

**Advance CTE/Center to Advance CTE Board Meeting Agenda**  
 Embassy Suites Minneapolis Airport – Cedar I Meeting Room  
 January 13 and 14, 2020

**January 13, 2020**

3 – 3:10 p.m.	Welcome and introductions <i>Pages 3-5</i>	Sarah Heath
3:10 – 3:15 p.m.	Review and approval of minutes <i>Pages 6-10</i>	Heather Justice
3:15 – 3:35 p.m.	Financial, development and future staffing update <i>Pages 11-24</i>	Heather Justice, Kimberly Green and Kate Kreamer
3:35 – 3:45 p.m.	Personnel policy revisions	Kimberly Green
3:45 – 4 p.m.	Strategic plan overview/update	Kate Kreamer
4 – 4:30 p.m.	Membership Strategy <i>Pages 25-36</i>	Sara Gassman and Kate Kreamer
4:30 – 5 p.m.	State Policy Strategy <i>Pages 37-47</i>	Meghan Wills
5 – 5:30 p.m.	Federal Policy Strategy <i>Pages 48-57</i>	Sam Dunietz
5:30 – 5:40 p.m.	Area technical center survey input	Sam Dunietz
5:40 – 5:45 p.m.	Vote on new Center Board member <i>Pages 58-59</i>	Kimberly Green
5:40 – 5:45 p.m.	Wrap up and next steps	Sarah Heath
5:45 – 6:30 p.m.	Break	
6:30 p.m.	Working dinner	
7 – 7:15 p.m.	Officer induction and recognition	Sarah Heath, Marcie Mack, Heather Justice and Bernadette Howard
7:15 – 7:45 p.m.	Communications Strategy <i>Pages 60-67</i>	Katie Fitzgerald

**January 14, 2020**

8 – 9 a.m.	Breakfast	
9 – 9:30 am.	100-year celebration input session <i>Page 68</i>	Katie Fitzgerald
9:30 – 10 a.m.	Technical Assistance Strategy <i>Pages 69-78</i>	Meghan Wills
10 – 10:30 a.m.	Equity Strategy <i>Pages 79-89</i>	Brianna McCain
10:30 – 10:45 a.m.	Break	

10:45 – 11:15 a.m.	Data Strategy <i>Pages 90-95</i>	Austin Estes
11:15 – 11:45 a.m.	Postsecondary Strategy <i>Pages 96-105</i>	Meredith Hills
11: 45 a.m. – 12:15 p.m.	WIOA input session	Meredith Hills
12:15 – 12:45 p.m.	Lunch	
12:45 – 2 p.m.	Stocktake	Austin Estes
2 - 3 p.m.	Other agenda items, wrap up	Sarah Heath

**President**

Sarah Heath  
Assistant Provost for CTE  
Colorado Community College System  
9101 E. Lowry Blvd  
Denver, CO 80230  
[sarah.heath@cccs.edu](mailto:sarah.heath@cccs.edu)

**Vice President**

Marcie Mack  
State CTE Director  
1500 W. 7<sup>th</sup> Avenue  
Stillwater, OK 74074  
[Marcie.mack@careertech.ok.gov](mailto:Marcie.mack@careertech.ok.gov)

**Secretary-Treasurer**

Heather Justice  
Division Director  
College, Career & Military Preparation  
Division  
Texas Education Agency  
1701 N. Congress Avenue  
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**Past President**

Bernadette Howard  
State CTE Director  
Lunalilo FWY Portable 1  
Lower Campus Road  
Honolulu, HI 96822  
[mbhoward@hawaii.edu](mailto:mbhoward@hawaii.edu)

**Region A**

Jay Ramsey  
Assistant Director of the Student  
Pathways Division  
Vermont Agency of Education  
219 North Main Street, Suite 402  
Barre, VT 05641  
[jay.ramsey@vermont.gov](mailto:jay.ramsey@vermont.gov)  
Term expires: June 30, 2022

**Region B**

Barbara Wall  
State CTAE Director  
Georgia Department of Education  
1752 Twin Towers East  
205 Jesse Hill Jr. Drive, S.E.  
Atlanta, GA. 30334  
[bwall@doe.k12.ga.us](mailto:bwall@doe.k12.ga.us)  
Term expires: June 20, 2020

**Region C**

Jeralyn Jargo  
State CTE Director  
Minnesota State Colleges & Universities  
Wells Fargo Place  
30 East 7th Street, Suite 350  
St. Paul, MN 55101-7804  
[Jeralyn.Jargo@minnstate.edu](mailto:Jeralyn.Jargo@minnstate.edu)  
Term expires: June 30, 2022

**Region D**

Thalea Longhurst  
State CTE Director  
Utah State Board of Education  
250 East 500 South  
P.O. Box 144200  
Salt Lake City, UT 84114  
[thalea.longhurst@schools.utah.gov](mailto:thalea.longhurst@schools.utah.gov)  
Term expires: June 30, 2021

**Region E**

VACANT  
Term expires: June 30, 2020

**At-Large State Director**

Katie Graham  
State CTE Director  
Nebraska Department of  
Education  
301 Centennial Mall South  
Lincoln, NE 68509  
[katie.graham@nebraska.gov](mailto:katie.graham@nebraska.gov)  
Term expires: June 30, 2022

**At Large State Director**

Laura Scheibe  
Director of Career and Technical Education  
South Dakota Department of Education  
800 Governors Drive  
2nd Floor, MacKay Building  
Pierre, SD 57501-2291  
[laura.scheibe@state.sd.us](mailto:laura.scheibe@state.sd.us)  
Term expires: June 30, 2021

**State Associate Representative**

Ms. Victoria Crownover  
Perkins Plan Manager  
Colorado Community College System  
9101 E Lowry Blvd  
Denver, CO 80230  
Phone: 303-595-1565  
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Term expires: June 30, 2022

**Associate Member Representative**

Dr. Sheila Ruhland  
7642 Midtown Road, 301  
Madison, WI 53729  
[ruhland11@gmail.com](mailto:ruhland11@gmail.com)  
Term expires: June 30, 2020

**THE CENTER to ADVANCE CTE  
BOARD OF DIRECTORS  
FY 20**

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**President**

Sarah Heath  
Assistant Provost for CTE  
Colorado Community College System  
9101 E. Lowry Blvd  
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Lower Campus Road  
Honolulu, HI 96822  
[mbhoward@hawaii.edu](mailto:mbhoward@hawaii.edu)

**The Center Board Members:**

Public Member – Dr. Nicole Smith,  
Research Professor and Chief Economist  
Georgetown University Center  
3300 Whitehaven Street, N.W., Suite 3200  
Washington, DC 20007  
[ns369@georgetown.edu](mailto:ns369@georgetown.edu)  
Term: July 1, 2018 – June 30, 2021

Vacant

Term: July 1, 2019 – June 30, 2020

Public Member – Alex Harris  
Vice President of Programs  
Castle Foundation  
1197 Auloa Road  
Kailua, HI 96734  
[aharris@castlefoundation.org](mailto:aharris@castlefoundation.org)  
Term: July 1, 2017 – June 30, 2020

## Advance CTE Board of Directors' Meeting

### MINUTES

June 26, 2019

Conference Call

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**ATTENDEES:** Sarah Heath, Bernadette Howard, Dwight Johnson, Pradeep Kotamraju, Thalea Longhurst, Marcie Mack, Lee Burket, Sheila Ruhland

**STAFF:** Kimberly Green, Kate Kreamer

**ABSENT:** Jeralyn Jargo, Barbara Wall

**Welcome, Overview of Agenda:** Bernadette Howard welcomed everyone and called the meeting to order.

**Review and Approval of April Board Minutes:** Marcie Mack presented the minutes.

**MOTION:** To approve the April 7, 2019 Advance CTE Board minutes and Joint Advance CTE/Center to Advance CTE Board Minutes, as presented. Mack; Heath.  
**MOTION ADOPTED.**

**Review and Approval of the Personnel Policy Revision:** Annually, staff sends the personnel policies to the attorney for review to ensure compliance with appropriate laws and regulations. The attorney returned no substantive changes to the personnel policies. Hugh Webster, counsel, provided the following statement: *"I have no recommended changes to the Personnel Policies. They remain current and accurately reflect applicable laws and regulations."* However, staff recommended a series of revisions that do not substantively change benefits or policies but instead seeks to provide clarification to polices that staff have identified are unclear.

**Review and Approval of the proposed FY20 Advance CTE Budget:** Mack noted that the budget was reviewed in detail by the finance and audit committee and was unanimously approved noting the diligence and detail the staff put into making the budgets clear and transparent.

Kreamer provided an overview of the budget, noting the organizational split has shifted due to additional funding secured by the Center. No funding is requested for a fall meeting, as we are instead hosting the series of three Perkins implementation meetings. New funding is requested for the 100-year anniversary celebration.

**At Large Board Position:** Kreamer shared that we have a vacant at-large Board position due to Passias leaving her post in Ohio. A call for candidates will be posted and a vote hosted to fill the vacancy.

**Technical Assistance Strategy:** In follow up to the spring stocktake, Kreamer drafted and provided an overview of the initial technical assistance strategy. The strategy focused on three

key objectives, which are largely being met via funding from grants (which is the fourth objective – fundraising):

- Impact and influence the development, adoption and implementation of policies, programs and initiatives that support, promote and increase equitable access to and success in high-quality CTE;
- Position Advance CTE as an expert and go-to resource on CTE policy design and implementation; and
- Maximize value from grant-funded projects to enhance the value and benefits of membership;

The strategy will be refined and shared at the next Board meeting.

**Schedule for FY20 Board Meetings:** Green shared that the schedule is a bit in flux due to the fall implementation meetings. As soon as the schedule is finalized, we'll share it. In January 2020, an in person meeting will be held (at Advance CTE's expense) given the lack of an in-person fall meeting.

**Appreciation for Outgoing Board Members:** Green noted that this was the last Board meeting for both Kotamraju and Burket, who have served in various roles on the Board and Finance/Audit Committee. Green and Howard expressed appreciation for their volunteer leadership and helping to guide the organization as it has undergone significant and positive transformation. Green also expressed appreciation to Howard as she ends her term as President. The year of Howard's presidency marked the passage of Perkins and the initial planning by states. Howard was personally involved in securing votes to ensure the law that passed met with our organization's priorities and as served as a steadfast sounding board and leader for the staff and membership. Howard shared her gratitude for the time to serve and noted how much the staff and Board supported her and that there is so much excitement and enthusiasm for CTE.

**Howard adjourned the meeting at 2:55 p.m. ET.**

**Advance CTE Board of Directors' Meeting**  
**MINUTES**  
November 22, 2019  
Conference Call

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**ATTENDEES:** Bernadette Howard, Heather Justice, Dwight Johnson, Thalea Longhurst, Marcie Mack, Jeralyn Jargo, Jay Ramsey, Katie Graham, Victoria Crownover

**STAFF:** Kimberly Green

**ABSENT:** Sarah Heath, Sheila Ruhland, Barbara Wall, Laura Schiebe

**GUEST:** Assistant Secretary Scott Sump, U.S. Department of Education

**Welcome, Overview of Agenda:** Mack welcomed everyone and called the meeting to order.

**MOTION: To go into Executive Session.**  
**Howard; Johnson.**  
**MOTION ADOPTED.**

**MOTION: To go exit Executive Session.**  
**Mack; Johnson.**  
**MOTION ADOPTED.**

**MOTION: To support the spirit and intent of the U.S. Department of Education's proposed revisions to methods of administration (MOA), as presented to the Advance CTE Board.**

**We believe the proposed revisions align to Advance CTE's equity statement. Further, we believe the proposed revisions will result in a modernization and renewal of MOA, focusing on approaches that will help states effectively and efficiently manage obligations to increase access and inclusivity to high-quality CTE programs.**

**Ramsey; Howard.**  
**Roll call vote was taken. All ayes with one abstention.**  
**MOTION ADOPTED;**

**Mack adjourned the meeting at 5:10 p.m. ET.**

**For the record:**

The Board approved the December 2019 FY20 Advance CTE Budget modification as presented by electronic vote on ten ayes.



**Center to Advance CTE Board of Directors' Meeting**  
**MINUTES**  
June 26, 2019  
Conference Call

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**ATTENDEES:** Sarah Heath, Bernadette Howard, Pradeep Kotamraju, Marcie Mack, Nicole Smith

**STAFF:** Kimberly Green , Kate Kreamer

**ABSENT:** Alex Harris

**Welcome, Overview of Agenda:** Bernadette Howard welcomed everyone and called the meeting to order.

**Review and Approval of April Board Minutes:** Marcie Mack presented the minutes.

**MOTION:** To approve the April 7, 2019 Center Advance CTE Board minutes and Joint Advance CTE/Center to Advance CTE Board Minutes, as presented. Mack; Smith.  
**MOTION ADOPTED.**

**Review and Approval of the proposed FY20 Advance CTE Budget:** Mack noted that the budget was reviewed in detail by the finance and audit committee and was unanimously approved noting the diligence and detail the staff put into making the budgets clear and transparent.

Kreamer provided an overview of the budget, noting the organizational split has shifted due to additional funding secured by the Center. The budget, as previously discussed with the Board, covers expenses through December 2019. The budget largely aligns to grant-funded activities, with the new accounting rules being applied related to rent. A new budget will be presented to the Board in December, after the new JPMC and Siemens grants have been approved.

**Public Board Position:** Green shared that Carrier's term ends June 30. Considerations for filling the position might include expertise/representation from the following communities: postsecondary, equity, data, and employer. Howard shared she felt the employer voice was a priority. Heath said she'd look at the SkillsUSA employer partners to see if there are any viable candidates. Green noted that she'd rather take the time to find the right person rather than just fill the position. The Board agreed. Staff was charged with coming up with a roster of potential candidates for the Executive Committee to consider.

**Schedule for FY20 Board Meetings:** Green shared that the schedule is a bit in flux due to the fall implementation meetings. As soon as the schedule is finalized, we'll share it. In January 2020, an in person meeting will be held (at the Center to Advance CTE's expense) given the lack of an in-person fall meeting.

**Howard adjourned the meeting at 1:35 p.m. ET.**

**For the record:**

The Board approved the December 2019 FY20 Center Budget modification as presented by electronic vote on five ayes.

## Approved FY20 Advance CTE Budget

	Approved FY20 Budget	Actuals as of 12/31/19	Variance - Actuals to Budget	Explanatory Notes
<b>INCOME</b>				
State Memberships	\$576,131.00	\$528,172.00	91.7%	On target. Outstanding state dues include NY and CA, as well as two territories.
Associate & Organizational Memberships	\$63,000.00	\$82,850.00	131.5%	Associate dues are greater than projected. Many states added members to their state teams and Perkins V resulted in an increase in interest/membership.
Spring meeting registration	\$110,000.00	\$0.00	0.0%	Registration to open in January 2020.
Spring meeting sponsorships	\$85,000.00	\$0.00	0.0%	Sponsorships to open in January 2020.
ABC Equity Grant	\$25,000.00	\$25,000.00	100.0%	Full payment received.
Iowa Contract	\$28,500.00	\$6,125.00	21.5%	First payment invoiced. Payments based on deliverables.
Chamber TPM	\$40,000.00	\$20,000.00	50.0%	First 1/2 of work invoiced.
NASFAA	\$75,000.00	\$25,000.00	33.3%	First payment invoiced. Payments based on deliverables.
UMass	\$9,000.00	\$0.00	0.0%	Work begins in 2020.
Interest/Dividend	\$60,000.00	21601.11	36.0%	Included interest through October 2019.
Other Income	n/a	\$5,000.00	-	Honoraria received; not budgeted.
<b>TOTAL REVENUES</b>	<b>\$ 1,071,631.00</b>	<b>\$ 713,748.11</b>	<b>66.6%</b>	
<b>EXPENSES</b>				
<b>Allocated Expenses to</b>				
Member Services	\$56,192.45	\$17,838.49	31.7%	On target.
Member Supports	\$18,999.88	\$1,044.39	5.5%	New State Director program just re-started. Majority of expenses in 2020.
Government Relations	\$19,449.00	\$1,690.88	8.7%	Majority of expense to date have been able to be covered by grants/reimbursed.
Spring Meeting	\$113,720.00	\$278.70	0.2%	Planning just beginning for spring 2020 meeting.
Communications	\$7,848.00	\$18.95	0.2%	Majority of expenses project in 2020.
Advance CTE Board	\$38,042.40	\$9,824.19	25.8%	On target. Majority of expenses in 2020, with in-person meetings.
100 Year expenses	\$70,850.00	\$0.00	0.0%	Planning just beginning for centennial celebration.
Lobbying	\$2,355.00	\$5.27	0.2%	Lobbying expenses minimal, other than staff time.
AEC Equity grant expenses	\$25,000.00	\$4,992.84	20.0%	Equity consultant has invoiced for first quarter of work. On target.
Iowa expense	\$28,500.00	\$2,678.35	9.4%	Staff time through November 2019.
Chamber expenses	\$40,000.00	\$1,472.98	3.7%	Staff time through November 2019.

NASFAA expenses	\$75,000.00	\$716.87	1.0%	Staff time through November 2019.
UMass expenses	\$9,000.00	\$0.00	0.0%	Project begins in 2020.
<b>Subtotal - Specific Projects</b>	<b>\$ 504,956.73</b>	<b>\$ 40,561.91</b>	8.0%	
<b>General &amp; Administrative</b>				
Salaries and benefits	\$383,719.89	\$179,672.56	46.8%	Includes salary and benefits through November 2019.
Telephone/Comm	\$100.00	\$29.47	29.5%	
Office Supplies	\$150.00	\$0.00	0.0%	
Printing/Copying	\$6.00	\$0.00	0.0%	
Rent	\$51,002.16	\$30,617.64	60.0%	Paid through December 2019.
Merrill Lynch Charges	\$30,000.00	\$10,772.05	35.9%	Through November 2019.
Accounting	\$23,300.00	\$5,025.18	21.6%	Largest expenses in December/January due to audit and 990s. On target.
<b>Total G&amp;A Expenses</b>	<b>\$ 488,278.05</b>	<b>\$ 226,116.90</b>	46.3%	
<b>Total Project Expenses</b>	<b>\$ 504,956.73</b>	<b>\$ 40,561.91</b>	8.0%	
<b>TOTAL EXPENSES</b>	<b>\$ 993,234.78</b>	<b>\$ 266,678.81</b>	26.8%	
<b>INCOME LESS EXPENSES</b>	<b>\$78,396.22</b>			

**Advance CTE  
Balance Sheet  
As of December 31, 2019**

	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1011 Cash-New BOA checking	795,683.16
1017 Merrill Lynch Cash - 749	89,429.46
1018 Merrill Lynch Cash - 7WD	23,575.15
<b>Total Bank Accounts</b>	<b>\$ 908,687.77</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	43,433.74
<b>Total Accounts Receivable</b>	<b>\$ 43,433.74</b>
<b>Other Current Assets</b>	
<b>1100 Investments</b>	
1131 Government Bonds	750,991.70
1159 Equities	2,503,780.99
<b>Total 1100 Investments</b>	<b>\$ 3,254,772.69</b>
1275 Security Deposit	9,000.00
1280 Due from Foundation	4,105.12
1299 Accrued Interest Receivable	3,620.57
1300 Prepaid Expense	390.61
<b>Total Other Current Assets</b>	<b>\$ 3,271,888.99</b>
<b>Total Current Assets</b>	<b>\$ 4,224,010.50</b>
<b>Other Assets</b>	
1400 Furniture and Fixtures	33,200.78
1405 Accumulated Depreciation - Furniture and Fixtures	-26,380.45
1410 Equipment	12,459.70
1450 Accumulated Depreciation- Equipment	-7,950.53
<b>Total Other Assets</b>	<b>\$ 11,329.50</b>
<b>TOTAL ASSETS</b>	<b>\$ 4,235,340.00</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 Accounts Payable {105}	5,054.29
<b>Total Accounts Payable</b>	<b>\$ 5,054.29</b>
<b>Other Current Liabilities</b>	
2070 Accrued Vacation	83,291.41
2099 Deferred Revenue	5,000.00
2148 Deferred Revenue FY 19-20 State Dues	276,155.54
2149 Deferred Revenue FY 19-20 Associate Dues	51,625.00
<b>Total 2099 Deferred Revenue</b>	<b>\$ 332,780.54</b>
2102 Payroll Liabilities	32.50
<b>Total Other Current Liabilities</b>	<b>\$ 416,104.45</b>

<b>Total Current Liabilities</b>	<b>\$ 421,158.74</b>
<b>Long-Term Liabilities</b>	
2880 Deferred Rent and lease incentive	162,268.34
<b>Total Long-Term Liabilities</b>	<b>\$ 162,268.34</b>
<b>Total Liabilities</b>	<b>\$ 583,427.08</b>
<b>Equity</b>	
3000 Net Assets Without Donor Restrictions	2,981,479.51
3900 Earnings	441,746.81
Net Income	228,686.60
<b>Total Equity</b>	<b>\$ 3,651,912.92</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 4,235,340.00</b>

## FY20 The Center to Advance CTE Budget

	Approved FY20	Actuals as of 12/31/19	Variance - Actuals to Budget	Explanatory Notes
<b>Income</b>				
JPMC Grant	\$447,142.00	\$447,142.00	100.00%	Full income received. No cost extension approved through the end of February 2020.
Siemens 2.0	\$142,450.84	\$142,450.84	100.00%	Carry forward from prior fiscal year.
Joyce	\$58,871.08	\$53,933.42	91.61%	Carry forward from prior fiscal year; amount slightly less due to year end adjustments made via audit/year end close out.
PAYA	\$104,725.00	\$130,947.97	125.04%	Reflects 1/2 of second year of funding(\$50,000). This remaining balance reflects carry forward from prior fiscal year.
Gates 2.0	\$701,388.01	\$1,049,336.39	149.61%	Reflects payment of \$600,00, of which a portion will be carried into next fiscal year for Summit and remaining TA works re: Perkins.
JPMC Innovation	\$193,079.00	\$299,046.93	154.88%	Carry forward \$98,046.93 plus additional and final payment of \$200,000.
Joyce 2.0	\$191,019.00	\$151,587.54	79.36%	Carry forward from prior fiscal year; amount less due to year end adjustments made via audit/year end close out.
Oregon	\$79,520.00	\$49,540.00	62.30%	Payments based on deliverables; on target.
Global CRI	\$335,836.33	\$0.00	0.00%	Receiving single payment this fiscal year. Accountants will work to adjust to reflect carry forward amount into next fiscal year.
Lumina	\$109,487.76	\$250,000.00	228.34%	Received full grant amount. Accountants will work to
ECMC	\$64,500.00	\$0.00	0.00%	Grant begins in January 2020.
ACTE VISION	\$10,000.00	\$0.00	0.00%	Reimbursement will be submitted in January 2020.
Other Income	\$1,600.00	\$4,204.58	262.79%	NOCTI revenue share and purchases of CC products.
Interest/Dividend	\$20,000.00	\$9,407.55	47.04%	Additional realized gains of \$39,987.66
<b>Total</b>	<b>\$2,459,619.02</b>	<b>\$2,587,597.22</b>	<b>105.20%</b>	
<b>EXPENSES</b>				
<b>Allocated Expenses to Specific Projects</b>				
JPMC Expenses	\$345,599.96	\$202,952.83	58.72%	Salaries and benefits not yet recorded for December 2019. No cost extension approved through the end of February 2020, to cover gap as GCRI begins in March 2020.
JPMC Contingency	\$60,000.00	\$0.00	0.00%	Funds will revert to reserves.

