Appendix A

WAKE INVESTS IN WOMEN

PROJECT CHARTER

Version 4.0

07/22/2019

VERSION HISTORY

Version #	Author	Implemented by	Revision Date	Approved By	Approval Date	Reason
1.0	*Carrie Bartek*	Wake Invests in Women Launch Team	*8/4/2018*	*EVP Greene SVP Ryan*		*Agree on organization, activities, timeline*
2.0	*Kristen Chew Carrie Bartek Rose Hahn*	Wake Invests in Women Launch Team and Steering Committee	*10/2/2018*	TBD		Input from Steering Committee
3.0	*Carrie Bartek and Robert Albright*	Wake Invests in Women Steering Committee	*04/15/19*	TBD	05/22/2019	Input from Steering Committee in Nov. 14 and Jan. 16 meetings
4.0	Carrie Bartek	Wake Invests in Women Steering Committee	7/22/2019	Wake Invests in Women Steering Committee		Update 2019-2020 budget

UP Template Version: 11/30/06

TABLE OF CONTENTS

1 INTRODUCTION

The Wake Invests in Women project charter documents and tracks the necessary information required by the Executive Sponsors to approve the project for funding. The project charter describes the *why* and *what* will be done - the justification, scope, and resource commitment as well as the project's owners and sponsors (see Section 8) decision to proceed or not to proceed with the project. The project management plan is a more detailed, separate document that describes *how* the project will be accomplished.

2 PROJECT OVERVIEW

This project is focused on closing the gender wage gap between men and women initially in STEM-related fields in Wake County. The project will consider strategies to close the gap occurring among different races and ethnicities, age groups, education levels and income levels. This issue has been identified as an adaptive challenge requiring interdependent collaboration between cross-sector entities for implementation, and therefore requires a collective impact approach – a structured, strategic partnership and project management approach to solving an adaptive challenge. This charter authorizes the initiation (Phase I) and planning (Phase II) of the project aimed at bringing together Wake County businesses and government, nonprofit, philanthropic and educational organizations to develop a common agenda and implement a plan to increase female participation and pay equity in the labor market.

Through a facilitated planning and decision-making process, the cross-sector partners involved in Wake Invests in Women will develop a multi-year strategy in 2019 to address several goals: 1) increase the number of women in the pipeline for higher-wage, higher-demand jobs in STEM-related fields; 2) increase the movement and retention of women as they progress through the career pipeline in STEM-related fields; and 3) achieve pay equity between men and women in STEM-related fields at each stage of the career pipeline in tech-related fields. This project will result in a strategic action framework and long-term implementation plan that identifies, organizes and aligns strategies and mutually reinforcing tactics around a common agenda and identifies the resources needed to create the conditions necessary for its success. Specifically, the plan will be organized around the methods detailed in Hanleybrown, Kania, & Kramer (2012):

1) A common agenda that sets a shared vision and goals for change, which includes a common understanding of the problem and an agreement on a collaborative approach to solving the problem;

2) An assessment and data sharing plan with metrics that can be shared across all participating organizations to help partners gauge the progress of the initiative and shift strategies and tactics as needed.

3) Strategies with mutually reinforcing activities (tactics) based on research, with partners having the freedom to choose activities based on their unique environment and organization.

4) A continuous communication plan and a glossary of shared language;

5) An independent Backbone Center with a dedicated staff to manage the project.

A new project charter will be developed for (Phase III)

3 JUSTIFICATION

3.1 BUSINESS NEED

3.1.1 Gender Wage Gap in Wake County

In 2016, the U.S. Bureau of Labor Statistics reported that the median weekly earnings of women who worked full-time was lower than men, both nationally and in North Carolina. In North Carolina, women's median full-time weekly wages were $704 compared to $836 for men (84.2 percent). In the same year, the Wake County Commission for Women and a Task Force was convened by Wake County Commissioners to study the wage disparity in Wake County. Expanding on a 2016 report by the Wake County Commission on Women (2016), in July 2017 they reported that the median income for women over the age of 25 was $34,809 in 2014 while the median income for men was $50,137. The wage disparity persists, and is even greater, for women with graduate degrees, who earn less than 56 percent of their male counterparts with similar educational backgrounds in the county (a difference in income of over $40,000 per year). Further, the study found that the wage gap is higher among women of color, and that the gap between men and women of all education levels is higher in Wake County than in peer counties studied (WCCW Report, 2016). Statewide, the Institute for Women's Policy Research (2014) projected that if something is not done, the earliest year the gender wage gap could possibly close in North Carolina is 2064. With a rising percentage of families relying on at least one quarter of the women's income (statistics show an increase from 28 percent to 63 percent between 1967 and 2012, Women's Policy Research, 2014), this gap impacts the health and economic stability of families in North Carolina.

To determine why the wage gap exists, North Carolina State University Doctoral program students performed a preliminary analysis of US Bureau of Labor Statistics for the Raleigh metropolitan area and compared it to statistics reported by the Wake County Commission on Women to determine if there was a disparity in distribution of women and men in high wage fields. The data show that men's salaries exceed those of women in a majority of occupations with at least 10,000 employed, with significant differences in the higher wage occupations. Further, there are significantly more men than women in several high employment, high wage fields, including management and computer occupations.

2014 Number of Employed In Wake County by Occupation, Sorted by Highest to Lowest Numbers Employed
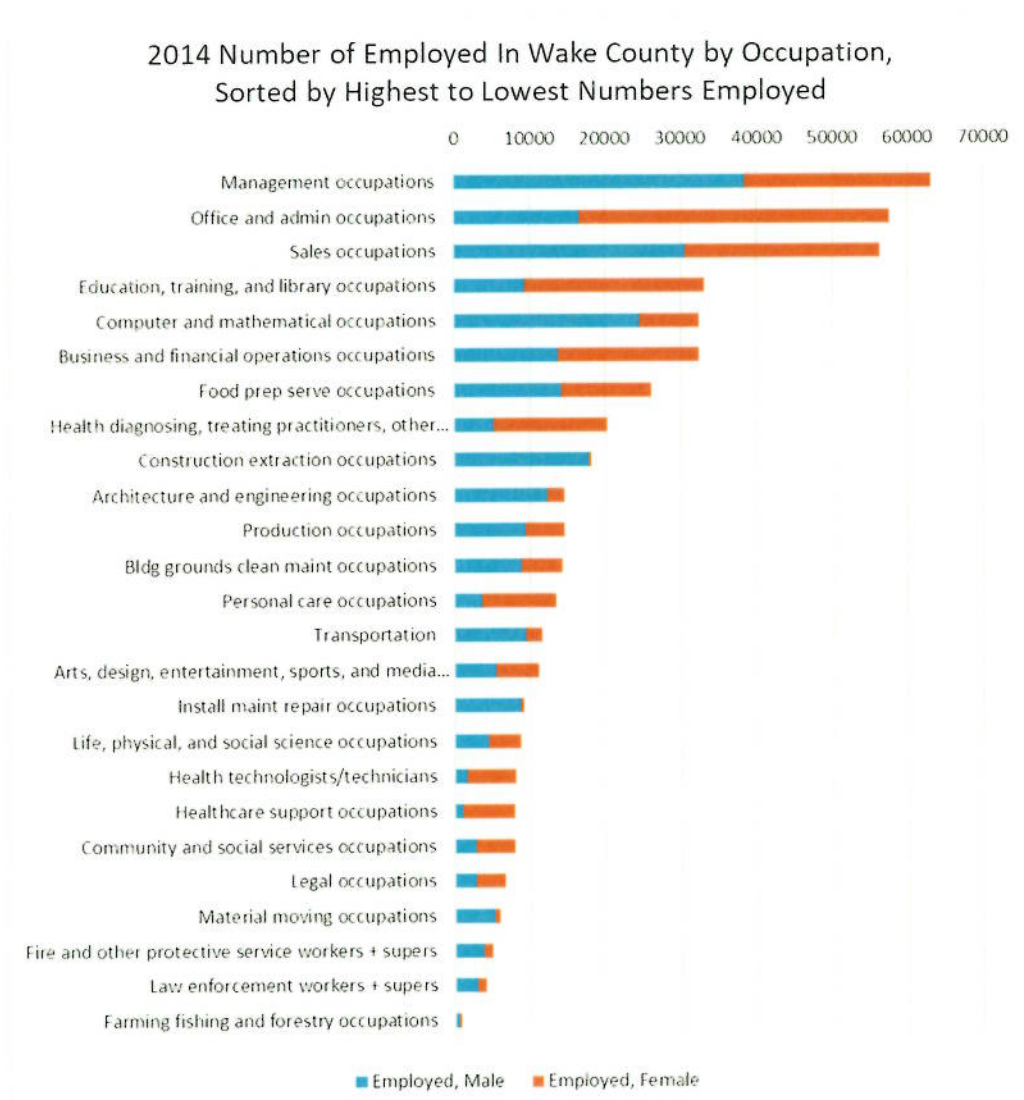
Source: US Department of Labor Statistics

