CB4, E12)
2. Cross-Cutting [WD2, WD3]: Create **more enrollment spaces in high-demand community college programs** (like furniture and medical fields) related to local opportunities in the workforce
3. Cross-Cutting [WD2, WD3]: Provide more **guidance about financial supports** to those pursuing higher education

Recommendations for Measuring Progress on Workforce Development Pipeline Actions

- **[TBD]**²⁰ employers provide real-world educational opportunities designed to support workforce needs (Year 2)
 - **[TBD]**²¹ employers provide real-world educational opportunities designed to support workforce needs (Year 3+)
- **[TBD]**²² of high school students are enrolled in secondary-level educational pathways designed to meet workforce needs (Year 2)
 - **[TBD]**²³ of high school students are enrolled in secondary-level educational pathways designed to meet workforce needs (Year 3+)
- **[TBD]**²⁴ students are enrolled in regional postsecondary programs that contribute to regional economic needs and goals (Year 2)
 - **[TBD]** students are enrolled in regional postsecondary programs that contribute to regional economic needs and goals (Year 3+)

Workforce Retention

With an abundance of employment opportunities across a wide array of fields, one challenge somewhat unique to the region is the relative mobility of workers (in particular, lower-wage workers), who often can find higher-paying employment in their field without leaving the region. While advantageous for

²⁰ AEE Planning Group recommendation: 100

²¹ AEE Planning Group recommendation: 300

²² AEE Planning Group recommendations: AEE Leadership and partners determine criteria for including pathways in this count; initial target = 40% of secondary population

²³ AEE Planning Group recommendation: 50% of secondary population

²⁴ AEE Planning Group recommendation: AEE Leadership and partners determine criteria for including programs in this count

the individual worker, the constant turnover can strain employer efforts to create stable, productive teams and to develop talent.

WR1. Retain a larger number of qualified workers in the region



Connections to Other Action Steps: BR3

Specific actions to consider:

1. Create a **region-wide career website**²⁵ to promote training and employment opportunities across the AEE service area

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula

WR2. Improve within-business employee retention



Specific actions to consider:

1. Gather **feedback from employees** about their personal career ladder visions and give them in-house opportunities to develop skills needed to advance along those ladders
2. Promote development of more **on-site, silent-paycheck amenities** (e.g., health services)
 - o Help coordinate cross-business opportunities to offer these amenities (to take advantage of economies of scale)

Recommended Responsible Party/-ies: Partners

Goal(s) Addressed: 5. Workers feel empowered to enhance their employability

WR0. [A cross-cutting Specific Action that addresses both WR General Actions, above]

1. Cross-Cutting [WR1, WR2]: Create more opportunities for those currently in the workforce to be promoted and learn new skills within target businesses and industries

²⁵ For example, a region-wide version of the current [Work in Burke](#) website.

Recommendations for Measuring Progress on Workforce Retention Actions

- AEE measure(s) of annual regional workforce retention established (Year 1)
 - The region records an annual overall workforce retention rate of **[TBD]**% (Year 3+)
- **[TBD]**% of K-12 graduates are employed in the region five years after graduation (Year 3+)
 - **[TBD]**% of K-12 graduates remain employed in the region 10 years after graduation (Year 3+)
- **[TBD]**% of community college graduates are employed in the region five years after graduation (Year 3+)
 - **[TBD]**% of community college graduates remain employed in the region 10 years after graduation (Year 3+)
- Measure(s) of within-business/industry employee retention established for AEE partner businesses and industries (Year 1)
 - AEE partners record annual within-business workforce retention rate increases (Year 3+)

Business Recruitment

The region has weathered significant changes in the industries that provide the majority of work opportunities, as well as changes related to major recessions; however, more often than not, the burden has fallen on the workforce to make significant changes in order to fill new roles. Instead of always adapting to the needs of the next wave of opportunities, the region can be more proactive in its pursuit of businesses and industries that fit current and projected workforce characteristics.

(Note: Because the Specific Actions associated with General Actions BR1 through BR5 are so closely intertwined, they are presented here in a single entry.)

BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce



BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce²⁶

²⁶ Aspirational workforce: The workforce needed to encourage development of promising new industries for the region (see Specific Action 4, below).

BR3. Attract new talent to the region/recruit a larger number of qualified workers

BR4. Develop a pathway to business/industry diversification

BR5. Increase housing stock at all income levels

Connections to Other Action Steps: WR1

Specific actions to consider:

1. Lobby to have Catawba County included in the **Appalachian Regional Commission**
2. Work with Economic Development partners to identify shared **regional economic aspirations** across all stakeholder groups
3. Use economic projections to target opportunities for **scaling and expanding established industries**
4. Work with Economic Development partners to use state and national economic projections to target opportunities to **develop new industries** (e.g., tourism, customer service, etc.) for the region
5. Create an **asset inventory of space available** for business and residential housing development
6. Incentivize dense, **low-cost housing** near strategic locations
7. Encourage and promote a public-private partnership model for **incentivizing and planning for development of affordable housing**

Recommended Responsible Party/-ies: AEE and Partners

Goal(s) Addressed: 4. There is measurable improvement in in-migration; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions

BR6. Develop a region-wide transportation network and encourage adoption



Connections to Other Action Steps: EI3

Specific actions to consider:

1. Conduct a study to determine **regional demand for public transportation** (and characteristics of that demand), as well as connections between transportation and pursuit of regional job opportunities
2. **Inventory available resources and staff** at each participating community college who can contribute to transportation services
 - o Identify ways to link campuses using these existing resources

Recommended Responsible Party/-ies: AEE and Partners

Goal(s) Addressed: 1. Partner counties identify as a cohesive region; 7. Education, workplace, and economic development opportunities are increased

Recommendations for Measuring Progress on Business Recruitment Actions

- List of businesses that provide employment opportunities that match well with the area's *existing* workforce developed²⁷ for targeted recruitment (Year 2)
 - Addition of **[TBD]** new businesses to the region that provide employment opportunities that match well with the area's existing workforce (Year 3+)
- List of businesses that provide employment opportunities for the area's *aspirational* workforce²⁸ developed for targeted recruitment (Year 2)
 - Addition of **[TBD]** new businesses to the region that provide employment opportunities for the region's aspirational workforce (Year 3+)
- **[TBD]** new qualified workers in the region due to in-migration (Year 3)
 - **[TBD]** new qualified workers in the region due to in-migration (Year 3+)
- A plan for regional business/industry diversification has been developed (Year 2)
 - Increase of **[TBD]**% in the number of industries in the region (Year 3+)
- Potential affordable housing contractors identified; incentives established in all AEE counties (Year 3)
 - Average of **[TBD]**% increase in housing stock across all income levels (Year 3+)
- A plan for a region-wide transportation network has been developed (Year 2)
 - First cross-county transportation link(s) established (Year 3)

