

ECKEL & VAUGHAN

MEMORANDUM

T O: NC Education Human Capital Roundtable
F R O M: Eckel & Vaughan
R E: UpliftEd NC Coalition Structure & Recruitment Strategy
D A T E: August 27, 2021

Overview

The following memo outlines the decisions made between Eckel & Vaughan (E&V), the Southern Regional Education Board (SREB) and the NC Education Human Capital Roundtable (Roundtable) over the last several months in regard to the UpliftEd NC coalition, as well as guidance for approaching next steps (including coalition recruitment).

Coalition Overview & Structure

- o **Name:** UpliftEd NC
- o **Purpose/Goals:**
 - o Build widespread awareness and support for the proposal.
 - o Leverage the networks and voices of coalition leaders and members to advance the need for and widespread benefits of the new model.
 - o Serve as a public face/mouthpiece for the proposal, elevating the issue in the public eye and facilitating constructive dialogue.
 - o Leverage networks to recruit additional support and engage with key decision-makers who are critical to the proposal's success.
- o **Coalition Structure:**
 - o Three levels of leadership:
 - 2-3 honorary co-chairs (of diverse backgrounds/geographies/parties)
 - 3-4 board co-chairs (of diverse backgrounds/geographies/parties)
 - 15-20 board of directors members

Honorary Co-Chair: Lend their name to supporting this effort. Their support adds credibility to the vision and coalition. Honorary co-chairs can be as involved with the Coalition or as hands-off as they desire. **(Commitment: Low)**

Co-Chairs: Lead the work of the Board of Directors, act as a public face for the issue with media/the public, engage with key decisionmakers, ensure interests of their constituencies are represented **(Commitment: Low-to-Moderate)**

Board of Directors: Serve as the steering committee and voice for the Coalition. Help educate, engage and activate advocates/stakeholders. **(Commitment: Moderate)**

Advocates: Boots on the ground, grassroots leaders/advocacy groups from across the state that can publicly support the issue. **(Commitment: Low to Moderate)**

- o Level of commitment and responsibilities of each are outlined below.

- o **Members:**
 - o Official recruitment has not yet begun.
 - o The Roundtable has finalized its first- (A), second-priority (B), and third-priority (C) targets for coalition leadership, which can be [found at this link.](#)
- o **Calls to Action:**
 - o Coalition members will be asked to participate in a number of calls to action including, but not limited to:
 - Signing/Contributing to a Letter to the Editor or opinion piece
 - Acting as a spokesperson for media opportunities
 - Being featured in the coalition’s online content (e.g., photos/videos)
 - Participating in virtual events across the state
 - Meeting with key stakeholders/legislators to discuss the coalition’s goals
 - Engaging and aligning with other community leaders
 - Sharing the coalition’s messages via social media channels
 - Attending the coalition’s launch event
 - Prioritizing the proposal in their individual work

Recruitment Outreach Strategy & Timeline

Since 2018, the Roundtable, with help from PEPSC, has progressed from conversations among great minds in the industry to a developing piece of legislation with the potential to revitalize teacher licensure and professional career paths in a way that positively impacts students. Now, it’s time to recruit leaders of the UpliftEd NC coalition to champion the Roundtable's vision, which is coming to life through PEPSC’s proposal, and sell the need for and benefits of this innovative reform.

- o **Coalition Recruitment & Campaign Timeline:**
 - o Q3 & Q4 2021 (September – December 2021)
 - Recruit target coalition leaders (list linked above)
 - Form coalition
 - Onboard leaders and members
 - o Q1 2022 (January – March 2022)
 - Launch coalition publicly
 - Launch public communications campaign
 - Leverage short session to push the coalition’s narrative/for legislative advocacy (consider hosting Lobbying Day)
 - o Q2 – Q4 2022 (April – December 2022)
 - Continue public communications campaign
 - Host UpliftEd NC roundtable event series across NC
 - Meet with key stakeholders and lawmakers in their districts

o **Coalition Recruitment Checklist**

STEP 1: Outreach to Priority A honorary co-chairs. Depending on responses, conduct outreach to priority B targets. If necessary (based on feedback), move on to Priority C targets. It's important honorary co-chairs are secured before moving on to Step 2.

STEP 2: Once honorary co-chairs are confirmed, conduct outreach to Priority A board co-chair targets. Depending on responses, conduct outreach to priority B targets. It's important board co-chairs are secured before moving on to Step 3.

STEP 3: Once both honorary and board co-chairs are secured, reach out to Priority A board members. If necessary, move on to Priority B targets. Once honorary and board co-chairs are selected, they can potentially help in recruiting board members to participate.

STEP 4: Recruit advocates (coalition members) on an ongoing basis once coalition leadership is formed. Recruiting for advocates never stops.

Keep in Mind:

- Refer to the notes section of coalition member list ([at this link](#)) for guidance on when/who to reach out to as alternates, should Priority A targets be unavailable.
- Determine the best Roundtable members to reach out to Governor Cooper, Senator Berger and Speaker Moore for designee representation on the coalition board.
- Record recruitment feedback/progress [at this link](#), as individuals are contacted and as they commit or decline.
- Rationale for securing co-chairs first is to ensure leadership is in place before recruiting board members. Additionally, the names of co-chairs will hold weight, and possibly help persuade other people to get involved. Finally, leaders can aid in the recruitment process.
- Immediately following a successful recruitment conversation (the individual commits to the coalition), share a formal invitation, which will link to additional resources and information about UpliftEd NC. It's suggested the invitation come from the coalition or Roundtable member who had the conversation with the recruited.
- Recruitment conversations will be different for everyone, depending on the relationship. A lot of individuals on our target list have been engaged with this effort previously and are already well-informed. Others on the list will need to be caught up on the details. Ultimately, you know these individuals best and the channels by which they are most receptive to information/asks. So, communicate in the way you see best fit for the individual (in person, via phone, email).

Keeping the Coalition Informed

While recruiting coalition members is an important step, it's not the last step. It will be vital to continue the conversation with coalition leaders and members, once committed. Once the honorary and board co-chairs are identified, bring them together for a leadership onboarding meeting (in person or via Zoom). Simultaneously, you will be recruiting the larger group of coalition board members. Once a larger group begins to form, schedule regular onboarding meetings (in person or via Zoom) to welcome and present to new members.

As the coalition grows, be sure to add each person to an email distribution list and share bi-weekly updates (via email or UpliftEd NC branded enewsletter) regarding how the coalition is growing, how they can help garner support, proposal updates from PEPSC, and what's upcoming (this includes public campaign updates from E&V). Monthly calls are also recommended in order to provide an opportunity for open discussion and Q&A.

Next Steps

- **E&V** to draft formal invitation email for coalition/Roundtable members to share once an individual commits to the coalition.
- **E&V** to share updated UpliftEd NC one-pager, which is being branded.
- **E&V** to develop a consolidated advocacy toolkit (talking points, one-pager, sample social posts), which can be shared with coalition members and eventually placed on the UpliftEd NC microsite.
- **Roundtable** to develop an onboarding presentation for new coalition members.
- **Roundtable** to develop enewsletter template for updating the coalition, once formed.