Siemens 2.0 Expenses	\$142,450.84	\$108,347.78	76.06%	Salaries and benefits not yet recorded for December 2019. No cost extension approved through the end of February 2020.
Joyce Expenses	\$58,871.08	\$24,761.39	42.06%	Salaries and benefits not yet recorded for December 2019.
PAYA Expenses	\$104,725.00	\$16,872.55	16.11%	Contract is fixed fee. Likely extra funds from year 1 will revert back to reserves
Gates 2.0 Expenses	\$679,433.00	\$211,621.44	31.15%	Salaries and benefits not yet recorded for December 2019. Expenses are still trailing expectations.
NSFY Innovation Expenses	\$193,079.00	\$84,945.18	44.00%	Due to funder's shift in priorities, fewer snapshots projected. Shifting funds to cover a new Shared Solution Working Group that will happen later this fiscal year.
Joyce 2.0 Expenses	\$182,304.00	\$87,055.00	47.75%	Salaries and benefits not yet recorded for December 2019. Expenses are still trailing expectations.
Oregon Expenses	\$79,520.00	\$47,093.40	59.22%	On target with deliverables.
Global CRI Expenses	\$335,836.33	\$0.00	0.00%	Grant begins in March 2020.
Lumina Expenses	\$109,476.76	\$3,194.34	2.92%	Work began in December 2019.
ECMC Expenses	\$64,500.00	\$0.00	0.00%	Grant begins in January 2020.
ACTE VISION expenses	\$10,000.00	\$2,961.50	29.62%	Includes direct expenses only. Staff salaries and benefits have not yet been recorded for December 2019, which is when the event was held.
Development	\$11,280.00	\$711.15	6.30%	Direct expenses associated with development.
Board expenses	\$10,424.60	\$2,039.80	19.57%	Majority of expense will occur in 2020 with in person Board meetings.
Project-based internal staff time and benefits	\$60,525.00	\$9,378.62	15.50%	Staff time spent on development and Board. Will be much lower than projected due to shift in expenses to grants.
<b>Subtotal for Specific</b>	<b>\$2,448,025.57</b>	<b>\$801,934.98</b>	<b>32.76%</b>	
<b>General &amp; Administrative Expenses</b>				
Direct staff and benefits	\$3,000.00	\$296.35	9.88%	Majority of time covered by grants.
Licenses/Fees	\$240.00	\$234.84	97.85%	On target
<b>Total G&amp;A expenses</b>	<b>\$3,240.00</b>	<b>\$531.19</b>	<b>16.39%</b>	
<b>Total project</b>	<b>\$2,448,025.57</b>	<b>\$801,934.98</b>	<b>32.76%</b>	
<b>TOTAL EXPENSES</b>	<b>\$2,451,265.57</b>	<b>\$802,466.17</b>	<b>32.74%</b>	
<b>INCOME LESS</b>	<b>\$8,353.45</b>	<b>\$1,785,131.05</b>		



**The Center to Advance CTE**  
**Balance Sheet**  
As of December 31, 2019

	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1010 Cash - Bank of America	2,249,586.15
1017 Cash - Merrill Lynch	78,331.32
1018 Cash - Merrill Lynch# 03248	71,097.19
<b>Total Bank Accounts</b>	<b>\$ 2,399,014.66</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	52,183.14
<b>Total Accounts Receivable</b>	<b>\$ 52,183.14</b>
<b>Other Current Assets</b>	
1050 Mutual Funds	1,414,453.69
<b>Total Other Current Assets</b>	<b>\$ 1,414,453.69</b>
<b>Total Current Assets</b>	<b>\$ 3,865,651.49</b>
<b>Fixed Assets</b>	
1100 Furniture	19,885.35
1101 Accumulated Depreciation-Furniture	-11,210.75
1120 Equipment	49,784.01
1121 Accumulated Depreciation-Equipment	-44,682.90
<b>Total Fixed Assets</b>	<b>\$ 13,775.71</b>
<b>TOTAL ASSETS</b>	<b>\$ 3,879,427.20</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 *Accounts Payable	5,539.95
<b>Total Accounts Payable</b>	<b>\$ 5,539.95</b>
<b>Total Current Liabilities</b>	<b>\$ 5,539.95</b>
<b>Total Liabilities</b>	<b>\$ 5,539.95</b>
<b>Equity</b>	
3900 Net Assets Without Donor Restriction	1,050,942.89
Net Income	2,822,944.36
<b>Total Equity</b>	<b>\$ 3,873,887.25</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 3,879,427.20</b>

## Fundraising & Development Update

*Report submitted by Kate Kreamer, Deputy Executive Director*

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Advance CTE/The Center to Advance CTE has had incredible success raising funds to support new and existing project work, staff time and member resources. Looking at the estimated total income for FY20 – as of December 19, 2019 – funds raised through grants and contracts account for about 73 percent of our income, while dues account for 19 percent.

Advance CTE/The Center to Advance CTE has continued to pursue fundraising and development opportunities, but is committed to only taking on projects aligned to *Putting Learner Success First: A Shared Vision for the Future of CTE*, our strategic plan, and our member priorities, as well as be sure we can manage the continued growth of our organization.

Starting in July 2017, we began tracking our fundraising and development activities to capture within the organization’s Shared Impact and Reach Dashboard. Since April 2019, Advance CTE staff:

- Maintained eight active grants/contracts;
- Secured and launched six new grants/contracts, all with new funders;
- Secured a next round of funding from our largest funder, JPMorgan Chase, and a second year of funding for PAYA;
- Have worked to finalize the renewal grant from the Siemens Foundation;
- Are in the process of discussing 2021-22 funding from the Gates Foundation, in addition to support from current funders (Joyce and JPMorgan Chase) for the 2020 Summit; and
- Have engaged with four additional funders to inform their career readiness strategies.

Funder	Project Description	Status
<i>Bill &amp; Melinda Gates Foundation</i>	In 2018, Advance CTE secured a one-year, \$300,000 grant from the Gates Foundation for: the revision of the National Career Clusters <sup>®</sup> Framework; support for the implementation of the Strengthening Career and Technical Education for the 21 <sup>st</sup> Century Act (Perkins V); national leadership and state support activities that advance the implementation of and access to high-quality CTE pathways across the nation, with a focus on priority states; and support for expanded efforts to address equity in CTE. Since the initial grant award, we have received two supplemental grants, to expand our Perkins support as well as foundational support for the CTE Forward Summit, to be held in fall 2020. The grant runs from October 2018-December 2020 and totals \$1,250,000.	Ongoing
<i>JPMorgan Chase &amp; Co.</i>	<i>New Skills for Youth:</i> Over the past four years, Advance CTE has served as the project co-lead with CCSSO and ESG on JPMorgan Chase’s investment in state career readiness systems. This grant has had a transformative effect on CTE and career readiness in states, Advance CTE as an organization and the broader landscape of philanthropy in our community. This grant is ending in December 2020, but we will continue to draw down on remaining funds to	Sunsetting

	launch the new Global Career Readiness Initiative (see below).	
<i>JPMorgan Chase &amp; Co.</i>	<i>New Skills for Youth Innovation Sites:</i> Advance CTE has been documenting the site-based investments JPMC made across the global. In 2019, we released the first ten (out of a total of 12) snapshots as well as a summary report. In 2020, Advance CTE will release the final two snapshots, and leverage the rest of the resources to launch a Shared Solutions Workgroup around data quality and use. The grant runs from October 2018-December 2020 and totals \$475,000.	Ongoing
<i>JPMorgan Chase &amp; Co.</i>	<i>Global Career Readiness Initiative:</i> Advance CTE has received a five-year grant of \$5 million from the JPMorgan Chase Foundation (JPMC) to support JPMC’s new career readiness initiative that will launch in 2020. The initiative aims to increase student completion of high-quality career pathways through a combination of local implementation, practice change, and state-level policy to scale career pathways and promote economic mobility for populations of underrepresented students. JPMC will provide five-year grants to six sites across the country, with the sites being publicly announced beginning in February 2020.	Launching in Q1 2020
<i>Joyce Foundation</i>	<i>Perkins V Implementation Support:</i> This two-year grants is supporting Advance CTE’s implementation supports for Perkins V. Specifically, this two-year grant is supporting deep work in Joyce focus states (Minnesota, Illinois and Ohio), the implementation meetings and a range of activities around equity (e.g., a shared solutions workgroup, research and the development of a workshop for state leaders). The grant runs from May 2019-April 2021 and totals \$300,000.	Ongoing
<i>Joyce Foundation</i>	<i>Increasing Effectiveness of Postsecondary CTE Program Approval and Review:</i> Over the course of this two-year grant, Advance CTE deepened our relationships and resources around postsecondary CTE. The grant will end in February 2020.	Sunsetting in Q1 2020
<i>Siemens Foundation</i>	<i>Strategies for Attracting Students to High-quality CTE</i> Advance CTE is in the process of closing out the project. We completed the final round of state technical assistance with three states: Georgia, Arkansas and Utah. Each state was provided with technical assistance regarding how to better recruit students into CTE programs of study in their states through monthly phone calls, on-site visits and cross-state calls. Each state has submitted their final report, and Advance CTE is in the process of reviewing and auditing all materials developed. Advance CTE conducted 24 workshops, <i>Empowering Students to Pursue their Career Goals</i> , across the country reaching 600 school counselors. The workshop was delivered through State CTE agencies, ACTE chapters as well as the American School Counselors Association (ASCA) chapters. The workshop was met with high praise and Advance CTE plans to continue this work in 2020 if funded by the Siemens Foundation. Advance CTE also conducted a four-part webinar series with ASCA national on components of the in-person workshop.	Sunsetting in Q1 2020

<p><i>Siemens Foundation</i></p>	<p><i>Siemens 3.0:</i> Advance CTE was invited to submit a third round of funding from the Siemens Foundation. Staff submitted a proposal in the fall, and if funded, will begin the work in February 2020. The funding would be used to support states in their communications and recruitment efforts at the state and local levels. This round of funding would include technical assistance for states, subgrants to states to pilot recurrent activities, a national survey of students and families to re-test the messages developed in 2017 and oversample for subpopulations to ensure that messages resonate with families of varying backgrounds. Additionally, the grant would be used to deliver 30 career advising workshops over two years. The grant would run from February 2020-January 2022 and total \$838,500.</p>	<p>In Development</p>
<p><i>New America (Siemens, Ballmer Group, JPMorgan Chase)</i></p>	<p><i>Partnership to Advance Youth Apprenticeship:</i> Advance CTE has joined New America and a number of other partners as a leading partner on a multi-year, multi-funder project to support the expansion of high-quality youth apprenticeship programs. The partners include New America, JFF, Education Strategy Group, National Alliance of Partnerships for Equity, National Governors Association and National Workforce Fund. The funders include JPMorgan Chase, Siemens Foundation, Joyce Foundation, Ballmer Group, Bloomberg Philanthropies and Annie E. Casey Foundation. We are finalizing the amendment of our contract to extend for a second year, where we will be providing specialized support around data and accountability. The project will run from September 2018-August 2020 and total \$200,000.</p>	<p>Ongoing</p>
<p><i>Lumina Foundation</i></p>	<p><i>Area Technical Centers:</i> In 2019, Advance CTE received its first grant from the Lumina Foundation to conduct research and provide recommendations around the role of area technical centers in supporting adult learners and statewide postsecondary attainment. This grant will run from September 2019-January 2021 and total \$250,000.</p>	<p>Ongoing</p>
<p><i>Lumina Foundation (NASFAA)</i></p>	<p><i>Short-Term Postsecondary Programs:</i> The National Association for State Financial Aid Administrators (NASFAA) approached Advance CTE to join a new initiative funded by the Lumina Foundation on the national landscape of short-term postsecondary programs. Our role is to serve as a critical thought partner, disseminate a survey to our members around motivators and inhibitors of short-term postsecondary programs, conduct additional research, contribute to the publication and help with dissemination. The grant runs from August 2019-April 2020 and totals \$75,000.</p>	<p>Ongoing</p>
<p><i>ECMC Foundation</i></p>	<p><i>Advancing Postsecondary CTE Data Quality:</i> In October 2019, Advance CTE was awarded a three-year, \$750,000 grant from the ECMC Foundation to support a multi-state initiative to improve the quality and effective use of postsecondary CTE data. The grant will allow Advance CTE to select a small cohort of postsecondary state or system offices to conduct a comprehensive needs assessment, examine</p>	<p>Launching in Jan 2020</p>

	problems of practice and receive technical assistance. Through this project Advance CTE will also develop a CTE data quality policy benchmark tool, which will lay out a framework for a high-quality, interconnect CTE data system and strategies to maximize the impact of CTE data. The grant period will begin in January 2020 and conclude in December 2022. In the first six months of 2020, Advance CTE’s priorities for the ECMC project will include hiring a new policy associate, convening an expert workgroup to develop the CTE data policy benchmark tool, and releasing a request for proposals to participate in the initiative	
<i>Association of Black Charities</i>	<i>Racial Equity:</i> Advance CTE secured a grant to help us understand how to identify federal and state CTE policies or practices that perpetuate inequities. This one-year grant, totaling \$25,000, is being used to support internal equity trainings for Advance CTE staff and Board members.	Ongoing
<i>U.S. Chamber of Commerce Foundation</i>	<i>TPM-CTE:</i> Advance CTE staff has secured a contract with the U.S. Chamber of Commerce Foundation to embed CTE into their Talent Pipeline Management curriculum. We are serving on the committee, along with six State Directors. The project will run from August 2019-May 2020 and total \$40,000.	Ongoing
<i>Oregon Perkins Support</i>	In early 2019, Advance CTE secured a contract with the Oregon Department of Education to provide support around the development of their Perkins V plan, in partnership with ACTE. The contract runs from March 2019-February 2020 and totals \$119,820.00.	Ongoing
<i>Iowa Perkins Support</i>	In 2019, ACTE secured a contract with the Iowa Department of Education to provide support around the development of their Perkins V plan, in partnership with Advance CTE. The contract runs from October 2019-June 2020 and totals \$28,500.	Ongoing
<i>UMass Medical School</i>	Advance CTE has been built into a five-year grant, focused on supporting adult learners with disabilities, in partnership with the National Institute on Disability, Independent Living, and Rehabilitation Research. The total sub-contract runs from October 2019-September 2024 and is for \$42,000.	Ongoing

***Looking Ahead:***

Advance CTE has joined the College in High School Alliance’s steering committee, joining JFF and NACEP, Bard College, Middle College National Consortium and KnowledgeWorks. While there is a \$15,000 membership fee associated with being on the steering committee – to support the organization – this is waived for our first year so we can explore the benefits of the partnership. We have begun robust conversations about what funded work Advance CTE might take on starting in Summer/Fall 2020 as the Alliance secures their next round of funding.

Advance CTE is also in discussions with the Gates Foundation about funding for 2021 and beyond, and has submitted early proposals to JPMorgan Chase and the Joyce Foundation for support for the CTE Forward Summit. We are cautiously optimistic about all of these opportunities.

While there have been other state contract opportunities that have come our way, we are choosing to be strategic given our current capacity.

**Board action:** None

Grant	Grant Amount	Grant Start Date	Grant End Date	Apr-Jun 2019	Jul-Sept 2019	Oct-Dec 2019	Jan-Mar 2020	Apr-Jun 2020	Jul-Sept 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-Jun 2021	Jul-Sept 2021	Oct-Dec 2021
SIEMENS 2.0	\$610,000	Nov. 2017	Jan. 2020*											
JPMC: New Skills for Youth	\$2,578,028	Jan. 2016	Feb. 2020*											
JOYCE: Post-secondary CTE Program Quality	\$250,000	Dec. 2017	Feb. 2020*											
Partnership to Advance Youth Apprenticeship	\$200,000	Sept. 2018	Sept. 2020											
GATES: Perkins V, Career Clusters, Summit	\$1,250,000	Oct. 2018	Dec. 2020											
JPMORGAN CHASE: Innovation Sites	\$475,000	Oct. 2018	Dec. 2020											
JOYCE: Perkins Support	\$300,000	Apr. 2019	Mar. 2021											
Lumina: Area Technical Centers	\$250,000	Sept. 2019	Jan. 2021											
Lumina: NASFAA	\$75,000	Aug. 2019	Mar. 2020											
ECMC: Data Quality	\$750,000	Jan. 2020	Dec. 2022											
JPMC: Global CRI	\$5,000,000	Mar. 2020	Feb. 2025											
Siemens 3.0	\$838,500	Jan 2020	Dec 2021											

**Overview of Global Career Readiness Initiative**  
*Report Submitted by Meghan Wills, Director of Strategic Initiatives*

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Advance CTE (as the Center to Advance CTE) has received a five-year grant of \$5 million from the JPMorgan Chase Foundation (JPMC) to support JPMC’s new career readiness initiative that will launch in 2020. The initiative aims to increase student completion of high-quality career pathways through a combination of local implementation, practice change, and state-level policy to scale career pathways and promote economic mobility for populations of underrepresented students. JPMC will provide five-year grants to six sites across the country, with the sites being publicly announced beginning in February 2020.

Advance CTE will provide support to the career readiness initiative and to the selected sites throughout the duration of the project by conducting work in four major areas:

1. Serving as a strategic advisor to the initiative, which includes working with JPMC and Education Strategy Group to inform the initiative’s direction, priorities and operating strategy, as well as support progress monitoring within and across sites;
2. Leading the overall knowledge management strategy for the initiative, which includes gathering, curating and sharing information and data gathered through work with grantees and research for publications;
3. Leading the development and dissemination of critical resources for state leaders to support the implementation of high-quality career readiness and Career Technical Education (“CTE”) policies and programs; and
4. Supporting sites through technical assistance (e.g., supporting convenings, on-the-ground supports, etc.).

By leading the knowledge management strategy and dissemination of resources, Advance CTE will both document grantees’ work and share promising practices and lessons learned from JPMC’s career readiness initiative with the broader CTE/career readiness field. Advance CTE will produce annual snapshots and reports that capture the work of grantees individually and as a group. Advance CTE’s communications technical assistance to grantees will help grantees effectively communicate about their work and about the importance of career readiness efforts broadly. Advance CTE will develop thematic career readiness policy resources, which will be leveraged by grantees as well as the broader CTE/career readiness community. Finally, through a set of Shared Solutions Workgroups, each year, Advance CTE will develop policy benchmark tools that states and local communities can use to support and advance implementation of stronger career readiness pathways and policies.

**Board Action Required:** No action required.



## **Member Engagement & Professional Learning Update – January 2020**

### **Overview of Major Activities**

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE is committed to ensuring all policy resources and supports are developed with our state members' needs front and center. Over the past year, Advance CTE has leaned in heavily around Perkins implementation supports. Between August and October 2019, Advance CTE hosted three Perkins V implementation meetings for State CTE Directors and four additional participants of their choosing covered at cost by Advance CTE. States were able to bring additional participants for an added cost. The meetings, held in Phoenix, Arizona and two in Silver Spring, Maryland, were met with high satisfaction.

In addition, Advance CTE continues engaged our members in the development of major policy priorities and positions through our quarterly advocacy calls, the HEA kitchen cabinet, the Board of Directors call on OCTAE's MOA proposal, and the equity kitchen cabinet.

#### **2. Empower members through professional learning**

Now in its third year, the New State CTE Director Leadership Program provides each participant with a mentor, and uses a cohort model to build affinity among state director members facing similar challenges. The cohort is encouraged to join the in-person meetings and monthly virtual check-ins, and also work through a slate of modules that help them analyze the health and effectiveness of their state CTE systems. Additionally, each participant is offered a mentor pairing of a more seasoned State Director to provide advice and mentorship throughout the program. Advance CTE launched this year's New State Director Leadership Program in the fall and will continue to roll in new State CTE Directors as they are announced.

Advance CTE uses a blend of webinars, online communities and regular phone calls to help members deepen their professional learning in between our bi-annual in-person meetings. While there is no formal strategy in place at this time, the overarching virtual learning strategy is under development.

#### **3. Raise the visibility and promotion of high-quality CTE**

Advance CTE is focused on providing opportunities to elevate the positive outcomes of CTE from across the nation and the efforts of our members. For one, Advance CTE engages member experts to share promising practices on webinars and the online Moodle community. Additionally, staff developed a number of case studies and briefs highlighting model state programs and practices throughout the year, such as the work of the 10 New Skills for Youth states, states with robust credit for prior learning policies, and states implementing effective strategies to address inequities in CTE. Advance CTE has recommitted to releasing blogs highlighting our members, starting with six welcome blogs featuring newly appointed State Directors in fall 2019. Finally, Advance CTE continues to support a select group of states in the development of their own communications strategies, as well as provide tools and resources to help all states make the case for CTE.

#### **4. Build and maintain strong and effective partnerships that advance Advance CTE's vision and mission**

Advance CTE continues to have a variety of partners in the promotions, policy and equity spaces that help to provide support and resource to our members. For example, the Perkins V regional meetings were held in partnership with the American Community College Association, National Alliance for Partnerships in Equity and the Association for Career and Technical Education. They – in addition to the 20 other national organizations represented at these meetings – had a significant presence throughout the duration of the meetings, providing members with expertise on equity, postsecondary and CTE-related issues.

Additionally, staff have created a number of resources together with partners throughout the year, including with ACTE, Asia Society, the American School Counselors Association, Education Strategy Group, and more. These resources provide knowledge and guidance to members across a variety of issues.

#### **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

Advance CTE is focused on streamlining all internal processes related to becoming a member and renewing membership, including connecting back-end systems, improving invoicing, and more. To ensure we have strong feedback loops in place to help us be data-driven and responsive to our members' needs, we released our annual Member Services survey in December 2019. The focus of the survey is to gauge member satisfaction in the types of information Advance CTE is creating, as well as the ways in which they receive that information in an effort to ensure we are meeting each member's needs. Initial results will be shared at the Board of Directors meeting in January.

## **Major Accomplishments (April – December 2019)**

- **New State CTE Director Leadership Program:** There are 12 participants in this third cohort of the New State Director Leadership Program and most have been connected with a longer-standing State Director from another state who is serving as a mentor. Participation and engagement has been solid and State Directors who entered into their role after the cohort officially began in October have been warmly welcomed.
- **Staff:** Advance CTE hired a new Senior Associate, Member Engagement & Professional Learning, who started in November.
- **In-person meetings:** Advance CTE hosted three Perkins V meetings with high attendance including:
  - Overall: 45 states
  - August: 15 states, 82 state participants
  - September: 15 states, 107 state participants
  - October: 15 states, 82 state participants
- **Resources:** As mentioned above, Advance CTE developed a number of supports and tools for members throughout the year, including 31 reports or briefs, six guides, tools or fact sheets and nine webinars. These were all developed with membership needs at top of mind and in service of the work happening in their states.
- **Dues Renewal:** Advance CTE led a successful dues renewal process, leading to all 50 states, DC and four territories renewing their memberships.

## **Challenges**

- **Ongoing State CTE Director Turnover:** Continued turnover of people in this role could potentially threaten progress in the field. It also shrinks the pool of willing and qualified mentors for new State Directors.
- **Staff:** Advance CTE was without a dedicated Membership staff person for several months, and responsibilities of this position were divided among other staff. This challenge has since been addressed.
- **Delivering additional Professional Learning to members who are not State Directors:** While State Directors are able to engage with Advance CTE in a variety of ways, opportunities are less defined for other member types. One way to build more connection points with associate and organizational members is to develop a professional learning series targeted at these groups. Delivering targeted and valuable products, opening these channels of communication and establishing an affinity among these member types and between them and Advance CTE will be especially important as Advance CTE continues to approach our work through an equity lens, which, in order to be effective, will require broad-reaching and meaningful communications.