Figure 1. Number of employed males and females by occupational group in Wake County, 2014.

2014 Median Salaries in Occupations with at least 10,000
Employed
Arranged from highest number to lowest number employed

Occupation	Med Earnings, Male	Med Earnings, Female
Management occupations	87825	61328
Office and admin occupations	32020	30987
Sales occupations	42660	18982
Education, training, and library occupations	43355	34272
Computer and mathematical occupations	87161	69991
Business and financial operations occupations	67104	50560
Food prep serve occupations	16482	12032
Health diagnosing, treating practitioners, other technical occupations	113398	57917
Construction extraction occupations	24290	24712
Architecture and engineering occupations	77070	56185
Production occupations	37070	23833
Bldg grounds clean maint occupations	20224	12790
Personal care occupations	14890	14182
Transportation	30237	25634
Arts, design, entertainment, sports, and media occupations	44435	27795

Source: US Department of Labor Statistics

Figure 2. Median earnings of men vs. women in occupations with at least 10,000 workings in Wake County, 2014.

Number of workers in occupation categories with mean annual salaries of $50,000 and above (ordered by highest paying occupations)
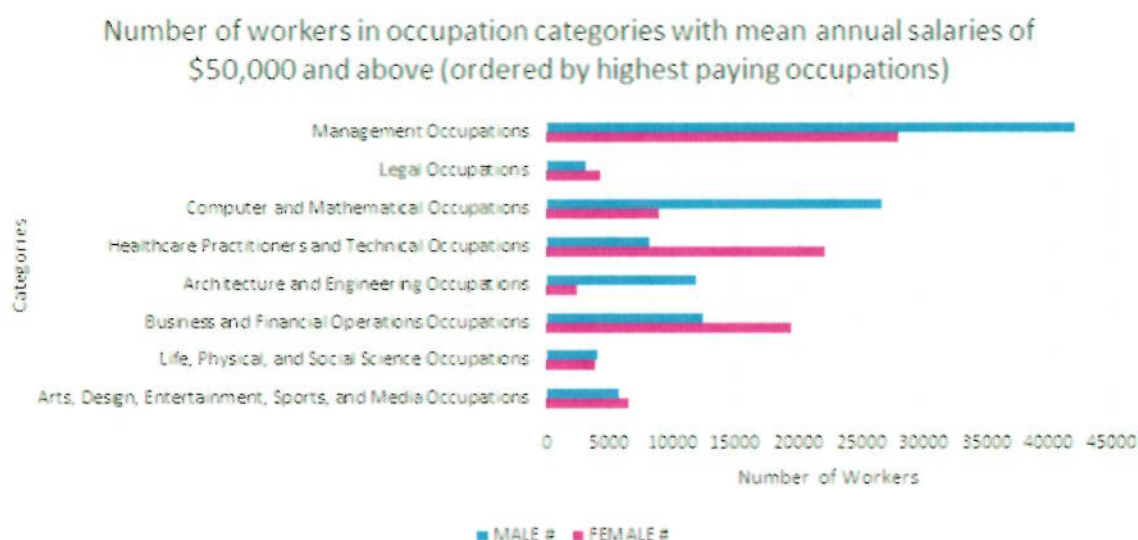
Source: US Department of Labor Statistics

Figure 3. Number of employed males and females with mean annual salaries of $50,000 and above in Wake County, 2014. Ordered by highest paid occupations,

3.1.2 Occupational Growth Projections Compared to Female Participation and Income

According to US Bureau of Labor Statistics projections for the Raleigh-Durham area, the top 15 occupational groups projected for the Raleigh-Durham prosperity zone include those with relatively high wages but where participation of women is significantly lower and/or wages are significantly lower than men. Table 1 summarizes these trends for each high occupational growth group with at least 10,000 employed in the Raleigh-Durham prosperity zone. The table compares the Total Employed (number of citizens employed in the field) to other wage indicators. The table shows that the top three occupational groups by number employed in 2014 were Office and Administration, Management, and Sales occupations.

The median wage index was calculated by dividing the median wage for that field by the median wage of Wake County reported by the US Census Bureau, which is about $35,000 per year. A Median Wage Index greater than 1 means the wages in that field are above the median wage for Wake County, and a median wage of less than 1 means the median wage for that occupation is less than 1.

Next, the Female Participation and Income ratios were calculated for each occupation, which are the number and annual salaries of females in that occupation divided by the number and annual salaries of males, respectively. Female Participation and Income ratios less than 1 mean that there are fewer females than males, or that females make less than males, in that occupational group, greater than 1 means there are more females, or they make more than males, respectively.

Last, the occupation groups and their ratios are ranked by those with the highest total growth predicted for 2014-2024 at the top, and the lowest at the bottom. Again, the occupation groups provided here are those with at least 10,000 or more workers.

Analysis of these indicators shows that occupations that can be categorized as "STEM" (Science, Technology, Engineering and Math) are high wage, high growth fields in Wake County but female participation and/or income is typically lower than males in these fields. Specifically Computer and Mathematical Occupations, Management Occupations, and Architectural and Engineering Occupations are high median wage, high grow fields with low female participation. Health diagnosing, treating practitioners, and other technical occupations, as well as Business and Financial operations occupations are fields with a high median wage index and a high female participation ratio but low female income ratios. Additionally, there are large numbers of workers in sales occupations but this occupational group shows lower female participation than men and the lowest female to male income ratios among all occupations with at least 10,000 workers.

Table 1. Occupational groups with at least 10,000 employed showing comparisons of median wage index, female participation ratio, female income ratio and predicted growth in the Raleigh-Durham Prosperity Zone over the time period 2014-2024.

