

Advance CTE Board of Directors' Meeting

**AGENDA**

May 22, 2016

8 a.m. – 11:30 a.m.

Meeting Room: **Coolidge**

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1. Welcome, Overview of Agenda  
*8 a.m. – 8:10 a.m. (10 minutes)*  
..... Rod Duckworth  
President  
*Pages 1-13*
  
2. Approval of April 14, 2016 Minutes  
*8:10 a.m. – 8:12 a.m. (2 minutes)*  
..... Pradeep Kotamraju  
Secretary/Treasurer  
*Pages 14-16*
  
3. Approval of Consent Agenda  
*8:12 a.m. – 8:15 a.m. (3 minutes)*  
..... Rod Duckworth  
President  
*Pages 17-83*
  - ACTE Collaboration Update
  - Advance CTE Regional Elections Results
  - Advocacy Plan for FY 2017
  - Communications Plan through June 30, 2016
  - Finance/Audit Committee Minutes
  - Fundraising and Development Update
  - Legislative and Advocacy Update
  - Liaison Reports:
    - DECA
    - HOSA
    - SkillsUSA
  - Lost Inventory Update
  - Member Services Update
  - Partnerships Update
  - Publications & Webinars Update
  - Year-Round Sponsorship Pilot
  
4. Advance CTE Financial Reports  
*8:15 a.m. – 8:35 a.m. (20 minutes)*  
..... Pradeep Kotamraju  
Secretary/Treasurer  
*Pages 84-100*
  
5. Finance/Audit Committee Update/FY17 Appointments  
*8:35 a.m. – 8:40 a.m. (5 minutes)*  
..... Karen Hornberger  
Finance and Office Manager  
*Pages 101-102*
  
6. Nominations Committee Update/FY17 Officers  
*8:40 a.m. – 8:45 a.m. (5 minutes)*  
..... Karen Hornberger  
Finance and Office Manager  
*Page 103*
  
7. Personnel Policy Revisions  
*8:45 a.m. – 8:55 a.m. (10 minutes)*  
..... Karen Hornberger  
Finance and Office Manager  
*Pages 104-122*

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|-------|--|---|
| 8.    | Perkins Reauthorization Update<br><i>8:55 a.m. – 9:25 a.m. (30 minutes)</i>                          | Steve Voytek<br>Government Relations Manager  |
| 9.    | New Preamble for Perkins Recommendations<br><i>9:25 a.m. – 9:45 a.m. (20 minutes)</i><br>.....       | Steve Voytek<br>Government Relations Manager<br><i>Pages 123-124</i>  |
| Break |  |   |
| 10.   | State Policy Strategy Update and Discussion<br><i>10 a.m. – 10:20 a.m. (20 minutes)</i><br><br>..... | Kate Bosveren Kreamer<br>Deputy Executive Director<br><br>Ashleigh McFadden<br>State Policy Manager<br><i>Pages 125-135</i> |
| 11.   | Governance Taskforce Discussion<br><i>10:20 a.m. – 11:05 a.m. (45 minutes)</i>                       | Kate Bosveren Kreamer<br>Deputy Executive Director  |
| 12.   | Liaison Discussion<br><i>11:05 a.m. – 11:20 a.m. (15 minutes)</i>                                    | Kimberly Green<br>Executive Director  |
| 13.   | Other items to be added/next meeting<br><i>11:20 a.m. – 11:30 a.m. (10 minutes)</i>                  | Rod Duckworth<br>President  |

**LUNCH BEGINS IN THE STONE’S THROW RESTAURANT AT 11:45 A.M.**

**PLEASE RETURN TO COOLIDGE BY 12:45 P.M. FOR THE  
JOINT MEETING OF ADVANCE CTE/THE CENTER TO ADVANCE CTE BOARD MEETING**

**Upcoming Meetings**

**Advance CTE Board Conference call**  
**June 23, 2016**  
2:30 – 3:30 p.m. ET

**2016 Fall Meeting**  
BWI Airport Marriott  
Linthicum Heights, MD  
Meeting: October 17 – 19, 2016  
Board Meeting: Monday, October 17, 2016

**2017 Spring Meeting**  
Omni Shoreham  
Washington, DC  
Meeting: May 1 – 3, 2017  
Board Meeting: Sunday, April 30, 2017

FY17 Board Meetings will be announced in June 2016

# Ashleigh L. McFadden

2800 Quebec St, NW, Apartment 1135, Washington, DC 20008  
mcfadden.ashleigh@gmail.com 972-741-3465

## EXPERIENCE

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### **U.S. Education Delivery Institute, Washington, DC**

*Associate*

Feb. 2014-Present

- Creation and maintenance of the Tools & Resources section of EDI's website, including creation of the curriculum toolkits
- Serve on EDI's internal "Delivery Unit," facilitating strategic planning for the organization and monitoring progress on all five strategic goals
- Provide direct support to K-12 and higher education partners to improve policy implementation planning and delivery and build capacity among education leaders
- Design, execute and facilitate field interactions and workshops for education leaders
- Led the production team for publication of *Deliverology in Practice*, which updates the delivery framework based on lessons learned in American education

*Executive Assistant*

July 2012-Feb. 2014

- Provided executive support to the Chief Executive Officer and K-12 Director
- Assisted in developing and tracking the organization's strategic delivery plan
- Helped partners understand progress using high quality data visualization presentations and tools

### **National Rifle Association of America, Office of the General Counsel, Fairfax, VA**

*Paralegal*

May 2010-July 2012

- Compiled and submitted dozens of monthly lobbying compliance reports for lobbyists in multiple states
- Worked on projects and assignments with the fundraising division of the organization
- Served as Secretary for the Ethics Committee and the Committee on Hearings for the Board of Directors
  - Received the Outstanding Achievement Award in December 2010

*Legal Assistant*

June 2009-May 2010

- Assisted in planning and running the 13<sup>th</sup> Annual National Firearms Law Seminar, an event with over 200 attendees
- Prepared and filed corporate compliance and charitable solicitation compliance reports for the NRA and related entities

### **Ain & Bank; Curtin, Law, Roberson, Dunigan and Salans, Washington, DC**

Jan. 2007-Dec. 2008

*Organizational Intern/Case Clerk*

- Case clerk for domestic, estate, and corporate clients
- Created and maintained a database of thousands of closed client files and other organizational projects

### **World Affairs Council of Dallas/Fort Worth, Dallas, TX**

June-Aug. 2006

*Dallas/Fort Worth Committee for International Visitors and Dallas Protocol Intern*

- Wrote proposals for the International Visitors Program run by the U.S. Department of State and USAID
- Wrote program proposal which was selected for a program involving Latin American news media

## EDUCATION

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### **George Mason University, School of Policy, Government and International Affairs, Arlington, VA**

*Master of Public Policy*

Graduated May 2015

Concentration in Social Policy

- Honors: Seymour Martin Lipset Scholar, Member of the Pi Alpha Alpha public affairs honor society

### **The George Washington University, Elliott School of International Affairs, Washington, DC**

*Bachelor of Arts in International Affairs*

Graduated Dec. 2008

Concentrations in Europe and Eurasian Studies, Latin American Studies; Minor in Art History

- Honors: Magna Cum Laude, Presidential Academic Scholarship, Dean's List
- Activities: Phi Sigma Sigma Sorority, Kappa Chapter, (held leadership position); International Affairs Society

### **Universidad Pablo de Olavide, Sevilla, Spain**

Jan.-May 2008

*Council on International Educational Exchange*

- Studied international business and intensive Spanish language and culture

# Ashleigh L. McFadden

2800 Quebec St, NW, Apartment 1135, Washington, DC 20008  
mcfadden.ashleigh@gmail.com 972-741-3465

## PROFESSIONAL SKILLS

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- **Foreign Language:** Proficient in written and spoken Spanish (6 years experience)
- **Computer:** Website maintenance platform Drupal versions 6-8; Microsoft Office, including Word, Excel, Access, PowerPoint, Outlook; Microsoft Windows; Mac OSX; Typing at 70 wpm; Webinar software; Tableau
- **Associations:** Texas State Society, 2011-2015; Phi Sigma Sigma Northern Virginia Alumnae Chapter, 2010-2015

**Position Title:** State Policy Manager

### **Primary Responsibilities**

Advance CTE: State Leaders Connecting Learning to Work is seeking a State Policy Manager to oversee and manage the organization's efforts to promote and support effective adoption and implementation of Career Technical Education (CTE) policies at the state level. The ideal candidate will have state policy experience, a proven ability to manage multiple projects successfully and be committed to getting results in a fast-paced environment. This position provides a unique opportunity to engage with state leaders, national partners and other key stakeholders to help ensure all students have access to high-quality CTE and preparation for the careers of their choice.

### **About Advance CTE**

Advance CTE supports an innovative Career Technical Education (CTE) system that prepares individuals to succeed in education and their careers and poises the United States to flourish in a global, dynamic economy through leadership, advocacy and partnerships. Established in 1920, Advance CTE is the longest-standing CTE-focused national non-profit, representing State Directors and state leaders responsible for secondary, postsecondary, and adult CTE across all 50 states and U.S. territories. For more information, see [www.careertech.org](http://www.careertech.org)

### **Job Responsibilities**

The State Policy Manager, who will report to Deputy Executive Director, will:

- ✓ Manage Advance CTE's role in the *New Skills for Youth* initiative, a multi-year grant-funded partnership with the Council of Chief State School Officers, including:
  - Manage partner and funder relationships and coordination with the third-party evaluator to help monitor states' progress and challenges
  - Oversee the development and maintenance of the New Skills for Youth Resource Center, a curated web-based collection of best practices, resources and policies
  - Manage the development of annual case studies, policy briefs and implementation tools to support states' adoption and implementation of CTE and career readiness-related policies and programs
  - Ensure all activities led under New Skills for Youth are well-coordinated with other organizational initiatives, projects and priorities, including member supports
- ✓ Oversee the organization-wide state policy and implementation strategy
  - Lead an annual process to update and monitor progress on an organization-wide state policy and implementation strategy that is aligned to our mission of supporting high-quality CTE and responsive to members' priorities
  - Collaborate with staff to ensure state policy and implementation strategy is aligned with other initiatives, including federal advocacy and communications
- ✓ Outreach & Engagement
  - Develop an ongoing understanding of the CTE environment and the role of Advance CTE in serving the CTE community
  - Provide in-state technical support around policy development and implementation
  - Serve as an organizational spokesperson for Advance CTE

- Develop, maintain and grow partnerships in support of Advance CTE’s major initiatives
- Coordinate with other staff on full publication and member communication strategy, including newsletters, blog updates, research briefs, legislative briefing papers, analyses, social media/web content, presentations, articles, etc.

**Supervisory Responsibilities**

The State Policy Manager will have supervisory responsibility for a Policy Associate and consultants and contractors

**Qualifications & Skills**

- ✓ Bachelor’s degree with focus in a field related to the public policy, public administration, education, communications or political science, plus a minimum of seven (7) years’ experience or a master’s degree with a minimum of five (5) years’ work experience.
- ✓ Ability to develop and maintain positive relationships with a wide variety of people, including but not limited to, board members, staff, government officials, state directors, key stakeholders, community partners
- ✓ Ability to think critically, use good problem solving judgment, and take complex ideas and present them in a style for a layperson’s understanding
- ✓ Ability to work independently, accurately and meet deadlines and simultaneously manage multiple projects/tasks
- ✓ Skilled written report preparation and public speaking with a style appropriate to the audience
- ✓ Ability to facilitate small and large-group discussions with various stakeholder groups
- ✓ Ability to handle confidential and sensitive information with discretion
- ✓ Knowledgeable of standard office equipment, as well as proficient with computer software programs, such as Word, Excel, PowerPoint
- ✓ Hold a valid driver’s license within the commuting areas, have access to a reliable car with current insurance or access to a reliable/flexible transportation source

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**Employee Signature**

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**Date**

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**HR or Supervisor Signature**

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**Date**

**EXPERIENCE**    **Data Analyst: Flamboyant Foundation**

*September 2014 – Present*

- Collected and analyzed program data from in-depth interviews, focus groups, and surveys
- Maintained Flamboyant’s database and created program dashboards for partner schools
- Supported the Senior Director of Evaluation and Learning to manage a rigorous program evaluation with Johns Hopkins University

**Manager of Online Engagement: Rock the Vote**

*August 2013 – August 2014; Washington, DC*

- Designed and managed an experimental study, funded by a grant from the James Irvine Foundation, to determine the effects of SMS, email, and Facebook targeting on voter turnout in California
- Analyzed social media data to determine best practices and provide engagement reports to the team
- Managed all online communications including Rock the Vote’s blog, Facebook page (78K fans), Twitter feed (51K followers), mobile communications (300K+ subscribers), and email communications

**Field Team Leader: Invisible Children**

*June 2012 - Dec 2012; San Diego, CA*

- Led a four-person team to speak on behalf of Invisible Children at more than 65 community screenings in Southern California in order to generate revenue and political support for human rights initiatives in Uganda and Central Africa
  - Oversaw logistics, finances, and scheduling for the team, generating nearly \$25K in revenue and thousands of letters to Congress over the course of three months
  - Trained students for a two-day lobby day on Capitol Hill, resulting in a legislative victory
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**EDUCATION**    **American University: Master of Public Policy**

*Sept 2013 – May 2015; Washington, DC*

**Florida Atlantic University: BA, Psychology**

*Aug 2008 – May 2012; Jupiter, FL*

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**HONORS & ACTIVITIES**

**CURRENT**

**Vice President of Communications and Outreach**, Young Education Professionals – DC

- Managed a team of five volunteers to implement YEP-DC’s communications strategy and connect members with networking and career opportunities
- Designed and managed a communications plan to launch YEP-DC’s paid membership program, generating more than 200 enrollments