## **Update on Identified Priorities for (April – December 2019)**

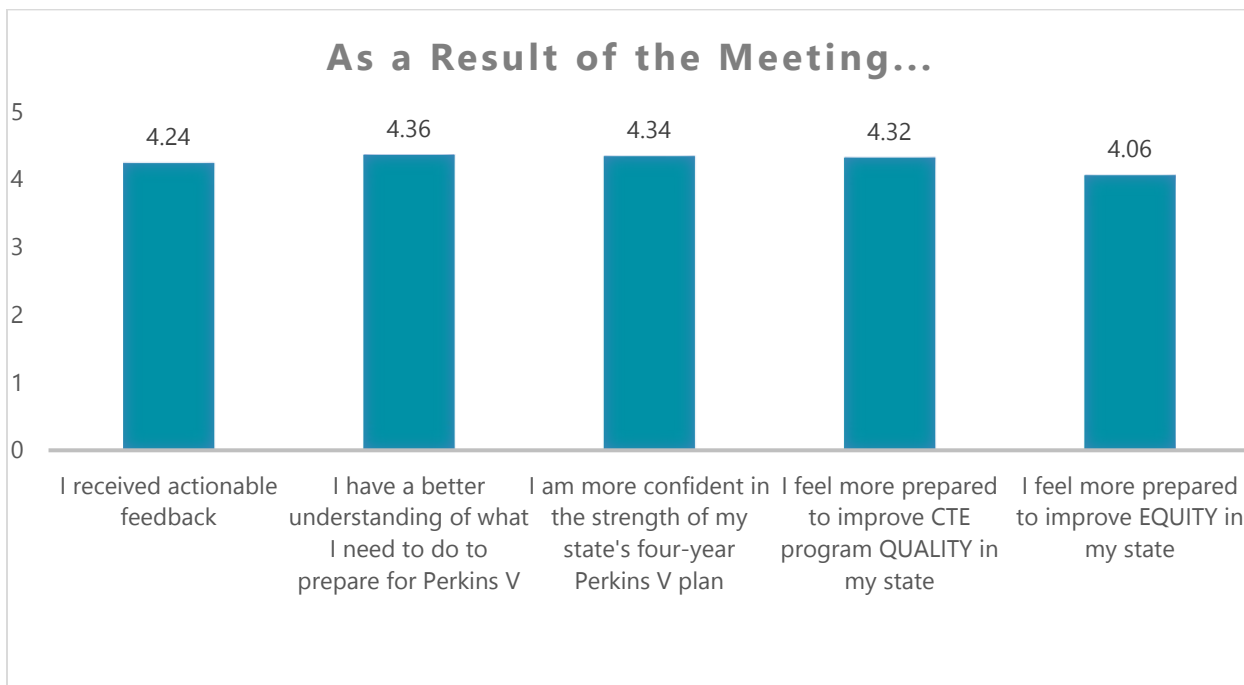
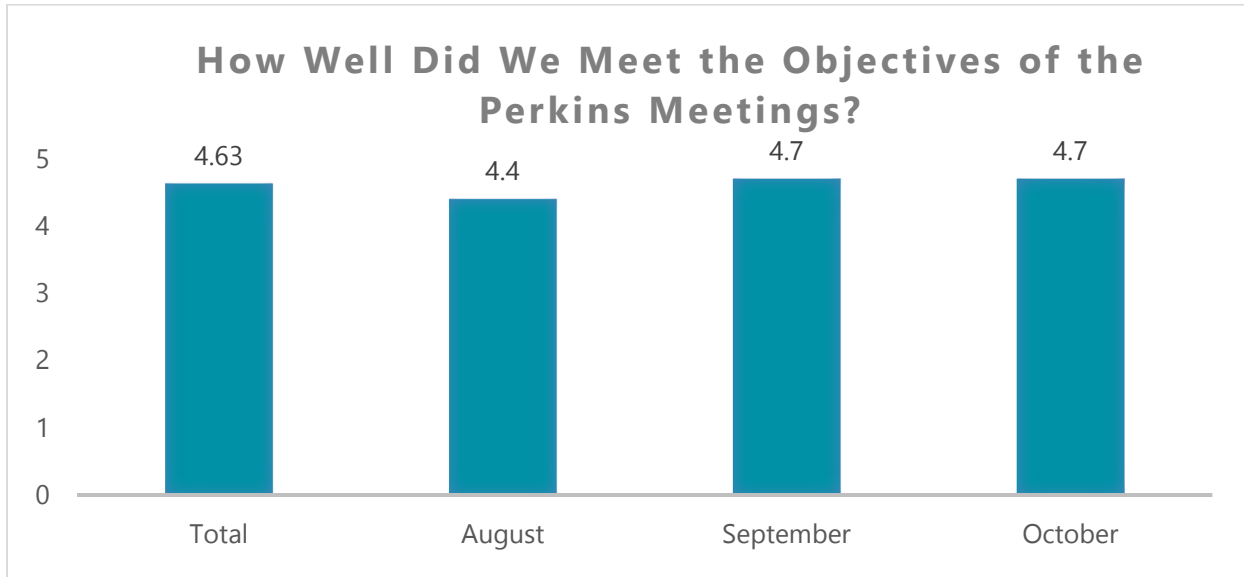
All but one of the priorities for the last six months were met.

- **Launch of 2019-2020 cohort of New State Director Leadership Program:** Marie Barry, former State Director, was added as a consultant to the New State Director program and it has launched.
- **Planning of 2019 Regional Perkins V Implementation Meetings:** Perkins V Implementation meetings were held and well-attended.
- **Technical Assistance to States through the Perkins V Implementation Initiative:** Staff and partners provided technical assistance to states through the Perkins V Implementation Initiative.
- **Launch of Virtual Professional Learning Strategy:** The Virtual Professional Learning Strategy was not developed, due to staff turnover. This will be a priority in the next six months.
- **Successful Dues Renewal Cycle with Increased Retention:** As described above, we have retained all 50 states, DC and four territories are members. As of December 2019, Advance CTE's membership has increased slightly from FY19, with our total state associate, non-state associate and organizational members increasing to 539 (from 523).

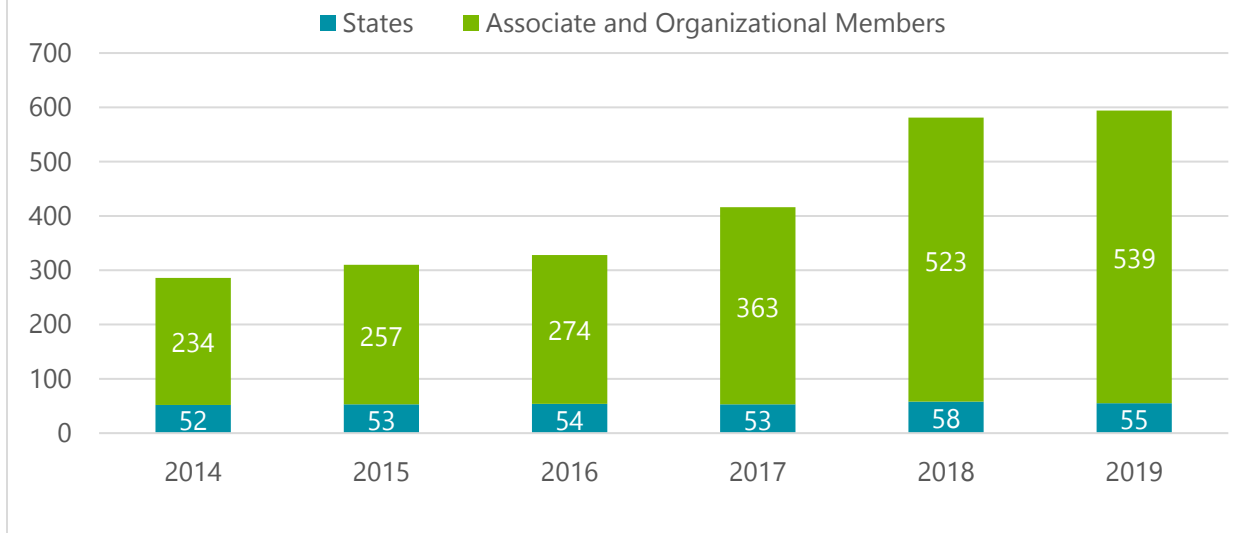
## **Priorities for Next Six Months (January – June 2020)**

- Ensuring members are aware of and engaged in 100-year anniversary of Advance CTE
- Deliver a high-quality, well-attended and well-received 2020 Spring Meeting
- Continue to lead the New State Directors Leadership Program, including an in-person workshop at the Spring Meeting, monthly virtual support and updates of the modules.
- Onboarding and including new State Directors in New State Directors Leadership Program or otherwise
- Streamlining administrative membership systems before launching next dues renewal process.
- Develop and launch new Virtual Learning Strategy.
- Planning 2020 CTE Forward Summit, including member engagement at key times.

**Relevant Data**



## Membership



## ***Membership Engagement & Professional Learning Strategy***

*Fall 2019-Summer 2020*

*Updated December 2019*

### **ALIGNED STRATEGIC PLAN ELEMENTS**

- 1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.
- 2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE's priorities, activities, resources and events.
- 2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE members, which they then implement in their own states and communities.
- 2c. Provide personalized and targeted supports to Advance CTE members to support CTE's leadership pipeline.
- 2d. Build and strengthen communities within Advance CTE's membership to foster cross-state sharing and learning.
- 3a. Develop, disseminate and support Advance CTE members and key stakeholders in the utilization of communications resources, tools, messages and technical assistance to build the visibility of and support for high-quality CTE.
- 3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.
- 5a. Ensure all aspects of the management of Advance CTE/The Center to Advance CTE are effective, efficient and in legal compliance.
- 5b. Revise and update the organizational standard operations procedures manual to comprehensively articulate key organizational policies, processes and practices.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

### **OBJECTIVES**

1. Support and foster effective CTE leadership at all levels of state government.
2. Provide first-in class service for state CTE leaders that supports the professional growth, leadership capacity, diversity and overall engagement of Advance CTE members.
3. Maintain full membership from all 50 states and DC, at minimum.
4. Be the go-to organization for our members for professional learning, promising practices and leadership development.
5. Ensure members have the information they need, when they need it.

6. Maintain the balance of learning and leading
7. Improve internal membership systems to reduce internal administrative burden

## **MAJOR ACTIVITIES**

### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will support its state members in the design, development, adoption and implementation of policies and programs, with an unerring focus on improving the quality of and access to/success through CTE programs and experiences. While most of the activities below are housed within other strategies, it is important to note the fact that they are all designed with our members' interests and priorities.

Specific activities include:

- Diverse and robust state participation in sustained and ad hoc technical assistance, which requires the engagement and/or sign off of State CTE Directors.
- Implementation supports related to Perkins, WIOA, apprenticeships, ESSA and HEA (as appropriate).
- The development of publications, resources and supports that are aligned with state members' needs and priorities (e.g., aligning resource calendar with key issues).
- The tracking of state policies, programs and successes to maintain an understanding of the state of play, identify key topics for further resources or supports; and identify states to feature, elevate and/or provide assistance.
- The development of customized, state-specific resources, such as fact sheets and personalized results of surveys.
- The development of member-only spaces and resources, such as the Moodle and facilitation guides to be released alongside new tools and reports.

In addition, Advance CTE will continue to engage our members in the development of any major policy priorities and positions through:

- Advance CTE's quarterly advocacy calls.
- The HEA kitchen cabinet.
- The planned WIOA kitchen cabinet.
- The equity kitchen cabinet.
- Other kitchen cabinets/advisory committees as needed.

### ***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

As a membership organization, Advance CTE is committed to designing and offering ongoing professional learning experiences and opportunities that meet the varied needs of our members. Given the differentiated professional learning needs of our members – which often depends on their role, purview, experience, perspective, background and state context – Advance CTE's professional learning offerings must be dynamic and diverse. We must also attend to any barriers



to participation in our membership and access to our resources, with an eye towards equity and inclusion, and creating a welcoming environment for each of our members.

Specific activities include:

- The ongoing execution and improvement of the New State CTE Director Leadership program, which includes, at a minimum, building a strong cohort of new State Directors, ensuring the modules are up-to-date and relevant, supporting mentor pairings, and providing high-quality in-person workshops. This program will lead to new State Directors feeling more prepared for their role, as well as facilitate their strong and consistent engagement as members of Advance CTE.
- In-person convenings that build content knowledge and leadership skills and foster cross-state sharing among our members. These meetings not only elevate strong state practices, they also give our members an opportunity to present, build their own networks and get feedback on their ongoing efforts.
- The development of a year-round virtual learning strategy that leverages Advance CTE's own work as well as the expertise of partners and the field to support the advancement of high-quality CTE and equitable access and success for each learner. This strategy may include a defined webinar calendar, revival of the CTE Virtual Institute (in some form), and the development and support for communities of practice (see below).
- The development and expansion of communities of practice for state CTE leaders. Building on the early use of Moodle by State Directors, Advance CTE will build and support virtual spaces for members to engage with and learn from one another. These may be topical and/or role-based and/or organized around Advance CTE's regions. Over time, there may be in-person communities of practice, as part of the technical assistance strategy.
- Offer equity training to Advance CTE Board of Directors, as part of our grant with the Association of Black Charities.

In addition, Advance CTE always needs our members to be involved in the design of major projects and initiatives and will:

- Continue to work collaboratively with the Board of Directors to direct the work of the organization and achieve its mission and vision.
- Strategically and comprehensively engage members in the revision of the National Career Clusters<sup>®</sup> Framework.
- Strategically and comprehensively engage members in the planning of the CTE Summit (and subsequent resource development).
- Ensure diverse state member participation in all future Shared Solutions Workgroups.

### ***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will provide opportunities to elevate the positive outcomes of CTE from across the nation and the efforts of our members.

Specifically, Advance CTE will:

- Lead an annual “Advancing Career Technical Education Leadership” award program that recognizes distinguished and emerging leaders from among our members. In addition to recognizing our members, the award program also will identify ways in which we will continue to engage and leverage the awarded leaders.
- Feature our members (and State Directors, in particular) in Advance CTE and partner-hosted events that raise their profiles and elevate their work (e.g., CTE caucus events, webinars, in-person meetings, Talent Pipeline Management review committee, etc.)
- Engage our members to identify best practices and positive stories for CTE Month, 100-year anniversary and beyond (especially important in lieu of Excellence in Action award).
- Post regular blogs featuring our state members (e.g., new State Director blogs, “getting to know” blogs, etc.)

At the same time, Advance CTE will support its members so that they are poised to promote CTE in an effective way with families and students, policymakers, the media and other key stakeholders. We will:

- Provide our members with focused communications training, resources, technical assistance and professional learning opportunities (e.g., only State Directors can apply for communications technical assistance).
- Provide advocacy training for Board members so they can better communicate the mission, vision, priorities and major initiatives of Advance CTE.

Advance CTE needs to ensure that all resources and materials reach members so they can learn and replicate best practices from them. Advance CTE will:

- Review and consider improvements to our monthly member newsletter and related newsletters that members receive.
- Identify opportunities to personalize communications (such as e-blasts or listserv messages) as well as maximize our digital media strategy to ensure our resources are reaching members.
- Identify ways to repackage existing resources to reach new members.
- Commit to ongoing maintenance and improvement of the members-only section on the website, with a focus on ensuring it is up-to-date and contains relevant resources and information.

Finally, as Advance CTE continues to grow its fundraising and development strategy, we will continue to focus development efforts on:

- Topics/issues of greatest need to our state members.
- Opportunities that help build the capacity among our state members and their state agencies.
- The development of tools, supports or other “50-state” resources that can benefit our broader state-level membership across K-12, postsecondary and/or workforce development.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will continue to engage and leverage partnerships to help expand our reach, impact and ability to serve our members. Specifically, we will:

- Continue to invite national partners to help lead, present and participate in our annual convenings to share their expertise and expand our reach and impact.
- Strategically embed content from partners into our virtual learning strategy (e.g., hosting webinars to share new research from partners such as the Council of State Governments.)
- Continue our partnership with ACTE to help facilitate better connections between State Directors and state ACTE leaders.
- Continue to engage with the U.S. Department of Education, U.S. Department of Labor and other federal agencies to advocate on behalf of our members and ensure they have the clarity and non-guidance guidance needed to develop and implement strong policies and programs.
- Partner with other state-facing organizations to convene the 2020 CTE Forward Summit to facilitate shared goals across and within states and further support in-state partnerships between State Directors and other state leaders.
- Maintain and support liaison positions within key partner organizations (e.g., ACTE, SkillsUSA, HOSA, etc.), held by Advance CTE Board members.
- Serve as advisors, liaisons and experts on select partner organizations' Boards and working groups (e.g., ANSI, LAPSEN, etc.)

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE prides ourselves in having member renewal policies that offer flexibility to State Directors in the selection of their “team” members, as well appearing seamless externally. However, while our processes may seem seamless to those on the outside, there are improvements that can certainly be made internally to reduce our administrative burden.

Over the next year, Advance CTE will:

- Develop and implement an annual audit of all membership systems related to membership activation and de-activation, invoicing and communications.
- Identify and implement systems that streamline all membership related processes, such as the integration of CiviCRM, QuickBooks, Google groups and other communications channels.

In addition, as a data-driven organization focused on continuous improvement, Advance CTE will:

- Administer and use an annual member services survey to ensure we continue to offer best-in-class services and resources to our members.
- Hold quarterly state engagement meetings where we will analyze the results of our engagement matrix, share information across staff about members' needs and priorities, and identify ways to engage under-engaged states and members.

- Leverage evaluations to assess the quality and relevance of our meetings, webinars, new State Director Leadership program, and other professional learning offerings.
- Prioritize staff engagement of and relationships with members (and State Directors in particular) through our annual performance review process.
- Finally, all relevant materials and resources will be archived in the knowledge management system to ensure all current and future staff have access to them.

## State Policy Strategy Update – January 2020

### Overview of Major Activities

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE continues to produce and release a number of publications, tools and resources that support development and implementation of state policies that support improving the quality of and access to/success through CTE programs and experiences. In the last nine months, Advance CTE staff published 13 resources on topics including [data quality in CTE](#), [credit for prior learning](#), [measuring CTE program quality](#), and [data in youth apprenticeships](#). In addition, Advance CTE released [state impact snapshots](#) and a [summary publication](#) describing state efforts to strengthen career readiness systems through the New Skills for Youth initiative.

Advance CTE has expanded its provision of technical assistance to states throughout 2019; in recognition of this expanded work, the organization has developed a new stand-alone Technical Assistance Strategy, which provides more detailed information about current and planned technical assistance work. States are receiving technical assistance on a number of policy-related topics including implementation of Perkins V, strategic planning and systems alignment, development and effective use of high-quality data, equity in CTE and closing opportunity gaps, and youth apprenticeship and its alignment with CTE; in addition, Advance CTE continues to provide state technical assistance related to messaging and communications in support of high-quality CTE.

Advance CTE staff has shifted staff oversight of state implementation of federal policies (including Perkins V, WIOA, HEA, etc.). State implementation of federal policies now falls under the State Policy Strategy and Technical Assistance Strategy. Advance CTE federal policy staff will remain closely engaged in work related to state implementation of federal policies to ensure alignment to the Federal Policy Strategy.

#### **2. Empower members through professional learning**

Staff regularly present on a variety of topics at Advance CTE and partner conferences, to both share with and learn from members on state CTE policies. Since April 2019, in addition to presentations at Advance CTE's three Perkins V Implementation Meetings in fall 2019, staff presented to members and other partners at the events such as:

- *Delivering High-quality CTE in Rural Settings*, Idaho CTE Ad-hoc Workgroup, Boise, ID
- *Aligning CTE and Workforce Development*, National Association of State Workforce Agencies, Workforce Summit, Boston, MA
- *Career Technical Education as a Pathway to Adult Success: National, State and Local Perspectives*, Pathways to Adult Success National Dissemination Meeting, Baltimore, MD
- *Data for Accountable Youth Apprenticeship Programs and Partnerships*, Partnership to Advance Youth Apprenticeship National Meeting, Denver, CO

Advance CTE also held three webinars on Perkins V accountability indicators in December 2019 for State Directors and other state leaders with responsibility over Perkins accountability.

Advance CTE has a strong focus on learning from our members about effective policies and practices that support improving the quality of and access to/success through CTE programs and experiences. We gather this information from our members through the annual Year in Review publication, policy profiles and other reports featured in the Learning that Works Resource Center, and member surveys. To ensure that other states know about effective and innovative practices, we embed those lessons learned into other organizational work by highlighting state promising practices in publications and featuring states at meetings and on webinars.

### **3. Raise the visibility and promotion of high-quality CTE**

Since June 2016, Advance CTE has maintained a robust repository of reports, tools and policy profiles through the [Learning that Works Resource Center](#), which now includes more than 300 resources. Traffic to the Resource Center continues to grow, with an average of 13,100 monthly hits since April 2019; this is an increase of 19 percent over the same period in 2018. Staff have conducted regular maintenance of the Resource Center by auditing one topic page each month and modifying the Resource Center structure and navigation to improve usability. Additionally, staff regularly publish state policy research and updates on Advance CTE's blog.

In 2020, staff plan to develop and launch a web-based portal for state Perkins V plans, which will serve as a one-stop shop for information on states' Perkins V plans and will allow states and the public to easily search for specific components of states' plans.

### **4. Build and maintain strong and effective partnerships that advance Advance CTE's vision and mission**

Advance CTE maintains partnerships with key leaders and influencers in the field, including Education Commission of the States, National Conference of State Legislatures, Data Quality Campaign and the American School Counselor Association, among others, in order to strengthen our own capacity and influence the national conversation around CTE. In addition, Advance CTE is focused on strengthening our newer partnerships that have been formed in support of our equity initiative and our work on middle grades CTE; these partners include National Urban League, Council of State Governments and National Forum to Accelerate Middle-Grades Reform.

### **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

Advance CTE is committed to developing and implementing internal processes and protocols to share knowledge, coordinate efforts, streamline work and create efficiencies, and continuously improve our work and support of our members. Staff continue to upload documents, research and presentations to our shared online folder to ensure that knowledge and materials are shared across the organization. In addition, staff members regularly present information to each other on state policy projects and work through "deep dive" presentations at weekly staff meetings. Moving forward, as staff working on state policy shift to taking the lead on work related to state implementation of federal laws, state policy and federal policy staff will stay in close

communication to ensure that federal policy conversations inform state implementation and that state-level successes and challenges are appropriately incorporated into our federal policy work.

### **Major Accomplishments (April – December 2019)**

- Released 13 new reports, briefs and other resources related to state policy:
  - [\*The State of Career Technical Education: Improving Data Quality and Effectiveness\*](#)
  - [\*Developing Credit for Prior Learning Policies to Support Postsecondary Attainment for Every Learner\*](#)
  - [\*Making Good on the Promise: Expanding Access to Opportunity\*](#)
  - [\*Making Good on the Promise: Ensuring Equitable Success Through CTE\*](#)
  - [\*Driving Quality & Equity in CTE: A State Guide to Developing the Perkins V Comprehensive Local Needs Assessment Template\*](#)
  - [\*State Needs Assessment Crosswalk\*](#)
  - [\*Promoting a Regional Approach to the Perkins V Comprehensive Local Needs Assessment\*](#)
  - [\*Investing in Quality: Funding the Perkins V Comprehensive Local Needs Assessment\*](#)
  - A [\*series of four briefs\*](#) on measuring secondary CTE program quality
  - [\*The Role of Data and Accountability in Growing Youth Apprenticeship Programs\*](#)
  
- Concluded work on the New Skills for Youth initiative, including releasing the [\*NSFY Impact Summary\*](#) and the final set of 10 [\*state impact snapshots\*](#).
  
- Continued to expand individualized technical assistance to states in support of Perkins V plan development and implementation, with 11 states receiving state policy-focused technical assistance in the past nine months.
  
- Launched a new Technical Assistance Strategy in recognition of the growing portfolio of technical assistance work related to state policy and other topics.
  
- Maintained and strengthened the Learning that Works Resource Center, which received an average of 13,100 hits per month since April 2019.

### **Challenges**

One challenge has been building staff capacity to support continued provision of high-quality work on state policy; Advance CTE plans to hire three new staff members in early 2020 to support state policy work. While new staff will certainly bring additional capacity and talent to the Advance CTE team, it will require a time investment by managers to onboard and provide ongoing support to new staff members.

Advance CTE will be launching a major new project in January 2020 (a global career readiness initiative supported by the JPMorgan Chase Foundation). In the first six months of 2020, Advance CTE will working through some of the challenges of launching a new project, including learning about new state (and local) systems, building relationships with new organizations and individuals, and establishing new routines with partners and funders.