Occupation Group	Total Employed	Median Wage Index Greater than 1	Female Participation Ratio	Female Income Ratio	Total Predicted Growth in Raleigh-Durham Prosperity Zone 2014-2024
Computer and mathematical occupations	32,432	2.25	0.32	0.80	27%
Health diagnosing, treating practitioners, other technical occupations	20,248	1.75	2.92	0.51	26%
Food prep serve occupations	26,080	0.39	0.84	0.73	24%
Construction extraction occupations	18,150	0.67	0.02	1.02	21%
Office and admin occupations	57,630	0.86	2.47	0.97	21%
Business and financial operations occupations	32,341	1.53	1.35	0.75	20%
Arts, design, entertainment, sports, and media occupations	11,178	0.99	1.05	0.63	17%
Management occupations	63,141	2.11	0.64	0.70	16%
Bldg grounds clean maint occupations	14,315	0.47	0.62	0.63	15%
Education, training, and library occupations	33,127	1.00	2.57	0.79	14%
Sales occupations	56,363	0.85	0.84	0.44	14%
Architecture and engineering occupations	14,648	1.99	0.19	0.73	13%
Transportation	11,678	0.78	0.23	0.85	13%
Production occupations	14,542	0.87	0.54	0.64	10%
Personal care occupations	13,464	0.40	2.72	0.95	6%

Source: US Department of Labor Statistics

3.1.3 Labor Market Demand Gaps in Wake County

Wake County is currently experiencing a gap in the labor demand verses supply within STEM fields. Specifically, there are more job openings in these fields than candidates, especially in the computer and mathematical sciences fields and life and biological sciences fields (Greater Raleigh Chamber of Commerce, 2018). *JobsEq*, a vendor for labor market data, also projects high annual occupation gaps over the next ten years in STEM-related fields, including Healthcare and Technical occupations, Computer and Mathematical Occupations, Management Occupations and Architecture and Engineering Occupations.

Table 2. Projected gaps in occupational labor supply verses demand (annual number of jobs that won't be filled) over the next 10 years.
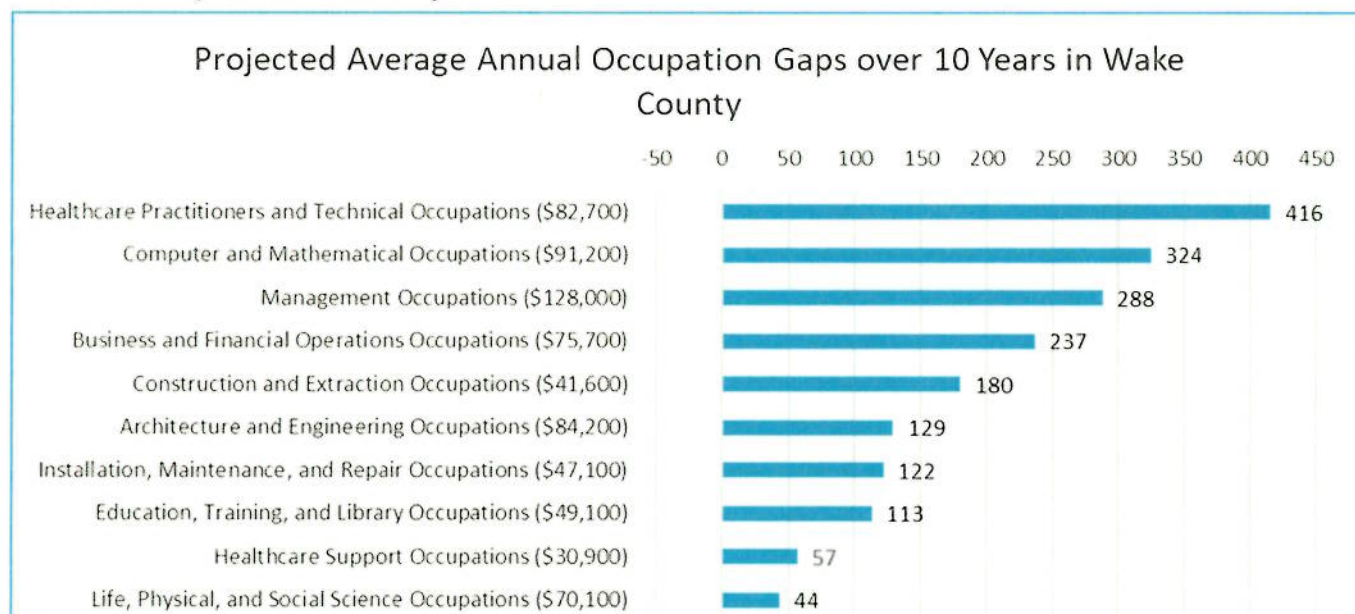
Source: JobsEq (Chmura, Copyright © 2018). Data as of 2018Q4 except wages which are as of 2017. Exported on: Tuesday, April 16, 2019 4:50 PM. Note: "Management Occupations" include all other occupations.

3.2   IMPACT

Given the gender wage gap is highest among the top 15 future growth fields in Wake County, and the need for Wake County to fill current and future occupation gaps in STEM-related fields, the Wake Invests in Women project, with Wake Tech as the backbone, has an opportunity to help business and industry meet current and future labor market needs and improve the lives of all Wake County citizens. The initiative aims to do this by helping more women participate in higher-demand, higher-wage occupations and working to develop strategies for more pay equity and advancement through the management pipeline within these occupations. Wake Invests in Women will initially focus on gender participation and income gaps in STEM-related careers, with a recognition that lessons could be applied over time to other occupations and fields outside of STEM. To this end, Wake Invests in Women will address several goals: 1) increase the number of women in the pipeline for higher-wage, higher-demand jobs in STEM-related fields; 2) increase the movement of through the career pipeline to management positions in STEM-related fields; and 3) achieve pay equity between men and women in STEM-related fields at each stage of the career pipeline.

3.3 STRATEGIC ALIGNMENT OF WAKE INVESTS IN WOMEN GOAL WITH WAKE TECH AND SYSTEM GOALS (APPENDIX B)

Strategic Goal	Wake Tech Goal	NCCCS Goal
Close the gender wage gap in tech-related fields in Wake County. More specific goals include: 1) Increase the number of women in the pipeline for higher-wage, higher-demand jobs in tech-related fields; 2) increase the movement of women as they progress through the career pipeline in tech-related fields; and 3) achieve pay equity between men and women in tech-related fields at each stage of the career pipeline in tech-related fields.	Goal 1 – Student Success Goal 2 – Workforce Development	Goal 2 - Clear & Supported Pathways for Student Progress and Success Goal 3 – Economic and Workforce Impact

4 SCOPE

4.1 OBJECTIVES

4.1.1 Phase 0: INITIATE

4.1.1.1 Develop/Revise Project Charter

4.1.1.2 Develop Project Management Plan

4.1.1.3 Identify Champion, Backbone, Internal and External Executive Sponsors

4.1.1.4 Begin research on gender participation and income ratio disparities

4.1.1.5 Identify and convene initial partners interested in continuing

4.1.1.6 Develop Director position for backbone

4.1.2 Phase I: SCAN

4.1.2.1 Complete initial research on gender participation and income ratio disparities

4.1.2.2 Form high-performing guiding coalition: Identify and invite additional partners

4.1.2.3 Assess landscape: other Wake County initiatives aimed at closing the gender wage gap

4.1.2.4 Identify additional partners

4.1.2.5 Form Steering Committee of committed partners

4.1.2.6 Hire Director for backbone

4.1.2.7 Complete partner professional development on Collective Impact

4.1.2.8 Identify and affirm strategic issues associated with gender wage gap.

4.1.3 Phase II: PLAN

4.1.3.1 Formulate the initiative mission, vision and goals.

4.1.3.2 Formulate common agenda and prioritize targeted, mutually reinforcing strategies

4.1.3.3 Develop key performance indicators (KPIs) and metrics for success

4.1.3.4 Produce a strategic plan documenting above items.

4.1.3.5 Develop an implementation plan for the strategic plan that includes a project management plan, a communication plan, and a research and evaluation plan for the initiative.