Additional Resources Needed for Enacting the Action Plan

- Public relations/communications support
- Web development support
- Lobbying support

²⁷ In partnership with Economic Development experts

²⁸ *Aspirational workforce*: See BR2 (footnote)

- School district-specific funding to enact K-12-relevant aspects of the region-wide K-12 plan (E11)
- Superintendent-appointed AEE liaison in each K-12 school district to lead cross-institution efforts and partnerships
- President-appointed AEE Liaison in each community college to lead cross-institution efforts and partnerships
- Regional economic projection data
- Transportation study support

Recommended Early Actions

The ultimate success of long-term plans like AEE's often hinge on quick and comprehensive early execution of several supporting and formative start-up tasks. Consequently, AEE should commit to completing the Actions outlined in the **Establishing AEE** section over the course of its first 18 months.

Fortunately, some of the **Action Plan** tasks already are underway, and can be completed alongside the establishment tasks. One benefit of working on both **Establishing AEE** and **Action Plan** items simultaneously is that quick completion of a few highly-visible **Action Plan** items will demonstrate the strength and commitment of the organization to potential supporters.

Even within these sets of early-activity Actions, some of the Actions listed above carry more urgency and immediacy than others. AEE should prioritize the following Actions during its first three months.

Recommended First Steps for Establishing AEE

Creation of Oversight Entity and Identification of AEE Leadership (part of DO1)

A key component of translating isolated recommendations (the “**what**” of a project) into a cohesive plan is the identification of the “**who**.” First, in order to coordinate all of the Actions and increase overall chances for success, AEE will need to appoint a fully-staffed leadership team as quickly as possible—and preferably one with representation from each participating county. Critical characteristics for members of this leadership team include deep knowledge of the region and credibility with a wide array of potential regional partners across all key sectors (education, business, industry, and government)

Equally as important will be the designation of a multi-county, multi-sector oversight entity to help ensure not only that AEE is responsive to the needs of each of the region's communities, but also that there is a formally-established group that can meet regularly to share information about successes, challenges, and needs. The current Planning Group may be a good initial oversight entity, with the caveat that there likely will need to be mechanisms in place for other stakeholders to recommend members, as well as for current members to cycle off periodically.

Socialization of the Plan and Formalization of Partnerships (part of DO2)

The “**who**” includes not only AEE leadership and Steering Committee members but also the host of partners from across the region whose commitment will be necessary for getting not only the work of establishing the organization under way but also of beginning to enact some of the Plan elements. Based on

responses from participants in the 2019 AEE Listening Tour focus groups, there is a general understanding across several target stakeholder groups of the importance to the region of having a group like AEE, as well as at least nominal interest in supporting its work. Formalizing the most promising of those partnerships now is critical while interest in AEE is high. Finishing AEE's first quarter with a healthy representation of supporting organizations and individuals from across the region who are willing to endorse publicly both the organization and the Plan will go a long way toward buttressing AEE's longer-term prospects for success.

Confirmation of Responsible Parties, Action Timelines, and Priority Tasks (part of DO4)

The Establishment and Plan Actions include suggestions for responsible parties and completion targets, but AEE will need to invest some time during its first three months reviewing, revising, and reaching agreement with partners on those parties and timelines (the “**when**”), as well as on which proposed Actions to prioritize for the first year. In addition, as a partnership organization with an anticipated small central staff, AEE likely will need to continue to rely on contributions of time and effort from its current Planning Group members for at least its first formative year. To maximize the support this group can provide, AEE members will need to make sure that each early contributor is in agreement not only with respect to who will take temporary responsibility for each task (ahead of the appointment of formal AEE Leadership) but also a realistic timeline for completion of those tasks that respects each volunteer's realistic availability.

Securing Start-Up Funding (VI1)

Finally, a fully-realized plan also needs clear definition of the “**how**”—how will the work (both of establishing AEE and of enacting the larger AEE plan) be accomplished? This question will be answered in part by those identified as being responsible for enacting certain Plan Actions, but another critical element is identifying and securing the funding necessary to create the time and opportunity to complete the work. The work of getting the organization off the ground and the work outlined in the Plan both will be significant and time-consuming, and it cannot be assumed that everything can be accomplished by a team comprised entirely of people already fully committed to other work. While securing permanent, ongoing funding is one of the tasks assigned to AEE Leadership (Action VA2, above), Leadership will need at least a year of support to enable the team to identify and pursue those longer-term funding sources.

Recommended First Steps for the AEE Action Plan

There are several efforts in the region already under way that are related to (or correspond directly with) some of the Actions outlined above. Capitalizing on

these actions and finding ways to associate them with AEE could help the organization establish validity and viability in the eyes of potential partners.

Expand guidance on pathways to careers region-wide (part of EI2 and WD2)

One of the original AEE Partners, Work in Burke,²⁹ already educates students and their parents about job opportunities in Burke County and the training required to enter those fields. Expansion of the Work in Burke model to other AEE partner counties is a logical next step.

Coordinate and reduce redundancies across community college offerings (EI3)

In spring 2020, the presidents of Catawba Valley Community College and Western Piedmont Community College charged department heads and instructors with beginning the process of identifying redundant course listings, both within and between schools. The colleges already share cross-listed courses in several departments. With the goal of creating more efficient programming through the sharing of resources, leaders aim to cross-list more courses while also maintaining distinct identities and programs.

Offer four-year degrees at community colleges (part of EI4)

Several existing two-year degree tracks (in particular, in nursing, education, and engineering) already help support important infrastructure needs in the region, and interest has been high at both CVCC and WPCC for expanding one or more of these programs to include a four-year option. Doing so can happen along two paths: 1) Extension of on-campus programs, with support of the state Community College system; and/or 2) partnership with state four-year programs to provide in-region locations for earning joint degrees. For the second path, North Carolina State University and Appalachian State University already maintain presences in the region; AEE offers a timely opportunity to expand those presences and strengthen partnerships.