### **Update on Identified Priorities for (April – December 2019)**

- Continue to support the New Skills for Youth initiative, as states work through the final year of this grant, and plan for sustainability.
  - Advance CTE provided support to the 10 New Skills for Youth states through December 2019 and gathered information on the states' accomplishments to support the knowledge management aspect of the project.
- Support technical assistance and resource development to help states prepare for Perkins V implementation through grants from the Gates and Joyce Foundations, as well as a contract with the state of Oregon.
  - Advance CTE is providing support and technical assistance to 11 states through grants from the Gates and Joyce Foundations as well as state contracts.
- Finalize and launch the member-facing CTE Research Warehouse, an Excel tool containing evidence and data points related to CTE and high-quality career pathways.
  - Advance CTE developed an internal version of this tool for staff use, but the release of this tool to members is on hold because staff currently does not have capacity to clean up the internal-facing tool for member use. As staff capacity increases in 2020, Advance CTE plans to revisit this tool and revise it for member use.
- Release new reports and briefs, including the State of CTE on data systems, an additional report on equity in CTE, as well as a report on credit for prior learning policies.
  - As listed above, Advance CTE released all planned reports, in addition to other resources on priority topics, such as data, equity and the comprehensive local needs assessment.
- Begin working on the final round of New Skills for Youth (NSFY) state snapshots for release at the end of the calendar year.
  - Advance CTE released the [NSFY Impact Summary](#) and the final set of 10 [state impact snapshots](#) in December 2019.
- Continue work on a Policy Benchmark Tool focused on dual enrollment, articulation and transfer, for release late in 2019.
  - Advance CTE began work on this tool, but further work was halted after the College in High School Alliance (CHSA), of which Advance CTE is a member, released a framework that would have made our tool redundant. CHSA shared their tool with Advance CTE for feedback ahead of dissemination.
- Continue the JPMC Innovation Sites grant work, releasing ten snapshots during summer 2019.
  - Advance CTE released [snapshots](#) on 10 Innovation Sites across the globe as well as a [report](#) summarizing cross-cutting strategies across the 10 global sites.

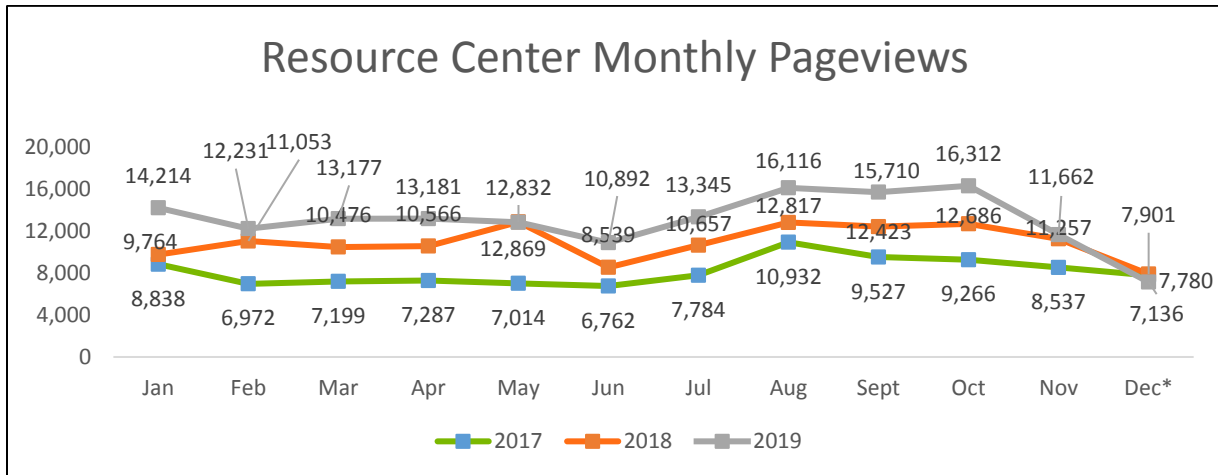
### **Priorities for Next Six Months (January – June 2020)**

- Begin work in support of the JPMorgan Chase Foundation's global career readiness initiative, including developing and conducting a needs assessment and action plan development process with the sites.



- Continue to support state implementation of Perkins V, including identifying innovative approaches in state plans and sharing those approaches with other states through professional learning and other strategies.
- Develop and launch a web-based portal for state Perkins V plans, which will serve as a one-stop location to search for and access specific content within and across state plans.
- Initiate a comprehensive and inclusive revision of the National Career Clusters Framework.
- Build staff capacity to support Advance CTE’s state policy work, including hiring, onboarding and supporting talented new staff members.
- Lead shared solutions workgroups on middle grades CTE (already in process), data visualization and use, CTE data quality, and closing equity gaps in CTE.

**Relevant Data**



*\*Reported data for December include website traffic through December 18, 2019*

## **State Policy Strategy**

*Fall 2019-Summer 2020*

*Updated December, 2019*

### **ALIGNED STRATEGIC PLAN ELEMENTS**

- 1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.
- 1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.
- 1d. Plan and execute a strategy for the revision of the National Career Clusters<sup>®</sup> Framework.
- 2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE's priorities, activities, resources and events.
- 2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE members, which they then implement in their own states and communities.
- 2d. Build and strengthen communities within Advance CTE's membership to foster cross-state sharing and learning.
- 3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.
- 4b. Develop, maintain and grow strategic partnerships with policymakers, advocacy groups and other key stakeholders to support states' adoption and implementation of legislation and policies.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

### **Objectives**

1. Identify state policies, programs and practices that support, promote and increase equitable access to and success in high-quality CTE.
2. Support states in their development, adoption and implementation of policies and strategies that support high-quality CTE.
3. Disseminate state policy resources to members, stakeholders and the public to help promote high-quality CTE and career readiness.
4. Position Advance CTE as the national expert and go-to resource on all dimensions of state-level CTE policy and best practices, including middle grades, secondary, postsecondary and workforce.

## MAJOR ACTIVITIES

### *Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY*

Advance CTE will support its members in the design, development, adoption and implementation of high-quality state policies that support improving the quality of and access to/success through CTE programs and experiences.

- Promote state policies that lead to high-quality and equitable CTE by researching and producing relevant, high-quality reports, tools, guides and other resources.
  - Produce and release reports and resources on a variety of relevant state policy topics; highlight best and promising practices from states in publications and in the Learning that Works Resource Center.
  - Create at least one policy benchmark tool per year on topic(s) that are relevant to State CTE Directors and state members.
  - Create other tools and guides as part of broader policy initiatives and projects.
  - Publish regular blog posts covering state policies and recent research from the field.
  - Host webinars highlighting Advance CTE's and partners' research and resources.
  - Ensure that state policy reports and other resources address topics related to organizational strategic priorities and initiatives, including equity in CTE, data quality and effective use, and other strategic initiatives, as well as have application at the secondary and/or postsecondary and/or workforce development levels.
- Launch a comprehensive and inclusive revision of the National Career Clusters Framework.
- Support states in their implementation of federal laws and requirements, including Perkins V; reauthorizations of HEA, WIOA and other relevant federal laws; and methods of administration monitoring requirements.
  - Share information with states related to implementation of federal laws and requirements.
  - Provide technical assistance to states related to implementation of federal laws and requirements using a variety of approaches and levels of intensity to meet states' needs.
  - Track and monitor state implementation of federal laws and requirements, including successes and challenges experienced by states; coordinate with federal policy staff to share state experiences and feedback with appropriate federal officials.
- Support the development, adoption and implementation of policies that lead to high-quality and equitable CTE through the provision of direct technical assistance to states.
  - Provide technical assistance to states related to policy benchmark tool(s) (PBT), to support state implementation of strategies outlined in the PBT.
  - Develop technical assistance strategies and materials to support states' adoption of/transition to the revised National Career Clusters framework at the state and local level.

- Ensure that state policy technical assistance regularly supports organizational strategic initiatives, including equity in CTE, data quality and effective use, and other strategic initiatives, as well as have application at the secondary and/or postsecondary and/or workforce development levels.
- Lead shared solutions workgroups, which convene national, state and local leaders to jointly develop tools and resources that benefit the entire field, focusing on the most complex challenges in advancing equitable and high-quality career opportunities for each learner.

***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

Advance CTE is committed to supporting its members and offering a variety of professional learning activities to both share with and learn from members on state CTE policies.

- Ensure that high-quality state CTE policies are shared with State CTE Directors and other members through professional learning activities, including:
  - Fall and Spring meetings and other in-person convenings;
  - Webinars and other virtual professional learning strategies;
  - New State CTE Director Leadership Program modules; and
  - Responses to member inquiries and requests on state policy questions.
- Develop and implement strategies to learn from Advance CTE members about high-quality state CTE policies, and embed information learned from members in the organization’s state policy work.
  - Regularly gather and collect information on high-quality state CTE policies through member surveys, the annual Year in Review report, content featured in the Learning that Works Resource Center, and other publications.
  - Regularly include State Directors and other state members with relevant content expertise in Shared Solution Workgroups.
  - Regularly include State Directors and other state members with relevant content expertise in topic-specific kitchen cabinets and/or task forces
- Develop and provide opportunities for Advance CTE members to engage in peer sharing and learning about best and promising practices in state policy using a variety of strategies to meet members’ diverse needs.
- Provide education and information to Advance CTE members regarding the revised National Career Clusters Framework using a variety of professional learning strategies.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will promote high-quality state policies that support equitable access to and completion of CTE programs and experiences.

- Maintain the Learning that Works Resource Center to provide an easy-to-access catalogue of state-level policies and best practices related to CTE and career readiness.

- Upload timely and relevant resources and policy profiles related to CTE and career readiness.
- Routinely audit the resources in the Resource Center for quality and relevancy, including alignment to organizational strategic priorities and initiatives, such as equity in CTE, data quality, etc.
- Use data in the design, management and continuous improvement of the Resource Center.
- Routinely review the structure and content of the Resource Center and modify, if needed.
- Disseminate Advance CTE’s state policy resources to members, stakeholders, the media and the public to help promote high-quality CTE and career readiness.
  - Develop and implement robust release strategies for all Advance CTE reports, resources, tools and guides, including promotion in newsletters, blogs, social media, and the Learning that Works Resource Center; release strategies and product promotion will include lifting up resources throughout the year as appropriate.
  - Share Advance CTE resources with states and partner organizations and collaborate with partners on cross-promotion across various media vehicles.
  - Disseminate high-quality, relevant CTE reports and resources produced by other organizations through Learning that Works Resource Center entries and promotion in newsletters, blogs and social media.
  - Disseminate state policy information and resources through project- and/or grant-specific newsletters, in accordance with grant/contract requirements.
  - Maintain and update the “CTE In Your State” profiles on the Advance CTE website, including reviewing content for accuracy and updating annually.
- Develop, launch and maintain a web-based portal for state Perkins V plans, which will serve as a one-stop location to search for and access specific content within and across state plans.
- Develop and execute a robust communications strategy around the revision of the National Career Clusters Framework.
- Feature and promote Advance CTE staff as national go-to experts on CTE and support learning within the broader community,
- Proactively seek out opportunities to share Advance CTE’s state policy expertise, research and tools with the education and workforce policy communities by submitting session proposals for conferences, participating in joint webinars and acting on other opportunities that arise.
- As appropriate, continue to build state policy activities into grant proposals and budgets to ensure sufficient resources are available to support this work.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will establish, engage and leverage partnerships that support the development and implementation of high-quality state CTE policies.

- Cultivate, strengthen and engage key partners to support the development and implementation of high-quality state CTE policy.
  - Develop a target list of partners and conduct outreach in order to:
    - Keep partners informed about our work;
    - Serve as a convener of partners in support of systems alignment and information sharing;
    - Gather information and guidance related to specific projects; and/or
    - Partner directly around the development or dissemination of specific projects.
  - Attend in-person educational and networking events to expand staff members' knowledge and professional networks.
  - Engage relevant content partners in the development, planning and launch of major organizational initiatives, including:
    - Revision of the National Career Clusters Framework; and
    - CTE Forward Summit.

***Develop and Maintain Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE as an organization is committed to developing and implementing internal processes and protocols to share knowledge, coordinate efforts, streamline work and create efficiencies, and continuously improve its work and support of its members.

- Implement processes and protocols to share knowledge with the broader team and document information for future access and use.
  - Adhere to expectations, protocol and timelines for updating the internal knowledge management system with state policy reports, resources, tools, guides and other documents.
  - Share relevant state policy information with colleagues through staff meeting briefings, memos, etc.
- Develop and implement internal processes and systems to track state-level implementation of Perkins V and other federal legislation and other state policies related to CTE and career readiness.
- Closely coordinate state policy and federal policy efforts so resources and information address concerns related to both and states are fully supported in implementation of Perkins V and other federal legislation.
  - Leverage existing knowledge, provide technical assistance to state leaders, and support the development of resources to support Perkins V implementation.
  - Identify and elevate lessons from ESSA implementation that can support state work around Perkins V.

- Build staff knowledge and capacity about the revision of the National Career Clusters Framework.
- Implement data-driven processes to evaluate the quality and impact of Advance CTE's state policy work and resources. Analyze and use this information to support continuous improvement of state policy work and products.

## Federal Policy Strategy Update – January 2020

### Overview of Major Activities

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE will continue to monitor federal legislative policy developments and will develop and update recommendations for legislation that advocates for high-quality CTE and the priorities of our members, with a special focus on equity. In particular, Advance CTE will focus on continuing to advocate for our Higher Education Act (HEA) recommendations and to create recommendations for the reauthorization of the Workforce Innovation and Opportunity Act (WIOA) reauthorization. Staff will also monitor state implementation of federal policies, with a focus on supporting the Carl D. Perkins Career and Technical Education Act (Perkins V). Advance CTE will continue to offer targeted technical assistance to states as they develop and implement their state plans to “be bold.” We will continue to assist our members in federal policy guidance in coordination with U.S. Department of Education, including maintaining strong working relationships with the Office of Career Technical and Adult Education (OCTAE).

#### **2. Empower members through professional learning**

Advance CTE will ensure that relevant federal laws, policies, and legislative changes are shared with Advance CTE members through professional learning opportunities including workshops, deep-dive webinars and legislative updates. Advance CTE will empower its members to gain topic knowledge through grassroots meetings. Specifically, we will revisit the process and purpose for “kitchen cabinet” ad-hoc committees to leverage our members’ topical expertise to not only guide grassroots federal policy development, but reports from the committee will help to inform the general membership of the ‘on the ground’ impact of proposed federal policy changes. We will readdress the utility and purpose of quarterly federal policy advocacy calls, with the potential to change the content or frequency to balance the utility of frequent updates with any time commitment asked of our members.

#### **3. Raise the visibility and promotion of high-quality CTE**

Advance CTE’s centennial celebrations offer the chance to connect federal policy stakeholders with our work and more broadly, with CTE in general. However, as events can unfold quickly within federal policy, it becomes necessary to build the capacity to respond effectively. Advance CTE will develop a social media strategy, focused on Twitter, that promotes Advance CTE’s brand, initiatives and priorities to increase our influence through interaction with high profile influencers, including legislators, associations, and think-tanks. We will increase the visibility of many of our federal policy recommendations through deep-dive blogs that explain complex regulation to a broad audience.

#### **4. Build and maintain strong and effective partnerships that advance Advance CTE’s vision and mission**

Advance CTE will create and maintain meaningful strategic partnerships that strengthen Advance CTE’s role and standing as the “go-to” organization for high quality CTE and relevant topics. We will build and maintain relationships with organizations, coalitions, and legislative staff that are focused on aligned priorities for Advance CTE, which can help maximize the presence of Advance CTE as an influential organization. Creating and maintaining strategic partnerships with organizations that have educational equity as a focus will be a priority over the



next six months. Strong partnerships with groups that support greater federal funding for education, like the 110 member organizations and associations that comprise the Committee on Education Funding (CEF) will help increase the influence of Advance CTE in the federal appropriations process. As we develop recommendations for WIOA, creating strong partnerships with influential organizations that will promote the role of CTE in workforce development will strengthen our position of impacting change in any upcoming WIOA reauthorization. We will partner with Congressional CTE caucuses to support CTE legislative briefings to promote best practices for high quality CTE and increase visibility for Advance CTE as topic experts.

## **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

Advance CTE is committed to creating and implementing data-driven internal scalable processes and protocols that increase staff efficiency and productivity to support our members. Specifically, we will re-evaluate existing internal dashboard metrics and propose revisions to more holistically reflect the impact of Advance CTE activities on federal policy, including creating a guide of what legislative success looks like and expanding ways to better evaluate and track federal policy influence. We will explore evaluative metrics and guidelines that address Advance CTE priorities, with a special focus on addressing equity. Emphasizing our member involvement in our activities requires evaluating the lifecycle of a topic based ad-hoc kitchen cabinet. Additionally, we will evaluate taking a proactive approach to legislation and look to our CTE “champions” in Congress to draft and introduce new legislation.

### **Major Accomplishments (April – December 2019)**

- Advance CTE involvement in crafting language that was introduced in the College Affordability Act to increase postsecondary Perkins funding by \$181 million.
- Advance CTE co-authored a letter in conjunction with ACTE to the House Appropriations Committee to advocate for greater funding for Perkins Basic State Grants. That letter, and subsequent bill amendment which was passed, added an additional \$10 million to Perkins Basic State Grants.
- Advance CTE successfully carried out three Perkins V implementation meetings to support and help our members to “be bold” in their Perkins V state plans.
- Advance CTE staff served as experts on panels of two Congressional CTE Caucus briefings, including one briefing on equity in Perkins V in which Advance CTE staff served as a moderator.
- Advance CTE support in guiding and evaluating Perkins V state transition plan reports
- Advance CTE staff published an Employer Engagement Resource to inform industry employers and partners how they can become more involved in CTE.

### **Challenges**

- Maintaining significant engagements with a large array of organizations that had an interest in CTE was a challenge after Perkins V passage.

- The need to expand strong partnerships with organizations that have educational equity as a focus.
- Congressional gridlock on passage of a comprehensive Higher Education Act reauthorization.
- Staffing capacity issues, including a vacant Senior Associate for Federal Policy position for much of the summer.
- Expanding the reach and success of the *Double the Investment* campaign.

**Update on Identified Priorities for (April – December 2019)**

- **Secure at least 10,000 signatures by the end of April 2019 on the campaign to Double the Investment in CTE:**

With approval from the Executive Committee, the Double the Investment campaign was put on hold given lack of member response.

- **Garner support among members of Congress for a strong federal investment in CTE for FY2020**

Advance CTE staff advocated for increased funding for basic state grants and more investment overall in education throughout the year. Advance CTE also participated in regular advocacy as part of the Committee on Education Funding (CEF), a coalition composed of over 110 organizations and associates. Advance CTE is represented with a current seat on the CEF board of directors.

In December, language for a bipartisan appropriations bill includes:

- \$40 million increase for Student Support and Academic Enrichment (SSAE) Grants under Title IV-A of the Every Student Succeeds Act (ESSA).
- \$30 million increase for Workforce Innovation and Opportunity Act (WIOA) Grants.
- \$15 million increase for registered apprenticeship programs.
- \$6,345 for the maximum Pell Grant award, an increase of \$150 over current award levels.
- \$50 million increase for Federal Work Study.
- \$163 million increase for higher education programs, including:
- \$93 million increase for Minority Serving Institutions (MSIs) including Historically Black Colleges and University (HBCUs), Hispanic Serving Institutions (HSIs) and Tribally Controlled Colleges and Universities.
- \$30 million increase for Federal TRIO programs and a \$5 million increase for GEAR UP.

- **Continue to provide support for states on Perkins V implementation**

Advance CTE carried out three Perkins state implementation meetings between August and October to support state development and implementation of Perkins state plans. Additionally, Advance CTE staff is supporting our members' planning process by offering guidance and consultation on state Perkins plans by serving as expert reviewers, along with other organizations. Additionally, staff have created resources to increase CTE collaboration with other stakeholders included in Perkins V. In October, we released "[Cheat Sheet: Opportunities](#)

[for Employer Involvement in CTE](#)” as a way to engage employers to get involved with CTE planning, including those specifically as part of Perkins V.

- **Determine how to best support states in their effort to better collaborate with ESSA, including activity to ensure funding available for CTE is coordinated**

Advance CTE collaborated with other organizations and continued to strive for increased CTE and ESSA collaboration. In particular, we participated in activities of the Title IV-A coalition, an organization to advocate for Student Support and Academic Enrichment grants as part of ESSA. Last spring, we released the third edition of the “[Making Career Readiness Count](#)” report, which examines and updates how states measure college and career readiness.

- **Prepare to develop WIOA recommendations, post blogs on WIOA implementation and include WIOA tools in the Resource Center**

Initial WIOA recommendation planning was delayed due to internal staffing capacity concerns and Congressional inaction on WIOA reauthorization discussions. Incorporating WIOA stakeholders into our meetings has remained a priority. WIOA alignment was a focal point at our four regional meetings, and all three of our Perkins implementation meetings were well attended by WIOA partners. Recently, Advance CTE staff have met with several key legislative staff to begin planning process for developing WIOA recommendations. Similar to the process with Perkins, legislative staff seem willing to use future Advance CTE created recommendations as guidance to develop a reauthorized WIOA bill.

- **Work with Congress to secure Advance CTE’s priorities for HEA reauthorization**

Since April, staff have further developed and strengthened [Advance CTE HEA recommendations](#). In consultation with the HEA kitchen cabinet, HEA recommendations were updated to include a provision on Pell Restoration for Prisoners. Advance CTE staff have created detailed talking points for HEA recommendations to use with legislators, media, and staff. Many of our recommendations have strong bipartisan support, at least in principle that have helped us gain tracking for legislation we support.. There is broad bipartisan support among both chambers to expand and streamline data collection, and to allow Pell Grant funds to be used for incarcerated individuals. Advance CTE has been an integral voice in building support for legislation that addresses teacher shortages in high need areas and fields, including CTE.

However, there are some ideological differences regarding the extent of opening Pell Grant funding to be used for short-term programs. Advance CTE has advocated for using Federal Pell Grants for high-quality short-term programs at not-for-profit institutions only. However, the limitation of excluding for-profit institutions has created resistance among many members of Congress.

Advance CTE has had involvement in the development of legislation that affects our HEA priorities and benefits CTE. We have worked with relevant committee staff on both the House and the Senate to have input on bill development, language changes, introduction and markup. Additionally, we proactively tracked HEA legislation throughout the development and introduction process.

### **Priorities for Next Six Months (January – June 2020)**

- Garner support among members of Congress for a strong federal investment in CTE for FY2021
- Develop Advance CTE WIOA reauthorization recommendations
- Promote and highlight CTE through Advance CTE Centennial Celebration
- Support passage of Higher Education Act reauthorization legislation that aligns with Advance CTE recommendations
- Support Advance CTE members respond and adapt to any proposed changes from OCTAE to Methods of Administration (MOA).
- Complete the Lumina grant survey, publish the comprehensive listing of area technical centers and initial draft of the 50-state report.

## ***Federal Policy Strategy***

*Fall 2019-Summer 2020*

*Updated December 2019*

### **ALIGNED STRATEGIC PLAN ELEMENTS**

- 1a. Develop, refine and advance federal legislative and budgetary priorities that support, promote and increase equitable access to and success in high-quality CTE.
- 1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.
- 3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.
- 4a. Develop, maintain and grow strategic partnerships with policymakers, federal agencies, advocacy groups and other key organizations to advance the federal legislative and budgetary priorities.
- 4c. Develop, maintain and grow strategic partnerships with K-12 and postsecondary education organizations to ensure CTE is considered an essential partner in the full P-20 education continuum.
- 4d. Develop, maintain and grow strategic partnerships, particularly with employers and industry and workforce development organizations, to ensure CTE is considered an essential partner to workforce and economic development
- 5c. Develop, maintain and use an internal knowledge management system
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

### **OBJECTIVES**

1. Position Advance CTE as the ‘go-to’ experts in CTE and knowledgeable in related topics in K-12, postsecondary and workforce issues to increase our influence with federal policy makers and national partners.
2. Advocate for equitable access to and success of high-quality CTE by representing and connecting our members’ work and board-approved priorities with federal policymakers, media, and strategic partnerships.
3. Ensure Advance CTE is positioned effectively to respond quickly to legislative and political changes.