**Pi Alpha Alpha Honors Society**, Member

**Eagle Scout**, Boy Scouts of America

**PAST**

**Graduate Student Commencement Speaker**, American University School of Public Affairs Graduation Ceremony, May 2015

**Marketing Director**, American University School of Public Affairs Graduate Student Council

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**SKILLS**

**Software Proficiency:** STATA, Excel, Microsoft Office Suite, Photoshop, Salesforce, Digital Media

**Skills:** Data Management, Research and Analysis, Problem Solving, Facilitation, Written and Oral Communication, Interpersonal Skills, Adaptability

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**AUSTIN ESTES**  
717 11<sup>th</sup> Street NE | Washington, D.C. 20002  
austinjamesestes@gmail.com | 321.243.4013

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**PROFESSIONAL  
REFERENCES**

**Dr. Anita Drever**, Senior Director of Learning and Evaluation, Flamboyant Foundation

- (Please notify me before contacting)
- *Relationship*: Anita supervised me in the Data Analyst role at Flamboyant Foundation from December, 2014 to present
- *Phone*: (202) 315-2410
- *Email*: adrever@flamboyantfoundation.org

**Dean Vicky Wilkins**, Senior Associate Dean, American University

- *Relationship*: I worked closely with Dean Wilkins when I served as the Communications Director for the School of Public Affairs graduate student council
- *Phone*: (202) 885-6443
- *Email*: vwilkins@american.edu

**Kaitlin Pennington**, Education Policy Analyst, Bellwether Education

- *Relationship*: I worked under Kate at Young Education Professionals-DC from September, 2014 to August, 2015 and assumed her role as VP of Communication and Outreach when she stepped down in August, 2015
  - *Phone*: (202) 579-7472
  - *Email*: kaitlin.pennington@gmail.com
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**SARALY  
REQUIREMENTS \$52,000-\$55,000**



**Position Title:** Policy Associate

### **Primary Responsibilities**

Advance CTE: State Leaders Connecting Learning to Work is seeking a Policy Associate to help advance the organization's state and federal policy priorities and initiatives. The ideal candidate will have policy experience, a desire to go deep within a focused policy area, and be a team player committed to getting results in a fast-paced environment. This position provides a unique opportunity to conduct key research and develop resources leveraged by state leaders, national partners and other key stakeholders to help ensure all students have access to high-quality CTE and preparation for the careers of their choice.

### **About Advance CTE**

Advance CTE supports an innovative Career Technical Education (CTE) system that prepares individuals to succeed in education and their careers and poises the United States to flourish in a global, dynamic economy through leadership, advocacy and partnerships. Established in 1920, Advance CTE is the longest-standing CTE-focused national non-profit, representing State Directors and state leaders responsible for secondary, postsecondary, and adult CTE across all 50 states and U.S. territories. For more information, see [www.careertech.org](http://www.careertech.org)

### **Job Responsibilities**

The Policy Associate, who will report to State Policy Manager, will:

- ✓ Directly support and advance Advance CTE's state policy and implementation strategy
  - Develop and maintain the New Skills for Youth Resource Center, a curated web-based collection of best practices, resources and policies
  - Track the adoption and implementation of state and federal legislation, policies and practices that impact CTE within and across states
  - Develop resources, such as briefs, case studies, talking points or fact sheets, that support the adoption and implementation of high-quality CTE state and federal policies and programs
- ✓ Member Engagement
  - Respond to member requests for policy-based research and analyses
  - Coordinate with other staff to produce newsletters, blog updates, research briefs, legislative briefing papers, analyses, social media/web content, presentations, articles, etc. to ensure the Advance CTE membership is up-to-date on relevant research that impacts or effects CTE
  - Attend and support Advance CTE committees and conferences
- ✓ Outreach & Engagement
  - Develop an ongoing understanding of the CTE environment and the role of Advance CTE in serving the CTE community
  - Develop, maintain and grow partnerships with national organizations in support of Advance CTE's policy initiatives

**Qualifications & Skills**

- ✓ Bachelor's degree or equivalent with focus on public policy, public administration, or education plus three years of related experience (or relevant Master's degree) with familiarity of education policy.
- ✓ Ability to develop and maintain positive relationships with a wide variety of people, including but not limited to, board members, staff, government officials, state directors, key stakeholders, community partners
- ✓ Ability to think critically, use good problem solving judgment, and take complex ideas and present them in a style for a layperson's understanding
- ✓ Ability to work independently, accurately and meet deadlines and simultaneously manage multiple projects/tasks
- ✓ Excellent English language oral and written communication skills, proficiency in spelling, punctuation, citations, footnoting, grammar and content; including public speaking with a style appropriate to the audience
- ✓ Ability to handle confidential and sensitive information with discretion
- ✓ Knowledgeable of standard office equipment, as well as proficient with computer software programs, such as Word, Excel, PowerPoint
- ✓ Hold a valid driver's license within the commuting areas, have access to a reliable car with current insurance or access to a reliable/flexible transportation source

Compensation depends on experience and is highly competitive.

**How to apply**

Please send a cover letter, resume, two writing samples, and reference and salary history to [careers@careertech.org](mailto:careers@careertech.org) by February 23, 2016.

**ADAVANCE CTE  
BOARD OF DIRECTORS  
FY 15-16**

**Advance CTE President**

Mr. Rod Duckworth  
Chancellor  
Division of Career and Adult Education  
Florida Department of Education  
325 West Gaines Street, Suite 744  
Tallahassee, FL 32399-0400  
Phone: 850-245-9047  
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Email: rod.duckworth@fldoe.org

**Advance CTE Vice President**

Ms. Jo Anne Honeycutt  
Director, Career and Technical Education  
North Carolina Department of Public  
Instruction  
6361 Mail Service Center  
Raleigh, NC 27699-6361  
Phone: 919-807-3764  
Fax: 919-807-3899  
Email: joanne.honeycutt@dpi.nc.gov

**Advance CTE Secretary / Treasurer**

Dr. Pradeep Kotamraju  
Director, Career and Technical Education  
Bureau Chief  
Division of Community Colleges  
Iowa Department of Education  
400 East 14th Avenue  
Grimes State Office Building  
Des Moines, IA 50319  
Phone: 515-281-4716  
Fax: 515-242-5988  
Email: pradeep.kotamraju@iowa.gov

**Advance CTE Past President**

Ms. Marie Barry  
Director  
Office of Career and Technical Education  
New Jersey Department of Education  
100 Riverview Plaza  
P.O. Box 500  
Trenton, NJ 08625  
Phone: 609-633-0665  
Fax: 609-984-5347  
Email: marie.barry@doe.state.nj.us

Ms. Vanessa Cooley  
State Career and Technical Education  
Administrator  
Rhode Island Department of Education  
255 Westminster Street  
Providence, RI 02903  
Phone: 401-222-8438  
Fax: 401-222-2537  
Email: vanessa.cooley@ride.ri.gov  
**Region I** - Connecticut; Maine;  
Massachusetts; New Hampshire; Rhode  
Island; Vermont  
Term: July 1, 2014 – June 30, 2017

Ms. Marie Barry  
Director, Office of Career and Technical  
Education  
New Jersey Department of Education  
100 Riverview Plaza  
P.O. Box 500  
Trenton, NJ 08625  
Phone: 609-633-0665  
Fax: 609-984-5347  
Email: marie.barry@doe.state.nj.us  
**Region II** - New York; New Jersey; Puerto  
Rico; Virgin Islands  
Term: July 1, 2015 – June 30, 2018

Dr. Lee Burket  
Director, Bureau of Career and Technical  
Education  
Pennsylvania Department of Education  
333 Market Street 11<sup>th</sup> Floor  
Harrisburg, PA 17126  
Phone: 717-787-5530  
Fax: 717-783-6672  
Email: lburket@pa.gov  
**Region III** - Delaware; District of  
Columbia; Maryland; Pennsylvania;  
Virginia; West Virginia  
Term: July 1, 2014 – June 30, 2017

Ms. Jean Massey  
Associate Superintendent  
Mississippi Department of Education  
Office of Vocational and Workforce  
Development  
359 North West Street, PO Box 771  
Jackson, MS 39205  
Phone: 601-359-3090  
Fax: 601-359-6619  
Email: jmassey@mde.k12.ms.us  
**Region IV** - Alabama; Florida; Georgia;  
Kentucky; Mississippi; North Carolina;  
South Carolina; Tennessee  
Term: July 1, 2013– June 30, 2016

Ms. Kathleen Cullen  
Provost and Vice President of Student  
Success  
Wisconsin Technical College System  
4622 University Avenue, PO Box 7874  
Madison, WI 53707-7874  
Phone: 608-266-9399  
Fax: 608-266-1285  
Email: Kathleen.cullen@wtcsystem.edu  
**Region V** - Illinois; Indiana; Minnesota;  
Michigan; Ohio; Wisconsin  
Term: July 1, 2013 – June 30, 2016

Mr. Eric Spencer  
State CTE Director  
College and Career Readiness Bureau  
New Mexico Public Education Department  
120 South Federal Place, Room 207  
Mailing; 300 Don Gaspar  
Santa Fe, NM 87501  
Phone: 505-827-1808  
Fax: 505-827-1820  
Email: eric.spencer@state.nm.us  
**Region VI** - Texas; Arkansas; Louisiana;  
Oklahoma; New Mexico  
Term: July 1, 2014 – June 30, 2017

Mr. Richard Katt  
State CTE Director  
Career Education  
Nebraska Department of Education  
301 Centennial Mall South  
Lincoln, NE 68509  
Phone: 402-471-4808  
Fax: 402-471-2545  
Email: rich.katt@nebraska.gov  
**Region VII** - Iowa; Kansas; Missouri;  
Nebraska  
Term: July 1, 2015– June 30, 2018

Mr. Wayne Kutzer  
State CTE Director  
Department of Career and Technical  
Education  
600 East Boulevard Avenue  
Bismarck, ND 58505  
Phone: 701-328-2259  
Fax: 701-328-1255  
Email: wkutzer@nd.gov  
**Region VIII** - Colorado; Utah; North  
Dakota; Montana; South Dakota; Wyoming  
Term: July 1, 2013– June 30, 2016

Mr. Mike Raponi  
State CTE Director  
Nevada Department of Education  
Office of Career Technical & Adult  
Education  
755 N. Roop Street Suite 201  
Carson City, NV 89701  
Phone: 775-687-7283  
Fax: 775-687-8636  
Email: mraponi@doe.nv.gov  
**Region IX** - Arizona; California; Nevada  
Term: July 1, 2015 – June 30, 2018

Ms. Eleni Papadakis  
Executive Director  
Workforce Training & Education  
Coordinating Board  
P.O. Box 43105  
Olympia, WA 98504  
Phone: 360-753-5662  
Fax: 360-586-5862  
Email: epapadakis@wtb.wa.gov  
**Region X** – Alaska; Idaho; Oregon;  
Washington  
**Term:** July 1, 2015 – June 30, 2018

Ms. Bernadette Howard  
State CTE Director  
Career and Technical Education  
University of Hawaii  
Lower Campus Road  
Lunalilo Portable 1  
Honolulu, HI 96822-2849  
Phone: 808-956-4791  
Fax: 808-956-9096  
Email: mbhoward@hawaii.edu  
**Region XI** - Hawaii; Commonwealth of  
Northern Marianas; Federated States of  
Micronesia; Republic of the Marshall  
Islands; Republic of Palau; Guam;  
American Samoa  
**Term:** July 1, 2014 – June 30, 2017

Dr. Sheila K. Ruhland  
President  
Tacoma Community College  
6501 S. 19<sup>th</sup> Street  
Tacoma, WA 98466  
Phone: 253-566-5100  
Fax: 253-566-5100  
Email: sruhland@tacomacc.edu  
**Associate Member Representative**  
**Term:** July 1, 2014 – June 30, 2017

Advance CTE  
Board of Directors' Meeting  
**MINUTES**  
April 14, 2016 – 4 – 5 p.m. ET  
Conference Call

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**Attendees:** Vanessa Cooley, Mike Raponi, Eleni Papadakis, Jo Anne Honeycutt, Rich Katt, Kathy Cullen, Rod Duckworth, Sheila Ruhland, Pradeep Kotamraju, Eric Spencer, Wayne Kutzer, Lee Burket

**Absent:** Marie Barry, Jean Massey, Bernadette Howard

**Staff:** Kimberly Green, Karen Hornberger, Kate Kreamer

**Welcome and Overview of Agenda:** Kreamer welcomed the Advance CTE Board and noted that we would be holding all votes for an electronic ballot.

**Review Board Minutes:** Duckworth presented the minutes from the February 21, 2016 Board retreat. No discussion.

**Extension of the State Team Membership Pilot:** Kreamer shared that last April 2015, the Board approved a one-year pilot to invite all State CTE Director counterparts to the Summit, and then extended an associate state-level membership to them for the rest of the fiscal year. Kreamer stated that as FY17 dues are being collected, we have been asked whether this pilot would continue or not. The Board had begun early discussions about a potential team-based membership structure, although no formal proposals had been made. Kreamer stated that since the extension of the pilot has implications for invoicing and budgeting for FY17, a decision needs to be made on this pilot one way or another. Based on direction from the Executive Committee, staff is proposing the following:

*Extend the state team membership pilot for one more year, providing complimentary membership to one additional state-level leader representing a different sector of education/workforce development than the formal State Director, as identified by the State Director. This would be transferable in the event of the counterpart leaving his/her position and being replaced by a new leader. In a case where there is no counterpart, the State Director may select another state-level leader.*

Burket asked a question regarding the lost revenue of \$75 per “counterpart” member and if that will have any effect on our budget. Green shared that prior to the pilot, very “counterparts” were members. And the maximum potential loss would be near \$4,000 (if every state and territory were to have had a paying counterpart and took advantage of the waiver of the membership fee). The pilot was aimed to reflect the organization’s commitment to having a secondary and postsecondary (and workforce development) leadership engaged in the Summit and the organization, and to gather information to guide a more formal membership policy going forward. Green asked Hornberger to share the cost of the pilot for the summit.