Develop a region-wide transportation network and encourage adoption (part of EI3 and BR6)

To further enable students to take advantage of courses on both community college campuses and to remove transportation barriers, the campuses plan to create a bus line that operates regularly between CVCC and WPCC, with the line extended to CVCC's Alexander Center for Education in the next phase. Representatives from both campuses also have begun talks with each county's public transportation divisions. During the planning process, feedback from

²⁹ A partnership of Burke County Public Schools and Western Piedmont Community College, with support from Burke Development, Incorporated; <https://www.workinburke.com/>

participants across the region underscored the need for affordable public transportation. The establishment of a bus line between CVCC and WPCC provides a good test case for broader implementation in the region, as the schools can collect information on ridership and opportunities for growth. Lessons learned on a small scale then can be applied to regional transportation options.

Prepare a workforce to support construction of affordable housing (part of EI3 and BR5)

Western Piedmont Community College and Catawba Valley Community College have begun planning for a heavy equipment operation program and a residential construction program, both of which will be offered jointly by the two colleges. These programs begin to address two critical regional needs at once: first, more cooperation between the region's community colleges; and, second, training for the workforce necessary for improving the availability of lower-cost housing options region-wide. Some aspects of these programs are projected to be available for high school students as well.

Expand opportunities across the region to connect students and employers (part of WD1)

Both Work in Burke and another original AEE Partner, Catawba Valley Community College's K-64,³⁰ have made significant strides in recent years in connecting students in their respective counties with employers who are willing to provide them with opportunities to apply the skills they are learning in school to real-world challenges in business and industry. During the AEE Plan development process, the two organizations began working on ways to learn more about their efforts and approaches. A natural next extension of this budding partnership could be initial coordination of some services and extension of those services into all partner AEE counties.

³⁰ <https://www.k-64learning.com/>

Supplemental Materials

Along with the AEE Plan, the Friday Institute team worked with Stakeholder Committee members to create several supplemental materials for use in establishing the organization and carrying out the Plan of Action. The first is a series of **Budget Considerations** (next section) as AEE develops both its short-term and longer-term funding requests for establishing and maintaining the AEE effort on an annual basis. Also included in the Appendices are **Value Proposition** statements (**Appendix D**) which detail the benefits of supporting the AEE initiative for a variety of prospective stakeholders, as well as a sample **Memorandum of Understanding (Appendix E)** with language that AEE Leadership can use as they solidify new cross-sector partnerships.

Budget Considerations

Without a clearer sense of the amount and types of in-kind support (e.g., office space, staff time, materials, etc.) that can be provided in the first few years of AEE by the Planning Group and initial Partners (early adopters of the AEE vision and goals), it is difficult to estimate remaining fiscal budgetary needs. We can, however, offer an outline of what a fully-staffed and -supported AEE program might look like, based on the scope of the recommended Actions described in the Plan above and based on the sizes of similar existing efforts around the state.

Our primary recommendation is that AEE target an eventual staff of seven:

- An Executive Director;
- A lead liaison for each participating county;
- A support staff person for each participating county.

With the exception of the Executive Director, these staff members do not necessarily need to be full-time; in some cases, a staff person's AEE role may be part of a broader job description for a position hosted by one of the primary AEE partners. In addition, hiring for the Executive Directorship can be delayed if all of the lead liaison positions are filled and the liaisons work well together as a team.

As AEE grows (for instance, when Caldwell County joins the partnership), the staff should grow accordingly, if possible. The *Discovery and Convening and Information-Gathering* phases of the AEE planning process highlighted the importance of representation for every participating county: Not only will balanced county representation help to demonstrate that all participating counties are on equal footing in AEE, but it also will help ensure that stakeholders in every AEE community are identified and heard.

Our recommendation for the non-personnel portion of the operating budget is to plan for an annual budget that eventually will cover:

- Space rental
- Office supplies
- Travel (both within-region and statewide)
- Web presence
- Event planning and hosting
- Printing
- Marketing

Finally, much of the work outlined above will require not only contributions from all of the identified AEE partners (as anticipated in recommendations DO2 and DO4) but also a variety of semi-permanent and occasional consultants who can assist with the following tasks:

- Data management and analysis
- Lobbying
- Web design and management
- Public relations/marketing/communications

Appendix A. Planning Team and Support Team Membership

Alexander County Economic Development Corporation

David Icenhour

Alexander County Schools

Dr. Jennifer Hefner

Burke County Schools

Dr. Larry Putnam

Burke Development Inc.

Alan Wood

Carolinas HealthCare System - Blue Ridge Health

Kathy Bailey

Carrie Mull

Catawba County Board of Commissioners

Sherry Butler

Catawba County Schools

Dr. Matthew Stover

Catawba Economic Development Corporation

Scott Millar

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Catawba Valley Community College

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Appendix B. Summary of Listening Tour Themes

To raise awareness of the effort to establish AEE and to incorporate feedback from a broader array of stakeholders into the planning process, the Friday Institute team embarked on a nine-stop Listening Tour across Alexander, Burke, and Catawba counties in September 2019. The AEE stakeholder group helped secure host locations for three stops in each county: two for the general public with one morning and one evening option, and one for employees of a representative community business. Attendees in the general public sessions included government officials, school district and community college employees, local business leaders, and representatives from the non-profit sector. The employee sessions were held onsite during business hours; they were hosted by Catawba Valley Health System in Catawba County, Schneider Mills in Alexander County, and Meridian Specialty Yarn Group in Burke County, with employees from Kellex joining the Burke County session.

