



Re: Plan for Engaging Board Members as Effective Spokespersons

**Background:**

As part of an overall goal to educate and engage priority audiences regarding the purpose, value, and role of the workforce development boards, the NC Workforce Development Boards created a formal plan for helping board members become effective spokespersons and ambassadors. Existing board members represent various sectors of the community and this is an opportunity to leverage their knowledge and networks to advance workforce development boards as a go-to resource.

Although *all* board members should have access to the newly created messages and communication materials, only some board members will be asked to speak on behalf of the workforce development boards as board ambassadors. Board ambassadors are volunteer members on the board who sign up to speak at events, on panels, or in meetings on behalf of the workforce development board.

This memo includes recommendations on the following:

- Identifying who should be involved as board ambassadors
- Defining board ambassador expectations
- Preparing board ambassadors
- Identifying appropriate speaking engagements for board ambassadors
- Measuring success

**Board ambassador impact**

By leveraging the knowledge and expertise of board members as board ambassadors, NC Workforce Development Boards seek to have the following impact:

1. Increased awareness about workforce development boards, their role, and their services.
2. Workforce development boards are recognized as key conveners and a resource for community partners and policymakers.

**Implementation**

Although each board could conduct this work independently, because of the regional nature of some speaking engagements, there should be a coordinated effort among regional or neighboring boards. Therefore, one point person on staff from each board should be identified to coordinate materials, speaking opportunities, and ambassadors. This person have the following responsibilities:

1. Update and be the keeper of messages and communication materials. These point people use a shared calendar and share documents through Dropbox or Box.com.
2. Lead the effort to prepare board ambassadors.
3. Identify appropriate speaking and presentation opportunities.
4. Coordinate speaking engagements with other boards and with their own board ambassadors.
5. Track and measure success.

## Board ambassador strategies

The following strategies should be employed by each workforce development board in order to increase awareness about workforce development. Additional sections below outline how each of these should occur.

1. Arm all staff and board members with messaging and communication materials.
2. Identify and recruit key board members as ambassadors
3. Prepare board ambassadors.
4. Identify and coordinate speaking engagements for board ambassadors.
5. Measure success and tweak board ambassador process.

### *Strategy 1: Arm all staff and board members with messaging and communication materials*

- Tactic 1: Finalize communication materials
  - Add stories to the initial storybank. Include additional examples using the existing format.
  - Finalize the palm card with logos and contact information.
  - Update the PowerPoint presentation with local photographs and examples based on the audience and presentation purpose.
  - Update of materials on a quarterly basis, as initiatives change and priority audiences shift.
- Tactic 2: When distributing the materials, explain the purpose and when to use them to board members and staff. This should be done in-person to answer any questions about how and when to use the materials.
- Tactic 3: Place the materials in a shared folder or password protected website for easy retrieval. Let board members and staff know where they can be found.

### *Strategy 2: Identify and recruit key board members as ambassadors*

- Tactic 1: Define expectations of board ambassadors; these may differ slightly for each workforce development board. The following are recommended expectations of *all* board ambassadors:
  - Participation in an ambassador training. (See Strategy 3 below).
  - Speaking on behalf of the workforce development board at least one time per quarter (in meetings, on a panel, at conferences, etc.)
  - Seeking out additional opportunities for speaking engagements to increase awareness about the workforce development board and its role in the community.
- Tactic 2: Present the rationale and parameters of the board ambassador plan to the entire board. Communicate overall expectations and ask for volunteers.
- Tactic 3: Confirm board ambassadors. You can have 5 or 50 ambassadors – they just need to be the right ones. Ideal board ambassadors are individuals who:
  - Understand the need for and have an interest in making the community a better place through collaboration and partnership. They understand one organization cannot do it alone.
  - Are well-respected among many in the community. When they talk, others listen.
  - Are effective communicators.
  - Have the ability to wear multiple hats in order to further the mission and goals of the workforce development board.
  - Understand the mission, vision, and goals of the workforce development board.
  - Have a broad network that includes industry leaders and/or policymakers.

### *Strategy 3: Prepare board ambassadors*

- Tactic 1: Plan and conduct a board ambassador training with your local workforce development board to learn how, what, where, and why to communicate about the workforce development system.
  - Review the purpose, scope, and expectations of the ambassadors.
  - Introduce the core and targeted messages and review how to integrate these messages into talking points and presentations.
  - Include time to practice messages, increase familiarity with the role of the workforce development board using the communication materials, and generate new speaking engagements.
- Tactic 2: Schedule time quarterly with ambassadors to check-in and answer questions. Use this time to:
  - Discuss best practices, successes, challenges, experiences, and opportunities.
  - Update ambassadors on new workforce development board initiatives, messaging, upcoming events, and requests.
  - Ideally, quarterly check-ins could occur with ambassadors from all three workforce development boards.