### **MAJOR ACTIVITIES**

#### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will develop and advocate for federal policy priorities that are approved by the Board of Directors or those that align with the mission and strategic priorities of Advance CTE.

Our advocacy efforts will promote equitable access and success high-quality CTE programs and reinforce the leadership position of our members in advance CTE.

- Develop and update recommendations for federal legislation that advocates for equitable access and success of high-quality CTE and the priorities of our members. Advance CTE will advocate for priorities with policymakers and stakeholders, including a focus on influencing members of Congress and Congressional staff.
  - Higher Education Act (HEA) – evaluate and update recommendations as needed, based on member feedback and congressional activity towards final passage.
  - Workforce Innovation and Opportunity Act (WIOA) – Develop comprehensive policy recommendations, with input from Advance CTE members and congressional staff that advocate and support high-quality CTE.
  - Appropriations – Advance CTE will update our organization’s priorities for FY21 funding, with a special focus on securing additional funding for Perkins basic state grants.
  - Apprenticeship – Develop Advance CTE’s priorities for legislation that focuses on apprenticeships through the lens of maximizing alignment to high-quality CTE programs.
- Create published materials, including impactful white papers and policy briefs, to support federal policy priorities and recommendations to Advance CTE members, stakeholders, and Congressional members.
- Support states in implementation of Perkins V.
- Monitor state implementation of federal policies including but not limited to the Workforce Innovation and Opportunity Act (WIOA), Every Student Succeeds Act (ESSA) and the Carl D. Perkins Career and Technical Education Act (Perkins V).
  - Support states with program implementation crossover, such as states with combined WIOA/Perkins V plans.
- Explore feasibility of creating federal policy recommendations to increase access and credential attainment for Area Technical Centers, based on data gathered through the Lumina grant.

***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

It is crucial for the work of Advance CTE to not only represent our members’ interests, but to equip our members with the knowledge, skills and guidance on best practices to guide them to be empowered themselves in federal policy matters. As changes in federal policy affect our entire membership, offering comprehensive professional learning opportunities and focusing on active member engagement and learning are crucial to having maximal influence on federal policy issues.

- Ensure that relevant federal laws, policies and legislative changes are shared with Advance CTE members through professional learning opportunities including:

- Developing legislative update workshops and federal advocacy presentations at Advance CTE and partner meetings.
- Federal law deep-dive webinars on specific legislation (e.g.: WIOA, HEA, Appropriations).
- Trainings for members on changes in federal policies, including MOA requirements.
- Regular and timely legislative updates that empower our members to understand impactful federal policy changes, including blogs, Moodle posts, and newsletters that inform members about federal policy events.
- Empower Advance CTE members through grassroots meetings
  - Use ad-hoc kitchen cabinets to build member knowledge base and create membership expertise in specific topic areas.
  - Engage CTE members in federal policy through quarterly advocacy calls.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Ensuring the robust visibility of the work and role of Advance CTE is crucial to promoting high-quality CTE and expanding our reach to have substantial impact on implementing our federal policy priorities. Advance CTE’s centennial celebrations offer the chance to connect federal policy stakeholders with our work and more broadly, with CTE in general. Events can unfold quickly within federal policy, so it is necessary that we build the capacity to respond efficiently and effectively, including the reach of our Congressional allies to help spread our message.

- Develop a federal policy specific social media strategy, with an emphasis on Twitter, that promotes Advance CTE’s brand, initiatives and priorities, and:
  - Aligns with overall social media strategy
  - Specifically targets building interaction with high profile influencers – Associations, think-tanks, academics.
  - Includes a social media engagement strategy for legislators, media and Education focused associations, as well as how to leverage our members to increase reach for both.
- Publish and promote deep-dive blogs that explain within a CTE context, important complex legislation or regulation (e.g., HEA bills, WIOA proposals, appropriations process, apprenticeship legislation, Perkins V, etc.) to a broader audience.
- Create capacity and process for a federal policy rapid response team of Advance CTE members to respond quickly to impactful and changing events.
  - Identify topic or campaign based member experts that can speak to legislators and media when needed.
  - Create standardized talking points.
  - Develop action criteria and plan to activate rapid response team.
- Repackaging resources and enhanced promotion of already created reports to drive web traffic and inform new audiences.

- Promote and celebrate Advance CTE’s 100-Year anniversary.
  - Introducing CTE month Congressional resolution that highlights centennial
  - Collect Congressional member testimonials on the importance of Advance CTE’s role

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will create and maintain meaningful strategic partnerships that strengthen Advance CTE’s role and standing as the “go-to” organization for equitable access and success in high quality CTE and relevant topics. These strategic partnerships will help Advance CTE to expand our role and knowledgebase efficiently.

- Build and maintain relationships with organizations, coalitions and coalition members that have strategic value, including those whose work intersect with priorities for Advance CTE. These relationships can maximize internal Advance CTE capacity and expand the presence of Advance CTE as an influential organization. These groups can include, but not limited to:
  - Organizations that focus on educational equity issues
  - Employer coalitions
  - Organizations that focus on increasing educational funding (CEF, Title-IVA)
  - Associations and organizations representing education institutions and institutional systems
  - Think-tanks
  - Secondary and postsecondary partners
  - Grant funders
  - Federal agencies
  - Research organizations
  - Career & technical student organizations (CTSO)
- Partner with House and Senate CTE Caucuses to support CTE legislative briefings to promote best practices for high quality CTE, strengthen Congressional member relationships and increase visibility for Advance CTE as topic experts.
- Create and enhance a standing CTE federal policy coalition, led by Advance CTE in conjunction with ACTE to further increase the visibility and influence of Advance CTE as a “go-to” organization for relevant issues at the federal level.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE is committed to creating and implementing data-driven internal scalable processes and protocols that increase staff efficiency and productivity to support our members.

- Develop internal dashboard metrics that holistically reflect the impact of Advance CTE activities on federal policy



- Creating a guide for what legislative success looks like based on updated dashboard metrics
- Examining ways to better evaluate and track federal policy influence
- Use created dashboard metrics to evaluate program effectiveness based on data.
- Develop process for identifying, evaluating and tracking changes to legislative priorities and legislation over time.
  - Create quarterly Federal Policy topical SWOT (Strength, Weakness, Opportunities, Threats) analyses in strategy meetings to proactively identify legislative landscape.
  - Developing internal processes and benchmarks for identifying relevant legislation, conducting bill analysis and dissemination to members and stakeholders, including creation of relevant rubrics.
- Advance CTE will evaluate taking a proactive approach to legislation and will explore the process of introducing new legislation that represent our members.
  - Identifying CTE “champions” within Congress that would introduce relevant legislation.
- Standardize the process for legislative and policy tracking to streamline internal workflow.
  - Create a centralized internal legislative resource
  - Search for new bill tracking software
  - Streamline and update engagement and Congressional visit matrix processes.
- Evaluate the process for creating ad-hoc kitchen cabinet committees that maximize impactful participation.
  - Identify CTE leader volunteers to serve in kitchen cabinet/ad-hoc committees. Establish responsibilities and timeline for involvement.
  - Create list of state leader advocacy contacts by topic area.
  - Create processes for how and when a kitchen cabinet committee would be useful to increase member involvement in federal policy.

**The Center to Advance CTE Public Board Member**  
*Report submitted by Kimberly Green, Executive Director*

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Cheryl Carrier of the Ford Foundation finished up her term as the Center Board member on June 30, 2019. Staff, working along with the Executive Committee identified an array of potential candidates to fill the three-year term, focused on the employer community. In December 2019, Green met with Wendi Safstrom, who heads up the Society for Human Resource Management's Foundation to determine interest, capacity and if there were mutually beneficial aspects of Safstrom joining the Board. During the meeting there were many identified potential collaborations and Safstrom expressed her strong interest in serving on the Center Board. Below is her bio:

Wendi Safstrom is a senior non-profit leader committed to serving the public through philanthropic program management, cultivating strategic partnerships and managing and developing high performing teams. She has both association and nonprofit management experience including; national program development and administration, membership strategy, marketing and product development, grant management, development and donor stewardship, and leading cross functional teams. Safstrom currently serves as Executive Director for the Society for Human Resource Management Foundation (SHRM Foundation), where she leads the development and implementation of SHRM Foundation's programmatic, development, and marketing and communication strategies in support of SHRM Foundation's new mission and vision, creating growth plans and ensuring alignment with SHRM goals.

Prior to assuming the role at SHRM Foundation, Safstrom served as Vice President at the National Restaurant Association and National Restaurant Association Educational Foundation, where she led the development and implementation of their Foundation's most recent five-year strategic plan, and was responsible for all Foundation programming, including workforce development initiatives, scholarship and event management, community relations and engagement initiatives. The NRAEF's philanthropic programming supported a number of audiences including high school youth, veterans transitioning from service to civilian work and life, opportunity youth and incumbent workers. Of particular note, she led the implementation of the restaurant industry's premier high school career and technical education program, growing the program to over 2,000 public high schools, engaging over 150,000 students annually, nationwide. In 2016, she served as lead project director for the development of a \$10 million contract awarded by the U.S. Department of Labor to develop the hospitality industry's first apprenticeship program, and was instrumental in the Foundation's reorganization and relocation of operations from Chicago, Illinois to Washington, D.C., transforming the staff and culture.

Safstrom has also held human resource management roles with the Leo Burnett Company and Hyatt Hotels Corporation in Chicago, Illinois. She has a BS in Business Administration from the Eli Broad School of Business at Michigan State University and was recognized as a member of

the 2014 "Power 20" by Restaurant Business Magazine as a leader in philanthropy within the restaurant industry.

**Board action:** Vote to appoint Wendi Saftstrom on to the Center to Advance CTE Board as a public member, whose term will run through June 30, 2022.

## Communications Strategy Update – January 2020

### Overview of Major Activities

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE has continued to lead the field in CTE by developing and disseminating a number of resources and materials to support members in the creation and adoption of high-quality policies and practices including the *Making Good on the Promise* series, *Developing Credit for Prior Learning Policies to Support Postsecondary Attainment for Every Learner*, model practices outlined in snapshots from the New Skills for Youth Innovation sites and state work, and more. As part of the refresh of careertech.org, Advance CTE updated the functionality and look of the Learning that Works Resource Center, including adding Perkins V and communications as new sections.

#### **2. Empower members through professional learning**

Advance CTE, with support from the Siemens Foundation, completed the final round of state work with three states: Georgia, Arkansas and Utah. Each state was provided with technical assistance regarding how to better recruit students into CTE programs of study in their states through monthly phone calls, on-site visits and cross-state calls. Each state has submitted their final report, and Advance CTE is in the process of reviewing and auditing all materials developed.

Advance CTE has supported the Texas Education Agency through the Gates Foundation grant to help them communicate about Perkins V to administrators, instructors and key stakeholders. Staff provided information and resources to support their presentations and stakeholder meetings.

Advance CTE conducted 20 workshops, *Empowering Students to Pursue their Career Goals*, across the country reaching 600 school counselors. The workshop was delivered through state CTE agencies, Association for Career and Technical Education (ACTE) chapters as well as the American School Counselors Association (ASCA) chapters. The workshop was met with high praise and Advance CTE plans to continue this work in the Spring if funded by the Siemens Foundation. Advance CTE also conducted a four-part webinar series with ASCA national on components of the in-person workshop.

#### **3. Raise the visibility and promotion of high-quality CTE**

Staff developed three case studies and a series of templates such as posters, postcards, etc. to be used by members and states to communicate the value of CTE based on state work developed through the Siemens Foundation grant. The materials are completed and will be launched during CTE Month in February 2020.

Advance CTE refreshed the careertech.org website. The updated website includes a new homepage that better connects users with resources across the site, a new homepage for the Learning that Works Resource Center and combined several pages across the site to create a better user experience.

Staff promoted a variety of resources developed by Advance CTE including 31 reports, briefs or case studies, six tools or fact sheets, and nine webinars across a range of topics. The work focused on supporting member needs, as well as providing best practices and model programs within states across the country.

#### **4. Build and maintain strong and effective partnerships that advance Advance CTE's vision and mission**

Advance CTE continued to work with partners to assist in the development and promotion of materials and resources including with ASCA, Asia Society, ACTE and the Aspen Institute. Additionally, Advance CTE developed a strong partnership with the Aspen Institute, which released a study on how to communicate with adult learners about CTE in community colleges. Staff presented a joint session at the National Council on Workforce Education conference on how to communicate with learners in middle and high school, as well as adult learners, about the benefits of CTE.

#### **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

Advance CTE conducted a website refresh mentioned above and developed a website 101 sheet for staff on how to use and update the website. Staff has continued to rely on the processes for marketing and dissemination developed last year with success.

Additionally, Advance CTE began a process for collecting evaluation data when conducting in person technical assistance on communications with states to inform future technical assistance.

#### **Major Accomplishments (April 2019 – December 2019)**

- Refreshed and launched the Advance CTE website, [careertech.org](http://careertech.org).
- Delivered 20 career advising workshops and four webinars to school counselors across the country.
- Disseminated and marketed 37 resources, nine webinars and three Perkins V implementation meetings highlighting Advance CTE work.
- Provided technical assistance to three states on how to recruit students into CTE.
- Developed resources based on past state work that all members can use in 2020 to communicate the value of CTE.
- Advance CTE was invited to submit a third round of funding to the Siemens Foundation. The proposal is begin reviewed by the Siemens Foundation board, and upon approval would begin a third grant in February 2020.
- Gained nearly 1,300 followers on Twitter.

#### **Challenges**

- Advance CTE has been unsuccessful in our efforts around the Double the Investment campaign.

- Staff has not developed a media engagement strategy largely due to competing priorities and staff turnover. This will be a priority going forward.

### **Update on Identified Priorities (April – October 2019)**

- All priorities were met except the promotion of the Double the Investment campaign, which has been put on hold.

### **Priorities for Next Six Months (January – June 2020)**

- Release the communications material developed for states in February 2020.
- Launch the celebration of Advance CTE’s 100-year anniversary beginning January 2020.
- Develop and implement a media engagement strategy.
- Develop and implement a digital media engagement strategy.
- Develop a strategy to utilize data to drive marketing and dissemination choices (e.g., open rates, social media engagement).
- Explore avenues to ensure all materials developed are accessible to those with disabilities.
- Implement processes and protocols to ensure Advance CTE website is up to date.
- Hire two new communications associates – one focused on digital media and one to support external communications and state technical assistance related to communications.
- Plan and launch the third Siemens Foundation grant including:
  - Conducting a national survey of students and their families on the best ways to communicate with them regarding CTE options, with a special focus on sub populations.
  - Develop and disseminate an RFP for a cohort of state work to begin fall 2020.
  - Update and deliver the workshop, *Empowering Students to Pursue their Career Goals*.

### **Relevant Data**

**Total Sessions: 349,388**

**Total Users: 246,984**

**Total Pageviews: 1,162,454**

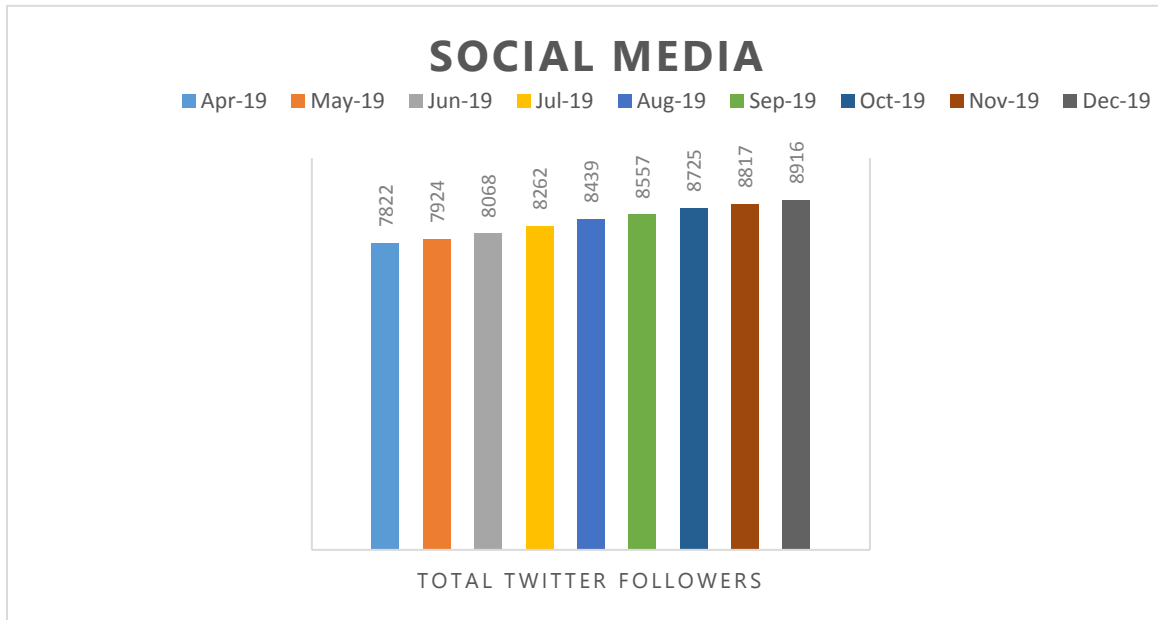
### **Selected Webpage Views:**

- Learning that Works Resource Center landing page: 15,845
- Perkins: 12,606
- Perkins Virtual Resource Table: 5,928
- Fact Sheets: 5,031
- Recruitment Strategies: 3,234
- State of CTE: Improving Data Quality Effectiveness: 2,113
- Learning that Works Resource Center: Career Advisement Topic: 2,324
- Learning that Works Resource Center: Access and Equity Topic: 1,522
- *NEW PAGE*: Initiatives: 1,265
- *NEW TOPIC AREA*: Learning that Works Resource Center: Perkins V: 1,265

- *NEW SEARCH FUNCTION*: Learning that Works Resource Center: Featured Series: 1,260

**Social Media:**

Twitter Impressions: 1,434,900



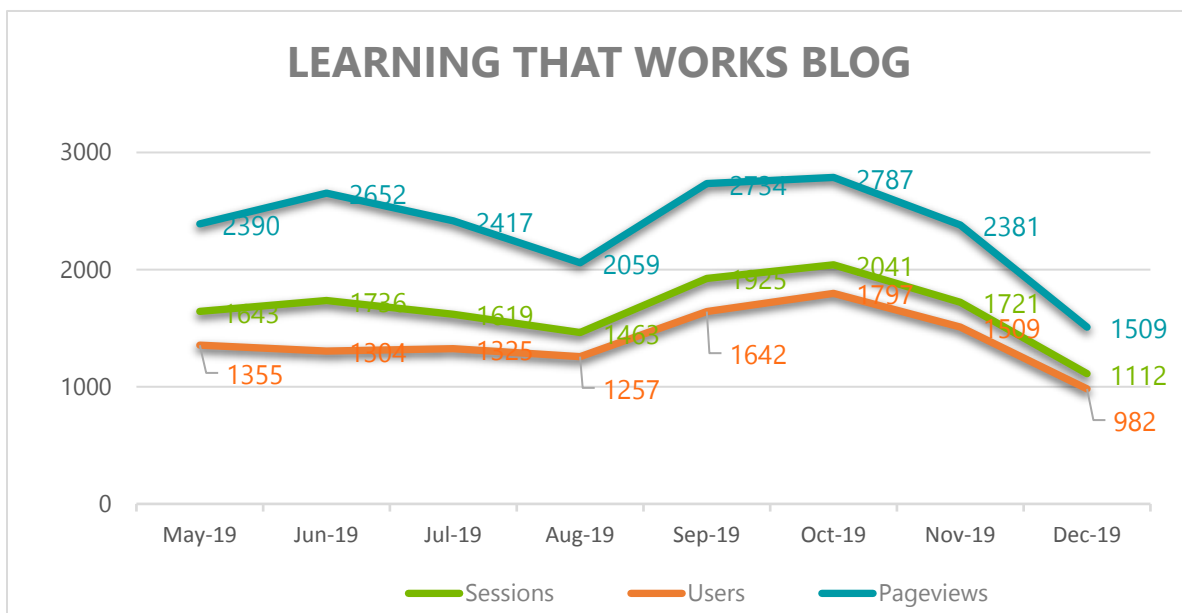
**Learning that Works for America Blog**

**Total Blogs: 122**

**Total Sessions: 15,652**

**Total Users: 12,490**

**Total Pageviews: 22,397**



# **Communications Strategy**

*Fall 2019-Summer 2020*

*Updated December 2019*

## **ALIGNED STRATEGIC PLAN ELEMENTS**

- 2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE’s priorities, activities, resources and events.
- 2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE Members, which they then implement in their own states and communities.
- 3a. Develop, disseminate, and support Advance CTE members and key stakeholders in the use of communications resources, tools, messages and technical assistance to build the visibility of and support for high-quality CTE.
- 3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.
- 3c. Plan and execute a strategy to celebrate Advance CTE’s 100-year anniversary that documents and honors our history and success while continuing to move the organization and CTE field forward.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

## **OBJECTIVES**

1. Support states in communicating Perkins V to key stakeholders such as policymakers, administrators, instructors, employers and community members.
2. Support states in improving perception of CTE in their state through technical assistance and resources, with a specific focus on reaching underserved populations.
3. Position Advance CTE as the “go-to” CTE organization.
4. Celebrate 100 years of Advance CTE!
5. Streamline and improve external and digital communications with members and key stakeholders to ensure that all audiences are receiving the information they need.
6. Tell the CTE story to set the national narrative around CTE.

## **MAJOR ACTIVITIES**

### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will disseminate and market resources developed by staff as well as partners that assist states in the adoption and implementation of high-quality state and federal policy.



Additionally, staff will execute a digital media strategy to highlight key federal and state policy priorities. Staff will also continue to support members in their communications efforts as they roll out Perkins V in their states. Specifically, Advance CTE will:

- Develop a digital media strategy to focus on the amplification of Advance CTE’s work in the following topics and describe how Advance CTE supports federal policy, state policy and equity in CTE:
  - Higher Education Act, Workforce Innovation and Opportunity Act and Every Student Succeeds Act
  - Apprenticeships
  - Appropriations
  - Perkins V implementation
  - State policy
  - Technical assistance to states
  - Advancing equity
  - Data quality and use
- Support states in their communications with key stakeholders to ensure they understand the changes happening in states around Perkins V and the delivery of CTE, as well as the value and benefit of CTE.

***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

Advance CTE will provide targeted resources, supports and technical assistance in helping members and state leaders communicate about the value of CTE to stakeholders and the media. Specifically, Advance CTE will:

- Develop a national survey of students and parents to better understand how to communicate to them about CTE, with a special focus on communicating with subpopulations.
- Provide technical assistance to states and communities in how to communicate effectively about CTE to students and families with a focus on reaching special populations.
- Develop and disseminate new resources and supports related to helping states communicate about the value of CTE with key stakeholders, learners and their families.
- Update and deliver Career Advising workshops to school counselors, with a renewed focus on equity, including expanding the pool of trainers to include a more diverse roster and potentially delivering the workshop to non-traditional education groups that focus on career advisement (e.g., afterschool programs).
- Utilize the virtual institute module on messaging in professional learning settings/opportunities.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will promote CTE through various platforms, with an increased focus on digital media. Additionally, Advance CTE celebrate its 100-year anniversary, demonstrating the organization’s many successes while also raising awareness about CTE in general. Specifically, Advance CTE will:

- Continue to promote Advance CTE’s materials including reports, briefs, tools, guides and webinars through a wide variety of channels to support our members, while also driving the CTE field forward.
- Disseminate resources on how to communicate about CTE with stakeholders.
- Develop and execute a comprehensive digital media strategy utilizing Twitter, LinkedIn, Facebook, YouTube and related or new platforms, aligned with major initiatives.
- Develop and execute a media engagement strategy aligned with major initiatives and priorities (e.g. equity, HEA reauthorization, Perkins V implementation, etc.).
  - Develop and implement a strategy to become the go-to media contact for CTE-related issues in the education and workforce press community.
  - Develop and implement a strategy for engaging and building relationships with media and publications outside of the CTE and education spaces.
- Develop a strategy to explain, market and promote the National Career Clusters® Framework refresh effort.
- Develop a proactive strategy to explain the shift in methods of administration, ensuring partners and members understand Advance CTE’s commitment to equity.
- Conduct a national survey of students and parents with focus on how to communicate with subpopulations and provide supports and resources related to the research findings.
- Develop process and resources for telling the CTE story drawing on Excellence in Action past winners, Double the Investment sign-ons and other collected testimonials.
- Launch a year-round celebration of Advance CTE’s 100-year anniversary, which will include:
  - Monthly celebrations of Advance CTE embedded in all communications (e.g. member newsletter).
  - Implementation of a digital strategy that highlights Advance CTE’s accomplishments and members.
  - Implementation of a monthly blog series featuring interviews with past Board of Directors presidents, members, State CTE Directors, partners and key stakeholders.
  - Reception at the Advance CTE Spring Meeting featuring the accomplishments of Advance CTE and its members.
  - Testimonials and quotes from partners, members, former members, past presidents, etc. to be featured in social media and related materials throughout the year.
  - Intentional connections to the Summit in Fall 2020.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will continue to build strong partnerships to help promote resources, collaborate on projects and initiatives and broaden our reach and connections to key stakeholders.