4.2 HIGH-LEVEL REQUIREMENTS

To Be Added

Req. #	Requirement Description	Priority 1-Must Have 2-Should Have 3-Nice to Have
1	Wake Tech will charter the backbone organization to ensure it acts impartially and as an independent entity.	

4.3 MAJOR DELIVERABLES

The following table presents the major deliverables that the project's product, service or result must meet in order for the project objectives to be satisfied.

Major Deliverable	Deliverable Description
Steering Committee Formed	Steering Committee of high performing partners is functioning as the guiding coalition of the intiative
Backbone formed	Director hired and center formed with coordinator, technical assitant and data analyst
Strateic plan with common agenda approved	Common agenda and mutually reinforcing strategies documented and agreed to by all partners. Key copmonents of the comomn agenda will include: 1) Guiding Principles, 2) Problem Definition, 3) Goals, and 4) Framework for Change (including priority strategies and identified working groups)
Implementation plan approved	Project management plan, communication plan, and a research and evaluation plan (KPIs and common measurement system) for the overall initiative and for each priority strategy.

4.4 BOUNDARIES

This project will consider strategies to close identified participation and income gaps between women and men in STEM fields in Wake County among different races and ethnicities, age groups, education levels and income levels. The Steering Committee acknowledges there are wage and participation gaps in other fields and occupational areas, but initially Wake Invests in Women will focus specifically on high employment, high growth STEM-related fields.The Committee also acknowledges that some citizens in Wake County may identify with gender categories other than women and men. However, because other gender categories are not yet reflected in wage data, wage gaps among these categories have not been identified and are therefore outside the scope of the current project.

4.5 EXECUTIVE MILESTONES

The table below lists the high-level Executive Milestones of the project and their estimated completion timeframe. For a detailed version of the timeline, see the project management plan.

Phase 0- Pre-project activities	
Identify champion	2017
Identify initial partners	2017
Phase I : SCAN	
Convene initial partners	2018
Form high-performing coalition of original partners (Steering Committee)	2018
Begin conversations on common agenda	2018
Complete baseline data analysis and landscape assessments	2019
Hire Director	2019
Recruit additional partners	2019
Phase II: Plan	
Begin community outreach and engage leaders	2019
Identify key issues and gaps	2019
Approve common agenda and strategies	2019
Working Strategic Action and Implementation Plan, including communications plan	2019
Phase III (not part of charter, provided for partner direction): DO	
Final Draft of Strategic Action and Implementation Plan	2020
Deploy communications campaign	2020
Develop initial collective impact infrastructure	2020
Implement strategies aligned with the common agenda	2020
Develop specific action plans to improve based on data	2020 and Yearly Thereafter

5 BUDGET ESTIMATE

5.1 FUNDING SOURCE

The Director position for the initiative is funded by Wake County. The backbone center (Coordinator and research team) will be funded through a combination of Wake Tech sources and fund raising.

5.2 ESTIMATE

This section provides a summary of estimated spending in 2019-2020 to meet the objectives of the project as described in this project charter. This summary of spending is preliminary, and reflects costs for the development of the strategic plan, and an implementation plan. It is intended to present probable funding requirements and to assist in obtaining budget to support it. It will need to be adjusted after review by the partners.

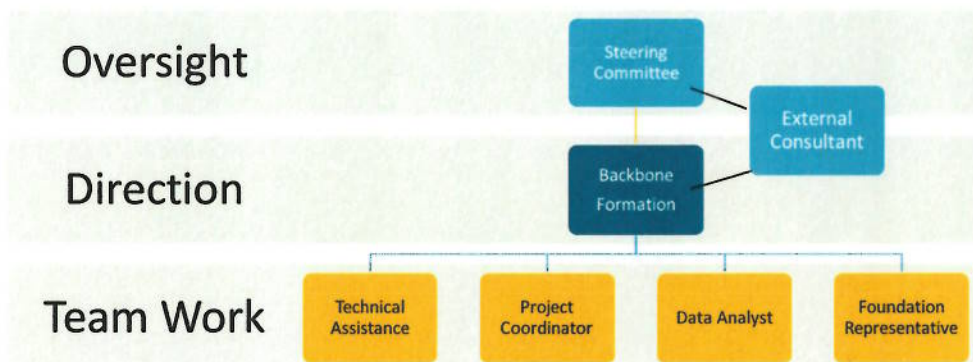| Category	Item Description	Total	Funding Source
Personnel (With Fringe)	Executive Director (In-Kind Services)	$0	Wake Tech
	Director (pro-rated to start date)	$85,000	Wake County
	Research Support (In-Kind Services)	$0	Wake Tech
	Part-time Data Scientist (In-Kind Services)	$0	Wake Tech
	Part-time Coordinator	$45,500	Wake Tech
Contracted Services	FSG Consulting	$15,000.00	Wake Tech
	RTI Consulting (Surveys, Data Analysis, Program Planning and Evaluation Plan).	$40,000	Wake Tech
	Transcription Services	$1,000	Wake Tech
Travel	Local partnership travel and out-of-state travel to benchmark other initiatives	$20,000	Wake County
Outreach	Events	$15,000	Wake Tech
	Marketing and Communication	$5,000	Wake Tech
TOTAL		$211,500	

6 ASSUMPTIONS, CONSTRAINTS AND RISKS

This project has a number of assumptions and constraints that could pose a risk to the project:

1. Assumption of recurring funding from the county at $100,000 per year.
2. Assumption Wake Tech can provide needed back-bone support through the life of the project
3. Constrained by the extent to which partners implement mutually reinforcing strategies and use data to make changes.
4. Sustainability – partners are willing to stay with the project for the long term.
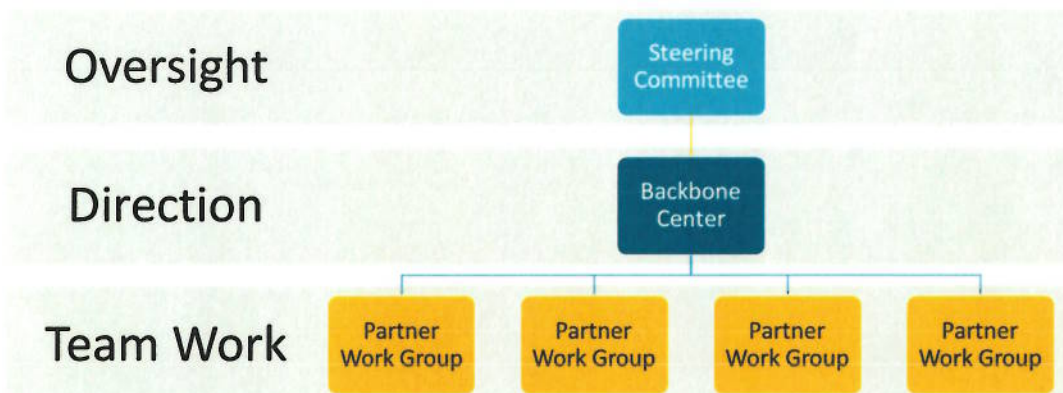
7 PROJECT ORGANIZATION

The project will be organized to ensure "cascading" levels of linked collaboration facilitated by a Backbone Center (aka, a project management office, or PMO) that functions to keep the initiative moving forward and the partners collaborating and focused on the common agenda (Hanleybrown, Kania and Kramer, 2012). Phase I and II structures will be organized to plan the project, with the Phase III structure designed to implement it.