Major Challenges

Participants identified **reaching cross-community consensus** on the main problems/areas of focus **as a major obstacle** to winning support for a regional Plan. To help reach consensus, they recommended **focusing on these major challenges**:

(1) Employee Availability, Recruitment, and Retention

- **Mismatch between employment opportunities and available employees**
- **Inefficiency of company training of entry-level employees** (current common practice)
- **Mismatch between employee expectations and reality**

(2) Education

- **Uneven support for different post-secondary pathway options**
- **Challenges to innovation and responsiveness**
- **Lack of support outside of K-12 and community colleges for soft skill instruction**
- **Barriers to on-the-job/real-world simulation training**
- **Cost of higher education**

(3) Governance

- **Leadership challenges**
- **Regulatory challenges**

(4) Infrastructure

- **Housing shortage**
- **Unbalanced retail/service availability**
- **Insufficient transportation infrastructure**

(5) Additional Societal Contexts

- **Drug addiction**
- **Child care availability and expense**
- **Perceptions of/assumptions about motivation/work ethic**

Generating Buy-In for a Regional Plan

In addition to unifying challenges, participants also recommended several **themes that could encourage buy-in for a unified regional effort**, as opposed to separate local efforts:

- **Provide a rationale for a regional approach** -- Making the case for a regional **need** and for a regional **effort**
 - **Shared challenges** -- AEE needs to identify a common, unifying theme or issue (see above)
 - **Urgency** -- AEE needs to pull together **numbers** (e.g., employment by degree level, age, etc.) to prove the **need**
 - **Efficiency** -- There is concern about creation of a new entity/effort/focus; there is more acceptance of a regional coordinator/convener of current/existing efforts
- **Highlight key potential benefits of a well-executed regional Plan:**
 - Cuts down on inefficiencies/duplication of efforts
 - Coordinates external communication/recruitment
 - Facilitates sharing of best practices across the region
 - Makes the region a leader in education
 - Magnifies successful local endeavors
 - Addresses damaging regional competitiveness and territoriality
 - Engenders a greater regional attitude from the bottom up
 - Establishes common outcome measures (e.g., via a common dashboard, etc.)

- **Orchestrate a shared initial/early “win”** -- AEE needs one or two example efforts to demonstrate the genuineness and the power of a regional approach to addressing common goals
- **Acknowledge major hurdles to regional buy-in**
 - **Local history** -- AEE cannot underestimate the strength and challenges of still-simmering, barely-healed inter-community tensions, prejudices, biases, and, as one participant put it, “hurt feelings”
 - **Local competition** -- The current mindset in many of the AEE communities -- especially in terms of economic well-being -- is “we take care of our own”; the conversion to “we take care of each other” is a major challenge

Proposed Foundational Elements of the Plan

In order to understand how each can contribute, **all Sectors** need a better, broader understanding of the sell-points of the region as a whole (not just a given community's) and of overall shared goals/messaging everyone can use in recruitment pitches to potential businesses, employees. **Potential components of a regional Plan:**

- **Identification of common regional assets** -- Region needs to identify and market assets that could draw people and businesses to the area.
- **Development of pathway to business/industry diversification** -- Including expansion of employment opportunities within and beyond the school systems, government entities, manufacturing, fast food/service, agriculture, healthcare, construction, and maintenance.
- **Creation of meaningful roles in the Plan for representatives from every community**
- **Nominations for local leadership** -- Think critically about the person(s) who will steer implementation of the Plan. It is important that this person is authentic; even better if home-grown. AEE should be championed by local voices and defined by local ownership.
- **Potential areas of focus for early action** -- From the survey of Listening Tour participants, the top priorities should be *attracting new business and new talent to the area* and *promoting acceptance of alternatives to a four-year college degree*

Getting the Message Out: Publicizing the Plan

A major challenge to implementing a regional Plan will be getting the message out to **all stakeholders** in ways that enhance the probability that each group will **absorb** and **act on** that message. Participants identified **barriers** and offered **recommendations** for overcoming them:

(1) Challenges, Barriers, and Information Gaps

- **Barriers to communication:**
 - Inundation
 - Lack of a Central Authority
 - Lack of Service (Internet, radio) or Infrequent Service (local papers)
- **Communication targets:**
 - **Businesses** need a better sense of how to contribute to the education sector; biggest **gap** in the school-to-workforce pipeline is **between K-12 and industry**
 - **Students and their families** need to know about opportunities available in the area so that they know what they can work toward. Participants identified families as an important influence on higher education/career choices.
- **Communications goal: Community-Wide Shift in Values** -- There needs to be a concerted effort to create a cultural shift in how families talk about and view schooling

(2) Recommendations for Communications Plan

- AEE needs a compelling **vision** that makes people want to know more and seek out information; AEE should not rely on steering people to an information platform first
- AEE needs **personal success stories** to share; more than just testimonials, these stories need to demonstrate each of the **pathways that leads to success** (e.g., to help break the four-year college narrative)
- Successful communication efforts should be **scaled to reach more students** -- Traditional methods of spreading the word about higher education/jobs still work; AEE should find ways to increase their use
- Although time-consuming and resource-intensive, AEE needs to make **personal appeals**
- AEE needs to provide **guidance** for educators, mentors, and parents re: how to make students feel valued, encouraged to do well

Perspectives from Current Workers across the Region

- **Current Employee Perceptions of Work/Education Pathways post-High School**
 - *Workforce*: Healthcare options abound, but not necessarily for high school graduates; other options (advanced manufacturing/factory; construction; mechanical & maintenance; warehouse; service industry; farming) are hit-or-miss
 - *Military*
 - *Community College*: Many opportunities, but enrollment spaces in the highest-demand programs are limited
 - *Four-Year College*: Fewer opportunities, relative to workforce, Community College options
 - And yet, this is the option high schools promote the most
 - Perceived to be a pathway for leaving the region
- **Supports that Matter the Most during High School³¹**
 - Teacher and counselor guidance, support, and advice -- especially in terms of understanding work opportunities and navigating financial aid
 - Opportunities to explore local industries (from one-off job talks to internships)
 - Family -- for better (connections, support, values, work ethic) or worse (limited information, historical biases about certain industries)
- **Ways to Improve Support during High School**
 - Schools need to help students answer these three questions:
 - What kinds of jobs are available in our community?
 - What skills will I need to work in those jobs?
 - Why should I consider working in those jobs? (financial reasons, but also personal fulfillment and quality of work-life balance reasons)
 - Additional supports needed to answer those questions:
 - Better coordination, equitable opportunities across schools, LEAs

³¹ While high school was the primary focus for the employees who participated in focus groups, other stakeholders noted the importance of extending outreach and support to earlier grades as well.