### *Strategy 4: Identify and coordinate speaking engagements for board ambassadors*

- Tactic 1: Develop a running list of speaking opportunities or presentations.
  - Based on their networks, ask board members and all staff for additions on a regular basis through email and in meetings.
  - Think about formal and informal events and who will be there. Target events that:
    - Have an opportunity to sit on a panel;
    - Are industry related and will include businesses; and
    - Invite elected officials.
- Tactic 2: Apply a screening template to all speaking engagement opportunities. Sometimes engagement helps build relationships and makes connections, while others include an “ask” and can be the beginning of a formal partnership. Other engagements help bridge differences or conflicts. With the understanding that not all speaking engagements are equal; they may require different types of messengers; and board members have limited time, apply the following screening questions to all speaking engagements:
  1. Does it fit within the workforce development board mission and vision? If it does not, it may not be worthwhile for a board ambassador to speak.
  2. What is in it for the workforce development board? Does it add value and advance the workforce development board’s goals?
  3. What is in it for *them*? Understand what the group organizers hope to get out of the speaking engagement and ensure it aligns with the workforce development board goals.
  4. What do *we* expect to come from the engagement? Identifying expectations up front will help participants and speakers prepare for the engagement.
- Tactic 3: Coordinate speaking engagements.
  - Step 1: Develop a shared calendar and folder (such as Dropbox or Box.com) to share opportunities and materials across the three workforce development boards.
  - Step 2: Work with board chairs and vice-chairs to understand which board ambassadors might be best for the engagement.
  - Step 3: If there are regional implications for the event, work with other workforce development boards to identify the best spokesperson(s) to participate on behalf of the

- workforce development boards. Prepare each of these individuals with information and messaging about the workforce development boards.
- Step 4: Coordinate calendars and indicate which board ambassador will participate for tracking purposes.
  - Step 5: Prepare the board ambassador. Remember to:
    - Share information about who the audience will be, the purpose, expectations of what will happen as a result of the engagement, and the format.
    - Provide talking points, power point presentation, and leave behind materials.
    - Be clear on what should be emphasized and the top 1-2 messages to highlight in case there is limited time.
    - Make introductions as necessary (with other panelists or speakers, or with meeting organizers).
    - Schedule a phone call one week in advance of the event to answer any last-minute questions.
  - Step 5: Follow-up with the board ambassador after the event. Send a thank you note. Ask for his/her key takeaways about the event.

### *Strategy 5: Measure success and tweak board ambassador process*

- Tactic 1: Develop a method to track indicators, successes, and impact based on the framework below. This can be done in a shared Excel spreadsheet or an existing Client Management System.
- Tactic 2: Evaluate the board ambassador process as a group. After a 3-5 board ambassador speaking engagements, check-in with board ambassadors, staff, directors, and others to evaluate the process and tweak it as necessary. Questions to ask may include, but are not limited to the following:
  - Do you have enough/the right board ambassadors or do more need to be recruited?
  - Did the filter for engagements yield quality engagements or should new/other questions be applied?
  - Were the right board ambassadors identified for the engagement? How can that matching process be improved?

### **Measuring the success of board ambassadors**

The following framework is recommended for tracking, analyzing, and measuring success of the board ambassador plan to achieve the impact the workforce developments boards seek.

#### *Outcomes*

Outcomes are influenced by a variety of factors. The board ambassador strategies outlined above are designed help move the workforce development boards toward the following outcomes:

1. Organizations that have not involved the workforce development board in the past are reaching out, inviting speakers, or asking for help.
2. Board members are knowledgeable and have a better understanding of the workforce development system, what services are available, and why it matters to the region.
3. There is an increase in the number of opportunities to speak about workforce development boards and their services in the community.
4. There is an increase in interest to serve on the workforce development board.
5. A greater proportion of individuals on the board are decision makers who are able to advance priorities and goals within their own organizations.
6. There is an increase in board member engagement. This includes:
  - a. Board members are engaged in board meetings. They are bringing their experience and expertise and sharing that information with the full board.