Phase I and II (Present)
Initiating and Planning for Collective Impact

Oversight

Direction

Steering Committee

External Consultant

Backbone Formation

Team Work

Technical Assistance	Project Coordinator	Data Analyst	Foundation Representative

Phase III (Future)
Implementing Collective Impact

Oversight

Steering Committee

Direction

Backbone Center

Team Work

Partner Work Group	Partner Work Group	Partner Work Group	Partner Work Group

7.1 ROLES AND RESPONSIBILITIES

This section describes the key roles supporting the project.

Organization	Project Role	Project Responsibilities
Wake County Commissioner Representative	Project Initiator/ Owner	Champions the cause, approves scope, provides official backing for the backbone organization and represents Wake County Commissioner interests on the Steering Committee.
Partners	Steering Committee	The guiding coalition that sets the initial vision and common agenda for the project. This group is committed to and responsible for planning, overseeing and sustaining the strategic plan to carry out the collective impact project. The committee is comprised of the Project Owner and CEO-level partners. This group will also include representatives from key stakeholder groups identified by the common agenda, such as NC Works Clients, female students, women from key focus area businesses, female managers, ensuring women of color are well represented. Co-chairs will be elected from this group and serve as the leaders of the Steering Committee.
Wake Tech	External Sponsor	Champions the cause externally and provides the official external backing, resources, strategic direction, guidance and approval of the project; approves the request for funding, approves the project scope represented in this document, and sets the priority of the project relative to other projects.
Wake Tech	Internal Sponsor	Champions the cause internally and provides the internal resources, strategic direction, guidance and approvals for the backbone; approves resource request, approves the project scope represented in this document, and sets the priority of the project relative to other projects.
Collective Impact Forum (FSG)	External Consultant	Provides collective impact coaching and technical assistance during formation of Backbone and Steering Committee. Facilitates bringing stakeholders together as a committee before the backbone is established enabled to ensure it is established collaboratively
Wake Tech	Executive Director	Internal organizer and overseer in the creation and functioning of the Backbone Organization; leads Director hiring process and acts as functional manager for Director.

Organization	Project Role	Project Responsibilities
Wake Tech	Backbone Center	The center serves as the "supporting infrastructure", or PMO to coordinate the participating partners, organizations and agencies and ensure its success. The center will provide the overall strategic direction, facilitate the dialogue between partners, manage data collection and analysis, handle communications, coordinate community outreach, and mobilize funding (Hanleybrown et al., 2012; Serena Klempin, 2016) It will host a website that clearly promotes the shared vision, and will manage the collection, analysis and dissemination of data, direct partner activities, develop relationships with the public and advocate for policies that promote gender pay equity The center will also be involved in its own fundraising, which will be housed at Wake Tech free of charge (Klempin, 2016)
Wake Tech	Director	Leads the Backbone Center. This person is provides direction and support to the initial backbone team and later on, the partner workgroups; plans, oversees and secures resources; decision maker on day-to-day activities; escalates issues or concerns to the Senior Project Manager or Sponsors as appropriate. Defines and clarifies scope, hires center personnel; organizes and oversees and facilitates Project Work Groups and develops project plans with Steering Committee (Phases I and II planning) and Partner Work Groups (during Phase III implementation). Organizes Steering Committee meetings, partner social functions and prepares and presents reports on progress of Partner Work Groups, ensuring all actions and tactics being pursued are mutually reinforcing and clearly link back to the common agenda and shared measures (Hanleybrown et al., 2012). Reports functionally to the Executive Director and to the Steering Committee for project deliverables.
Wake Tech	Project Coordinator	Assists with planning and coordinating meetings. Responsible for keeping project documents and developing and implementing a communication plan and websites. Reports to Director (Executive Director in Interim)
Wake Tech	Data Analyst	Plans and manages the systematic collection and sharing of data to enable the Steering Committee

Organization	Project Role	Project Responsibilities
		and Partner Work Groups to learn and refine their activities, strategies and processes as they track progress toward the common goal; develops dashboards for shared measurement system.
Partners	Project Working Groups	Working groups formed around each strategy associated with the common agenda and identified in the implementation plan. Facilitated by and reporting to the Director, work groups develop their own tactical plans for implementing actions (mutually reinforcing activities) based on strategies identified in strategic the collective impact implementation plan. They communicate and coordinate with each other regularly, and engage in a continuous improvement process of "planning and doing," adjusting actions based on data and evidence about what is or is not working.

7.2 STAKEHOLDERS

Wake County Commissioners

Wake County Residents

Wake Technical Community College

Business and Industry

Non-profit Organizations devoted to women's advocacy

Partners

8 PROJECT CHARTER APPROVAL

The undersigned acknowledge they have reviewed the project charter and authorize the project. Changes to this project charter will be coordinated with and approved by the undersigned or their designated representatives.

Signature:		Date:	
Print Name:	Gayle Greene		
Title:	Executive Vice President		
Role:	Project Owner		

Signature:		Date:	
Print Name:	Bryan Ryan		
Title:	SVP, Effectiveness and Innovation		
Role:	Executive Sponsor		

Signature:		Date:	
Print Name:	Jackie Hughes		
Title:	JTH Law - Owner		
Role:	Co-Chair Steering Committee		

Signature:		Date:	
Print Name:	Hilda Pinnix-Ragland		
Title:	Duke Energy Executive (Retired)		
Role:	Co-Chair Steering Committee		

Signature:		Date:	
Print Name:	Regina Petteway		
Title:	Director Wake County Human Services		
Role:	Member		

Signature: _____ Date: _____

Print Name: Caroline Sullivan

Title: Executive Director - NC Business Committee for Education

Role: Member

Signature: _____ Date: _____

Print Name: Andrea DeSantis

Title: Research Associate – NILIE, NC State University

Role: Member

Signature: _____ Date:

Print Name: Marjorie Williamson

Title: Senior Vice President, RTI

Role: Member

9 APPENDIX A: REFERENCES

References

Hanleybrown, F., Kania, J., & Kramer, M. (2012). Channeling change: Making collective impact work. *Stanford Social Innovation Review,*

Heifetz, R., Kania, J. & Kramer, M. (2004). Leading boldly (SSIR). Retrieved from https://ssir.org/articles/entry/leading_boldly

Kezar, A. J. (2014). *How colleges change : Understanding, leading, and enacting change.* New York: Routledge. Retrieved from http://www2.lib.ncsu.edu/catalog/record/NCSU2817700

Klempin, S., & Karp, M. M. (2017). Leadership for transformative change: Lessons from technology-mediated reform in broad-access colleges. *The Journal of Higher Education,* , 1-25. 10.1080/00221546.2017.1341754 Retrieved from http://dx.doi.org/10.1080/00221546.2017.1341754

10 APPENDIX B: KEY TERMS

The following table provides definitions for terms relevant to this document.

Term	Definition
Adaptive Challenges	*Challenge is complex, answers are not known, implementation requires learning and adjusting along the way, no single unit has the authority to impose solutions on other stakeholders. Example: Reforming practices to improve completion rates, improving online education.(Heifetz et al., 2004)*

11 APPENDIX C: MISSION AND GOALS

11.1 WAKE TECH

URL: HTTPS://WWW.WAKETECH.EDU/ABOUT-WAKE-TECH/MISSION-STATEMENT

Mission

The mission of Wake Technical Community College is to improve and enrich lives by meeting the lifelong education, training, and workforce development needs of the communities it serves; to promote individual success in the workplace and in higher education; and to increase entrepreneurship as well as cultural, social, and economic development.