- Better coordination between K-12 and industry
- More and deeper internship opportunities
- Focus on transferable skills and soft skills
- ***Supports that Matter the Most after High School***
 - Constant on-the-job training on new machinery and procedures
 - Opportunities for promotion
 - Note: Many participants indicated that the die is cast in high school; supports after high school arrive too late
- **Why Employees Choose to Live and Work in the Unifour**
 - Quiet, peaceful, bucolic
 - Small, close-knit community; community spirit
 - Good schools
 - Affordable

Appendix C. Crosswalks of Actions, Measures, and Goals Addressed

Actions to Goals to Measures

Establishing AEE

	Actions	Goal(s) Addressed	Measures
<i>Defining the Organization</i>	DO1. Form the organization	C. A common space exists for bringing together regional voices to identify and solve regional challenges	<ul style="list-style-type: none"> • AEE has a dedicated leadership team (Year 1) • AEE has a formal Steering Committee or Advisory Board (Year 1) • The AEE Plan of Action identifies short- (1- and 2-year) and longer-term (3- through 10-year) regional goals (Year 1) • The AEE Plan of Action identifies measurable outcomes for AEE goals (Year 1) • Elected officials from each participating county endorse the Plan's top goals and advocate for the Plan (Year 2) • AEE has developed and maintains an up-to-date list of regional assets (Year 2)
	DO2. Identify existing regional assets	B. Reps. from every AEE community have meaningful roles in the AEE Plan	
	DO3. Set education, workforce, business development, and AEE partnership goals for the region	A. AEE has a Plan of Action that guides its efforts	
	DO4. Reach consensus among partners on initial strategies for reaching AEE goals	A. AEE has a Plan of Action that guides its efforts	
	DO5. Identify measurable outcomes to track progress toward AEE goals	A. AEE has a Plan of Action that guides its efforts	

	Actions	Goal(s) Addressed	Measures
Making the Organization Visible	VI1. Secure start-up funding	A. AEE has a Plan of Action that guides its efforts	<ul style="list-style-type: none"> • Start-up funding for the first year of operations has been secured (Year 1) • A communications plan has been established (Year 1) and implemented (Year 2) • AEE has a physical headquarters (Year 1)
	VI2. Establish and enact a communication plan	A. AEE has a Plan of Action that guides its efforts	
	VI3. Establish physical headquarters for AEE	C. A common space exists for bringing together regional voices to identify and solve regional challenges	
Making the Organization Viable	VA1. Identify AEE champions in each participating county and at the state level	A. AEE has a Plan of Action that guides its efforts; B. Representatives from every AEE community have meaningful roles in the AEE Plan	<ul style="list-style-type: none"> • At least two AEE champions have been identified from each participating county and have begun advocating for the Plan (Year 1) <ul style="list-style-type: none"> ◦ County-level AEE champions have begun advocating for the AEE Plan locally (Year 2) • At least 3 state-lvl AEE champs. have been identified and have begun advocating for the plan (Year 1) <ul style="list-style-type: none"> ◦ State-lvl AEE champions have begun advocating for the AEE Plan at the state lvl (Year 2) • A plan for permanent, ongoing funding has been established (Year 2)

Action Plan for AEE

	Actions	Goal(s) Addressed	Measures
Capacity-Building	CB1. Re-educate the entire citizenry on AEE's common message/common goals	1. Partner counties identify as a cohesive region; 8. There are measurable reductions in unfilled positions; 9. AEE has a sustainable, flexible, living Plan	<ul style="list-style-type: none"> • A communications plan has been established (Year 1) and implemented (Year 2) • [TBD] external funders and in-kind contributors have committed to supporting AEE (Year 2) <ul style="list-style-type: none"> ◦ [TBD] external funders and in-kind contributors have committed to supporting AEE (Year 3+) • A list of state regulations slowing regional progress for which waivers will be sought has been identified (Year 1) <ul style="list-style-type: none"> ◦ Progress has been made on getting flexibility on at least [TBD]% of the regulations identified as slowing progress (Year 3+) • AEE has adopted a broadly supported definition of a regional workforce-valued credential (Year 1)
	CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan	1. Partner counties identify as a cohesive region; 2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 9. AEE has a sustainable, flexible, living Plan	
	CB3. Reduce state regulations/ increase flexibility for schools, local governments, and businesses	7. Education, workplace, and economic development opportunities are increased; 9. AEE has a sustainable, flexible, living Plan	
	CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials	5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 8. There are measurable reductions in unfilled positions	

	Actions	Goal(s) Addressed	Measures
Educational Improvement	E11. Develop a region-wide K-12 Plan that responds to current and projected regional needs	7. Education, workplace, and economic development opportunities are increased	<ul style="list-style-type: none"> • A region-wide K-12 plan that responds to current and projected regional needs has been developed (Year 2) <ul style="list-style-type: none"> ◦ The plan has been implemented in all five participating AEE LEAs (Year 3+) • Redundancies across regional community colleges have been identified (Year 1) <ul style="list-style-type: none"> ◦ A plan for phasing out cross-campus redundancies has been established (Year 2) • A plan for offering four-year degrees via community colleges has been drafted and submitted to NCCCS (Year 2) <ul style="list-style-type: none"> ◦ At least one four-year degree program has been approved and is operational (Year 3+)
	E12. Enhance the presence and availability of non-degree, post-high school skill and talent development options	5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions	
	E13. Coordinate and reduce redundancies across community college offerings	2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 7. Education, workplace, and economic development opportunities are increased	
	E14. Offer four-year degrees via Community Colleges	5. Workers feel empowered to enhance their employability; 7. Education, workplace, and economic development opportunities are increased	

Actions	Goal(s) Addressed	Measures
<p>WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs</p>	<p>2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions</p>	<ul style="list-style-type: none"> • [TBD] employers provide real-world educational opportunities designed to support workforce needs (Year 2) <ul style="list-style-type: none"> ◦ [TBD] employers provide real-world educational opportunities designed to support workforce needs (Year 3+) • [TBD]% of high school students are enrolled in secondary-level educational pathways designed to meet workforce needs (Year 2) <ul style="list-style-type: none"> ◦ [TBD]% of high school students are enrolled in secondary-level educational pathways designed to meet workforce needs (Year 3+)
<p>WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals</p>	<p>2. Connections, understandings, and trust among educators, businesses, and local leadership; 3. There is strong, cross-sector engagement across education, business, and economic development; 5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions</p>	<ul style="list-style-type: none"> • [TBD] students are enrolled in regional postsecondary programs that contribute to regional economic needs and goals (Year 2) <ul style="list-style-type: none"> ◦ [TBD] students are enrolled in regional postsecondary programs that contribute to regional economic needs and goals (Year 3+)
<p>WD3. Improve within-region student retention (as they transition from K-12 to postsecondary)</p>	<p>3. There is strong, cross-sector engagement across education, business, and economic development; 6. Mechanisms are in place to connect students to real-world careers and curricula</p>	