*Note: There were 14 paying state-level associate members who took advantage of the complimentary membership, resulting in a loss of \$1050. In addition, nine additional states added new members in this category.*

Green continued that with counterparts participating in our organization, we heard from many of them how much they appreciated the direct invite to the Summit and resources they have been receiving as a result of their membership. Also, given the new organizational brand, there is an opportunity to build a stronger relationship between State Directors, counterparts and the organization through the extension of the pilot. Finally, with the increased attention to collaboration and coordination through federal policy, there is value in promoting collaboration in various ways that we can. No further discussion on this topic.

**A Shared Vision for the Future of CTE:** Kreamer thanked everyone who sent back feedback. The draft vision has gone through a full round of revisions based on input from our six co-convening organizations (ACTE, NGA, CCSSO, NASBE, National Skills Coalition, and the U.S. Chamber of Commerce's Foundation). The document still needs to be finalized, so what is being asked of the Board today is to approve the overall content but allow the staff to make final copy edits. Kreamer posed two questions: does this document push us far enough and does it reflect the discussions and outcomes of the Summit?

The majority of the Board agreed that the draft reflects and captures the spirit of the Summit and that it does push the field of CTE. It was also stated that the vision is taking us in the right direction, it is bold and that the framing is done well, positioning all of these groups to work together. A few Board member stated that the vision could cause some discomfort, which is a good thing in terms of how far it will push the community.

It was stated by a couple of Board members that the beginning of the document felt a little negative but it was very reflective of the Summit. There was also a concern regarding the workforce contingent at the Summit and wanting to make sure their voices were reflected in this document. Kreamer stated that the document does focus on the learner, which did lead to less of a focus on the workforce perspective. She stated that we would need to work with employers and the workforce development stakeholders to help implement the work called for by the vision. Kreamer noted that we are planning to put final touches on the document, so if there are any places in this document where we can strengthen the workforce perspective, please let us know.

Kreamer stated that with no further questions staff would send out the electronic ballot to secure Board approval of the vision. No further comments were made.

Duckworth thanked everyone for their input, time and engagement.

Meeting adjourned 5 p.m. ET

***Advance CTE Board of Directors April 14, 2016 Electronic Ballot Results***

***Quorum present:*** 12 of 15 attended the **April 14, 2016** conference call meeting

***Question to vote on:*** Approval of February 21, 2016 Advance CTE/Center to Advance CTE Board meeting minutes

***Vote counts:*** (vote by electronic ballot)

- 14 yes
- 1 abstain
- 0 no

***Question to vote on:*** Approval of One-Year Extension of State Team Membership Pilot.

***Vote counts:*** (vote by electronic ballot)

- 15 yes
- 0 abstain
- 0 no

***Question to vote on:*** Approval of New Shared Vision for CTE with staff being given the authority to amend the document for clarity and copy editing

***Vote counts:*** (vote by electronic ballot)

- 15 yes
- 0 abstain
- 0 no



## ACTE Collaboration Update

*Report submitted by Kate Kreamer, Deputy Executive Director*

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Since 2014, Advance CTE and ACTE have collaborated on a joint work plan to enable more intentional coordination and identify new partnership opportunities. ACTE and Advance CTE put the work plan into a Google Drive document, allowing it to be a “living document,” reviewed regularly by each organization. Our leadership have quarterly calls scheduled to discuss it, make key updates and strategize next steps.

The work plan helped facilitate a number of successful collaborations in the past two years, such as monthly calls between ACTE’s and Advance CTE’s policy teams and communications teams, the development of an MOU that formally integrated the National Career Clusters® Institute into CareerTech VISION starting in 2015, and joint legislative language in support of Perkins.

Below is a summary of our work plan, identifying work already in process or completed (green), still in the planning phase (yellow), and on hold or still to be discussed formally (red).

<i>Collaboration</i>	<i>Status</i>
<b><i>Advocacy/policy</i></b>	
<ul style="list-style-type: none"> <li>Policy/advocacy staff hold monthly calls to discuss collaboration on engagement of Congressional offices, including Hill visits and school visits; draft language for Perkins; aligned recommendations on other major federal legislation; coordination and support for CTE Caucuses; and other efforts and projects.</li> <li>Submitted jointly-developed Perkins language to key Congressional offices</li> <li>Co-develop and release the annual <i>Year in Review</i> on state CTE policy</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>While each organization may initiate separate projects, Advance CTE and ACTE continue work to coordinate and work toward a common and public understanding of what “high-quality” CTE is to inform Perkins reauthorization, professional development activities and other initiatives.</li> <li>Advance CTE was involved in work led by ACTE and Central Regional Education Laboratory (REL Central)</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>Advance CTE and ACTE served as co-conveners for the Future of CTE Summit</li> <li>ACTE and Advance CTE have both signed onto the <i>Putting Learner Success First: A Shared Vision for the Future of CTE</i> and will be collaborating on the release of the vision, as well as supplemental resources over the Summer 2016.</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>Coordinate on activities to better engage the business community in advocating for CTE (e.g., business letter in support of Perkins)</li> <li>Coordinate on a campaign to increase congressional visits to see CTE programs.</li> </ul>	On hold until reauth.
<ul style="list-style-type: none"> <li>Revision of CTE Monthly to strengthen the design and dissemination of the monthly newsletter sent to Congressional offices</li> </ul>	Planned 2016
<b><i>Communications</i></b>	
<ul style="list-style-type: none"> <li>Communications staff hold monthly calls to discuss opportunities for collaboration as well as cross-organizational promotions</li> </ul>	Ongoing

<ul style="list-style-type: none"> <li>Proactively plan strategy for Advance CTE to better support annual CTE month</li> <li>Jointly develop a press engagement strategy for promoting federal policy work (e.g., joint press statements, budget requests, etc.) and at least one joint op-ed (still planned)</li> </ul>	In process
<b><i>Meetings &amp; Conferences</i></b>	
<ul style="list-style-type: none"> <li>Hosted first CareerTech VISION conference with National Career Clusters® Institute fully integrated through formal MOU.</li> <li>Planning is well underway for the 2016 VISION conference. Career Clusters will still maintain a strand, but efforts are being made to more fully integrate the content</li> <li>ACTE built Advance CTE into Core Curriculum grant/workplan</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>MOU with Advance CTE, CORD &amp; ACTE on Career Pathways Effect workshops, which is being updated and expanded to include CPE workshops at other ACTE events (i.e., Best Practices conference, etc.)</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>Engage states hosting regional ACTE conferences about ways we can jointly support them (e.g., range of themes, speaker bank, common resources, etc.). Explore possibility of each region focusing on specific issues.</li> </ul>	TBD
<b><i>Leadership Development</i></b>	
<ul style="list-style-type: none"> <li>Advance CTE surveyed State Directors and ACTE surveyed their state leadership to determine the relationship between each State CTE Director and their ACTE chapter, from both perspectives (<i>See below</i>)</li> <li>Based on survey of State Directors and ACTE leaders, develop resources to support collaboration</li> </ul>	In process
<b><i>Resources</i></b>	
<ul style="list-style-type: none"> <li>Share a regularly updated calendar of publications and webinars</li> <li>Advance CTE supports/provides content for Techniques</li> <li>Partner on Global Competency &amp; CTE paper, webinar and toolkit (with Asia Society)</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>Begin series from the ACTE president in Advance CTE blog</li> </ul>	Plan
<b><i>Organizational Leadership – Coordination</i></b>	
<ul style="list-style-type: none"> <li>Serve as liaisons on each other Boards</li> <li>Provide free registrations to organizations’ meetings</li> <li>Board members each automatically receive membership to other Association</li> <li>Quarterly meetings between Kim, Kate, LeAnn &amp; Steve</li> <li>Host annual Joint ACTE-Advance CTE Executive Committee meeting</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>Formally compare strategic plans to determine overlap, leverage points and gaps</li> <li>Jointly pursue grant money/funding to support new initiatives through mutual discussion and agreement on strategic targets related to funding and projects.</li> </ul>	Plan

## OVERVIEW OF JOINT SURVEY OF STATE CTE DIRECTORS AND STATE ACTE LEADERS

This past fall, ACTE and Advance CTE worked together on the design of a survey, which each organization sent to its members to better understand the existing and potential areas of collaboration between State CTE Directors and ACTE state leadership. Below is a high-level overview of the findings from this survey, which may be used to develop resources and activities to elevate effective in-state partnerships and facilitate more collaboration where gaps may occur.

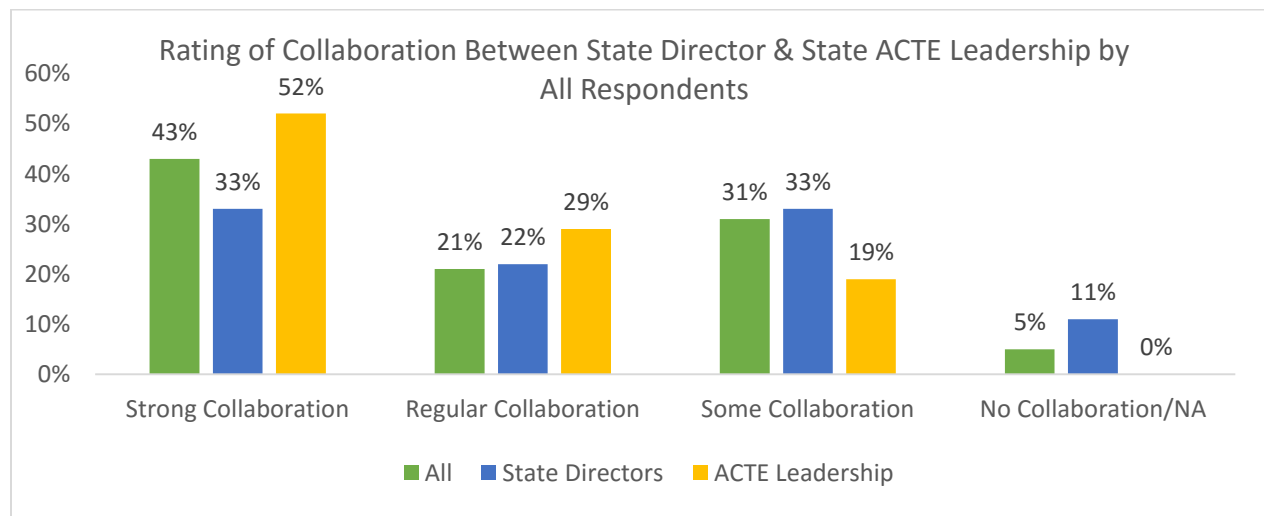
Survey Participation			
Both (20)	ACTE Leadership (11)	State Directors (7)	No Response (13)
Alaska, Arizona, Arkansas, Colorado, Illinois, Indiana, Iowa, Kansas, Kentucky, Mississippi, Missouri, Nebraska, Nevada, New Jersey, New Mexico, North Carolina, Ohio, Oregon, West Virginia, Wyoming	California, Georgia, Massachusetts, Montana, South Carolina, South Dakota, Texas, Utah, Virginia, Washington, Wisconsin	Florida, Maine, Maryland, Michigan, New York, Vermont, Virgin Islands	Alabama, Connecticut, Delaware, Hawaii, Idaho, Louisiana, Minnesota, New Hampshire, North Dakota, Oklahoma, Pennsylvania, Rhode Island, Tennessee

### State CTE Director and ACTE Leadership Collaboration

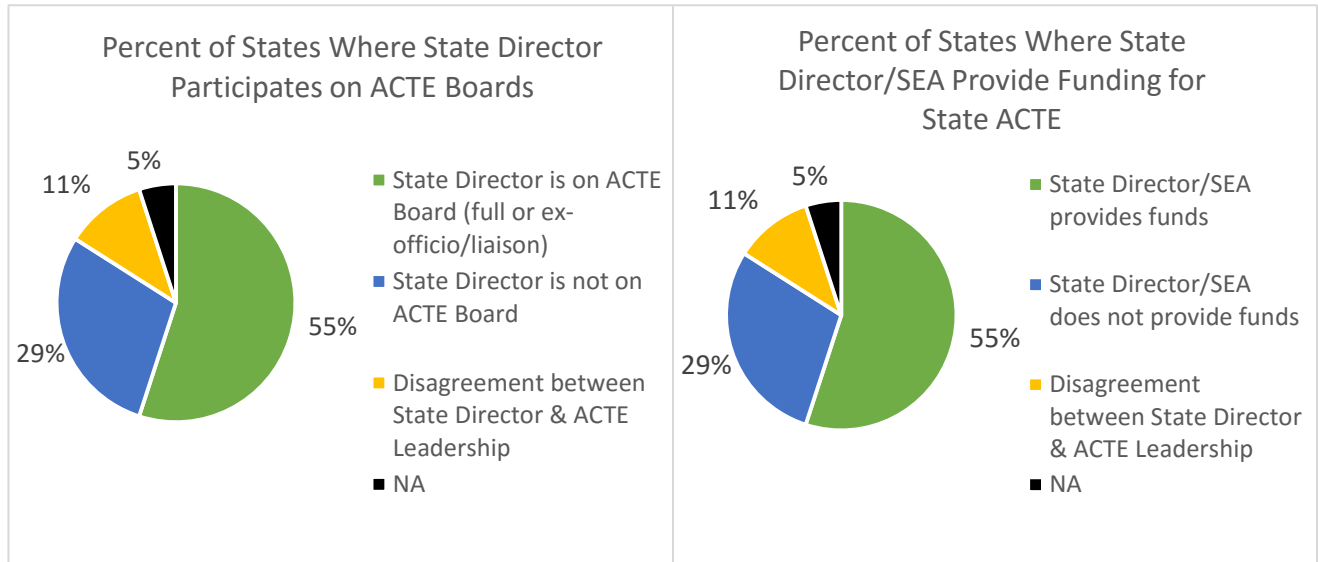
There is general agreement among both State CTE Directors and state ACTE leadership that there is solid in-state collaboration, with 64 percent of respondents categorizing the collaboration as “strong” or “regular” and only three states citing no collaborating, including two states with no active ACTE chapters. Among the 20 states with responses from both State Directors and ACTE leadership, two-thirds agreed on the level of collaboration, with only slight differences of opinion from the remaining third of states.