11.1.1 Goal 1 – Student Success

Wake Tech will provide students with a safe and dynamic learning environment through policies, curricula, instruction, and support services that are responsive to their needs and focused on improving completion rates in programs that prepare them for employment or transfer to a four year institution.

11.1.2 Goal 2 – Workforce Development

Wake Tech will promote economic growth, job creation, and entrepreneurship through educational partnerships that provide citizens with the skills necessary for success in a transformational economy. Partnerships will include business, industry and the public school system.

11.1.3 Goal 3 – Diverse Learning Needs

Wake Tech will provide citizens with opportunities to develop and upgrade essential skills for lifelong learning and the workplace through flexible, accessible, and customized educational and training programs.

11.1.4 Goal 4 - Resources

Wake Tech will continuously research, analyze and secure the resources necessary to fulfill the mission of the College.

11.1.5 Goal 5 – Community Service

Wake Tech will provide courses and support services for personal enrichment and lifelong learning and centered around the community's civic, economic, and cultural needs.

11.2 NORTH CAROLINA COMMUNITY COLLEGE SYSTEM STRATEGIC PLAN 2018-2022

URL: http://www.nccommunitycolleges.edu/strategic-plan

Mission

To open the door to high quality, accessible educational opportunities that minimize barriers to postsecondary education, maximize student success, develop a globally and multi-culturally competent workforce, and improve the lives and well-being of individuals by providing:

- Education, training and retraining for the workforce including basic skills and literacy education, occupational and pre-baccalaureate programs.
- Support for economic development through services to and in partnership with business and industry and in collaboration with the University of North Carolina System and private colleges and universities.
- Services to communities and individuals which improve the quality of life

11.2.1 Goal 1 - Student Interest and Access

Increase the percentage of North Carolinians, particularly within underserved populations, pursuing and easily accessing education or training through North Carolina community colleges.

11.2.2 Goal 2 - Clear & Supported Pathways for Student Progress and Success

Provide a continuum of education, training, advising, and support to help learners make informed decisions that lead to credentials and careers.

11.2.3 Goal 3 – Economic and Workforce Impact

Ensure the educational pipeline prepares a workforce possessing the interest, knowledge, skills, and abilities to meet the needs of employers, now and into the future.

11.2.4 Goal 4 – System Effectiveness

Advance organizational effectiveness, operations, and decision making to support a cohesive system of nimble, empowered, and community driven colleges.

Appendix B

Appendix B

Wake Invests in Women Current Steering Committee Members

Name	Title	Org	Role	Photo	Expertise / Constituencies Represented
Beth Briggs	Philanthropic Consultant	Armstrong McGuire	Member		• Gender equity and women's empowerment • Nonprofit leadership and fundraising
Jackie Hughes	Attorney	JTH Law	Co-Chair		• Wake Invests in Women Steering Committee Co-Chair • Corporate legal counsel
Hilda Pinnix-Ragland	Corporate Affairs / Business Executive	Retired	Co-Chair		• Wake Invests in Women Steering Committee Co-Chair • Supporting women in corporate leadership • Wake County Commissioner relationships
Andrea DeSantis	Research Associate	N.C. State University	Member		• Higher education experience • Research into gender participation gap and wage gap in STEM-related fields • Collective Impact
Gayle Greene	Executive Vice President and COO	Wake Technical Community College	Member External Sponsor		• Wake Tech Senior Leadership • Triangle Women in STEM leadership
Tamara Pearce	Manager, Campus Recruiting	Cree	Member		• Recruiting and other human resources supports for STEM professionals
Regina Petteway	Director	Wake County Human Services	Member		• Women in leadership in the public sector • Wake County Commission for Women • Relationships with Wake County Commissioners
Caroline Sullivan	Executive Director	N.C. Business Committee for Education	Member		• Advocate to the Governor's office and other public sector entities for education and gender equity issues • Prior Wake County Commissioner
Marjorie Williamson	SVP, Global Talent Rewards & HR Operations	RTI International	Member		• Human resources expertise in technology, pharma, manufacturing, and other corporate sectors

Backbone Center (Wake Invests in Women's Staff Support)

Name	Title	Org	Role	Photo	Function
Robert Albright	Director of Programs	FSG – Collective Impact Forum	Consultant		• Collective impact coaching, facilitation, and technical assistance for the initiative
Kasey Ashton	Director, Wake Invests in Women	Wake Technical Community College	Director		• Project lead (begins 8/19/2019) • Point of contact for initiative • Provides direction to project workgroups and support to Steering Committee
Carrie Bartek	Dean, College Initiatives and Assessment	Wake Technical Community College	Executive Director		• Executive Director of Wake Tech Backbone
Rachel Madsen	Director of Assessment	Wake Technical Community College	Research Team		• Research into gender participation gap and wage gap in STEM-related fields
Rosmery Hahn	Director of Campus Services	Wake Technical Community College	Coordinator		• Project management and administrative support
Bryan Ryan	SVP Effectiveness and Innovation	Wake Technical Community College	Internal Sponsor		• Internal sponsor of Wake Tech's backbone organization

If you have questions about Wake Invests in Women, contact Carrie Bartek at cebartek@waketech.edu.

Appendix C

.

Kasey Ashton, Ed.D

511 Lawndale St.   (919) 522-1197
Garner, NC 27529   ashton.kasey.13@gmail.com

Summary of Qualifications: Knowledgeable higher education professional with 15 years of experience including:

Stakeholder Collaboration	Academic/Student Support	Recruitment/Outreach
Program Development	Leadership Development	New Student Programming
Supervision/mentoring	Program Management	Student Organization Advising
Non-Profit Fundraising	Vendor Management	Teaching/Training

EDUCATION

North Carolina State University (NCSU), Raleigh, NC
   Doctorate of Education (Ed.D) in Higher Education Administration   December 2013
   Dissertation: Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)gender Undergraduates
   Master of Education (M.Ed) in Higher Education Administration and Student Affairs   May 2008

University of North Carolina at Chapel Hill, Chapel Hill, NC
   B.A. in Recreation Administration   December 2001

PROFESSIONAL EXPERIENCE

Women in Science & Engineering (WISE) Village, North Carolina State University, Raleigh, NC
Associate Director, June, 2015 – present
Assistant Director, May 2010 – May 2015
Program Administration
- Cultivate a community of academic support and gender equity focusing on first and second year female identified students in Science, Technology, Engineering, and Mathematics (STEM)
- Recruit diverse students through large scale recruitment events, open houses, and small group tours, including one-on-one tours and meetings with prospective students and families
- Manage day-to-day operations of WISE Village
- Maintain all social media platforms for the village
- Supervise student/graduate assistant staff
- Establish and cultivate new campus and industry partner collaborations
- Assist with the management of $140k operating budget and $26,000 programming budget
- Collaborate with the WISE Operating Council on creating and implementing common programmatic, recruitment, and growth goals and milestones
- Maintain and monitor administrative databases and programmatic evaluative tools
- Assess evaluation/survey results to make date-informed decisions related to growth goals and program milestones
- Coordinate admissions for WISE Village including application review and student communication
- Coordinate and facilitate programming including speaker series, social programs, and community service events
- Provide advising for students of an academic, social, professional, and personal nature
- Collaborate with campus departments, partners, and stakeholders for programming
- Logistics planning for large scale events such as WISE Opening, which includes working with caterers, facilities, rental companies, coordinating volunteers, and planning evening activities for ~800 guests
- Co-coordinate Bridge, a 2 day intensive program to kick-off WISE and introduce the first year women to the WISE program, their colleges, and campus; focus on teambuilding within mentee groups, introducing the WISE culture, and special WISE focused time with their colleges
- Serve as a member of the WISE Operating Council, the governing body of the WISE Village
WISE mentor Program Oversight
- Supervise Graduate Assistant who oversees 18 upper-class student mentors for first year WISE Women to help ease the transition from high school to college
- Provide guidance and support for mentors helping mentees through challenging situations such as roommate conflicts, thoughts of self-harm, stalking or interpersonal violence, and loss of loved ones
- Organize and facilitate WISE mentor summer training including areas of community development, general counseling, diversity, programming, and leadership development