	Actions	Goal(s) Addressed	Measures
Workforce Retention	WR1. Retain a larger number of qualified workers in the region	5. Workers feel empowered to enhance their employability; 6. Mechanisms are in place to connect students to real-world careers and curricula	<ul style="list-style-type: none"> • AEE measure(s) of annual regional workforce retention established (Year 1) <ul style="list-style-type: none"> ○ The region records an annual overall workforce retention rate of [TBD]% (Year 3+) • [TBD]% of K-12 graduates are employed in the region five years after graduation (Year 3+) <ul style="list-style-type: none"> ○ [TBD]% of K-12 graduates remain employed in the region 10 years after graduation (Year 3+) • [TBD]% of community college graduates are employed in the region five years after graduation (Year 3+) <ul style="list-style-type: none"> ○ [TBD]% of community college graduates remain employed in the region 10 years after graduation (Year 3+) • Measure(s) of within business/industry employee retention established for AEE partner businesses and industries (Year 1) <ul style="list-style-type: none"> ○ AEE partners record annual within-business workforce retention rate increases (Year 3+)
	WR2. Improve within-business employee retention	5. Workers feel empowered to enhance their employability	

	Actions	Goal(s) Addressed	Measures
Business Recruitment	BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce	4. There is measurable improvement in in-migration; 7. Education, workplace, and economic development opportunities are increased; 8. There are measurable reductions in unfilled positions	<ul style="list-style-type: none"> • List of businesses that provide employment opportunities that match well with the area's existing workforce developed for targeted recruitment (Year 2) <ul style="list-style-type: none"> ◦ Addition of [TBD] new businesses to the region that provide employment opportunities that match well with the area's existing workforce (Year 3+) • List of businesses that provide employment opportunities for the area's aspirational workforce developed for targeted recruitment (Year 2) <ul style="list-style-type: none"> ◦ Addition of [TBD] new businesses to the region that provide employment opportunities for the region's aspirational workforce (Year 3+) • [TBD] new qualified workers in the region due to in-migration (Year 3) <ul style="list-style-type: none"> ◦ [TBD] new qualified workers in the region due to in-migration (Year 3+) • A plan for regional business/industry diversification has been developed (Year 2) <ul style="list-style-type: none"> ◦ Increase of [TBD]% in the number of industries in the region (Year 3+) • Potential affordable housing contractors identified; incentives established in all AEE counties (Year 3) <ul style="list-style-type: none"> ◦ Average of [TBD]% increase in housing stock across all income levels (Year 3+) • A plan for a region-wide transportation network has been developed (Year 2) <ul style="list-style-type: none"> ◦ First cross-county transportation link(s) established (Year 3)
	BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce		
	BR3. Attract new talent to the region/recruit a larger number of qualified workers		
	BR4. Develop a pathway to business/industry diversification		
	BR5. Increase housing stock at all income levels		
	BR6. Develop a region-wide transportation network and encourage adoption	1. Partner counties identify as a cohesive region; 7. Education, workplace, and economic development opportunities are increased	

Goals to Actions

Establishing AEE

Goals	Actions that Address this Goal
A. AEE has a Plan of Action that guides its efforts	DO3. Set education, workforce, business development, and AEE partnership goals for the region
	DO4. Reach consensus among partners on initial strategies for reaching AEE goals
	DO5. Identify measurable outcomes to track progress toward AEE goals
	VI1. Secure start-up funding
	VI2. Establish and enact a communication plan
	VA1. Identify AEE champions in each participating county and at the state level
	VA2. Establish permanent, ongoing funding
B. Representatives from every AEE community have meaningful roles in the AEE Plan	DO2. Identify existing regional assets
	VA1. Identify AEE champions in each participating county and at the state level
C. A common space exists for bringing together regional voices to identify and solve regional challenges	DO1. Form the organization
	VI3. Establish physical headquarters for AEE

Action Plan for AEE

Goals	Actions that Address this Goal
1. Partner counties identify as a cohesive region	CB1. Re-educate the entire citizenry on AEE's common message/common goals
	CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan
	BR6. Develop a region-wide transportation network and encourage adoption
2. Connections, understandings, and trust among educators, businesses, and local leadership	CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan
	EI3. Coordinate and reduce redundancies across community college offerings
	WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs
	WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals

Goals	Actions that Address this Goal
3. There is strong, cross-sector engagement across education, business, and economic development	CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan EI3. Coordinate and reduce redundancies across community college offerings WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals WD3. Improve within-region student retention (as they transition from K-12 to postsecondary)
4. There is measurable improvement in in-migration	BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce BR3. Attract new talent to the region/recruit a larger number of qualified workers BR4. Develop a pathway to business/industry diversification BR5. Increase housing stock at all income levels
5. Workers feel empowered to enhance their employability	CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials EI2. Enhance the presence and availability of non-degree, post-high school skill and talent development options EI4. Offer four-year degrees via Community Colleges WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals WR1. Retain a larger number of qualified workers in the region WR2. Improve within-business employee retention
6. Mechanisms are in place to connect students to real-world careers and curricula	CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials EI2. Enhance the presence and availability of non-degree, post-high school skill and talent development options WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals WD3. Improve within-region student retention (as they transition from K-12 to postsecondary) WR1. Retain a larger number of qualified workers in the region

Goals	Actions that Address this Goal
<p>7. Education, workplace, and economic development opportunities are increased</p>	<p>CB3. Reduce state regulations/ increase flexibility for schools, local governments, and businesses</p>
	<p>E11. Develop a region-wide K-12 Plan that responds to current and projected regional needs</p>
	<p>E12. Enhance the presence and availability of non-degree, post-high school skill and talent development options</p>
	<p>E13. Coordinate and reduce redundancies across community college offerings</p>
	<p>E14. Offer four-year degrees via Community Colleges</p>
	<p>WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs</p>
	<p>WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals</p>
	<p>BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce</p>
	<p>BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce</p>
	<p>BR3. Attract new talent to the region/recruit a larger number of qualified workers</p>
	<p>BR4. Develop a pathway to business/industry diversification</p>
	<p>BR5. Increase housing stock at all income levels</p>
	<p>BR6. Develop a region-wide transportation network and encourage adoption</p>
<p>8. There are measurable reductions in unfilled positions</p>	<p>CB1. Re-educate the entire citizenry on AEE's common message/common goals</p>
	<p>CB4. Elevate awareness and acceptance of regionally valuable non-degree credentials</p>
	<p>E12. Enhance the presence and availability of non-degree, post-high school skill and talent development options</p>
	<p>WD1. Better coordinate and create equitable career-focused opportunities for students across schools and LEAs</p>
	<p>WD2. Increase postsecondary enrollment in programs that contribute to regional and economic needs and goals</p>
	<p>BR1. Attract/recruit new businesses to the region that provide employment opportunities for the region's existing workforce</p>
	<p>BR2. Attract/recruit new businesses to the region that provide employment opportunities for the region's aspirational workforce</p>
	<p>BR3. Attract new talent to the region/recruit a larger number of qualified workers</p>
	<p>BR4. Develop a pathway to business/industry diversification</p>
	<p>BR5. Increase housing stock at all income levels</p>