Some common types of collaboration state leaders cited include:

- Planning statewide CTE conferences and/or other professional development activities;
- Engagement on ACTE board; and
- Coordination around legislative priorities.

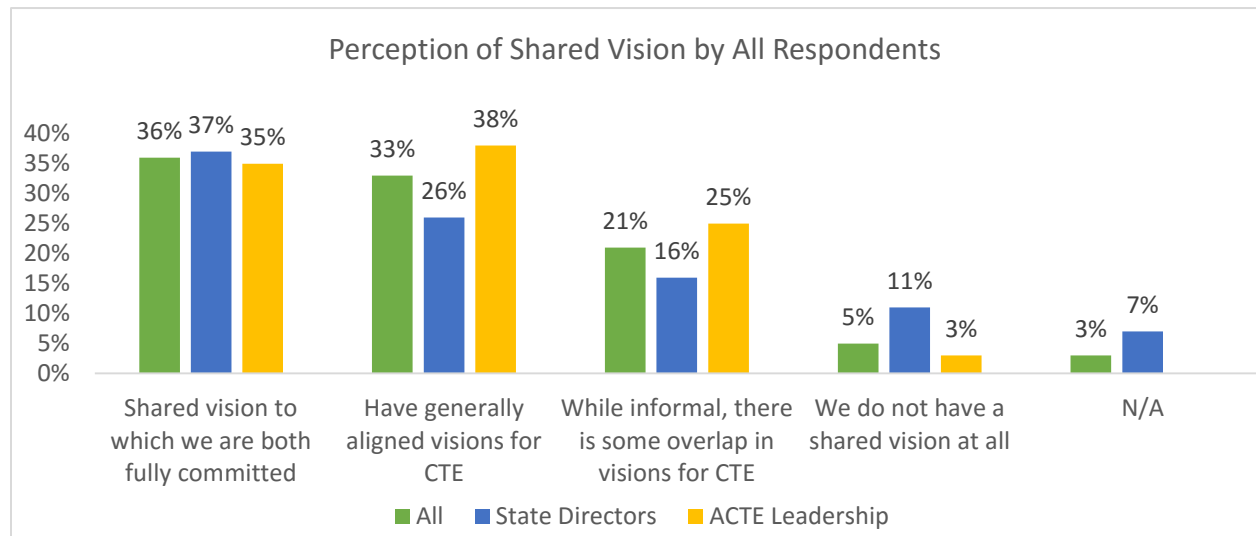


In terms of specific types of collaboration, over half of State Directors (or proxies) participate on their ACTE Boards, as a full voting member, an ex-officio member or liaison. And, the majority of State Education Agencies (SEAs), or the other state agency responsible for overseeing CTE, provide financial resources to support state ACTE activities, ranging from conference support, grant funds to support local initiatives, state employee dues or subsidizing other professional development activities.



### Shared Vision

Critically, a third of states have a shared vision for CTE, while the vast majority of states without a shared vision across ACTE and the SEA still find common ground in their goals for CTE.

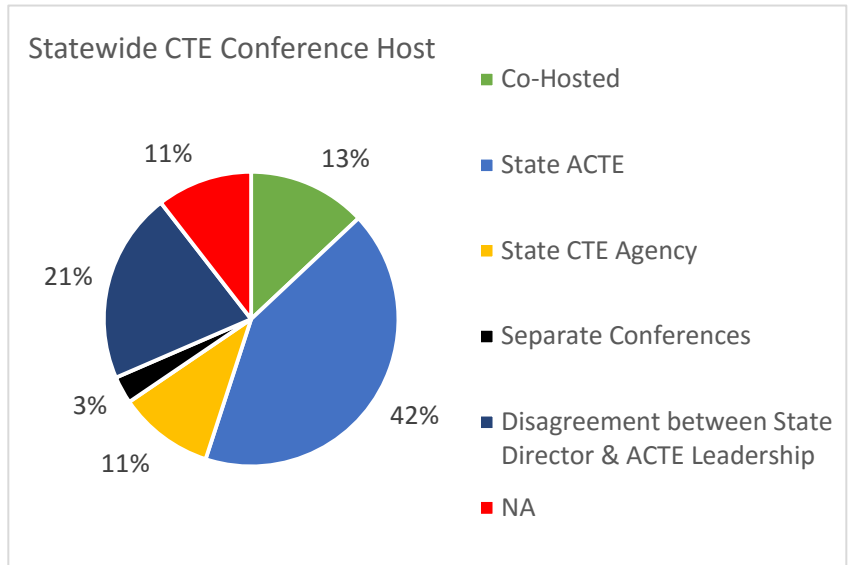


Leaders from 11 of the 20 states with survey responses from both the State Director and ACTE leadership had different perspectives on whether they share a common vision for CTE – either formally or informally. In half of these states, one side of leadership believes there is a shared vision, while the other leader disagrees, with slight differences of opinion from the remaining states.

### Statewide CTE Conferences

It is very common for state ACTE chapters and the State Director/SEA (or relevant state agency overseeing CTE) to collaborate on statewide CTE conferences. Even in those states where ACTE is the official host, State Directors are engaged regularly in the development of content, securing of speakers and providing financial support.

However, in about a fifth of responding states, there is confusion over the formality of the relationship between the ACTE chapter and State Director/SEA. In eight of the 20 states with responses from both the state ACTE leadership and State Director, different answers were given to the question of who hosts the statewide CTE conference. In nearly all of the states, both organizations were involved in the conference, but the perception of who the formal “host” was varied.



### Ideas for Strengthening Partnership

When asked for ways in which State Directors and state ACTE leadership could strengthen their relationship, a few common themes emerged:

- *Communication:* Those states with well-aligned visions and activities cited regular communication as key to their collaboration; similarly those looking to deepen their collaboration also identified communication and regular engagement, through meetings, participation on the ACTE board and other strategies as critical.
- *Joint Activities:* Beyond conferences, State Directors and ACTE leaders can collaborate on joint statements and appearances, regional meetings and other professional development opportunities, and the collection and recognition of best practices and quality.
- *Postsecondary focus:* Some State Directors, including those within non-SEA, noted their state ACTE chapters should do more to engage postsecondary educators and administrators.

## **Advance CTE Regional Election Results**

*Report prepared by Karen Hornberger, Finance and Office Manager*

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Following the bylaws and Board policies, the staff conducted the elections for regional representatives to the Advance CTE Board of Directors. The process involved an initial announcement and solicitation for nominations in February 2016; electronic ballots distributed on March 29<sup>th</sup> with votes due by April 8<sup>th</sup>.

The following are the election results, to be announced at the Advance CTE Business Meeting on May 23, 2016. Until then, results are confidential. These Board terms will begin July 1, 2016 and end on June 30, 2019.

**Region IV** - Alabama; Florida; Georgia; Kentucky; Mississippi; North Carolina; South Carolina; Tennessee

Phil Cleveland of Alabama was elected

**Region V** - Illinois; Indiana; Minnesota; Michigan; Ohio; Wisconsin

Kathy Cullen of Wisconsin was re-elected

**Region VIII** - Colorado; Utah; North Dakota; Montana; South Dakota; Wyoming

Thalea Longhurst of Utah was elected

## **FY 2017 Advocacy Plan & Strategy**

### **Advocacy Plan:**

Advance CTE will continue to advocate for CTE within the context of all major pieces of federal legislation and regulation. With Congressional interest in renewing the Perkins Act piqued in this Congress, staff will be focusing its primary efforts on this process. Components of this year's advocacy plan are being implemented in various capacities in conjunction with other organizational initiatives to support these efforts.

Advance CTE's close working relationship related to federal policy with ACTE will be leveraged more strongly than in past years in an effort to present a unified front from the CTE community for the purposes of Perkins reauthorization. Our organizations continue to hold cross organizational policy calls to share information learned during the weeks prior, plan outreach strategies and legislative projects moving forward, provide updates on internal organizational developments, and negotiate joint policy positions on various issues of interest to Advance CTE. This relationship has deepened considerably since the beginning of the 2016 calendar year and the scope and breadth of these activities will wax and wane in relation to Congressional progress to renew the Perkins Act for the above reasons.

### **Congressional Meetings**

We will continue our direct lobbying efforts on Capitol Hill in both the House and the Senate. Primary attention will be paid to the education committees in both the House (HEW) and the Senate (HELP) where Perkins reauthorization is being considered. Given the most recent budget agreement reached in late 2015, Advance CTE's lobbying efforts related to federal funding for the Perkins Act will center on the principal offices represented in each Chamber's Budget and Appropriations Committee. Our appropriations coalition— the Committee for Education Funding (CEF)— will continue to be our primary way to engage in high-level advocacy work on the main federal budget function which funds the Perkins Act (Labor-HHS-ED).

Since the last convening of the Advance CTE Board of Directors in February, staff have had many meetings with Congressional offices on both of these topics. These meetings have several broad goals (please note that this list is not exhaustive):

- Support the reauthorization of the Carl D. Perkins Career and Technical Education Act using specific recommended legislative language based on current Board-approved Perkins recommendations
- Implementation of Advance CTE's Board-approved legislative recommendations for related legislation such as ESEA, HEA, WIOA etc.
- To support the planning, coordination, and execution of Congressional events in support of CTE, primarily Congressional CTE Caucus events

- To advocate for a robust federal investment in the Perkins basic state grant program and for stronger investments in the overall Labor-HHS-ED budget function (as mentioned above in coordination with our work with CEF)

Meetings have been and will continue to be bicameral and with both political parties. In light of the Republican majorities in both Chambers, particular attention has been paid to cultivating relationships with these offices. Where appropriate, Advance CTE will continue to connect State Directors with Senate offices and to a lesser extent House offices.

The current Presidential election, which will likely result in different party majorities in one or both of the Congressional chambers next year, will likely shift this focus in calendar year 2017. Advance CTE anticipates Congressional Republicans to pursue a legislative agenda related to Perkins throughout this election cycle and thus the short-term focus will continue to be on the Republican Majorities in both the House and the Senate. However, our longer-term strategy will be to pivot towards possible Democratic majorities in the next Congress. Such a change will alleviate current difficulties in securing additional funding for the Perkins Act, but will also present a new set of priorities (and possible challenges) from a newly empowered majority.

### **Appropriations Levels**

Advance CTE has been urging Congress and the Obama Administration to fund the Perkins Act at “pre-sequester” levels in FY 2017. Currently, Perkins funding is \$5.4 million below what it was receiving prior to the enactment of the Budget Control Act (i.e. sequestration). Given the extreme partisanship and strong opposition to any increases to most non-defense discretionary programs from the current Republican Congressional majorities, our request has reflected these basic political realities. In the interim, Advance CTE has ensured that its CTE Champions in both the House and the Senate echo this request in “Dear Colleague” letters being circulated this year. A record 150 lawmakers signed-on in support of these request in the first quarter of calendar year 2016.

Despite our current FY 2017 appropriations ask of pre-sequester funding levels, Advance CTE is advocating for a much larger authorization level in the context of Perkins reauthorization. Such a strategy would ensure that current funding levels for Perkins are not “locked-in” in subsequent years. Instead, decisions for specific funding levels for Perkins would be made in future federal fiscal years leaving much greater room for an increase in funding at a future date.

While the artificial budget caps have been slightly relaxed in FY 2016 and FY 2017—a major advocacy accomplishment for Advance CTE and CEF— those caps will come into force once again in FY 2018. In the long-term addressing these sequester caps will be necessary to secure additional funding for the Perkins Act in addition to the strategy outlined above.

As a supplement to this work, we have been cultivating close working relationships with USDE’s Office of Budget Services personnel. These relationships will help Advance CTE better understand the internal dynamics of the federal administration of Congressional appropriations and how that will likely impact states’ Perkins allocations and the timely availability of these resources. These relationships are an important strategy to mitigate the immediate consequences



of “Continuing Resolutions” (CRs)— short-term stop-gap legislative measures that often disrupt USDE’s ability to disburse Perkins allocations to states in a straightforward and timely manner.