- Lead weekly staff meetings that focus on different training aspects, including program planning as a part of community development, student leaders and social media, and connecting with shy mentees
- Direct all aspects of the mentor application and selection process, review applications, conduct interviews with current mentors, and make final hiring decisions

WISE Sophomore Experience Program
- Coordinate the sophomore experience program designed to keep second year students engaged and supported during the critical second year
- Organize and facilitate programming to develop community and increase development skills, including academic and career focused programs
- Supervise and manage the year-long sophomore special project
- Created WISE Ambassador Program where sophomores help with recruitment and high school outreach

Graduate Assistant, WISE Village, NCSU, Raleigh, NC July 2008 – May 2010
- Supervised and advised 14 WISE mentors who help first year students transition from high school to college
- Managed a mentor programming budget of $2000
- Planned and facilitated mentor training, coordinating leadership development with the Resident Assistant summer training
- Facilitated evening activities and speaker events
- Advised WISE Student Council and supervised events
- Provided trainings for mentors and student council in programming, community development, and connecting with students
- Managed the WISE monthly calendar, listserv updates, and the WISE Village website

Teaching Fellows Graduate Assistant, North Carolina State University, Raleigh, NC
August 2007 – May 2008
- Organized and facilitated Teaching Fellows forums and seminars related to teaching in the classroom
- Planned and coordinated Teaching Fellows Banquet and student events
- Graded Teaching Fellow portfolios for all cohorts
- Facilitated leadership development trainings for first year Teaching Fellows
- Advised Executive Council, supervised council events, and led trainings on creating successful programs

Residence Director, Meredith College, Raleigh, NC
July 2005 – May 2007
Residential Program
- Managed a residential building of 150 students, created and implemented campus wide programming
- Supervised and evaluated 4 Residential Assistants, participated in RA selection and training
- Provided individual and group counseling of an academic and personal nature
- Moderated roommate mediations

Safezone Coordinator
- Restructured Safezone Ally training program and revised Safezone manual
- Designed Safezone Ally Training program for Meredith College Students
- Organized and coordinated Safezone training sessions
- Maintained roster of Safezone Allies

Honor Council Co-Advisor
- Co-advised the student run Honor Council with the Dean of Students
- Met with Honor Council twice a month for cases involving academic integrity, behavioral misconduct, alcohol and drug violations, and honor code violations
- Maintained Honor Council records and advised Honor Council on past-precedence for cases
- Met with and advised students on the Honor Council process

Student Life Instructor, North Carolina School of Science and Math, Durham, NC
January 2002 – July 2005
- Supervised and managed a residence hall of 31 junior and senior high school girls
- Provided counseling for students of an academic and personal nature, including self-confidence, relationships, struggles with academic rigor of Science and Math, and behavioral concerns

- Supervised 4 Resident Life Assistants who maintained hall cleanliness, hall policies, and monthly programs
- Created a supportive family atmosphere through social programming, community service, and one-one-one interactions with students
- Worked with Guidance Counselors and Academic Advisors as part of student support team
- Planned and implemented frequent, regular activities based on the Wellness Model
- Taught weekly Student Life 101 curriculum pertaining to diversity, hazing/harassment, drugs and alcohol, and sex education
- Reviewed level III conduct cases involving academic dishonesty, behavioral misconduct, alcohol, and drugs as a member of the Level III Appeal Hearing Board

Resident Life Assistant Co-Coordinator (2003-2005)
- Supervised and evaluated 49 Resident Life Assistants (RLAs)
- Coordinated and facilitated RLA training week and monthly RLA meetings
- Counseled and advised RLAs in peer mediation, community development, and discipline issues
- Organized and coordinated RLA selection process

Prom Coordinator (2002-2004)
- Supervised Prom Committee made up of 20 students
- Coordinated all Prom orders for gifts, invitations, food, jazz band
- Supervised Prom ticket and flower sales
- Recruited and organized parent volunteers to decorate and chaperone
- Oversaw Prom budget of $3000
- Collaborated with student groups for advertising and promotion

FUNDRAISING EXPERIENCE

Crape Myrtle Festival, Inc. 501(c)(3), Raleigh, NC
Primary Chair (Queen), August 2017 – July 2018
Junior Chair (Co-Queen), August 2016-July 2017
- Acted as the primary public face of the non-profit with agencies, vendors, beneficiaries, and greater community
- Distributed over $150k in grants to local and regional AIDS/HIV support organizations and LGBT organizations
- Networked with stakeholders and community members at community events to garner donations and interest in the work of the organization
- Designed fundraising campaigns in coordination with the Executive Board and volunteer court
- Collaborated with the Executive Board, partners, and volunteer court to develop common goals/objectives and implementation calendar
- Cultivated a transparent working relationship between the Executive Board and the volunteer staff in order to mediate the needs of all branches of the organization
- Supervised committee co-chairs and managed relationships between co-chairs and volunteer court
- Identified and recruited new and diverse volunteers for the upcoming court year

Crape Myrtle Festival, Inc. 501(c)(3), Raleigh, NC
Outreach Co-Chair, August 2014-July 2016
- Coordinated free educational/outreach programming for the Triangle community including event tabling, community cookouts, OutRaleigh!, World AIDS Day, art show fundraisers
- Organized Outreach Committee volunteers
- Created and sustained relationships with CMF grant beneficiaries
- Assisted CMF Executive Board and Chairs with the grant application process
- Managed and reported on grant application data
- Recruited new members for the Crape Myrtle Festival

PUBLICATIONS AND AWARDS

Ashton, K. J. (2019). How I see me, how you see me: Trans college students navigating gender outside the binary. In G. Beemyn (ed), Trans People in Higher Education. Albany, NY: SUNY Press.
ACPA Marylu McEwen Dissertation of the Year Award, 2015
- American College Personnel Association, College Student Educators International
ASHE Dissertation of the Year Finalist, 2014
- Association for the Study of Higher Education

North Carolina State University, Higher Education Program Outstanding Dissertation of the Year, 2014
North Carolina State University, Diversity Mini-Grant, 2013

TEACHING AND TRAINING EXPERIENCE

Adjunct Faculty, North Carolina State University January 2015 – present
- Fostering Diversity in Higher Education (EAC 595), core first year master's level class, 3 credits
- College Student Outcomes (EAC 595), core second year master's level class, 3 credits
- Capstone (EAC 545), core second year master's level class, 3 credits

Co-Instructor, North Carolina State University January 2012 – May 2012
- Student Development Theory (EAC-543), core first year master's level core class, 3 credits

Teaching Assistant, North Carolina State University, January 2010 – May 2010
- Finance and Administration, master's level core class, 3 credits

Teaching Assistant, North Carolina State University, January 2009 – May 2009
- Current Issues in Student Affairs, master's level core class, 3 credits

Trans 101 Awareness Training, North Carolina State University August 2009 – May 2014
- Trans 101 Training for faculty, staff, and students

SL 101 Instructor, North Carolina School of Science and Math, 2002-2004
- Transition and skills class focusing on diversity, sex education, and life skills