Goals	Actions that Address this Goal
9. AEE has a sustainable, flexible, living Plan	CB1. Re-educate the entire citizenry on AEE's common message/common goals
	CB2. Build the capacity of stakeholders to carry out all aspects of the AEE Plan
	CB3. Reduce state regulations/ increase flexibility for schools, local governments, and businesses

Appendix D. Value Propositions for AEE Stakeholders

The full and final value of AEE for various stakeholder groups will be realized only once the Plan has been put into action and AEE has better established the roles it plays in the region. Based on the **Action Plan** elements outlined in the main text, we can begin to construct potential specific value proposition statements for several of AEE's intended stakeholder audiences, in addition to the more general value proposition shared in the main text.

Overall Value Proposition

- There is a reason to engage in the work envisioned by AEE, because **there is a shared need**. The Region's three main challenges are:
 - **(1) Filling all available positions in the region**
 - **(2) Keeping more students in the area after graduation**
 - **(3) Encouraging in-migration**

and the AEE vision, goals, and Plan of Action present a pathway for addressing those challenges.
- Participation will improve access for participants to **opportunities and resources across the region**.
 - The Unifour region is host to a wide array of assets and amenities that currently are accessed by only community- or county-wide pockets of citizens. AEE will provide a mechanism for increasing cross-county exposure and access to those opportunities and resources.
- Consensus among partners on an agreed-upon education and workforce development focus and a commitment to cross-community collaboration will promote greater **fiscal and programmatic efficiency** among the multitude of entities across the region already engaged in work related to the AEE vision.
- Participation will help the region not only **focus efforts** but also **broaden views** and **improve cross-community understanding**.
 - AEE will expand the community conversation beyond standards and tests in schools, or numbers of jobs available—it will encourage action for improving the longer-term career and life goals of every resident across the region.

Potential Value Proposition for Students (K-12 and Community College)

- **Awareness & Planning**
 - Awareness of the post-schooling pathways available, including job opportunities in the region, and the skills, experience, and credentials needed to secure them
 - Assistance with planning academic and non-academic work and experiences to meet the requirements of a chosen pathway
- **Experience & Exposure**
 - Experience in and exposure to the world of adult work through experiences such as mentoring and internships
 - Exposure to enrichment experiences—experiences that enhance the traditional academic experience (e.g., opportunities to connect with industry leaders and employees off-campus; experiential learning)
 - Access to off-site facilities—i.e., experience with current tools, machinery, and industry opportunities that schools cannot provide on their own
 - Sufficient work-based preparation for a wide array of post-schooling pathways
- **Personal and Emotional Growth**
 - Increase in confidence in themselves as leaders and engaged citizens who can work for the betterment of their region
 - Opportunities to take ownership of their learning, to work independently, and to advocate for themselves and their goals
- **Academic Skills**
 - Opportunities to advance their knowledge and skills in a topic of personal interest, and gain a different perspective than that which can be provided in a classroom setting
 - Opportunities to test out fields of interest, build curiosity, solve problems, and create and pursue innovative ideas
 - Opportunities to make long-lasting connections in the professional world
- **Workplace Skills**
 - Increase in personal and professional skills that will impact future endeavors
 - Diligence, persistence, resourcefulness

- “Soft” skills—most importantly, communications skills
 - Awareness of the etiquette of different fields of work
- **Application of Learning and Career Exploration**
 - Opportunity to apply/translate learning in a real-world setting, and to see adults/professionals using the knowledge/practices they are learning in school

Potential Value Proposition for Educators (K-12 and Community College)

- **Learning Environment Enrichment (Capacity-Building)**
 - Enrichment of the expertise available to each school; for example:
 - Via school-industry mentorship partnerships
 - Via increased access to current tools/machines/processes used in industry
 - Via Cross-District Partnerships
 - Increase in the capacity of teachers and support staff who work with partners
 - Enrichment of the facilities available to each school
- **Wider Community Stewardship**
 - Engagement of companies/mentors in school settings via volunteering and mentorships
 - Cultivation of prospective job opportunities for students
- **Improvement of Student Engagement via Real-World Applications**
- **Improvement in Ability to Prepare Students for Regional Career Opportunities**

Potential Value Proposition for Business/Industry

- **Development of Regional Workforce Pipeline**
 - Potential expansion of workforce through student and employee retention across the region
 - Student exposure to regional career paths they otherwise might not have considered

- **Organizational Advancement**

- Exposure of their specialty area (their company's or industry's work) to potential future workers
 - *Examples for specific local industries:*
 - **Advanced Manufacturing:** Opportunity to educate job-seekers about lifelong career paths in clean, safe, modern manufacturing environments; Opportunity to inform job-seekers and the general community about the high-tech and critical thinking skill sets that are required for success in advanced manufacturing
 - **Healthcare:** Opportunity for students to shadow professionals in the healthcare industry, increasing the recruitment of qualified job candidates
- Opportunity to harness the creativity and energy of promising students to solve organizational challenges
- Opportunity to generate public good will and good publicity for the company—particularly true for early investors in AEE/early adopters of the AEE vision and goals
- Opportunity to work with K-12/Community Colleges to provide training specific to their job opportunities so students graduate ready to work in their organization or industry

- **Capacity-Building**

- Opportunity for professionals—especially early-career professionals—to engage with students and add mentoring to their resume and suite of skills
- Increase access to other opportunities to engage with schools and other businesses

- **Opportunity for Greater Exposure beyond the Region**

- Benefit from mentored students who become good ambassadors for companies when they work and study outside the region

Potential Value Propositions for Parents/Families

- **Improvement in Access to Information**

- Greater awareness of educational and career pathway options for their children

- Expansion of the pool of mentors and advisors focused on finding the best pathways for their children
- **Increased Post-Secondary Options for Children**
 - Expansion in the number of non-traditional, alternative, apprenticeship, two-year, and four-year pathways
- **Family Stability**
 - Increased likelihood of employment closer to home for their children

Potential Value Propositions for Communities

- **Stronger Communities**
 - Population growth
 - More education-to-workforce pipelines
 - Stronger future economy
 - Increased tax base
 - Mitigation of economically-based social problems
- **United Communities**
 - Greater wealth distribution as a result of educational and economic improvements in multiple communities across the region
 - Increased likelihood for cross-community collaborations on shared challenges and innovations

Appendix E. Sample Memorandum of Understanding

This example Memorandum of Understanding text was provided by K-64.