### **Perkins Reauthorization**

Advance CTE remains hopeful that Congress will reauthorize the Perkins Act in calendar year 2016. Despite a number of extenuating factors that could limit Perkins’ chances of being fully reauthorized before the end of this Congress, we expect one and perhaps two full proposals from both chambers. The extent of progress on Perkins will largely be dependent on Congressional willingness to reauthorize a major federal law prior to a Presidential election and in the midst of ongoing disagreements on unrelated matters of public policy.

Nonetheless, Advance CTE staff have been intimately engaged with these parallel processes and will continue to meet with members of Congress, their staff, and other relevant policymakers to ensure the organization’s positions, recommendations, and priorities are incorporated into the wider effort to renew the Perkins Act. Following each visit to a Senate office, staff will connect the State CTE Director with relevant Senate staff as appropriate. Moreover, Advance CTE will continue to engage relevant Caucuses in each chamber to promote organizational positions and raise the visibility of the CTE enterprise more broadly.

As draft legislation potentially emerges from Congress, Advance CTE has developed a response plan and related activities to engage with the membership in conjunction with ACTE. Specific recommendations and legislative comments for Congressional staff will first be prioritized. Briefings will be scheduled for the below mentioned education group coalition to galvanize this community around common points of interest and to reinforce Advance CTE’s comments and recommendations. This is a strategy aimed at counteracting current recommendations from groups outside of the education community that have the potential to dramatically alter the nature of the Perkins Act.

Throughout all of this, Advance CTE plans to keep its membership engaged through briefing calls with several overarching goals in mind:

- To share general information about the draft legislation, process, and general outlook for the law’s renewal;
- To solicit feedback from Advance CTE members to strengthen lines of argumentation and accurately reflect members’ positions; and
- To share talking points in response to specific topic areas of importance that may or may not emerge in the draft legislation.

There will likely be a very short window for formal, public comment and Advance CTE will need to capitalize on this opportunity. Following this, Advance CTE plans to work with its membership to reinforce the organization’s Perkins recommendations to Congressional offices with influence on the Perkins reauthorization effort.

### **Legislative Language**

In conjunction with ACTE, Advance CTE formulated legislative language for the Perkins Act. This draft language is based solely on our Board-approved Perkins Act recommendations which

are attached in a separate portion of this board report. This document was finalized November 2015 when the Senate began to formally consider the law's renewal and has been the legislative position we've been advocating for since that time.

The document is a complete re-write of current law and is available on an as-requested basis. Summaries of this proposal are attached as a supplement to this report.

### **Congressional CTE Site Visits**

Advance CTE staff continue to visit exemplary CTE programs in the D.C. metropolitan area and to vet these sites as potential locations for Congressional member and staff visits. As part of this process, remains the goal of Advance CTE to get every member of Congress and / or their staff to see a CTE program as the Perkins Act reauthorization process unfolds.

We are currently supporting several such efforts in conjunction with ACTE and the Congressional CTE Caucuses on an ad hoc basis.

### **Perkins Coalition**

As Perkins reauthorization efforts progress, we plan to re-convene a Perkins Coalition group in conjunction with ACTE. The purpose of this coalition is to foster collaboration and share information relating to the Perkins Act and the reauthorization process more broadly among and between primarily education and workforce stakeholder groups. Bringing together a diverse group of CTE stakeholders, this groups meets on an as-needed basis in relation to the Congressional progress towards reauthorization.

Another overarching goal of this group is one of balancing. Given the significant interest in Perkins reauthorization from the business community, we hope to galvanize this coalition as a way to more effectively respond to proposals from the employer community that may be at odds with our organization's Perkins recommendations.

### **Perkins Briefing, Hearings and Events**

Advance CTE staff will continue to work with Congressional staff to support events and briefings promoting CTE through both Congressional CTE Caucuses. Advance CTE has already successfully supported several such events this year and will continue this work moving forward.

Although the House education committee has said they do not plan to have any additional Perkins-related hearings, we will continue to monitor the hearing process for issues of importance to CTE. In the Senate, as Perkins reauthorization picks up pace, hearings remain a possibility and Advance CTE plans to work constructively with the committee throughout that process if the opportunity arises.

### **Perkins Roundtable Group**

Advance CTE has continued to engage with a group of national employers and other associations around the reauthorization of the Perkins Act. Collectively the group has interests in closing the skills gap and promoting education and workforce development outcomes that are more aligned with needs of employers. Expertise in both the Perkins Act and CTE more generally are lacking and we have provided guidance to the group as the members craft a legislative proposal to reauthorize the law.

While consensus among all of the members of the group was not reached, our involvement helped to mitigate many potentially damaging recommendations emanating from this coalition.

Additionally, we have participated in many Hill meetings in conjunction with this group, calling for the reauthorization of the Perkins Act, stronger federal investments for the program, and three broad areas of priority for the next iteration of the law:

- Alignment of CTE programs to the needs of the regional, state, and local labor market
- Support effective and meaningful collaboration between secondary and postsecondary institutions and employers
- Increase student participation in experiential learning opportunities such as industry internships, apprenticeships and mentorships

In January, the group solicited support and later re-released a sign-on letter promoting these principles and calling for Perkins reauthorization. This year the group garnered a record 350 signatures in support— more than ever before. Moving forward the primary value proposition for Advance CTE’s continued engagement is twofold:

- To perpetuate interest and enthusiasm for Perkins reauthorization generally; and
- To stay informed and connected with a number of groups actively working on Perkins reauthorization.

## Communications Plan through June 30, 2016

*Report submitted by Katie Fitzgerald, Communications Associate*

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Advance CTE staff has worked to refine and carry out the Advance CTE communications strategic plan, with objectives and strategies in place. The following objectives were finalized in mid-February 2015. Staff has carried out plan strategies to meet communications goals and objectives and will revisit the communications strategic plan previous to the next board meeting. Plans and objectives include:

1. Raise visibility of Advance CTE as leading voice on high-quality CTE programs of study
2. Raise visibility of high-quality CTE as the most effective strategy for graduating students ready for their next steps and supporting America's global competitiveness (as articulated through Vision Paper)
3. A broader array of stakeholders are engaged around the notion and goals of high quality CTE (directly and indirectly through our members), including an emphasis on business/industry
4. CTE: Learning that works for America is a nationally-recognized campaign and brand adopted by 49 states– and Advance CTE's communications and case-making resources are aligned under this brand
5. Support the adoption, implementation and/or endorsement of Career Clusters<sup>®</sup> and/or Common Core Technical Core and/or programs of study across states
6. Support Advance CTE's federal and state policy efforts through the reinforcement of effective partnerships, publications, messaging and engagement with policymakers

Since the last board update, communications efforts have been focused on rolling out a variety of large-scale initiatives including:

- Rebranding the organization under the name Advance CTE: State Leaders Connecting Learning to Work
- Launching New Skills for Youth, the \$75 million initiative co-led with JPMorgan Chase & Co., Council of Chief State School Officers and Advance CTE
- Promoting CTE Month
- Marketing the 2016 Spring Meeting

Below is a description of the strategies and tasks accomplished with related data. Note, these strategies are based on the communications strategy, which will be updated in summer 2016 to reflect the new vision for CTE and the updated strategic plan.

1. *Leverage the website, blog, social media tools and e-blasts to maximize the reach of informational and persuasive messaging tools to engage potential partners and key stakeholders*

Tasks accomplished to date/Ongoing:

- Regular updates of the homepage slides pointing to or repurposing Advance CTE resources and information,
- Daily updates of Twitter and weekly updates of Facebook resulting in over 2,000 followers on each platform,
- Released a new e-blast series, CTEWorks Communications, for current future supporters of the CTE: Learning that works for America campaign,
- Released new e-blast series, Advance CTE Research Review, for self-selected members of the research/publications email list,
- Worked with state policy team and web developers to create a state policy/resource directory featuring Advance CTE and external resources to be launched in June,
- Maintained regularly released blog series including This Week in CTE, State Policy Updates, Getting to Know..., Inside International CTE, Legislative Updates and CTE Month, and
- Integrated a CRM system into the Advance CTE website to streamline event registration and member data management.

Tasks to be accomplished:

- Integrating social media into the website for real-time updates,
- Continue to work with partners to obtaining content from organizations and leaders in CTE diversify content and build goodwill among partners including cross promoting on blogs and sharing content on social media,
- Feature partner content on the Learning that Works Resource Directory
- Releasing monthly Friends of CTE blog posts

**Success Metrics:**

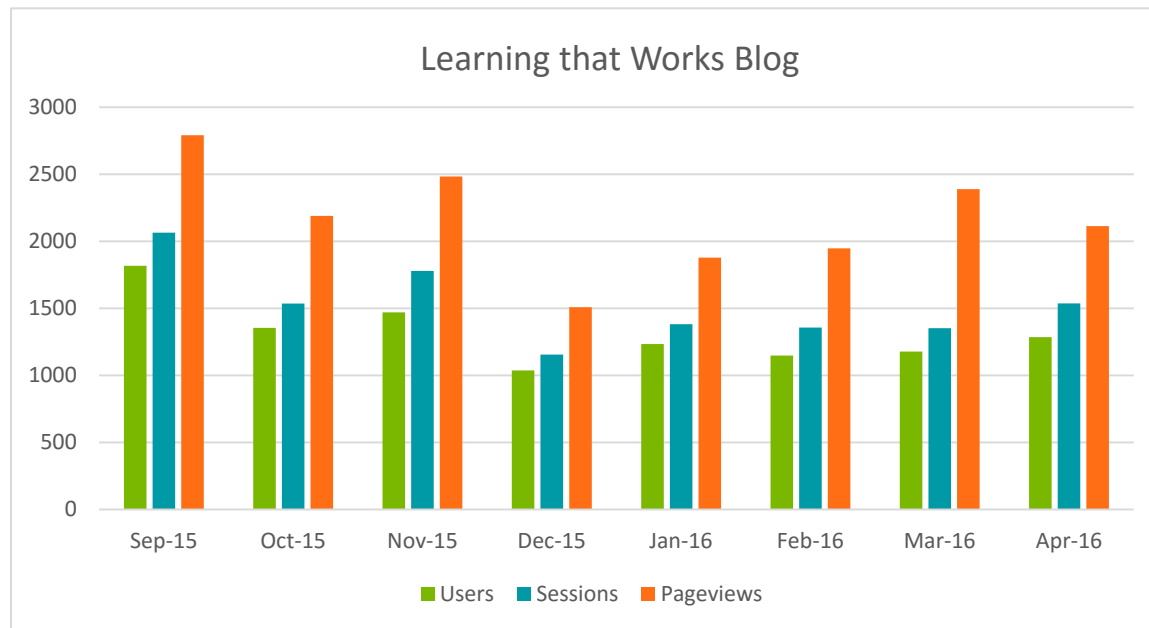
- The first CTEWorks Communications e-blast had a 26 percent open-rate and 22 percent click-through rate.
- Advance CTE Research Review e-blasts were released in September and April. September's eblast had a 26 percent open-rate and 28 percent click-through rate. April's eblast had a 30 percent open rate and a 37 percent click-through rate. While this did not meet the 35 percent benchmark, as subscribers become more familiar with the e-blasts and Advance CTE staff predicts open-rates and click-through rates will rise. (**Goal:** 35 percent open-rate and quarterly release schedule for e-blasts.)

**Learning that Works Blog and Round-Up**

The Learning that Works Blog has featured **86 posts** since the September 2015 that have highlighted events, major accomplishments and announcements such as the Advance CTE rebrand; timely state and federal policy updates; and new State CTE Directors. The blog also highlights regular series ranging from weekly (This Week in CTE) to monthly (Inside International CTE) including:

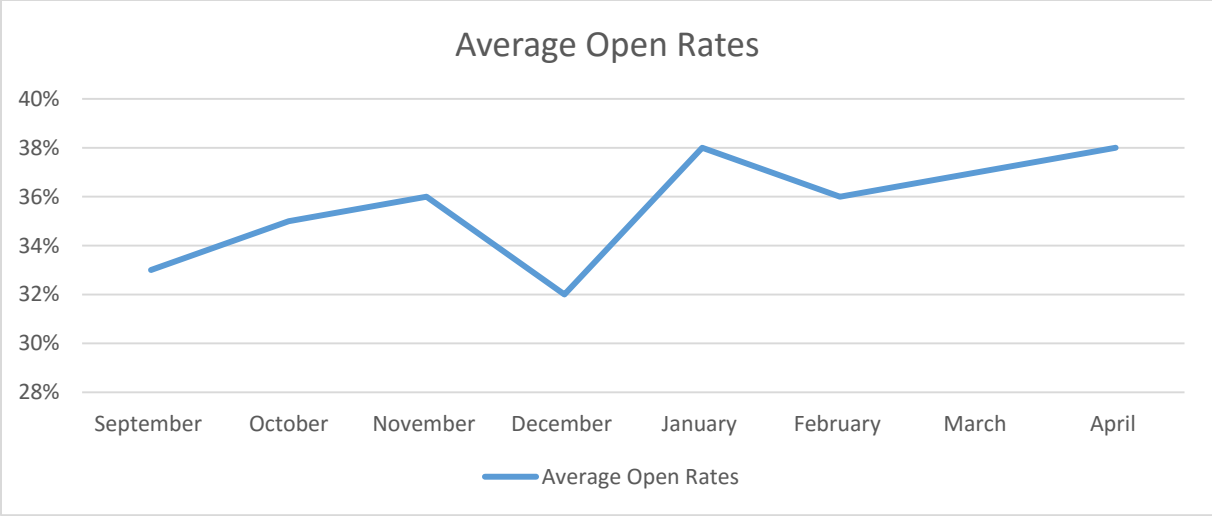
- [Legislative updates](#)
- [State policy updates](#)
- [Research reviews](#)
- [This Week in CTE](#)
- [Inside International CTE](#)
- Getting to Know...