PRESENTATIONS AND CONFERENCE PARTICIPATION

ACPA National Conference, March 2019
- Feminism and Privileged Identities: Creating Inclusive Spaces for Collaboration
- Burnout in Student Affairs Professionals: Self Care as Necessity Not Luxury

Capstone, Guest Lecturer, February 2019
- Theory to Practice: The Importance of Reflective Practice

College Foundations, Guest Lecturer, October 2017, 2018
- LGBT College Students & Multiple Dimensions of Identity

ACPA Assessment Institute, June 2018
- Institute focused on a deep-dive into creating/facilitating/analyzing effective program assessment and data management

Student Development Theory, Guest Lecturer, October & November 2017, October 2018
- Social Identity: Privilege, Oppression, & Social Justice
- Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)Undergraduate College Students

Community College Diversity & Inclusion Workshop, April 2017
- A Day of Learning: LGBT Students

Narrative Methodology, Guest Lecture, April, 2016
- Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)Undergraduate College Students

Poole M100 Diversity Forum, March 2016
- What's in a word: Gender, Language, & Toxic Masculinity in Marketing

Emerging Leaders Retreat, January 2016
- Gender & Language: Problematizing "Like a Girl" & "Man-up"

Narrative Methodology, Maymester Guest Lecture, May 2015
- Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)Undergraduate College Students

ACPA National Conference, March 2015
- Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)Undergraduate College Students

ASHE National Conference, November, 2014
- Self-Authoring Gender Outside the Binary: A Narrative Analysis of (Trans)Undergraduate College Students

North Carolina School of Science & Math, Student Services Special Training, December 2013
- Trans 101 and Student Needs on a Residential Campus

Meredith College, Dean of Students Special Presentation, Fall 2011
- Trans students at a Women's Institution

ACUHO-I Living Learning Conference, October, 2010
- Redefining Mentoring

ACPA National Conference, May, 2010

- Supporting Sophomores: A Living and Learning Community Initiative

WILD Leadership Conference, November, 14, 2009
- Creating Inclusive Communities: Leading Where You Live

UNIVERSITY SERVICE AND PROFESSIONAL AFFILIATIONS

- American College Personnel Association (ACPA) – member
- Association for the Study of Higher Education (ASHE) - member
- LeaderShape Cluster Facilitator Faculty, May 2018
- West Campus Diversity Trip to New Orleans Faculty/Staff Chaperone, March 2018
- Council of the Status of Women & Sisterhood Dinner Planning Committee, Fall 2016-June 2018
- Make-a-thon Planning/Facilitation Committee, Spring 2015-July 2018
- USA Science and Engineering Festival Exhibitor, Colleges of Engineering & Sciences, North Carolina State University, April 2018, 2016, 2014, 2012
- GLBT Faculty/Staff Network & Advocate, Fall 2014-present
- NC State Village Outcomes Subcommittee, Fall 2014-present
- West Campus Village Committee, North Carolina State University, 2012-present
- Alliance for Sexual Assault Prevention Committee, North Carolina State University 2011-2014
- Eco-Village mentor Hiring Committee, North Carolina State University, Spring 2014
- College of Design Mock Interviewer, North Carolina State University, Spring 2014
- College of Engineering Summer Orientation Advisor, North Carolina State University, Summer 2013
- Women's Center Hiring Committee, North Carolina State University, Summer 2013, Summer 2012
- ACPA Program Reviewer 2009-2011
- Trans 101 Trainer, North Carolina State University, 2009-2014
- Project SAFE Trainer, North Carolina State University, 2008-2014

Appendix D

Occupation Group	Wake County Per Capita Income Index (1=$35,752/yr, Wake County Annual Per Capita Income)	Female Participation Ratio	Female Income Ratio	Total Predicted Growth in Raleigh-Durham Prosperity Zone 2014-2024
Computer and mathematical occupations	2.25	0.32	0.80	27%
Health diagnosing, treating practitioners, other technical occupations	1.75	2.92	0.51	26%
Food prep serve occupations	0.39	0.84	0.73	24%
Construction extraction occupations	0.67	0.02	1.02	21%
Office and admin occupations	0.86	2.47	0.97	21%
Business and financial operations occupations	1.53	1.35	0.75	20%
Arts, design, entertainment, sports, and media occupations	0.99	1.05	0.63	17%
Management occupations	2.11	0.64	0.70	16%
Bldg grounds clean maint occupations	0.47	0.62	0.63	15%
Education, training, and library occupations	1.00	2.57	0.79	14%
Sales occupations	0.85	0.84	0.44	14%
Architecture and engineering occupations	1.99	0.19	0.73	13%
Transportation	0.78	0.23	0.85	13%
Production occupations	0.87	0.54	0.64	10%
Personal care occupations	0.40	2.72	0.95	6%

Wake County female to male participation and income ratios in TOP 15 Growth Occupations with Employment Numbers >10,000

Wake Invests in Women Guiding Principles

- **Passion for Impact:** we are passionate about empowering women to advance in their careers and to achieve greater pay equity

- **Data-Driven:** our decisions are informed by qualitative/quantitative research on needs and what has worked elsewhere to address the gender wage gap

- **Program and System-Focused:** we will seek out both programmatic and systemic solutions that will address inequities in the gender wage gap

- **Collaborative:** we are committed to working with strategic partners to identify lasting solutions

- **Equity Lens:** we are committed to bringing an equity lens to this work (e.g., disaggregating data by race, ethnicity, and socioeconomic status to understand needs and targeted solutions)

- **Application and Replication:** we are focused initially on the gender gap in STEM-related fields, and we believe in the potential application and replication of lessons to other occupational groups

Wake Invests in Women Working Theory of Change

Research-based Solutions

Aim: Close the Gender Wage Gap in Wake County

Outcome Measures:

1. Equal proportion of women and men in higher-wage occupations

2. Equal proportion of women and men in lower and middle-skill positions moving to higher-skill and management positions

3. Pay equity (by race, ethnicity, and socioeconomic status) between women and men within occupations.

Primary Drivers

Culture
Cultural norms and beliefs support women in higher wage, high-growth fields

Support

Women have the supports they need to find and stay in higher wage, higher demand fields and move through the career pipeline

Employer

Policies and practices ensure the representation, retention and wage equity of women in higher demand, higher wage fields.

Secondary Drivers (What)

Increase representation of women in higher-wage majors

Increase participation of women within higher wage occupations

Increase vertical movement of women from lower and middle skill to higher skill positions

Revise workplace policy to be life and family friendly.

Increase pay *and* participation transparency

Change Ideas (How)

Middle and high school outreach

Post-secondary education and training

Internships

Returnships

Mentoring and access to company leaders.

Employer reporting

Bias training

Appendix E

Appendix E

2018-2019 Wake Invests in Women Budget and Expenditures

Category	Item Description	2018-2019 Budget	Amount Expended	% Expended	Funding Source
Personnel (With Fringe)	Executive Director	In-Kind	NA	NA	Wake Tech
	Director	$100,000	$0	0%	Wake County
	Part-time Research Support	In-Kind	NA	NA	Wake Tech
	Part-time Technical Assistant	In-Kind	NA	NA	Wake Tech
	Part-time Coordinator	$11,500	$3,953.44	34%	Wake Tech
Contracted Services	FSG Consulting	$0	$82,687.97	NA	Wake County
Travel	Equity and Diversity Conference	$100	$80	80%	Wake County
Outreach	Food for meetings	$500	$213.99	43%	Wake Tech
	TOTAL	**$112,100**	**$86,935.40**	**78%**	