Specifically, Advance CTE will:

- Leverage partnerships to disseminate resources and materials developed by Advance CTE.
- Coordinate with Aspen Institute on secondary and postsecondary messaging related to recruitment of students. Advance CTE's research focuses on middle and high school students and their families, while Aspen Institute's focuses on adult learners. Both studies provide states with a comprehensive set of resources on how to communicate with learners in middle and high school, as well as adult learners, about the benefits of CTE.
- Coordinate with partners related to major grant activities to ensure promotion of high-quality CTE and Advance CTE's grant activities including through the JPMorgan Chase Foundation's Global Career Readiness Initiative, Partnership for Youth Apprenticeship and more.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

While there is a concrete process in place related to marketing and dissemination of publications and work, there are processes that need to be developed related to vendors, the website and evaluation of communications data. Specifically, Advance CTE will:

- Ensure promotional materials represent a wide variety of audiences.
- Develop, maintain and implement a website SOP/style guide.
- Develop, maintain and implement a vendor SOP (graphic design, copyediting, etc.).
- Develop, maintain and implement a process to evaluate communications-related data (e.g., social media engagement, Google analytics, newsletter open rates) and map it against key initiatives to ensure we are communicating effectively with key audiences.
- Streamline/update newsletters to most effectively communicate with members and stakeholders.

Additionally, Advance CTE will explore ways and processes to put in place to ensure all materials developed are accessible by those with disabilities (e.g. transcribed videos).

Finally, Advance CTE will implement data-driven processes to evaluate the quality and impact of Advance CTE's communications supports and resources to support continuous improvement of our communications work and products. This will include collecting evaluation data on our technical assistance to states, as well as relevant data collected through professional learning event evaluations.

In 2020, Advance CTE will kick off its 100-year celebration of the organization and its members.

Project objectives include:

- Celebrate 100 years of Advance CTE and its many accomplishments and growth;
- Celebrate the history of Career Technical Education (CTE) through the lens of the organization and how it contributed to its evolution;
- Create awareness among key stakeholders including members, partners, media and policymakers about Advance CTE's role in advancing high-quality CTE;
- Actively engage former, current and new members of Advance CTE to ensure members and states see their role as part of Advance CTE and the advancement of CTE in their own states;
- The CTE community looks forward to the future of CTE, specifically through Advance CTE's *CTE Forward Summit* and resulting work; and
- Reinforce Advance CTE's reach and impact and our role as the "go to" organization for all things CTE.

Staff has developed a marketing plan and hired a contractor to develop a logo, related branding materials and social media posts. Staff have also developed a monthly blog series featuring interviews with members, past State CTE Directors, past Board of Directors members, partners and key stakeholders. Staff have completed four blogs, and will continue to conduct interviews and release blogs over the coming months.

Advance CTE has also launched a testimonials webform to collect quotes, photos and documents that Advance CTE members and Members of Congress can submit to be used throughout the year.

Additionally, staff developed a 100-year timeline of Advance CTE achievements. This will be designed by the contractor and used on the Advance CTE website and in PowerPoint presentations throughout the year. Related materials are being developed including a mailer to all members.

The Spring Meeting in Arlington, Virginia will also feature a celebration of the 100-year anniversary, and specifically during a reception. The celebration will highlight accomplishments of Advance CTE and its members, as well as look towards the next 100 years of CTE. Along with participants from the Spring Meeting, Advance CTE will invite past Excellence in Action award winners, media and additional distinguished guests.

**Board action required:** No action required.

**Perkins Implementation Supports Update**  
*Report submitted by Kate Kreamer, Deputy Executive Director*

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Since April 2019, Advance CTE has continued to provide a wide array of state-specific, cross-state and 50-state resource and services to our members and the broader CTE to support the development of bold and meaningful Perkins V state plans that focus on quality and equity.

The work falls into three major categories:

- 50-state supports;
- Building cross-state solutions; and
- State-specific technical assistance;

### **50-State Supports**

*Implementation Meetings:* In August, September and October 2019, Advance CTE hosted three Perkins implementation meetings in partnership with Association for Career and Technical Education (ACTE), American Association for Community Colleges (AACC), and the National Alliance for Partnerships in Equity (NAPE). The U.S. Department of Education presented at and participated in all three meetings to ensure coordination between our supports and theirs. These meetings were designed for states to:

- Collaborate with peers from other states to share ideas and solutions on major strategies within their Perkins V state plans, with a focus on quality, equity, data, systems alignment and career advisement;
- Work with their state team to review and strengthen their Perkins V plans based on input from national experts, peers and in-state stakeholder engagement; and
- Leave with clear next steps for strengthening their Perkins V state plans to advance a statewide vision for CTE that is innovative, bold and prioritizes quality and equity.

In total, approximately 290 state leaders from across 45 states attended the meetings, in addition to invited experts from National Governors Association, Council of Chief State School Officers, New America, NACEP, National Skills Coalition, JFF, Institute for Educational Leadership, Education Strategy Group, CLASP and Alliance for Excellent Education.

Across the board, these meetings were incredibly well-received, as demonstrated by informal feedback and our evaluations. Averaged across the three meetings, participants responded with an average of 4.6 (on a 5-point scale) to the question: *were the meeting objectives met?* They also responded with 4.4 based on the prompt: *as a result of this meeting, I have a better understanding of what I need to do to prepare for Perkins V.*

*Expert Peer Review:* Advance CTE has been able to offer an “Expert Peer Review,” which aims to have national experts provide actionable feedback on draft state plans. Initially, 40 states signed up for one period (and we anticipate at least 38 will complete the review), and we have confirmed 22 expert peer reviewers, including seven former State Directors, two former OCTAE staff (including a former Assistant Secretary of OCTAE), two CEOs/Presidents of national non-profits, and representatives from K-12, postsecondary and workforce development. The final of four review periods will conclude in January 2020.

*Other Supports/Tools:* Advance CTE has added a [Perkins V section](#) to our Learning that Works Resource Center; hosted [three webinars](#) on Perkins V accountability indicators; continued to support the State Director-only Moodle; and presented around the country on Perkins V with partner organizations like the National Association of State Workforce Agencies (NASWA), the National Alliance for Concurrent Enrollment Partnerships (NACEP), the National Career Pathways Network, HOSA, The Afterschool Alliance and others.

### **Building Cross-State Solutions**

Early on, Advance CTE recognized that there was a clear need for the development of “shared solutions” to help states maximize the new law to its fullest and leverage the plan development so that more learners have access to and are successful in high-quality CTE programs. The new law provides a number of opportunities to push states and locals to ensure they are offering the highest quality of CTE programs, aligned to labor market demand, that are truly accessible so that all learners may benefit from them. As such, Advance CTE has designed a new model of state engagement and support, “Shared Solution Workgroups,” which are comprised of state and national leaders with the goal of developing and identifying the resources, tools and best practices needed to address key issues, from which all states could benefit.

From March through August 2019, Advance CTE (with support from ACTE) led the first of four Shared Solutions Workgroups (SSWG), focused on the comprehensive needs assessment (CLNA). This Workgroup was comprised of over a dozen state leaders (including representation from North Carolina, Oregon, Tennessee, Texas and Washington) and national partners, including The Education Trust, The U.S. Chamber of Commerce Foundation, ACTE and National Skills Coalition. The Workgroup ran from March to August 2019, and led to four deliverables:

- [Driving Quality & Equity in CTE: A State Guide to Developing the Perkins V Comprehensive Local Needs Assessment Template;](#)
- [State Needs Assessment Crosswalk;](#)
- [Promoting a Regional Approach to the Perkins V Comprehensive Local Needs Assessment; and](#)
- [Investing in Quality: Funding the Perkins V Comprehensive Local Needs Assessment.](#)

In September 2019, Advance CTE launched the second SSWG – focusing on middle grades CTE. To date, we have 11 states involved, five national partners and one local practitioner. The first major deliverable, which will identify design principles for quality middle grades CTE, will be released in early 2020.

Looking ahead, Advance CTE has two additional SSWGs planned in support of Perkins implementation, one on Data Visualization and Use (to launch in early 2020) and one on closing equity gaps (to launch in summer 2020).

### **State-Specific Technical Assistance**

Advance CTE is providing technical assistance to a number of states in support of development and implementation of their Perkins V state plans. This technical assistance work is supported by the Bill & Melinda Gates Foundation, the Joyce Foundation, and state-specific contracts.

California, New York and Washington are receiving intensive coaching from former State Directors in support of Perkins V plan development and implementation.

In April, Advance CTE put out an RFP to a group of 12 priority states, as identified by the Gates and Joyce Foundations. The RFP asked states to identify top challenges they want support in as they advance their Perkins V state plans. Based on the review of these plans and follow up with states, we have begun providing targeted technical assistance to seven states (Florida, Illinois, Minnesota, Ohio, Oregon, Tennessee and Texas), who will receive assistance through April 2020.

### **Looking Ahead**

Over the next six months, Advance CTE will continue to provide targeted technical assistance, complete the Expert Peer Review process and begin to develop a web-based portal to house 50-state information and analyses of the submitted Perkins V plans. We will also lead two additional SSWGs and release the resources generated by the middle grades CTE workgroup.

**Board Action Required:** No action required.

**Update on State Technical Assistance Work**  
*Report Submitted by Meghan Wills, Director of Strategic Initiatives*

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Advance CTE (as the Center to Advance CTE) is providing technical assistance to a number of states in support of development and implementation of their Perkins V state plans. This technical assistance work is supported by the Bill & Melinda Gates Foundation, the Joyce Foundation and state-specific contracts.

**California, New York and Washington** are receiving coaching from former State Directors in support of Perkins V plan development and implementation. Coaches have helped these states establish a vision and priorities for CTE in the state, strengthen alignment between secondary and postsecondary systems and between CTE and other state systems, strengthen stakeholder engagement efforts, and strengthen data collection and data-driven decision-making.

Advance CTE staff have been providing topic-specific technical assistance to seven states, which were selected through an RFP application process:

- **Florida:** Advance CTE is working with the state to close gaps around CTE access and performance among subgroup and special populations. This work will include supporting data and root cause analyses, identifying strategies to address equity gaps, and developing a stakeholder engagement plan to engage special populations on an ongoing basis.
- **Illinois:** Advance CTE is working with the state to develop a plan for program approval and alignment of programs of study between secondary and postsecondary CTE.
- **Minnesota:** Advance CTE is working with the state to identify and address equity gaps in CTE programs and success. This includes analyzing the state's data and conducting a root cause analysis, and developing a train-the-trainer approach so local organizations can take on this work themselves. Advance CTE plans to make this workshop a national model for other state leaders to adopt. In addition, Advance CTE is helping support the state's local consortia that were established under Perkins IV.
- **Ohio:** Advance CTE is facilitating Ohio's stakeholder engagement meetings as part of their Perkins V plan development, to help the state rebuild trust with the broader CTE community and key partners.
- **Oregon:** Advance CTE is helping the state use its Perkins V state plan to align and leverage a variety of other state initiatives related to education and workforce development.
- **Tennessee:** Advance CTE is working with the state to support local implementation of high-quality CTE programs of study and to close equity gaps in early postsecondary opportunities.
- **Texas:** Advance CTE is working with the state to train CTE specialists on major components of Perkins V and assisting in development of messaging and a communications strategy around Perkins V. Advance CTE is also working with Texas to develop and implement a local program quality monitoring process.



Two states (Iowa and Oregon) have separately contracted with Advance CTE to provide facilitation and consultation services in support of the states' Perkins V plan development process:

- **Iowa** contracted with the Association for Career and Technical Education (ACTE) and Advance CTE to provide facilitation and consultation services, including facilitation of Iowa's State CTE Advisory Council and subgroup meetings, consultation with agency staff members, and management of the State Plan public comment process.
- **Oregon** contracted with Advance CTE, in partnership with ACTE, to facilitate stakeholder engagement, planning for Perkins V, and broader CTE systems improvement.

**Board Action Required:** No action required.

## **Technical Assistance Strategy**

*Fall 2019-Summer 2020*

*Updated December 2019*

### **ALIGNED STRATEGIC PLAN ELEMENTS**

- 1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.
- 1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.
- 1d. Plan and execute a strategy for the revision of the National Career Clusters<sup>®</sup> Framework.
- 2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE members, which they then implement in their own states and communities.
- 2c. Provide personalized and targeted supports to Advance CTE members to support CTE's leadership pipeline.
- 3a. Develop, disseminate, and support Advance CTE members and key stakeholders in the use of communications resources, tools, messages and technical assistance to build the visibility of and support for high-quality CTE.
- 3d. Plan and execute a fundraising and development strategy that aligns with and advances the organizations' mission and vision.
- 4b. Develop, maintain and grow strategic partnerships with policymakers, advocacy groups and other key stakeholders to support states' adoption and implementation of legislation and policies.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5d. Support and maintain a positive work culture that is collaborative and values employees' contributions, leadership and growth.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

### **Objectives**

1. Impact, influence and support the development, adoption and implementation of policies, programs and initiatives that support, promote and increase equitable access to and success in high-quality CTE;
2. Position Advance CTE as an expert and go-to resource on design and implementation of CTE policy, communications/promotion, equity, and data;
3. Maximize value from grant-funded projects to enhance the value and benefits of membership to all states; and
4. Continue to build the external case for additional grant funding.

## **MAJOR ACTIVITIES**

### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will provide technical assistance to states related to adoption and implementation of policies and practices that support high-quality CTE, and will deliver technical assistance using a mix of strategies and methodologies that meet state needs and project objectives.

- Provide targeted technical assistance to states related to development, adoption and implementation of state and federal policies that support high-quality CTE, including, but not limited to:
  - Implementation of Perkins V and other relevant federal laws and requirements;
  - Strategic planning and systems alignment;
  - Use of policy benchmark tools developed by Advance CTE;
  - Development and effective use of high-quality data in CTE;
  - Equity in CTE and closing opportunity gaps;
  - Youth apprenticeship and its alignment with CTE; and
  - Messaging and communications in support of high-quality CTE.
- Deliver technical assistance through a number of methodologies, which will be selected through a data-informed process to meet state needs and project objectives, including:
  - Multi-state meetings;
  - Document review by content experts (Advance CTE staff, content experts at partner organizations, consultants, etc.);
  - Intensive coaching;
  - Topic-specific technical assistance;
  - Shared Solutions Workgroups;
  - Virtual cohorts of states working on a similar topic, to support peer sharing and learning;
  - In-person meetings, site visits and workshops;
  - Facilitation support;
  - Ad hoc support; and
  - Other methodologies in alignment with project or grant requirements.

### ***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

As a membership organization, Advance CTE is committed to providing relevant technical assistance that meets members' needs and to ensure that information and lessons learned through state-specific technical assistance informs the organization's broader work with all states.

- Provide technical assistance to build the capacity of members and position State CTE Directors as leaders in their states and in the field.
  - Continue and potentially expand the New State CTE Director Leadership Program, which may include more intensive technical assistance to a small number of select new State CTE Directors and/or repurposing New State CTE Directors Leadership Program modules into stand-alone technical assistance tools.
  - Offer technical assistance to build the capacity of non-State Director members.

- Offer technical assistance to members in support of advancing equity in CTE, including an equity workshop to build state capacity to conduct an equity-based data analysis and root cause analysis process to close opportunity gaps.
- Develop technical assistance strategies and materials to prepare states to adopt and transition to the revised National Career Clusters Framework at the state and local levels.
- Intentionally embed lessons learned, tools and state voices from technical assistance work into professional learning activities, to ensure that technical assistance informs Advance CTE's ongoing work and supports all states/territories.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE's technical assistance activities will support the visibility and promotion of high-quality and equitable CTE in states, and in turn the organization is committed to the promotion of the high-quality technical assistance it provides to states to ensure awareness by its partners and the field.

- Provide technical assistance to members and stakeholders related to communications, messaging and promotion of high-quality CTE, including:
  - Technical assistance to select states around the development and implementation of CTE strategic communications and messaging strategies; and
  - Developing customizable, off-the-shelf communications and messaging tools for state and local leaders and stakeholders to use in promoting high-quality CTE.
- Ensure Advance CTE's technical assistance offerings are promoted and well-known by our members, partners and funders, including:
  - Writing or soliciting blogs on state success stories that resulted from Advance CTE's technical assistance work in states; and
  - Embedding information on major technical assistance and cross-state initiatives on the website.
- Continue to build technical assistance activities into project proposals and budgets to ensure sufficient resources to support the provision of these services.
  - Secure funding from a variety of sources to support technical assistance work, including grants, fee-for-service payments from states, and state funding in response to a state-issued solicitation or Request for Proposals.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will continue to engage and leverage partnerships that support its delivery of high-quality technical assistance to states.

- Leverage partners (including partner organizations and consultants, as appropriate to the project) to expand Advance CTE's capacity to deliver technical assistance by:
  - Working collaboratively with partners to provide technical assistance to states;

- Tapping partners to provide technical assistance to states on our behalf; and
- Collaborating with partners on the development, potential co-branding and dissemination of technical assistance tools and resources.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE as an organization is committed to developing and implementing internal processes and protocols to ensure that the organization is providing high-quality technical assistance to states that need it and that information and lessons learned through state-specific technical assistance informs the organization’s broader work with all states.

- Develop and implement a systematic process to select states that will receive targeted technical assistance, with an intentional focus on providing assistance to states that are struggling and/or undergoing leadership transitions. This process will build on the following:
  - State engagement matrix process;
  - Knowledge of which states have new or interim State Directors; and
  - Other staff knowledge of state-specific challenges.
- Ensure Advance CTE has the necessary internal capacity to deliver high-quality technical assistance, including:
  - Providing or enabling training for Advance CTE staff to build their technical assistance and facilitation skills;
  - Recruiting and managing a cadre of consultants to expand our technical assistance reach and
  - Recruiting and hiring staff with current or potential expertise around technical assistance.
- Develop and implement a systematic process of collecting tools and documents used and/or developed during technical assistance and upload them to the organization’s internal knowledge management system. Such tools can then be shared with members, used by other staff, embedded in meetings, used for marketing, etc.
- Create a repository in the internal knowledge management system of documents that are typically needed to submit as part of grant proposals, to streamline and increase efficiency in the grant writing and submission process.
  - At the conclusion of technical assistance projects, Advance CTE will ask for a letter of reference or recommendation from the project lead in the state; staff will upload these letters of recommendation to the internal knowledge management system for use in future proposals.
- Implement data-driven processes to evaluate the quality and impact of Advance CTE’s technical assistance work.
  - Embed evaluation into all technical assistance work to collect evidence about the effectiveness of specific strategies

- Analyze and use this information to support continuous improvement of technical assistance work and products.

## Equity Strategy Update – January 2020

### Overview of Major Activities

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE has leveraged the Board approved [Statement on Equity in CTE](#) to promote policies that lead to high-quality and equitable Career Technical Education (CTE) programs. Staff, using the statement as a framework for research, released two more equity briefs in the [Making Good on the Promise](#) series that focused on promoting access to and ensuring learner success in CTE programs of study. Also, the Board voted to support proposed changes to Methods of Administration (MOA) that align with the Statement on Equity in CTE and that will allow states to invest their resources where they are most needed. Additionally, Advance CTE secured a grant from the Association of Black Charities (ABC) to help us understand how to identify federal and state CTE policies or practices that perpetuate inequities. In the past months, Advance CTE reviewed states' Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act (Perkins V) plans through an equity lens to help state leaders use the policy levers in the law to promote diversity, equity and inclusion in CTE. Advance CTE also provided technical assistance to states to help them identify and address opportunity gaps.

#### **2. Empower members through professional learning**

Advance CTE continued to convene the Equity Kitchen Cabinet, which is comprised of 14 state members, to support the equity strategy. In the past months, Equity Kitchen Cabinet members provided feedback on reports, participated on a call to help the World Education Services (WES) brainstorm how the immigrant population can be leveraged to address the CTE teacher shortage, and served as facilitators for a series of breakouts on equity during the 2019 Spring Meeting. Additionally, Advance CTE provided professional learning to our members through equity focused sessions at the 2019 Spring Meeting and the Perkins V Implementation Meetings.

#### **3. Raise the visibility and promotion of high-quality CTE**

Staff developed a dissemination strategy to share the work accomplished under the equity initiative and worked strategically to promote the resources developed under the initiative through multiple methods of communication. Staff also represented Advance CTE at numerous equity-focused workshops and presentations to raise the visibility of the organization in the broader equity field. Additionally, staff presented on the work of the initiative at events hosted by the Association for Career and Technical Education (ACTE), Advance CTE, National Alliance for Partnerships in Equity (NAPE), the Council of Chief State School Officers (CCSSO) and the Congressional CTE Caucus.

#### **4. Build and maintain strong and effective partnerships that advance Advance CTE's vision and mission**

Advance CTE continued to engage the Committee on Equity in CTE, which is comprised of representatives from national civil rights, workforce and education organizations, to support the equity strategy. In May 2019, the Committee on Equity in CTE convened virtually to learn about

the work of YouthForce NOLA in Louisiana and to discuss the work of the Committee on Equity in CTE moving forward. Most Committee members indicated that they would like to continue to participate in the Committee, which is charged with providing thought partnership and developing resources to help advance equity in CTE. Since then, Committee members have provided feedback on resources and Advance CTE has strengthened relationships with Committee members, such as the National Urban League and the Council of State Governments Justice Center. In the past months, Advance CTE has reaffirmed past Committee members' interest in participating in the Committee and has expanded the Committee to include new members, such as the American Indian Higher Education Consortium and the National Technical Assistance Center on Transition.

#### **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

Advance CTE has leveraged the ABC grant to help the organization operationalize the Statement on Equity in CTE. The ABC grant has allowed Advance CTE to hire a diversity, equity and inclusion expert. The expert has reviewed some of Advance CTE's internal processes and protocols through an equity lens, provided coaching to the leadership team on how to advance equity internally, and facilitated an equity training session in December that helped to deepen our organizational knowledge on diversity, equity and inclusion. This training complimented the two equity trainings sessions staff participated in April and May and has influenced not only our internal processes but also our work with states. Additionally, Advance CTE has embedded an equity lens into our organizational strategies and continues to use the Statement on Equity in CTE to guide our work.



### **Major Accomplishments (April – December 2019)**

- Developed two reports in the *Making Good on the Promise* series:
  - [\*Expanding Access to Opportunity\*](#); and
  - [\*Ensuring Learner Success\*](#).
- Strengthened relationships with organizations, such as the National Urban League and the Council of State Governments Justice Center.
- Obtained Board approval to support the proposed revisions to MOA, which align with the Statement on Equity in CTE.
- Provided three equity training sessions to staff that deepened our organizational knowledge of diversity, equity and inclusion.
- Provided technical assistance to states to help them identify and address opportunity gaps.
- Secured funding from the Association of Black Charities to hire an external diversity, equity and inclusion expert to help the organization advance equity internally and externally.