- b. Board members actively share information about the workforce development boards with the community and bring back insights from the community to the full board.
  - c. Board insights influence committee work.
  - d. There is an increase in participation by board members (and their organizations) in Workforce Development Board initiatives and events.
- 7. There is an increase in the number of positive stories in the media related to workforce development services.
- 8. There is an increase in the number of businesses aware of and interested in workforce development board activities:
  - a. More businesses reach out for help.
  - b. There is an increase in commitment from business Human Resource departments. The entire business is committed when there is involvement from a business leader.

### *Indicators*

Indicators track transactional activities. They need to be analyzed to understand if the board ambassadors are making a true impact on the workforce development boards. Other factors influence these indicators as well. It is not enough to track transactional activities, but when analyzed, they can indicate trends and measure outcomes on the way to impact and success. Track the indicators to show movement in the right direction toward outcomes and impact. Workforce Development Boards should track the following indicators:

- Ambassador activity:
  - Number of board ambassadors
  - Diversity in the organizations and sectors represented by board ambassadors
  - Number of engagements by board ambassadors
  - Diversity in the type of engagements
  - Engagements meet expectations outlined in the filter
  - Location of engagement
  - What happened as a result of the engagement?
  - Engagements with new organizations (i.e. organizations that have not worked with the WDB before)
- Website and social media traffic (i.e. twitter, facebook):
  - Followers
  - Email sign-ups
  - Likes/retweets/shares
  - Page views
- Board member activity:
  - Board meeting attendance
  - Board meeting agendas/discussion
  - List of people volunteering for openings on the workforce board
- Earned media:
  - Number of stories
  - Initial or follow up story
  - Type of media outlet
- Number of individuals served
  - Businesses
  - Career seekers

## SUGGESTED TIMELINE

The following timeline will help guide workforce development staff in implementing the plan above. This timeline may shift depending on already scheduled meetings and availability.

Timeline	Activities	Participants	
Month 1	<ul style="list-style-type: none"> <li>Finalize communication materials (strategy 1)</li> </ul>	Communication staff	
	<ul style="list-style-type: none"> <li>Place materials in a shared folder for easy retrieval (strategy 1)</li> </ul>		
	<ul style="list-style-type: none"> <li>Distribute communication materials at Board meetings, Association meetings, etc. (strategy 1)</li> </ul>	Board Director/communication staff	
	<ul style="list-style-type: none"> <li>Schedule regular ongoing calls or meetings with point people/communication staff</li> </ul>	Communication staff	
	<ul style="list-style-type: none"> <li>Confirm expectations of board ambassadors for each workforce development board (strategy 2)</li> </ul>	Board Director/Communication staff	
	<ul style="list-style-type: none"> <li>Present the board ambassador strategy to the board (strategy 2)</li> </ul>	Board Director	
	<ul style="list-style-type: none"> <li>Set up tracking process for board ambassadors (strategy 5)</li> <li>Develop a running list of speaking opportunities or presentations – starting with staff ideas – (strategy 4)</li> <li>Apply screening template (strategy 4)</li> </ul>	Communication staff	
Month 2	<ul style="list-style-type: none"> <li>Confirm board ambassadors (strategy 2)</li> </ul>	Board Director	
	<ul style="list-style-type: none"> <li>Develop a running list of speaking opportunities or presentations; collect board member ideas (strategy 4)</li> <li>Apply screening template (strategy 4)</li> </ul>	Communication staff	
	<ul style="list-style-type: none"> <li>Prepare board ambassadors with a joint training (strategy 3)</li> </ul>	Communication staff/Board Directors	
Month 3	<ul style="list-style-type: none"> <li>Develop a running list of speaking opportunities or presentations (strategy 4)</li> <li>Apply screening template (strategy 4)</li> <li>Coordinate speaking engagements (strategy 4)</li> </ul>	Communication staff/Board ambassadors	
	Month 4	<ul style="list-style-type: none"> <li>Develop a running list of speaking opportunities or presentations (strategy 4)</li> <li>Apply screening template (strategy 4)</li> <li>Coordinate speaking engagements (strategy 4)</li> </ul>	Communication staff/Board ambassadors
		Month 5	<ul style="list-style-type: none"> <li>Develop a running list of speaking opportunities or presentations (strategy 4)</li> <li>Apply screening template (strategy 4)</li> <li>Coordinate speaking engagements (strategy 4)</li> </ul>
Month 6			<ul style="list-style-type: none"> <li>Evaluate the board ambassador process and tweak as necessary (strategy 5)</li> </ul>
	<ul style="list-style-type: none"> <li>Develop a running list of speaking opportunities or presentations (strategy 4)</li> <li>Apply screening template (strategy 4)</li> <li>Coordinate speaking engagements (strategy 4)</li> </ul>		Communication staff/Board ambassadors