The blog saw a general decline in visitors in December, consistent with past trends based on the holiday season. However, the blog is consistently in the range of about 1,000 users and 2,000 page views per month.



**Goal:** The effectiveness of the blog strategy is measured by analyzing the Learning that Works blog Google Analytics, including the user visits and top posts of each month, with the goal of increasing views and click-throughs to blog posts that feature major Advance CTE announcements, policy updates, events and publications.

In an effort to drive traffic to the blog, staff revamped the weekly blog round-up with a template more in line with the Member Newsletter (more information below), and featuring the blog posts of the week. The ‘Week in Review’ e-blast sent to Advance CTE members is now sent Monday morning instead of Friday afternoon, resulting in about 36 percent opens-rate.

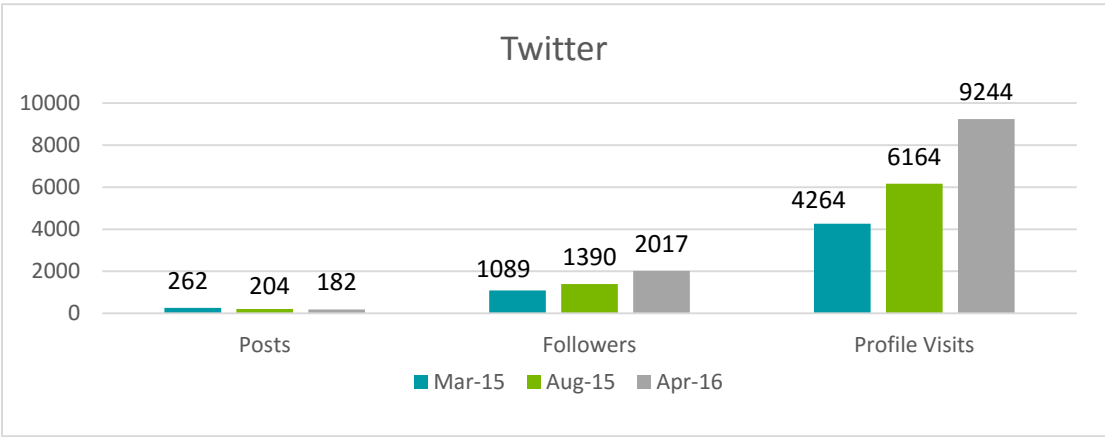


**2016 Goal:** Maintain 35 percent open-rate.

**SOCIAL MEDIA**

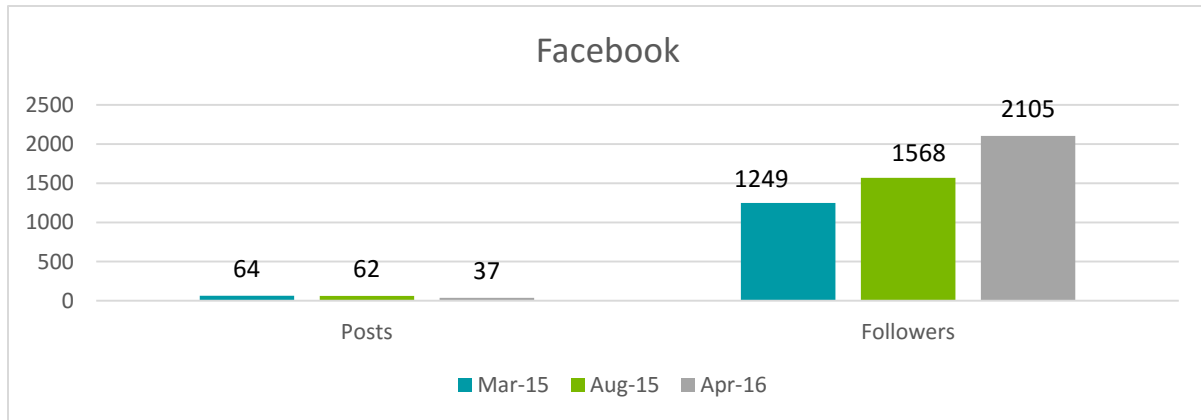
Social media engagement has steadily increased over the past six months, with significantly more followers on both Facebook and Twitter. Staff has worked on cross promotion of Facebook posts and tweets with key partners, and participated in promoting New Skills for Youth’s launch in January and CTE Month in February, resulting in an increase in engagement during those months.

@CTEWorks has gained 627 followers since the September board update, gaining an average of 78 followers per month and putting Advance CTE over 2,000 followers.



**2016 Goal:** Add 650 Twitter followers by the completion of the 2016 calendar year.

Advance CTE’s Facebook page gained 537 likes since the September board update, averaging 67 likes per month and also reaching over 2,000 followers.

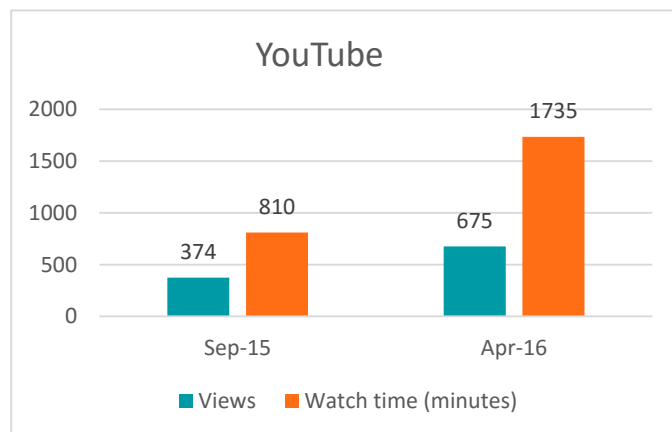


**2016 Goal:** Add 550 Facebook followers by the completion of the 2016 calendar year.

Advance CTE relaunched our YouTube page under the name CTEWorks to more closely align with social media channels. In addition to launching under a new name, the page has been updated to include a video explaining the Advance CTE Rebrand, among others. Staff will update the YouTube page with on-demand webinars and videos as they become available.

The top videos viewed during this time period are:

- [Career Pathways Effect: Overview of Career Pathways](#) (343 views),
- [NASDCTEc Rebrand](#) (104 views)
- [Reflect Transform Lead](#), (73 views) and
- [Career Pathways Effect: Programs of Study](#) (46 views).



**2016 Goal:** Update YouTube videos in a timely manner, increase views and watch times. Upload all relevant past webinars to the YouTube page.

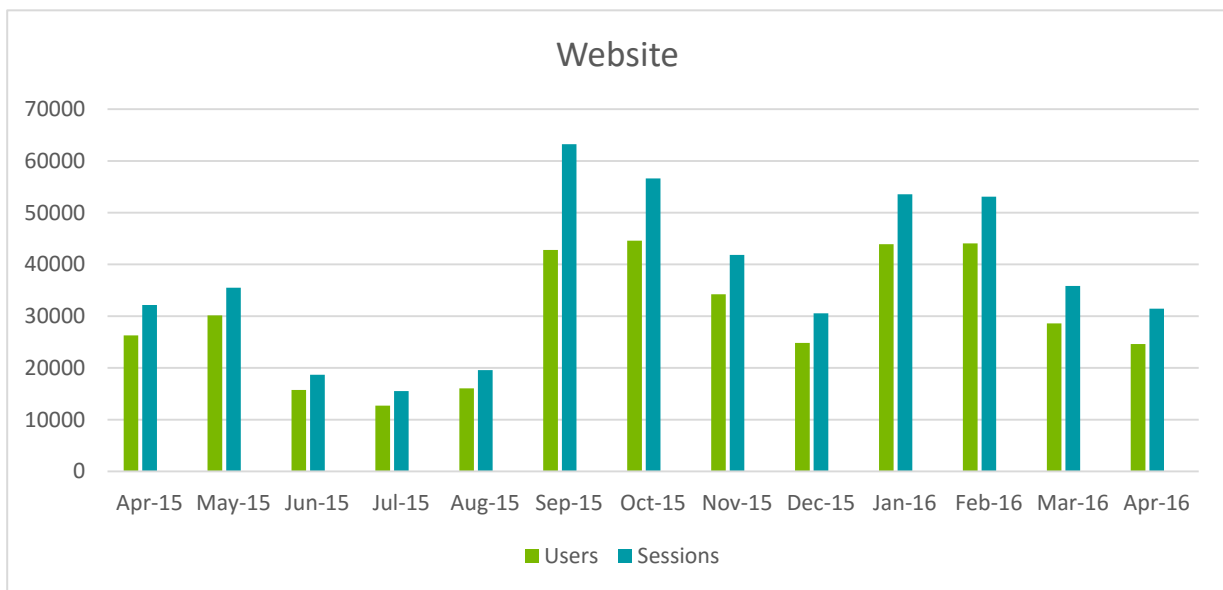
## WEBSITE

Staff has continued to update and manage all pages in a timely manner, regularly updating homepage slides, events, resources, publications, and more. Staff integrated a CRM system to better streamline event registration and membership management. Event registration was utilized for the Spring Meeting, and the internal member database will be launched in May. This will allow staff to better track new members, and aid in the development and management of a member engagement strategy.



Additionally, staff is developing the Learning that Works Resource Directory to feature Advance CTE and related CTE resources. Also, staff is developing a similar member directory to house resources and tools.

The 25,000 unique visitor goal was met in all but two months. In December, the website neared the goal with 24,844 users, and in April 24,602. December is traditionally a slow month for website visits due to the holiday season. Despite not meeting the monthly benchmark for all months, since August the website has averaged 35,816 users over the past eight months, exceeding the 25,000 goal.



***2. Engage in and maintain strong partnerships with critical education reform and business organizations, with a particular focus on those that can help amplify our federal policy agenda, our interactions with state policymakers and/or our direct impact on CTE in practice.***

Advance CTE is committed to identifying and developing national partnerships to promote CTE with related education organizations, policy organizations, federal agencies and business and industry/labor councils. There are efforts in place to continually improve upon our partnership and our reach through the education reform community such as leveraging CTE Month. Additional steps we took this year, and will continue to take are:

Tasks accomplished to date:

- Developed internal calendar of major events throughout the year (e.g., CTE Month, Teacher Appreciation Week, Manufacturing Month, etc.) so we can align our own communications (e.g., social media and This Week in CTE blog posts) with those efforts.

- Partnered on a variety of publications and webinars with partners including the Appalachia Regional Comprehensive Center, ACTE and Asia Society.
- Maintain/update our joint-work plan with ACTE to coordinate on policy, programs and communications.

Tasks to be accomplished:

- Launching and monitoring a partner calendar event to be updated quarterly,

**Success Metrics:**

- Staff monitors partner engagement and participation quarterly and reports back on partner events and announcements on a weekly basis.
- Staff is on track to complete the goal of partnering six times per year on publications and/or webinars.

**3. *Support the utilization of the CTE: Learning that works for America campaign in all states through regular revisions of resources and direct technical assistance.***

Tasks accomplished to date:

Currently 731 users have entered into the CTE: Learning that works for America® agreement compared to 707 users in August 2015.

- Revamped Learning that works for America website section to better streamline information and include new examples of best practices. Also included a new section on CTE Month with accompanying best practices and state and local examples.
- Featured the campaign heavily during CTE Month
- Released CTEWorks e-blast to campaign users on how to use the campaign in their own work.

Tasks to accomplish:

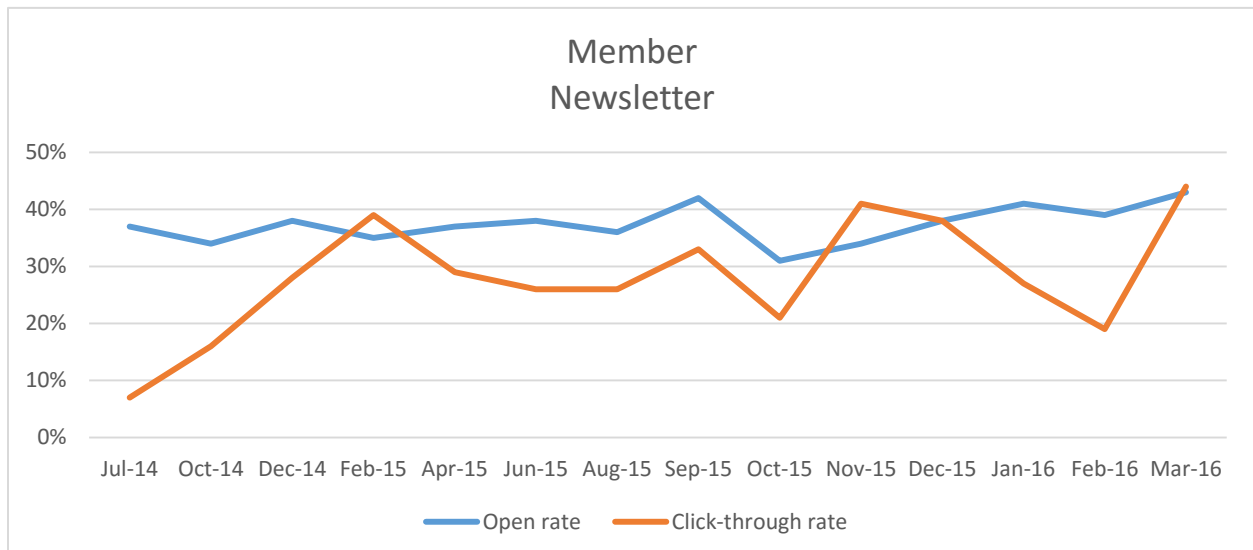
- Host standing cross-state calls where users can share lessons learned and challenges, each one featuring a state or local district that has embraced the campaign in a meaningful way. These calls should be inclusive of anyone in the state responsible for communications who may benefit from the campaign.
- Determine how new technologies can be utilized in promoting the campaign and best practices. (E.g. incorporating state/school videos on the YouTube page, etc.)
- Work with Communications Committee to update and develop new resources and materials for the campaign.
- Create process for resigning all 50 states onto the campaign due to the high turnover of State CTE Directors in the past two years.