### **Challenges**

It continues to be a challenge to gain commitment from partners, particularly members of the Committee on Equity in CTE, to join in the creation of resources. To address this challenge, Advance CTE will make targeted outreach to specific organizations and may provide a small amount of funding to organizations that agree to co-develop resources as a show of appreciation.

Through our coaching from the equity expert and our equity training, Advance CTE realizes we have personal, team and organizational work to accomplish our intended equity goals. And to have this work be intentional, successful and have fidelity within our organization, it will take more time (both in terms of timeline and effort/energy) than anticipated. To address this, the leadership team met with the equity consultant in mid-December 2019 to reflect on the most important and impactful changes that are needed and to map out a plan of prioritization.

### **Update on Identified Priorities for (April – December 2019)**

- Release up to two additional briefs on equity topics.
  - Advance CTE released the two final briefs in the *Making Good on the Promise* series in June and October 2019.
- Lifting up the Statement on Equity in CTE in the organization's work through presentations and other means of dissemination.
  - Advance CTE developed a dissemination strategy and staff presented on the work of the initiative at events hosted by numerous organizations.
- Continue to engage the Committee on Equity in CTE, utilizing these relationships to build content expertise and expand Advance CTE's presence in this space through strengthened relationships.
  - In the past months, Advance CTE continued to engage the Committee on Equity in CTE through facilitating a call, reaching out to the Committee to review our reports and developing content, such as a presentation and a webinar, with Committee members. Advance CTE has also expanded the Committee to include new members to expand our presence in this space.

- Continue to engage the Equity Kitchen Cabinet, utilizing their input on research and leveraging them to assist in dissemination strategies.
  - Advance CTE has used Equity Kitchen Cabinet members as a resources for reports and has shared the *Making Good on the Promise* series reports with the members to help with the their dissemination.
- Produce a resource, through the Gates Foundation grant, highlighting Advance CTE's work on equity.
  - Advance CTE paused this work to ensure that the resource that is developed meets our members' needs, particularly in light of Perkins V. Advance CTE anticipates developing this resource by August 2020.
- Promote equity as a pillar in organization-wide work, particularly technical assistance related to Perkins V planning.
  - Advance CTE has embedded equity into each organizational strategy. Advance CTE staff reviewed states' Perkins V plans through an equity lens to help states strengthen their approaches to addressing equity challenges in CTE. Additionally, Advance CTE provided technical assistance to states to help them identify and address opportunity gaps.
- Complete two staff equity training sessions.
  - Advance CTE completed three staff equity training sessions, which took place in April, May and December 2019.

#### **Priorities for Next Six Months (January – June 2020)**

- Develop resources and provide support to help states adopt an approach to MOA that maximizes their resources and promotes equity.
- Complete two staff equity training sessions to deepen our organization knowledge of diversity, equity and inclusion and to help us understand how to identify CTE policies or practices that perpetuate inequities.
- Provide one Board equity training session to deepen our Board's knowledge of diversity, equity and inclusion.
- Assess Advance CTE's internal processes and protocols through an equity lens.
- Continue to engage the Committee on Equity in CTE, utilizing these relationships to build content expertise and expand Advance CTE's presence in this space through strengthened relationships.
- Continue to engage the Equity Kitchen Cabinet, utilizing their input on research and leveraging them to assist in dissemination strategies.
- Begin developing a resource, through the Gates Foundation grant, highlighting Advance CTE's work on equity.
- Promote equity as a pillar in organization-wide work, particularly our work related to Perkins V.

**Equity Strategy**  
*Fall 2019-Summer 2020*  
*Updated December 2019*

**ALIGNED STRATEGIC PLAN ELEMENTS**

This strategy is aligned to all strategic plan elements, but some notable strategic plan elements include:

- 1a. Develop, refine and advance federal legislative and budgetary priorities that support, promote and increase equitable access to and success in high-quality Career Technical Education (CTE)
- 1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.
- 1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.
- 4b. Develop, maintain and grow strategic partnerships with policymakers, advocacy groups and other key stakeholders to support states' adoption and implementation of legislation and policies.
- 5a. Ensure all aspects of the management of Advance CTE/The Center to Advance CTE are effective, efficient and in legal compliance.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5d. Support and maintain a positive work culture that is collaborative and values employees' contributions, leadership and growth.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

**OBJECTIVES**

1. Operationalize Advance CTE's Statement on Equity in CTE to advance diversity, inclusion and equity in CTE.
2. Encourage, empower and support Advance CTE's membership and other state leaders to embrace their role in ensuring equitable access and outcomes for each CTE learner.
3. Deepen Advance CTE staff's knowledge, capacity and understanding of equity-related work, best practices, etc. to position us as a "go-to" organization for expertise on advancing diversity, inclusion and equity in CTE.
4. Reconsider Advance CTE's internal policies, procedures and practices that may impact our ability to operationalize our equity statement.
5. Be both listeners and leaders as we learn from the equity/civil rights and CTE communities and guide both to promote strategies for diversity, equity and inclusion in CTE.
6. Strengthen Advance CTE's network and presence with the equity/civil rights community in a meaningful way to foster productive and sustainable relationships between our communities.

7. Thoroughly research how CTE can be a strategy for promoting equitable outcomes (in contrast to researching how to advance equity in CTE).

## MAJOR ACTIVITIES

### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will support its members in the development and implementation of state and federal policies that support each learner in accessing, feeling welcome in, fully participating in and succeeding in high-quality CTE programs of study.

Advance CTE is committed to ensuring federal policies enable, rather than hinder, our members' ability to promote diversity, inclusion and equity in CTE. To that end, Advance CTE will:

- Develop, review and update federal policy priorities and recommendations to ensure alignment with the Board-approved Statement on Equity in CTE.
- Ensure that CTE is represented in relevant federal legislation so that each learner has access to high-quality experiences.

Historically, the federal requirements for *Methods of Administration* (MOA) prevented some of our members from maximizing their resources to promote quality, access and equity in CTE. The new, proposed approach to MOA provides state leaders with the flexibility needed to invest their resources where they are most needed to close opportunity gaps. To that end, Advance CTE is committed to providing guidance to our members on MOA and the required state equity plans to ensure their chosen approaches to MOA align with goals of the Statement on Equity in CTE. Specifically, Advance CTE will:

- Develop resources and supports to help state leaders as they implement the new MOA requirements, including the drafting their state equity plans, ensuring the work is leveraging the comprehensive needs assessment requirements in Perkins V, supports and promotes equitable access to CTE.
- Develop communication tools to help state leaders communicate their continued commitment to access and equity and how their approaches to MOA align with that commitment.
- Implement a thoughtful and proactive outreach and communication strategy to help national partners understand our support for the new MOA requirements fully aligns with and supports our commitment to equity and the accomplishment of the goals articulated in our Statement on Equity.

Advance CTE is committed to continuing the *Equity in CTE* initiative to equip our members with the knowledge, skills and abilities to promote diversity, inclusion and equity in CTE. This initiative will include the creation of tools, resources, and supports and building or deepening partnerships necessary for states to address equity challenges in CTE. Specifically, Advance CTE will:

- Convene a national Committee on Equity in CTE to provide input on and develop equity-focused resources, identify presentations and professional development opportunities on equity topics, and explore avenues for collaboration.

- Convene an Advance CTE member Equity Kitchen Cabinet, which will provide input on resources and explore avenues for collaboration.
- Develop resources and tools for our members and the field to promote equity in CTE, in partnership with the Committee on Equity in CTE and Equity Kitchen Cabinet.
- Lead a shared solutions workgroup to develop tools, resources and strategies to advance equity in CTE.
- Cultivate the *Learning that Works Resource Center's* Equity and Access topic page with relevant, actionable resources related to advancing diversity, inclusion and equity in CTE.
- Track state policies, programs and successes to maintain an understanding of the current landscape of equity-related CTE policies, identify key topics for further equity-related resources or supports; and identify states to feature, elevate and/or provide assistance.

Advance CTE recognizes that addressing diversity, inclusion and equity in CTE requires a great amount of effort, intentionality and knowledge. Recognizing this, Advance CTE is committed to providing equity focused technical assistance (TA) to states to help them understand and address barriers to advancing diversity, inclusion and equity in CTE. Specifically, Advance CTE will:

- Ensure that state policy technical assistance regularly supports our organizational strategic initiatives, including the *Equity in CTE* initiative.
- Provide support for equity gap analyses. Advance CTE will design supports for conducting a state- and local-level equity gap analysis and develop tools, templates and guides to support the effective implementation of the process.
- Review states' Perkins V plans through an equity lens, providing recommendations to states to help them leverage their state plans to promote equity.
- Develop and implement a systematic process to select states that will receive targeted technical assistance, with an intentional focus on providing assistance to states that are struggling and/or undergoing leadership transitions.

### ***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

Advance CTE will provide professional learning to its members to ensure that they are equipped with the knowledge and skills to advance diversity, inclusion and equity in their respective states. Specifically, Advance CTE will:

- In partnership with state leaders and national partners, develop and present equity-focused sessions to Advance CTE members at both Advance CTE and partners' events.
- If available and appropriate, partner with organizations to develop resources and/or deliver webinars that address the equity challenges our members face.
- Offer equity training to The Center to Advance CTE/Advance CTE's Board of Directors.
- Lead and engage CTE leaders within the Equity Kitchen Cabinet to help them cultivate their knowledge of equity challenges and solutions.

- Embed equity-focused content into the New State Director Program and virtual learning strategy to ensure our members understand what it means to advance diversity, inclusion and equity within the context of CTE.

Advance CTE is committed to ensuring that our equity focused professional learning content meets the needs of each of our members. To ensure this, Advance CTE will:

- Request demographic information, for example race, ethnicity and gender, on evaluations of Advance CTE's professional learning opportunities to ensure that these opportunities reach and impact each member, regardless of their identities.
- Administer and use an annual member services survey to assess whether the equity-focused resources, content and supports we develop throughout the year meet the needs of our members.
- Leverage evaluations to assess the quality and relevance of our equity-focused presentations, webinars, and cabinet/working groups.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will continue to work to position itself as an expert in promoting equity in CTE and raise the visibility of promising practices to advance equity in the field.

To help achieve this, Advance CTE developed a dissemination strategy. Advance CTE will refine and implement this dissemination strategy, which aims to highlight promising state strategies and practices to advance equity in CTE and leverage partnerships to reach a broader audience. Specifically, Advance CTE will:

- Position itself as an expert in promoting equity in CTE through presenting on equity related topics at partner organizations' conferences, convenings and meetings.
- Develop a case study highlighting Advance CTE's internal equity work to illustrate that, as experts, Advance CTE practices the strategies it is asking states to carry out.
- Develop blogs, e-blasts and other promotional materials that highlight the resources Advance CTE is producing and the work the organization is doing to promote equity.
- Use digital tools, such as social media and newsletters, to share publications, tools and resources to ensure that partner organizations' equity-related resources reach each member.
- Feature equity-focused content at Advance CTE's 2020 Spring Meeting.

Advance CTE recognizes that a core strategy to advancing diversity, inclusion and equity in CTE is ensuring that individuals recognize the benefits of CTE. Advance CTE will promote the value and promise of high-quality CTE to empower state leaders to build trust with communities, parents and learners. Specifically, upon approval from the Siemens Foundation, Advance CTE will:

- Conduct a national survey of students and parents that focuses on how to communicate with subpopulations. Advance CTE will provide supports and resources related to the research findings.

- Coordinate with Aspen Institute on secondary and postsecondary messaging related to recruitment of students.
- Conduct TA with states on how to communicate effectively about CTE to key stakeholders through the Siemens Foundation and Gates Foundation work.
- Develop and disseminate new resources and supports related to helping states communicate about the value of CTE with key stakeholders.

Advance CTE recognizes that we are not “general” diversity, inclusion and equity experts and therefore need outside assistance to strengthen our internal knowledge. We also recognize the importance of securing resources so that we may support our members who need help in this area. To that end, Advance CTE will implement a development strategy that enables us to strengthen our internal and external diversity, inclusion and equity work. Advance CTE will:

- Embed a diversity, inclusion and equity focus into grant proposals, when appropriate, to ensure that the grant work we carry out aligns with our fierce commitment to equity.
- Seek additional funding as needed to support Advance CTE’s internal and external equity work.

Recognizing that a core strategy to advancing diversity, inclusion and equity in CTE is to acknowledge the history of CTE, Advance CTE will leverage the organization’s 100-year anniversary celebration strategy to acknowledge the history and progress of the field. Advance CTE will:

- Develop a 100-year “retrospective” that includes the field’s progress towards advancing equity in CTE.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will continue to engage and leverage partnerships that support the organization’s vision.

Advance CTE recognizes that to strengthen our internal knowledge of diversity, inclusion and equity and produce resources that meet the needs of our members we must learn from and partner with other organizations. Additionally, we recognize that some organizations may not understand that Advance CTE prioritizes diversity, inclusion and equity in CTE given the history associated with CTE. To strengthen our internal knowledge and position us as leaders in diversity, inclusion and equity in CTE, Advance CTE will:

- Lead and engage individual organizations within the national Committee on Equity in CTE to build stronger connections that help the field to ensure equitable access to and success in CTE.

Advance CTE will build partnerships with civil rights, workforce and education organizations to broaden Advance CTE’s audience, learn about promising equity practices and strategies, co-develop equity-focused resources and present on equity-related topics at partner organizations’ events. Specifically, we will:

- Build relationships with organizations and coalitions that are focused on Advance CTE's federal and organizational priorities, including equity-focused, data-focused and postsecondary organizations.
- Ensure all kitchen cabinets' have diverse representation.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE is guided by and committed to the Board-approved Statement on Equity in CTE. To operationalize the Statement on Equity in CTE, Advance CTE will analyze Advance CTE's policies, practices and procedures through an equity lens and, if necessary, implement improvements. Specifically, Advance CTE will:

- In partnership with an external equity consultant, review Advance CTE's policies, practices and procedures to ensure they promote rather than hinder equity.
- Implement recommendations, as feasible and appropriate, that derive from equity training sessions and consultation with an equity expert.
- Develop a set of core values for the organization.
- Update the performance evaluation system to ensure with the core values and that there are no biases in the system.

To carry out this equity strategy, each staff member must understand what it means to advance diversity, inclusion and equity in an organization and in the broader CTE field. To ensure that each staff member is equipped with this knowledge, Advance CTE will implement practices and provide opportunities to staff. Specifically, Advance CTE will:

- Offer staff-wide and individual opportunities for equity-focused professional development to Advance CTE staff to increase their knowledge of equity and our capacity to better serve our members and foster an inclusive work environment.
- Store and share back equity content with staff through the knowledge management system.
- Incorporate lessons learned through the equity initiative in Advance CTE's onboarding process. Advance CTE will ensure new staff have the knowledge to apply a diversity, inclusion and equity lens to their work.
- Develop shared internal definitions for diversity, inclusion and equity.

Advance CTE is committed to continuous improvement. To ensure that we are achieving the objectives of the equity initiative, Advance CTE will:

- Implement stocktakes that ensure each Advance CTE staff member has access to the opportunities, tools, resources and supports they need to do their jobs well.
- Develop and implement surveys that gauge the extent to which staff believe they have the knowledge, skills and abilities to apply an equity lens to their work.
- Leverage member evaluation forms and surveys to assess whether we are meeting our members' diversity, inclusion and equity-related needs and to inform our future content.



As an organization, Advance CTE is committed to “practicing what we preach.” To lead by example, Advance CTE will implement a process to document and share lessons learned from the work associated with the Advancing Racial Equity in Workforce Development Grant, which is focused on increasing our internal knowledge and capacity as it relates to diversity, inclusion and equity.

## **CTE Data Quality & Use Strategy**

*Fall 2019-Summer 2020*

*Updated December, 2019*

### **ALIGNED STRATEGIC PLAN ELEMENTS**

- 1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.
- 1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.
- 2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE's priorities, activities, resources and events.
- 2d. Build and strengthen communities within Advance CTE's membership to foster cross-state sharing and learning.
- 4b. Develop, maintain and grow strategic partnerships with policymakers, advocacy groups and other key stakeholders to support states' adoption and implementation of legislation and policies.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

### **OBJECTIVES**

1. Promote the value of data-informed decision making within the CTE community to improve quality and equity in CTE.
2. Improve data literacy and awareness within the CTE community.
3. Encourage and support states to adopt improved methods of collecting, validating and linking high-quality CTE data.
4. Encourage and support states to use CTE data more effectively to identify and address opportunity gaps and improve program quality.
5. Encourage and facilitate cross-sector data partnerships.
6. Build Advance CTE's knowledge and capacity to lead the field in improving data quality and use, and position Advance CTE to be seen as an expert in CTE data.
7. Support states to leverage Perkins V – and their Perkins V state plans – to improve the quality and effective use of state CTE data and ensure effective linkages across federal programs such as the Workforce Innovation and Opportunity Act and the Every Student Succeeds Act.

## MAJOR ACTIVITIES

### *Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY*

Advance CTE will help state leaders improve the quality and effective use of CTE data by highlighting – and building out tools, resources and supports to scale – promising state practices and recommendations. This includes both the collection and use of federal data as well as state data. In particular, Advance CTE will develop a comprehensive policy benchmark tool and related supports that map out a process for improving state data systems.

Additionally, Advance CTE will draw connections between state and federal policy by identifying and elevating opportunities to improve data quality through Perkins V and other related pieces of federal legislation and policies (e.g. College Scorecard, Higher Education Act, Every Student Succeeds Act, Workforce Innovation and Opportunity Act, etc.).

Specific activities include:

- **Develop and publish a policy benchmark tool:** Building upon the lessons learned through the State of CTE report, Advance CTE will develop a policy benchmark tool that offers a framework for states to improve the collection, validation, linkage and effective use of K-12 and postsecondary CTE data with a particular focus on supporting equitable access and success. The tool will be developed with input and review from the state and local leaders and national partners involved in the CTE Data Quality Shared Solutions Workgroup (SSWG) and will inform Advance CTE’s technical assistance and other supports related to data quality and equity. States will be able to use the tool to conduct their own diagnostic assessments and identify strategies to improve equitable access and success in CTE.
- **Provide support for opportunity gap analyses:** Advance CTE will design a process to help state and local leaders promote equitable access and success for CTE students by examining and addressing opportunity gaps in their data. Advance CTE will develop tools, templates and guides to support the effective implementation of the process. These tools – which will include a data analysis template and guide, guidance for conducting focus groups, guidance for conducting a root cause analysis, and recommendations for evidence-based interventions – will be released to the public. Advance CTE staff will make themselves available to facilitate the process in states as funding allows or on a fee-for-service basis.
- **Provide technical assistance:** Advance CTE will provide virtual, just-in-time supports and intensive, sustained technical assistance to support overall data quality and effectiveness based on state need and available resources. Advance CTE will develop facilitation guides and tools derived from the policy benchmark tool to support the technical assistance strategy.
- **Launch a state-led postsecondary CTE data initiative:** Advance CTE will recruit a cohort of states to participate in a two-year “postsecondary CTE data initiative,” with support from the ECMC Foundation. The initiative will begin in summer 2020, and participating states will need to complete a needs assessment using the policy benchmark tool. Advance CTE will provide funding and ongoing technical assistance to help states develop and implement a two-year action plan. Advance CTE will draw upon lessons learned through the initiative to publish case studies and a summative publication with recommendations and examples to share with the field.

- **Monitor and support implementation of the new Perkins V secondary CTE program quality indicators:** To help states select and define a secondary CTE program quality indicator, Advance CTE will publish a series of briefs that explores the pros and cons of each of the three program quality options and examines different approaches states are taking to measure and validate each indicator. Advance CTE will monitor states' progress as they identify and implement their new program quality indicators and elevate promising practices through blogs, research briefs, the Perkins V web-based portal, presentations or other activities.
- **Organize shared solutions workgroups:** In 2020, Advance CTE will organize multiple SSWGs to identify promising practices and develop tools, resources and strategies to improve data quality and use. One workgroup, supported through the Gates Foundation, will be focused on CTE data reporting and visualization through Perkins V. Another will be in support of the Partnership to Advance Youth Apprenticeship and will be narrowly focused on collecting reliable and valid data on youth apprenticeships. The third will be supported by the ECMC Foundation and the JPMorgan Chase Foundation and will examine global strategies for improving data quality and use with the intention of developing a policy benchmark tool and additional resources to help state and local leaders improve CTE data policy and infrastructure. The workgroups will include national partners and state leaders from exemplar states.
- **Inform federal policy priorities:** Advance CTE will ensure federal policy recommendations are informed by the CTE data strategy by coordinating across workstreams and sharing information regularly about federal and state policy activity. Advance CTE will ensure that federal policy recommendations and advocacy efforts allow for and encourage data-driven practices by states.
- **Identify promising practices for setting performance targets:** To ensure Advance CTE is equipped to support Perkins V implementation, Advance CTE will monitor how states are setting targets and benchmarks for their performance levels.

### ***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

Advance CTE will offer professional learning opportunities to help build the capacity of secondary and postsecondary state leaders to improve data quality and use. This includes leading presentations and workshops on data quality and creating virtual and in-person learning opportunities for state leaders.

Specific activities include:

- **Provide virtual professional learning opportunities:** Advance CTE will organize a webinar series featuring leading states and subject matter experts to elevate promising practices and approaches for improving CTE data quality. In addition to offering webinars, Advance CTE will establish a Moodle group for data professionals through the CTE data initiative to foster collaboration among participating state leaders. Depending on interest, this group may be expanded to include data professionals in other states.

- **Provide in-person professional learning:** Advance CTE will deliver in-person presentations and workshops at Advance CTE professional learning meetings.
- **Support the new State CTE Director Leadership Program:** Advance CTE will update and deliver a module on CTE data through the new state directors leadership program. After Perkins V plans are submitted, the module will be updated to focus more on data quality and effectiveness generally.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will use various channels of communication – including blogs, social media and newsletters – to build state and national urgency around the need to improve data quality. This includes getting the message out about the challenges identified in the state of CTE report and casting a light on key opportunities and strategies so state leaders have a clear path forward.

Specific activities include:

- **Leverage the Advance CTE blog to tell a compelling story about data quality:** Advance CTE will regularly highlight different ways states, schools and institutions are using data to improve student outcomes. Blog posts will draw from ECMC, Lumina, JPMC and other initiatives and will involve national and state guest authors. Beginning October 2019, Advance CTE will also partner with the Institute of Education Sciences to publish a blog series highlighting opportunities for partnership between State CTE Directors and researchers.
- **Influence the national conversation and build awareness of promising practices:** Advance CTE will use digital tools – including social media and newsletters – to share publications, tools and resources and to influence the national conversation about data quality and use. Whenever possible, Advance CTE will also engage national partners online to extend its reach and influence. Further, Advance CTE will develop talking points and identify compelling stories of states, school districts and institutions that are using data effectively to improve outcomes for learners in order to support the organization’s media engagement strategy.
- **Build the case among funders for investing in CTE data quality:** Share findings from the State of CTE report with key funders (such as Gates and ECMC) and offer private briefings on the report and Advance CTE’s data strategy. Seek out other funding opportunities to support and sustain Advance CTE’s data efforts.
- **Position Advance CTE as an expert in data quality by maintaining a visible presence at partner meetings:** Seek out opportunities to attend and present at events hosted by partner organizations where other state CTE or data professionals may be reached. This includes OCTAE’s Data Quality Institute, NACTEi’s annual conference, and more.
- **Use state data to tell the story about CTE:** Advance CTE will identify states with strong data and coordinate with the communications team to inform advocacy and promotional efforts. Additionally, Advance CTE will start work with the web designer to build visually appealing charts and graphs into the state web profiles and tell each state’s CTE story in a more user-friendly and convincing way.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will leverage national partners to strengthen and expand the reach of the CTE data strategy. Continuing the effective engagement of national partners prior to the publication of the State of CTE report, Advance CTE will engage partners across different sectors and constituencies to inform technical assistance, resource development, professional learning and promotion.