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding, by and between Catawba County, Catawba County Schools, Catawba County Chamber of Commerce, Catawba County Economic Development Corporation, Catawba Valley Community College, Hickory Public Schools, and Newton-Conover City Schools (hereinafter "Participating Partners") is effective this _____ day of _____, 2017.

Purpose

In response to the Participating Partners' belief in actively engaging students of all ages in preparing for viable and sustainable careers throughout their lifetimes, a bold, talent building strategy called K-64 was created. K-64 is about engaging with students from kindergarten to age 64 and beyond focusing on lifelong learning and career development.

The success of K-64 is directly tied to the long term commitment of the Participating Partners. Overseen by the K-64 Board, initial outcomes will be refined and various pilot programs established so concepts can be tested and proven prior to broad County-wide implementation.

The Catawba County Board of Commissioners, the three school systems and CVCC are each committing significant dollars as start-up capital for this 21st century education initiative. Everyone recognizes all Participating Partners, business, industry and the community will have to work together to ensure continued progress and effective change.

Funding

County funding for the initial two years of K-64 is possible due to the County's practice of holding debt service funding constant as existing debt obligations are paid off and reserving any excess funds to finance future construction projects. Funding beyond the initial two-year commitment will need to be evaluated subject to factors including K-64 impacts, the County's financial position, and school construction needs. Funding for K-64 shall be separate from and not reduce funding for local current expense or annual capital needs for the three school systems and CVCC, as benchmarked against the total funding for all combined in the County's Fiscal Year 2016/17 budget, barring any major unforeseen change in the County's financial position that would require it to reevaluate all funding.

Participating Partners understand the initial County funding is not sufficient to sustain K-64 and recognize funds from Participating Partners, business, industry, the community as well as non-profits are necessary for continued success.

All K-64 dedicated funding, initial and future, shall be distributed through the Catawba Valley Community College Foundation, Inc. and appropriated in accordance with the annual budget adopted by the K-64 Board. All such funds will be deposited into a restricted account, which prohibits any distribution of funds except for purposes of K-64 as appropriated by the K-64 Board. The K-64 Executive Director, with oversight from the CVCC President and CVCC Chief Financial Officer, shall be responsible for administering the budget consistent with the K-64 Board's direction and providing a financial accountability report at each K-64 board meeting. The level of detail required in the report shall be up to the K-64 Board. Funds raised or grants obtained by individual schools, systems, or foundations are not required to be distributed through the CVCC Foundation. However, these funds can be sent to the CVCC Foundation if doing so benefits K-64 initiatives and it is consistent with funding requirements tied to the dollars.

Each Participating Partner agrees to share the financial accountability report, along with board meeting minutes, and any other relevant material with its respective governing board on a regular, but not less than quarterly, basis.

Funding shall only be distributed to a Participating Partner so long as it is abiding by this MOU and continuing good faith support of K-64.

Staff

The K-64 Executive Director shall be hired by the K-64 Board. The ED, as well as any other employees that may be hired, shall be accountable to the K-64 Board to implement its vision and follow its direction but will be managed day to day by the President of CVCC. Any employees of K-64 will be employees of CVCC.

Expectations of Participation

For each Participating Partner, its CEO and respective appointed board members are responsible for keeping their respective board regularly updated regarding K-64 progress by means of financial accountability reports, minutes and any additional ways deemed appropriate by the Participating Partner. Each Participating Partner agrees to abide by this MOU and the K-64 bylaws.

Continued Support

Continuity, consistency and sustainability are fundamental to K-64's success. It is critical that leadership changes within Participating Partners do not diminish or stop progress that is made.

The success of K-64 is tied to all Participating Partners continued active support. As such Participating Partners agree, to the extent allowed by law, they shall not withdraw from K-64. Should an unforeseen event occur necessitating a Participating Partners withdrawal, it agrees to provide written notice to all other Participating Partners (via certified mail, return receipt requested) at least 90 days and no later than December 31 of the fiscal year ending June 30 in which the need to withdraw arises.

Should a Participating Partner withdraw it understands and agrees it shall not be entitled to a return of funding contribution already made and must pay funds that have already been committed to K-64. Any funds distributed less than 365 days from the withdrawal date shall be returned to K-64 and the K-64 Board shall distribute as it deems appropriate.

Notices

Any notice sent required by this MOU shall be addressed as follows:

Catawba County Manager

<Address>

Catawba County Schools
Superintendent

<Address>

Catawba County Chamber of
Commerce President

<Address>

Catawba Valley Community College
President

<Address>

Catawba County Economic
Development Corp President

<Address>

Hickory Public Schools
Superintendent

<Address>

Newton-Conover Schools
Superintendent

<Address>

IN WITNESS WHEREOF, the parties hereunto have set their hands on the day and year above first written.

County Manager, Catawba County

Board Chair, Catawba County Board of Commissioners

President, Catawba County Chamber of Commerce

Chair, Catawba County Chamber of Commerce Board

President, Catawba County Economic Development Corporation

Chair, Catawba County Economic Development Corporation Board

Superintendent, Catawba County Schools

Chair, Catawba County Schools Board

President, Catawba Valley Community College

Chair, Catawba Valley Community College Board of Trustees

Superintendent, Hickory Public Schools

Chair, Hickory Public Schools Board

Superintendent, Newton-Conover City Schools

Chair, Newton-Conover City Schools Board

Contact Information:

Please direct all inquiries to Trip Stallings
dtstallings3@gmail.com