**Success Metrics:**

- Staff will review web-based resources and refresh as needed. Staff will utilize the expertise of the Communications Committee to update resources for the campaign.
- 4. *Maintain strong and effective two-way communications channels with members to ensure they are aware of Advance CTE’s activities, resources and events and that Advance CTE is developing the research, tools and resources most needed by our members.*

Tasks accomplished to date:

- Communications Committee  
Advance CTE re-launched the Communications Committee in May 2015, and has held regular calls and e-mail communication around specific topics. The committee consists of 25 members from 15 states and a multitude of national organizations. This summer, the committee worked with staff on rebrand efforts including providing input on the name, logo, style guide and roll out plans. The committee also provided guidance on the Career Clusters product update. As we look into next year, the committee will assist in the updating CTE: Learning that works for America campaign resources and marketing the 2016 Excellence in Action awards.
- Career Cluster Product Update  
Many of the Career Clusters products had not been updated since they were created in 2010. Staff worked with the Communications Committee to refresh 17 products including the Pocket Guide and Career Cluster-specific brochures. Since the announcement of the new products at the end of February, Advance CTE has sold over \$5,500 of Career Clusters materials in two months.
- Advance CTE Member Newsletter  
Advance CTE has dramatically reformatted and redesigned the member newsletter. In December 2014 the newsletter was reformatted to provide updates of organizational events and announcements, but also provide a place to highlight member updates such as new State CTE Directors. Additionally, in August 2015 Advance CTE moved from releasing a bi-monthly newsletter to a monthly newsletter for members.



Since the adoption of this new format, there has been a steady 35–45 percent open rate, and a dramatic increase in click-through rates, which has grown from around **seven percent**, to almost **half of readers** clicking through to links to our blog and website upon adoption of the reformatted newsletter in December 2015. This shows a significant increase in engaged users since the launch of the new format. Note, in October the open and click-through rate is much lower than previous and later months. This is due to a mistake in the release and having to send the newsletter twice, once with a correction. This contributed to a non-traditional open and click-through rate inconsistent with surrounding months.

#### Tasks to accomplish:

- In addition to current resources, we will explore other mediums, such as PowerPoints, YouTube videos, talking points and additional fact sheets, to support state and local advocates for CTE to be created throughout 2016 in line with our state policy strategy and federal policy goals.
- Staff will review and update case-making materials two to three times per year. This includes fact sheets, talking points, one-pagers and videos.
- On a quarterly basis, staff will monitor how often new or updated resources are accessed.
- Advance CTE will promote new or updated resources through homepage slides, social media and blog series.

#### **Success Metrics:**

- The committee hosted monthly meetings around the rebrand, but will move to quarterly meetings for the future.
  - Since the September board update, the newsletters has an average of 38 percent open rate surpassing the 35 percent goal and will continue to strive for a 35 percent open rate.
5. *Conduct and leverage annual Excellence in Action Award to identify and embed high-quality CTE programs of study throughout communications, outreach and advocacy efforts.*

Advance CTE featured 2015 award winners at the Association for Career and Technical Education's (ACTE) 2015 CareerTech VISION conference in November, promoting the award winners even further beyond monthly blog posts and recognition at the 2015 Spring Meeting. Additionally, award winners have been featured in numerous articles with reference to the Excellence in Action award. This year's winners have been selected and will be featured at the 2016 Spring Meeting and at CareerTech VISION among other events as they arise.

This Award is central to our broader communications and advocacy efforts, with the winners featured on fact sheets, Congressional newsletters, articles written for partner organizations, blogs, as well as in conversations with members of the media. As we look towards the 2016 Excellence in Action awards, we will focus on the following.

#### Tasks accomplished to date:

- Successfully launched the 2016 awards in October and increased the number of award recipients from nine to 11 winners.

Tasks to accomplish:

- Feature the award winners at the 2016 Spring Meeting in Washington, DC.
- More proactively work with State Directors with award winners, and their communications staff, to ensure they have a communications strategy in place to highlight the award winners in their communities and provide them with related materials including fact sheets and state-specific press releases.
- Better engage members of Congress around the award winners/winning programs in their districts and states.
- Make a clearer connection between the award-winning programs and the Advance CTE vision.

**Success Metrics:**

- Advance CTE will increase the amount of applications to the award yearly, with the goal of awarding a program of study in each Career Cluster in 2017.
- Advance CTE will successfully use the award-winning programs in communications and advocacy throughout the year.

**6. *Build and maintain strong relationships with key members of the media.***

Staff routinely updates the Newsroom and has developed a state-specific reporter list in preparation for engaging media around the 2016 Excellence in Action award recipients, or pitching Advance CTE resources pertinent to those states.

Advance CTE will focus on public relations efforts to increase presence of Advance CTE as a credible and preferred source about news for CTE. We must also position members and staff to serve as experts in media outreach in their own states as well as nationally.

Since September, Advance CTE has had seven notable media mentions, primarily around the release of New Skills for Youth in January. Media picks ups tend to be focused on significant announcements or events including:

- CTE Month (1)
- New Skills for Youth (5 articles)
- White House CTE event (4 articles)
- Excellence in Action awards (6 articles)

Tasks to accomplish:

- Continually update reporter list of press who generally ‘get’ CTE that we can engage and develop new relationships with reporters
- Update state-specific reporter list regularly

- Provide support to states/members (through webinars, workshops and/or print materials) on social media strategies
- Increase media hits to include 30 positive article mentions and/or op-ed placements in 2016
- Continue to develop press releases and statements in anticipation of major publications, events and federal policy changes or announcements. Publish joint releases or statements with major partners (e.g. ACTE), when needed. All releases will be published on the website under “Press Releases,” and sent to the media list.

**Success Metrics:**

- Advance CTE will monitor all media that mentions our organization, initiatives or staff through the story tracker. Staff will build out the reporter list and continue to develop state-specific lists of reporters who cover CTE. Success of this strategy will be measured in an increase of reporters included in the press lists and monitoring press engagement.

**7. *Educate staff, Board members and other spokespeople on key Advance CTE messaging.***

Advance CTE staff and Board are regularly asked to participate in presentations and discussions onsite and online for a variety of audiences. All spokespeople need to be knowledgeable on current policy, statistics, trends and messaging, and how it is aligned to the Advance CTE vision, brand and style guide, to effectively communicate on behalf of the organization.

Tasks accomplished to date:

- Provided FAQs and related resources around Advance CTE’s rebrand to help members communicate about the rebrand
- Worked with leadership to craft blogs supporting the rebrand
- Worked with leadership and members to create statements of support of the rebrand
- Updated style guide to reflect new brand and relation to sub-brands

Tasks to accomplish:

- Providing resources including fact sheets on key messaging and talking points
- Review and update organizational style guide each year in collaboration with full staff
- Template PowerPoint with key messaging and talking points to be used during presentations
- Deliver talking points and messaging for the new vision of CTE
- Yearly staff training on talking points and messaging

**Success Metrics:**

- Advance CTE will provide yearly trainings for staff and will update our style guide annually.

**8. *Regularly assess communication effort and strategies, and adjust efforts as needed.***

Tasks accomplished/ongoing:

- Monthly Board updates providing a snapshot of metrics including website, blog and social media traffic (Advance CTE is doing this currently)

Quarterly review of major communication efforts including the Excellence in Action Awards, CTE Learning that works campaign, newsletter and e-communication traffic, social media and YouTube channel utilizing Google Analytics, Constant Contact and social media (Facebook and Twitter) metrics in an effort to determine what communication methods are most effective for communicating to Advance CTE audiences.

Advance CTE/The Center to Advance CTE  
Finance/Audit Committee

**MINUTES**  
CONFERENCE CALL

March 31, 2016  
4 p.m.-5 p.m. ET.

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**Attendees:** Pradeep Kotamraju, Marie Barry, Connie Beene, Tim Hodges, Sheila Ruhland

**Absent:** Bernadette Howard

**Staff:** Karen Hornberger, Kate Blosveren

**Guests:** Mark Friese, Merrill Lynch

**Welcome:** Kotamraju welcomed the Finance/Audit Committee and thanked them for joining the call. He then introduced Mark Friese, the organizations' investment advisor from Merrill Lynch.

**Review of Investments:** Friese thanked the committee for inviting him to give a brief update of the status of the organizations' investments. He shared that the market has remained volatile since January 2015 and during a period like this the main focus is to protect the assets in two ways. First, he suggested that we remain over-weighted in sectors that are less volatile (like utilities and consumer staples) and remain under-weighted in sectors that are more economically sensitive (like technology and consumer discretionary). Further, Friese stated that we need to remain underweighted in problem areas like international and energy. He shared that all of our accounts are underweighted in energy and have less than 2% exposure to international markets.

Friese shared that our investments are doing slightly better than the market and stated that Merrill Lynch has been very defensive which has been allowing our accounts to do well. He reminded the Finance/Audit Committee that it is Merrill Lynch's job to protect the accounts while in a negative environment. Friese shared that while interest rates continue to rise, we will keep an eye on the bonds and reallocate stocks if the rates continue to rise. He also shared that are bonds are managed by a bond manager who keeps a close eye on them and makes any adjustments that are needed. In the short term, we will be keeping the bonds but be assured the team at Merrill Lynch is monitoring them closely.

**Review and Approval of Minutes:** Kotamraju presented the Finance/Audit Committee minutes from the January 12, 2016 committee call.

**MOTION: To approve the January 12, 2016 Finance/Audit Committee minutes.  
Beene; Ruhland.  
MOTION ADOPTED.**

**Review and Approval of Financial Reports:** Kotamraju and Hornberger presented The Center to Advance CTE/NCTEF financials.

**INCOME:** Income is at 35%, with only interest, product sales and some new grant money being received. Products sales at ACTE Vision were disappointing, however staff have been working to increase marketing efforts and sales are responding. It is unlikely we will reach our target



income for products. The FORD NGL Grant was received in the amount of \$9000; some of these funds will be allocated to the next fiscal year as that is when the relevant work will be completed. As the contract is still being finalized with CCSO, JPMC grant funding has not been received. It is likely that the Foundation will expend some reserve funds to offset expenses before the grant is received. However, the grant will fully reimburse the Foundation for all of these expenses. The Association reimbursement to the Foundation for the redistribution of work under the new theory of action plan will take place at the end of the fiscal year when all expenses have been accounted for.

**EXPENSES:** Expenses are on target at 23% with the expectation that this will increase as the JPMC grant work begins in earnest. Art, printing and copying is over budget due the full refresh of the 16 Career Cluster brochures and Pocket Guide. To keep cost of goods sold low, the quantity of products purchased was increased to obtain the best price possible. Investment expenses are higher but in line with interest income.

Barry asked for a reminder of what the IDIQ grant was for. Blossveren shared that the IDIQ grant is a joint effort with RTI international, Jobs for the Future and Vivayic. Our organizations successfully received a task order through OCTAE's latest indefinite-delivery, indefinite-quantity (ID/IQ) contract. The task the Center to Advance CTE is leading is around supporting better alignment between secondary CTE programs and apprenticeships through site visits, a synthesis reports and a final set of technical assistance tools for state and local leaders.

Kotamraju asked why we haven't received the JPMC grant funds. Blossveren shared that we were still working on a clause in the contract about intellectual property and that we have our lawyers looking at it now.

Kotamraju and Hornberger presented The Advance CTE/NASDCTEc Financials.

**INCOME:** As of January 31<sup>st</sup>, income is at 65% of budgeted projections. This is somewhat deceptive of the overall income position because the budget includes \$353,082.55 - 31% of the overall budget - in reserve withdrawals for the Summit, project-based work and payments to NCTEF. \$41,972.57 of the CTE Summit reserve withdrawal has been used and the final invoice and payment will be reflected on the next quarterly report. State dues are at 104% of budget, with the balance of California, Puerto Rico and Virgin Islands remain unpaid. Only Puerto Rico has not submitted an intent form – Virgin Islands are actively pursuing payment of its dues. Associate dues are at 108% of the budgeted amount due to increased number of organizational memberships. Interest is at 82% and exceeding budget as of January 31<sup>st</sup> due to minimal reserve withdraws. Conference registrations are above target (56%) for the Summit. Sponsorships are limited to the spring meeting, so the only income showing here is from the pilot year-round sponsorships.

**EXPENSES:** Expenses are at 49% and in line with projections. Several expenses (insurance, license fees) are annual fees that have already been paid. The contractor's expense line shows a payment to PWC for the CTE Summit, which occurred in October. Merrill Lynch charges are slightly above expectations as but are in line with an increase in interest in the account.

*Note: Originally in the financial report it was stated that the employee benefits are over budget at this time due to 30% of the overage is from the use of PTO leave used primarily by two staff members who have had to take additional leave for family. This was in error as this benefit is part of salaries and not actual benefits. It has been corrected in the financial reports for January 31, 2016.*

Hornberger asked if anyone had any questions regarding the financials. Kotamraju asked about the funding for the new staff members. Blosveren shared that the funding was coming from the JMPC grant and that most of their time will be paid for by this grant.