Specific activities include:

- **Strengthen and expand partnerships to inform resource and tool development:** Advance CTE will continue to engage the core partners – Data Quality Campaign, National Skills Coalition and Education Strategy Group – to inform additional resources and tools for the data initiative. Advance CTE will also work to establish new or expand existing partnerships with organizations that can help inform and promote the data initiative. This includes re-engaging partners that we already have a relationship with such as IHEP, ExcelinEd, the Aspen Institute, Achieving the Dream and the Association for Institutional Researchers.
- **Leverage partners as subject matter experts:** As appropriate, Advance CTE will engage partners to support technical assistance through ECMC and other related initiatives. Partners will also be invited to present at Advance CTE meetings or on webinars and will be asked to provide input, co-author and even guest author blog posts related to CTE data quality.
- **Maintain communication and partnership with organizations involved with Perkins V TA and research:** Check in with OCTAE and RTI regularly to learn about their priorities for state TA and any resources or lessons they have generated through those efforts. Stay informed and engaged with AIR’s national assessment of CTE.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

Advance CTE will ensure effective knowledge management practices are utilized to inform staff about the data initiative and preserve information and resources for future access and use.

Advance CTE will make use of the knowledge management tools and resources, including the shared organizational resource folder, to document information gathered through the data quality initiative. Additionally, Advance CTE will foster a data-driven culture by collecting metrics across all projects and workstreams, including the data strategy, and exercising best practices to collect, analyze and use data effectively.

Specific activities include:

- **Maintain Advance CTE’s Impact and Reach Dashboard:** Advance CTE will cultivate a data-driven culture and ensure actionable data are gathered, analyzed and made available to team members in a timely manner by maintaining a quarterly dashboard and conducting a biannual stocktake. This work will include establishing processes and routines for collectively examining and responding to data.
- **Maintain the CTE research warehouse:** Advance CTE will ensure all staff can draw on a broad and rigorous evidence base to inform policy recommendations, presentations, professional development and technical assistance. Information will be stored in a searchable

research warehouse with an array of data points across policy areas. After getting input into the design, Advance CTE will release the research warehouse to members.

- **Document and share lessons learned through the data initiative:** Advance CTE will maintain and regularly update the shared data initiative folder to ensure it has the latest information and resources and is available to all staff as needed. Additionally, staff will be briefed on the CTE data initiative, policy developments related to CTE data quality, and other developments that are relevant to all staff.
- **Develop staff facility for data visualization:** To improve the effective use of data in policy, professional learning and promotion, Advance CTE will develop and deliver a staff training on strategies for maximizing data visualization and ensure effective data visualization is practiced through publications, tools and other public-facing resources (specifically including the Siemens research).
- **Implement data-driven processes:** To evaluate the quality and impact of Advance CTE's supports and resources around data quality, Advance CTE will gather feedback from members and impacted stakeholders. We will analyze and use this information to support continuous improvement of data work and products.

## Postsecondary Strategy Update – January 2020

### **Overview of Major Activities**

#### **1. Ensure high-quality federal and state CTE policies are adopted and implemented**

Advance CTE focuses on postsecondary CTE through federal and state policy work. The state policy work should always inform the federal policy work. At the federal level, Advance CTE prepared for reauthorization of the Higher Education Act (HEA), and updated the organizational recommendations to include support for increasing Pell Grant eligibility to incarcerated individuals. When both the House and Senate introduced their versions for reauthorization, Advance CTE was pleased to see some of the organization's priorities were included, such as: expanding Pell grant eligibility to incarcerated individuals was included in both the House and Senate bills; the House and Senate both encompassed measures to make college more affordable; the House bill supported increasing and improving capacity to collect postsecondary data; and the House bill supported teacher recruitment. Going forward, staff will continue to monitor legislative movement on the House and Senate reauthorization proposals, as well as standalone bills, and engage in related lobbying efforts.

Staff also increased efforts to advocate for expanding Pell Grant eligibility to high-quality short-term programs, specifically through the Jumpstart Our Businesses by Supporting Students (JOBS Act). In the Senate, Advance CTE advocated for the legislation in one-on-one and group meetings. Advance CTE also worked with partner organizations and House staff to support introduction of a companion bill in the House, which was introduced in June. After introduction, Advance CTE continued to work with the House bill leaders to build Republican and Democratic cosponsors.

Advance CTE continued to provide feedback on standalone postsecondary legislation, including significant edits and re-writing of legislative language on "Strengthening the Alignment for Postsecondary Perkins Career and Technical Education." This language was introduced as part of the House HEA reauthorization, as well as a standalone bill- in which Advance CTE was featured in the press release.

In state policy, Advance CTE has prioritized sharing postsecondary stories and strategies in research and publications. Advance CTE published a new postsecondary report on credit for prior learning that elevated promising practices and policies from seven states. Staff also published one new postsecondary policy profile to the Advance CTE website.

#### **2. Empower members through professional learning**

Advance CTE continued to serve its postsecondary members through deliberate postsecondary-focused professional development, as well as to build the postsecondary knowledge of secondary members. The 2019 Spring Meeting included panels that had postsecondary CTE representation, as well as postsecondary-centered breakout sessions. Staff also worked to ensure that the Perkins V Implementation Meetings featured postsecondary content and examples, and facilitated inclusion of postsecondary CTE when absent from state discussions.

As the Joyce Foundation grant on postsecondary program quality came to a close, Advance CTE hosted a webinar on the work that had been done throughout the grant in Colorado and Illinois.



Advance CTE Staff will continue to include postsecondary content in professional development opportunities, including blog posts, webinars and meeting sessions, and will work on creating deliberate and enduring spaces for postsecondary members to interact with each other, such as Moodle and the HEA Kitchen Cabinet.

### **3. Raise the visibility and promotion of high-quality CTE**

Advance CTE will continue to raise the visibility of high-quality postsecondary CTE through regular postsecondary blog posts and postsecondary-focused resources in the Learning that Works Resource Center. Advance CTE will elevate the promising practices found with support from the Joyce Foundation, Lumina Foundation and ECMC Foundation as the corresponding work progresses. Additionally, staff participated on a panel hosted by the Senate CTE Caucus on “Connecting the Dots Between Perkins V and WIOA.” This event was attended by Congressional staff and organizations across Washington, DC.

Advance CTE engaged with partners in new ways to expand the organization’s reach. Staff published a new CTE 101 fact sheet in partnership with Higher Learning Advocates that is available on both organizations’ websites. Staff also presented at two National Association of State Workforce Association convenings, including the Workforce and Labor Market Information Committee Meeting and a Workforce Summit. Advance CTE also developed a strong partnership with the Aspen Institute, which released a study on how to communicate with adult learners about CTE in community colleges. Staff presented a joint session at the National Council on Workforce Education conference on how to communicate with adult learners, as well as learners in middle and high school, about the benefits of CTE.

### **4. Build and maintain strong and effective partnerships that advance Advance CTE’s vision and mission**

Advance CTE continued to establish new partnerships and grow existing ones in the postsecondary space through targeted outreach and regular participation in events and roundtable conversations hosted by organizations such as the National Association of State Workforce Agencies, the Center for Law and Social Policy and The Wilson Center. Advance CTE joined the Steering Committee of the College in High School Alliance, a coalition of national and state organizations that collaborates to impact policies and build broad support for programs that enable high school students to enroll in college pathways toward postsecondary degrees and credentials. Additionally, ongoing work with the Joyce Foundation and new work supported by the Lumina Foundation and ECMC Foundation allow for opportunities to engage with postsecondary partnerships.

### **5. Developing internal processes and protocols to ensure a strong and sustainable organization**

In order to continue to expand our reach in the postsecondary space, Advance CTE staff must have a thorough understanding of the content and the ways in which K-12 and postsecondary CTE differ. As Advance CTE staff build content expertise through new partnerships, topical panels, working groups and new reports (internal and external), this information is shared back internally through knowledge management strategies. Additionally, Advance CTE staff convened the HEA kitchen cabinet and plans to continue working with this group to increase the

organization's understanding of postsecondary priorities and advocacy goals, as well as to prepare for HEA reauthorization, as well as creating a WIOA Kitchen Cabinet.

### **Major Accomplishments (April – December 2019)**

- Published a report on credit for prior learning and hosted an accompanying webinar. This report was also presented on at Alaska's ACTE Professional Development Conference and ACTE VISION.
- Received new grant funding from the Lumina Foundation for an initiative on area career technical centers.
- Notified of upcoming new grant funding from the ECMC Foundation for an initiative on postsecondary data.
- Partnered with the National Association of Student Financial Aid Administrators for new grant funding from the Lumina Foundation for an initiative on short-term postsecondary programs and began grant work.

### **Challenges**

Moving forward in Advance CTE's WIOA reauthorization preparatory work proved challenging in this time frame. As an organization, we determined that our members' priorities- and the majority of their time- was dedicated to Perkins V implementation. Therefore, it would not be a wise use of time and resources to focus on WIOA during this time. In addition, federal and state staff turnover in this period led to a redistribution of work that at times made capacity to complete identified priorities a challenge.

### **Update on Identified Priorities for (April – December 2019)**

- Build three new postsecondary partnerships in order to expand our postsecondary content in a meaningful and informed way.
  - Advance CTE joined the *Pell Restoration Collaborative*, which has allowed the organization to learn from other postsecondary partners as well as position Advance CTE as an active member in the postsecondary policy space. Advance CTE also expanded our relationship with *Higher Learning Advocates* to develop a shared resource for the first time- a CTE 101 fact sheet that is published on both organization's websites. Advance CTE also expanded our newfound partnership with the *National Association of State Workforce Agency*- and presented at two of their convenings in this time frame. Staff continue to meet with organizations, such as *Education Trust*, to learn about postsecondary perspectives and see where future collaboration is possible. Advance CTE also continued to be invited to participate in small group discussions hosted by organizations such as the *Center for Law and Social Policy*, *Business Roundtable* and the *Wilson Center*.
- Continue work on the Joyce Foundation grant and implement a more robust dissemination strategy to lift up the lessons learned and build more visibility for Advance CTE's growing postsecondary expertise.
  - Advance CTE continued to work with two postsecondary state agencies (Colorado and Illinois), and is in the process of developing a new resource on high-wage, high-skill, and in-demand definitions through support from the Joyce Foundation. Advance CTE shared out findings from the credit for prior learning

report, developed through support from the Joyce Foundation, at the April 2019 Advance CTE Meeting, Alaska's ACTE Professional Development Conference and ACTE VISION.

- Release a report on credit for prior learning and host a related webinar.
  - The report was released and a webinar was hosted by Advance CTE, featuring Louisiana and Virginia, in April.
- Continue work on the policy benchmark tool for dual enrollment articulation and transfer.
  - This work had begun, but was halted after the College in High School Alliance (CHSA), of which Advance CTE is a member, released a framework that would have made our tool redundant. CHSA shared their tool with Advance CTE for feedback ahead of dissemination.
- Post six blog posts that highlight postsecondary topics and best practices including HEA reauthorization, WIOA implementation and pressing postsecondary areas of focus.
  - Advance CTE created seven blog posts that highlighted postsecondary topics and practices. In addition, Advance CTE's Legislative Update newsletter always includes postsecondary federal policy updates, when applicable.
- Ensure that Advance CTE postsecondary members are well served in the Perkins V implementation process.
  - Advance CTE included postsecondary focused sessions in the Fall 2019 Perkins Implementation Meetings. Advance CTE responded to all questions that came in on Perkins V.
- Track HEA reauthorization and actively engage in advocacy efforts, including Hill visits and coalition efforts.
  - Advance CTE staff met with all House Committee on Education & Labor, Senate Committee on Health, Education, Labor, and Pensions staff members in both parties (as possible). Advance CTE staff also met with the staffers for all committee members (as possible). Advance CTE staff also participated in coalition efforts in response to standalone HEA reauthorization bills, for example, the JOBS Act.
- Develop resources around WIOA revised state plans and implementation.
  - Advance CTE reviewed each WIOA revised state plan, and determined that no resources would be beneficial for our membership. However, the lessons learned from that review process will be used to support the organization's development of WIOA reauthorization priorities.
- Early planning and research to develop Advance CTE's WIOA reauthorization priorities.
  - Advance CTE began to get input on WIOA reauthorization from membership, including through a discussion during the December 2019 Quarterly Advocacy Call. Advance CTE has also discussed WIOA reauthorization positioning with partner coalitions and organizations, including the Campaign to Invest in America's Workforce, National Skills Coalition, Center for Law and Social Policy, ACTE and the National Association of State Workforce Agencies.

**Priorities for Next Six Months (January – June 2020)**

- Develop Advance CTE’s WIOA reauthorization priorities and continue to prepare for WIOA reauthorization, including participation in Hill visits and coalition efforts.
- Continue work on the Lumina Foundation grant with NASFAA and ACTE regarding short-term postsecondary programs.
- Continue work on the Lumina Foundation grant regarding area technical centers.
- Continue work on the ECMC Foundation grant, including releasing the RFP and selecting states to participate.
- Continue to track HEA reauthorization and actively engage in advocacy efforts, including Hill visits and coalition efforts.
- Continue existing and build new postsecondary partnerships to support legislative priorities and grow our content knowledge.
- Ensure that Advance CTE members are well served in Perkins V implementation process, and elevate promising practices in postsecondary CTE that come from submitted plans.
- Close out all activities for the Joyce Foundation postsecondary grant work in Colorado and Illinois.

**Update on Short-Term Postsecondary Program Grant from the Lumina Foundation**

The National Association for State Financial Aid Administrators (NASFAA) approached Advance CTE to join a new initiative funded by the Lumina Foundation on the national landscape of short-term postsecondary programs. Advance CTE provided feedback to NASFAA on their initial project outline, and gave input as to what information would be impactful to collect. The grant was finalized with the Lumina Foundation in the fall, and Advance CTE is included as a Consultant. Advance CTE will be compensated \$75,000 throughout the course of this initiative, concluding in August 2020.

So far, Advance CTE provided feedback on and disseminated a survey instrument that was deployed to a sample of Advance CTE membership. The survey asked for information on the landscape, motivators and inhibitors to creating and implementing short-term programs. Advance CTE also carried out interviews with states to learn more about this topic.

Moving forward, Advance CTE will write a section of the final publication for this grant. This section will share out findings from the survey and state interviews. Advance CTE will also present on these findings at NASFAA’s 2020 convening. Finally, the findings from this grant work will be used by Advance CTE to inform the organization’s federal policy advocacy.

***Postsecondary Strategy***  
*Fall 2019-Summer 2020*  
*Updated December 2019*

**ALIGNED STRATEGIC PLAN ELEMENTS**

- 1a. Develop, refine and advance federal legislative and budgetary priorities that support, promote and increase equitable access to and success in high-quality CTE.
- 1b. Develop and promote policy frameworks, publications and tools that support and increase learner access to and success in high-quality CTE.
- 2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE’s priorities, activities, resources and events.
- 2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE members, which they then implement in their own states and communities.
- 2d. Build and strengthen communities within Advance CTE’s membership to foster cross-state sharing and learning.
- 3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.
- 4a. Develop, maintain and grow strategic partnerships with policymakers, federal agencies, advocacy groups and other key organizations to advance the federal legislative and budgetary priorities.
- 4c. Develop, maintain and grow strategic partnerships with K-12 and postsecondary education organizations to ensure CTE is considered an essential partner in the full P-20 education continuum.
- 4d. Develop, maintain and grow strategic partnerships, particularly with employers and industry and workforce development organizations, to ensure CTE is considered an essential partner to workforce and economic development.
- 5c. Develop, maintain and use an internal knowledge management system.
- 5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.

**OBJECTIVES**

1. Increase organizational knowledge about postsecondary CTE, with the goal of becoming “go-to” knowledgeable experts.
2. Expand and build new relationships with organizations to position Advance CTE as an expert in postsecondary CTE.
3. Meet the needs of our postsecondary members, while building our secondary members’ knowledge about high-quality postsecondary CTE and alignment between secondary and postsecondary CTE.

4. Advocate for federal policy that supports high-quality postsecondary CTE opportunities and is informed by Advance CTE's state policy work.
5. Ensure that members have the resources and knowledge they need to be informed advocates for high quality postsecondary CTE, and facilitate cross-state discussions to share promising practices.
6. Create and disseminate publications, blogs and policy profile that elevate high-quality postsecondary CTE programs in states.

Postsecondary CTE is comprised of higher education and workforce development. This includes but is not limited to: short-term programs, two-year institutions of higher education, four-year institutions of higher education, the connection from secondary to postsecondary, supporting adult learners and responding to labor market demand and skills gap.

## **MAJOR ACTIVITIES**

### ***Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY***

Advance CTE will support the federal priorities established by the Board by advocating for the federal postsecondary legislation that aligns with Advance CTE's vision, mission and equity statements and is built off of the organization's state policy work. Advance CTE will ensure that high-quality postsecondary CTE is represented in federal postsecondary legislation. Specifically, Advance CTE will:

- Advocate for member priorities in HEA reauthorization.
  - Monitor HEA reauthorization and related standalone bills and engage in advocacy efforts to ensure that Advance CTE's priorities are represented in these policy proposals.
  - Update Advance CTE's HEA reauthorization priorities as needed.
  - Engage with the HEA Kitchen Cabinet to gain feedback on HEA advocacy activities.
- Advocate for member priorities in WIOA reauthorization.
  - Prepare for WIOA reauthorization by creating Advance CTE recommendations based on our members' priorities.
  - Monitor WIOA reauthorization and related standalone bills and engage in advocacy efforts to ensure that Advance CTE's priorities are represented in these policy proposals.
  - Establish a diverse kitchen cabinet that will initially serve as expert thought partners in the creation of WIOA priorities and reauthorization strategy.
- Advocate for member priorities in relevant postsecondary legislation, including but not limited to apprenticeship, workforce development and higher education bills.
  - Monitor, provide feedback on and advocate for postsecondary CTE legislation that is aligned to Advance CTE's priorities.
  - Revisit the role of Advance CTE membership in acting as advocates for legislation, including HEA and WIOA reauthorization and standalone bill.
  - Ensure that the findings from Advance CTE's grant supported work, including the Lumina Foundation grant on short-term programs, is represented in federal advocacy.

Advance CTE will also support states in their implementation of high-quality postsecondary CTE based on Advance CTE research and recommended promising practices, and use this research to inform Advance CTE's federal policy advocacy. Specifically, Advance CTE will:

- Ensure that the findings from Advance CTE's grant-supported work are widely disseminated with Advance CTE members and partner organizations, and used as a point of reference when advocating, or choosing not to advocate, for federal policy. This includes research and findings from the Lumina Foundation supported work on short-term programs and area technical centers.
- Monitor how states are using CTE to support postsecondary statewide attainment goals, guided pathways, career advisement, work-based learning, non-credit, etc.
- Monitor how states are supporting postsecondary CTE through Perkins V.
- Monitor how states are ensuring equity for nontraditional postsecondary learners, and use best practices to inform federal policy advocacy.

### ***Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING***

Ensure that Advance CTE members have information, resources and tools, as well as access to knowledgeable experts to support their role in leading high-quality postsecondary CTE in their states, thus ensuring equitable access and quality of programs for each learner who chooses to participate in CTE. Specifically, Advance CTE will:

- Ensure that Advance CTE members have resources, tools and access to knowledgeable experts to support their role in leading high-quality postsecondary CTE in their states, thus ensuring equitable access and quality of programs for each learner who chooses to participate in CTE. To accomplish this, we will offer professional learning activities, including:
  - Feature postsecondary content at the Advance CTE 2020 Spring meeting and other in-person convenings.
  - Host webinars and other virtual professional learning strategies on postsecondary resources and topics of interest.
  - Create blog posts that feature postsecondary content.
  - Respond to member inquiries and technical assistance requests related to postsecondary CTE.
  - Ensure that the findings and relevant implications from the Lumina Foundation-supported work on short-term programs and area technical centers are shared out with members.
- Develop and provide opportunities for Advance CTE members to engage in peer sharing and learning about best and promising practices in postsecondary CTE policy.
  - Create deliberate and enduring spaces for postsecondary members to interact with each other, such as Moodle and the HEA Kitchen Cabinet.

- Include postsecondary representation on all Advance CTE Cabinets and Committees.
- Develop and implement strategies to learn from Advance CTE members about high-quality postsecondary CTE policies and practices, and embed information learned from members in the organization’s state policy work.
  - Support postsecondary members in Perkins V planning and implementation.
  - Through a grant from the ECMC Foundation provide technical assistance and support for states to improve the quality and utilization of their data.
- Ensure that the postsecondary CTE perspective is present in all aspects of organizational work by including postsecondary representation on all Advance CTE committees, cabinets or ad hoc working groups.

***Raise the Visibility and PROMOTION of High-Quality CTE***

Advance CTE will continue to raise the visibility and support for high-quality postsecondary CTE with its partners, network, the public and media. Specifically, Advance CTE will:

- Disseminate Advance CTE’s postsecondary policy resources, and high-quality postsecondary resources from partner organizations, to members, stakeholders, the media and the public to help promote high-quality postsecondary CTE policies and practices.
  - Raise the visibility of high-quality postsecondary CTE through blog posts, policy profiles, reports and postsecondary-focused resources added to the Learning that Works Resource Center.
  - Utilize Legislative Updates and social media to share postsecondary legislation supported by Advance CTE.
  - Develop and implement robust release and proactive dissemination strategies for postsecondary Advance CTE reports, resources, tools and guides, including promotion in newsletters, blogs, social media, presentations at partner organizations and the Learning that Works Resource Center.
  - Re-lift resources after the initial release as appropriate.
- Ensure that postsecondary content and examples are featured in all Advance CTE produced resources, when possible.

***Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission***

Advance CTE will continue to establish new partnerships and strengthen existing ones with organizations that represent and influence postsecondary CTE through targeted outreach and regular participation in partner-hosted event, small group conversations and seeking leadership/board opportunities. Specifically, Advance CTE will:

- Build a network of organizational partners to get perspective from on Advance CTE’s HEA and WIOA reauthorization priorities. When possible, incorporate feedback into



recommendations in order to have support from others when advocating for these priorities.

- Continue to attend and participate in postsecondary group conversations and committees focused on priority topics such as data, policy development, career pathways, short-term Pell, credentials, etc. to build our organizational expertise and recognition with these groups.
- Monitor partner organization responses to HEA reauthorization and make outreach when priorities align. In addition, monitor organizational priorities that diverge from ours and facilitate a conversation to understand the reasoning and potentially come to a mutual agreement.
- Provide updates to organizations on Perkins V implementation to position us as a valuable and unique asset to the postsecondary space.

In addition, Advance CTE will develop new and support existing partnerships to grow organizational postsecondary knowledge, especially pertaining to equity, diversity and inclusion. Specifically, Advance CTE will:

- Establish new partnerships and support existing ones in postsecondary organizations that have an equity, diversity or inclusion focus.
- Work to build understanding and awareness of postsecondary CTE with civil rights and equity-focused organizations.
- Ensure targeted dissemination of resources of interest to share with these organizations.

***Develop Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization***

In order to continue to grow in the postsecondary expertise, Advance CTE staff must have a thorough understanding of the content and the ways in which K-12 and postsecondary CTE support one another, connect and differ. As Advance CTE staff builds content expertise and forms new partnerships, this information must be documented and shared back internally through knowledge management strategies. Specifically, Advance CTE will:

- Convene the HEA and WIOA Kitchen Cabinets to increase Advance CTE's understanding of postsecondary priorities and advocacy goals.
- Use the partnership matrix to track strength and value of postsecondary partners, and respond accordingly to foster high value and high strength partnerships.
- Use meeting evaluation data to ensure that we are responding to the needs of our members.
- Share back postsecondary content to Advance CTE through knowledge management strategies.
- Implement data-driven processes to evaluate the quality and impact of Advance CTE's postsecondary work. Analyze and use this information to support continuous improvement of postsecondary work and products.