Pradeep asked for a motion to approve the financial statements as presented.

**MOTION: To approve the Advance CTE and The Center to Advance CTE FY 16: July 1, 2015 through January 31, 2016 financial statements as presented.  
Hodges; Ruhland.  
MOTION ADOPTED.**

**Meeting adjourned 4:34 p.m.**

## Fundraising & Development Update

Report submitted by Kate Kreamer, Deputy Executive Director &  
Kimberly Green, Executive Director

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In the past six months, Advance CTE/The Center to Advance CTE has successfully raised funds to support new and existing project work, staff time and member resources. From FY2015 to FY2016, our revenues from grants and contracts shifted from just two percent of all revenue to 23 percent (projected).

At the request of the Board, Advance CTE/The Center to Advance CTE will continue to pursue fundraising and development opportunities, but only move forward with those that are closely aligned to our new strategic plan, the Shared Vision for the Future of CTE and our member priorities, as well as be sure we can manage the continued growth of our organization.

### Current Projects/Grants:

- *New Skills for Youth:* Advance CTE is partnering with CCSSO and the Education Strategy Group to lead the New Skills for Youth state competition, through a \$35 million investment from the JPMorgan Chase Foundation. Advance CTE's role is serving as the project co-lead with CCSSO, bringing critical content knowledge and expertise to the initiative. Specifically, we will be helping to monitor state progress, providing on-demand technical assistance at meetings, and creating resources such as learning papers on key issues, annual case studies on the states' progress, and implementation tools. Any resources we create will be used by the participating states as well as our entire membership, and the broader CTE and education reform community. Over the course of four years, Advance CTE will receive approximately \$2.3 million.
- *Potential Role of Secondary Career and Technical Education (CTE) Programs in Preparing Students for Apprenticeship Programs:* Advance CTE, in partnership with RTI International, Jobs for the Future, Vivayic and Quality Information Partners, is leading a project under contract with the U.S. Department of Education's Office of Career, Adult, and Technical Education through an indefinite delivery/indefinite quantity (ID/IQ). The goal of this project is to develop technical assistance tools and resources for state and local leaders to improve the alignment between existing CTE and apprenticeships programs and support alignment where it does not yet exist. These tools and resources will be grounded in successful practices and lessons learned from the field through site visits. Over the course of 14 months, Advance CTE will receive approximately \$124,000, largely for staff time.
- *Employer Roundtables:* In November 2015, Advance CTE received a \$9,000 grant from the Ford Motor Company Fund to conduct roundtable discussions with employer partners in up to three different Ford Next Generation Learning (NGL) communities to extract lessons learned and inform a brief paper for State CTE Directors and local CTE administrators and educators. Through this project, we aim to capture the voices and opinions of highly-invested employers and identify key messages and strategies other CTE leaders can leverage in their own states and communities. We have completed our two roundtable discussions with a group employers and industry representatives in Nashville, TN and Pinellas County, FL. The final paper will likely be released in summer 2016.

- *Wisconsin Professional Development Provider:* We partnered with CORD to respond to an RFP from Chippewa Valley Technical College (on behalf of Wisconsin’s state system) for professional development providers. Our proposal, which centered around our Career Pathways Effect workshops, was selected and we will be finding out more in the coming months.
- *Global Perspectives in CTE: Professional Development Modules:* Advance ACTE, in partnership with ACTE and the Asia Society, is part of a small grant that has been funded by the Project Management Institute. The goal is to expand the connection between global competency and CTE by building a toolkit for middle grade and early high school teachers to educate them on the need for their students to be globally competent and to lift up the global career opportunities that exist in CTE pathways. Additionally, there is a focus on building teacher capacity to integrate global competence into CTE career exploration and classroom projects. Over the course of two years, Advance CTE will receive approximately \$13,500 for its role in this project.

### **Looking Ahead**

- *Siemens Foundation:* Advance CTE has been in discussions with the Siemens Foundation over the last few months, and submitted a short prospectus on a possible project around communications and recruitment into high-quality CTE programs.
- *The Shared Vision for the Future of CTE:* We have begun to engage in discussions with potential funders with regards to the new vision, including Alcoa Foundation and the Bill & Melinda Gates Foundation. Crystal Bridgeman of the Siemens Foundation invited Advance CTE to present on the new vision to “Workforce Matters,” a group of funders interested in workforce development issues in June 2016.
- *Indefinite Delivery/Indefinite Quantity (ID/IQ):* As we were selected with RTI International, Jobs for the Future and Vivayic as one of the three groups to lead a project under the current ID/IQ, we will be eligible to bid on future projects if and when OCTAE releases them. The next round would be released in Fall 2016 at the earliest.

**Legislative Update:** *September 2015 through April 2016*

**FY 2016 and 2017 Budget and Appropriations Update**

*A Retirement and a Two-Year Budget Agreement*

Former Speaker of the House John Boehner (R-OH) announced his intention to resign from Congress in late autumn 2015. Boehner's announcement came at a time when there was growing concern about his ability to corral an increasingly conservative Republican House Caucus. Additionally, both chambers of Congress had just passed a short-term stop-gap legislative measure, known as a Continuing Resolution (CR), to temporarily extend current funding levels for a few months time. This CR was the result of infighting between two competing factions in the Congressional Republican Party who were unable to come to consensus on how to proceed with appropriations for the Federal Fiscal Year (FFY) 2016.

Boehner's announcement created uncertainty regarding who would succeed him and even more consternation related to how Congress would ultimately resolve the ongoing impasse over federal funding for the rest of the fiscal year.

These twin questions were answered one month later when current Speaker of the House Paul Ryan (R-WI) was elevated to his current position to replace the outgoing Boehner. During this transition period then-Speaker Boehner brokered a two-year budget deal with Congressional Democrats that provided \$80 billion in sequester relief for FY 2016 and FY 2017.

As a reminder the Budget Control Act of 2011 (BCA) has imposed caps on the federal budget for the next decade (known as sequester caps) and these constraints result in funding reductions for defense and non-defense discretionary programs (such as the Perkins Act) on an equal basis. This budget agreement, known as the [Bipartisan Budget Agreement of 2015](#), provided equal relief to both defense and NDD programs for these fiscal years and was intentionally crafted to push ongoing partisan disagreements over federal spending until well after the upcoming Presidential elections.

However this deal was merely a framework— Congress still had to act to appropriate funding, using the additional sequester relief, for the various programs that compose the federal budget. In December 2015 Congress accomplished that, passing a massive \$1.1 trillion spending bill just before the CR was set to expire. This spending bill funds all federal programs, including Perkins, for the remainder of FY 2016, restored earlier rescission cuts to the Perkins Act basic state grant program, and level-funded the Perkins Act at the same funding amounts the program has received since FY 2014 (\$1.18 billion overall). Although Advance CTE and ACTE sent [a letter](#) to lawmakers urging them to restore the remainder of Perkins' sequester cuts (approximately \$5.4 million) the restoration of earlier funding reductions was an accomplishment in an

extremely tight fiscal environment where many other programs received reductions despite the overall relaxation of the budget caps (due to reasons not germane to this update).

#### *President Obama's Final Budget Request*

President [Obama's FY 2017 budget request](#), the final one of his administration, was rather underwhelming in its support for Perkins and for CTE. At \$4.1 trillion overall, the Administration's proposal sought significant new investments in education and workforce development, but did so primarily by proposing to create new federal programs and initiatives largely at the expense of existing commitments.

Specifically, the budget request proposed flat-funding for the Perkins Act basic state grant program while proposing an additional \$2 million for the law's national activities fund which would be used to administer a new "American Technical Training Fund" (ATTF). The ATTF, if created, would be a competitive grant program targeted solely at community colleges and employer partnerships in "in-demand" sectors determined by the federal government. The President also proposed \$125 million for "Next Generation High School" transformation grants that would, if ever enacted, use CTE pedagogical approaches as a high school turnaround strategy.

Congress icily met this budget proposal, going so far as to "snub" the President by not inviting his budget experts to testify on Capitol Hill. Given the underwhelming support for Perkins, [Advance CTE vocalized strong disapproval](#) of the budget as well and actively worked with House and Senate Committees to advocate against the proposals outlined above during later U.S. Department of Education (USDE) oversight hearings. The fruits of these efforts can be observed in the critical nature of many questions posed by lawmakers in both chambers to newly confirmed USDE Secretary John King.

#### *FY 2017 Outlook and Update*

The President's budget request formally began the federal budget and appropriations process of FY 2017. Although the Bipartisan Budget Agreement brokered by Boehner covers this fiscal year, member of the Republican party have been unable and unwilling to pass a budget framework—despite last year's bipartisan agreement—for the upcoming FY set to begin on October 1, 2016. As a result, it is highly likely that Congress will pass another CR temporarily extending current funding levels for undetermined period of time. Such a move will likely complicate efforts to renew the Carl D. Perkins Act (Perkins) and undermine the ongoing implementation of the Every Student Succeeds Act (ESSA).

Nevertheless, Advance CTE has been advocating for a restoration of the remaining sequester reductions to Perkins throughout this process and even larger sums (approximately \$1.264 billion) in the context of full reauthorization for the Perkins Act. The extent to which these positions can be realized will largely be contingent on the composition of the next Congress and the outcomes of the Presidential elections this November. Advance CTE remains highly skeptical that these issues will be resolved before this time.

## **Carl D. Perkins Career and Technical Education Act Update**

### *Flurry of Perkins Activity in Autumn 2015*

After working with a group of stakeholders interested in the reauthorization of the Perkins Act (co-lead by Advance CTE), the House formerly began a process to do just that in October 2015. The House Education and the Workforce Committee (HEW) [held a hearing](#) on the legislation titled “Improving Career and Technical Education to Help Students Succeed in the Workforce” which [primarily focused](#) on specific efforts, initiatives, and programs in the CTE environment that could be looked to as models for renewing aspects of the Perkins Act. Since that time, the negotiations to renew Perkins have been ongoing at the staff level and have been closed to the public. Recently staff have expressed optimism for introducing draft legislation before the summer of 2016 with the hope of ultimately passing a bill through the chamber sometime thereafter. Unfortunately a clear timeline and process for this has not been forthcoming.

Around the same time as this House hearing the Senate Health, Education, Labor, and Pensions (HELP) Committee formerly announced efforts to consider Perkins reauthorization. Senators Enzi (R-WY), Casey (D-PA), Alexander (R-TN), and Murray (D-WA) were selected to lead this effort. To start their negotiations these offices released a set of eight bipartisan principles that they said would guide their efforts:

1. Make it easier for States and locals to run their CTE programs to serve all students who desire to gain access to CTE coursework, including students with disabilities;
2. Increase access to, and support of, career counseling for all CTE students;
3. Maintain Perkins as a formula program;
4. Align with ESEA and WIOA (where applicable) to improve the efficiency and effectiveness of the education and workforce development programs;
5. Support the expansion of public/private collaborations with secondary and post-secondary programs, including alignment with State or locally-determined in-demand industries and occupations;
6. Support efforts to integrate into and strengthen career pathways at the state and local levels;
7. Address unfunded programs; and
8. Improve evaluation and research to support innovation and best practices.

The HELP Committee then solicited public feedback from interested groups. Advance CTE and ACTE submitted substantial legislative language recommendations— all based on its board-approved Perkins recommendations— at this time. Summaries of these documents are available as a supplement to this board book and the full documents are available to members upon request. In the months that have followed, Advance CTE has been intimately engaged in these ongoing negotiations and has provided feedback and recommendations as draft Perkins legislation continues to take shape.

### *What’s in Store for 2016?*

According to staff, the Senate’s negotiation efforts are close to done and it is the hope of the HELP Committee to release a Perkins “discussion draft” sometime in the Spring of 2016 where

the committee will solicit additional public input. Similar to the House, the Senate hopes to complete work on Perkins in this calendar year prior to the end of the current Congress.

Advance CTE has a working plan in place to imbue the Association's recommendations and priorities in these parallel processes. Advance CTE remains cautiously optimistic that Congress will finalize legislation this year, but strongly notes that there are many extenuating factors that could negatively impact the ability of lawmakers to get Perkins finalized this year. In the interim, many House and Senate offices have been working on smaller "messaging bills" in an effort to advocate for specific provisions in future Perkins legislation.

To date, Advance CTE's strategy has been to forgo any endorsements of legislation related to Perkins which are not wholly aligned with the organization's legislative recommendations. Thus far, this strategy has enabled Advance CTE to extract concessions in prospective legislation, prior to introduction, in exchange for the organization staying neutral on the legislation. As of this writing, most of these smaller bills have an extremely small likelihood of being incorporated into larger Perkins legislation and Advance CTE has continued to monitor and engage with the wider legislative environment in this fashion as more likely emerge.

### **Every Student Succeeds Act (ESSA)**

The vast majority of time, energy, and political capital in the 114<sup>th</sup> Congress— at least as it relates to the education and workforce development policy environment in Congress— was expended on the reauthorization of the Elementary and Secondary Education Act (ESEA). This law, last reauthorized in 2001 as the No Child Left Behind Act (NCLB), has been due for reauthorization since 2007. Since that time, Congress has been perennially unable to come to agreement on how to fix what members of both parties agreed was a deeply flawed NCLB law.

In calendar year 2015, the Senate and the House began parallel processes to develop reauthorization legislation to replace NCLB. The House finalized the "Student Success Act" very early on in the same year which was a deeply partisan proposal containing many policies that were anathema to Congressional Democrats and the Obama Administration. Meanwhile the Senate undertook a bipartisan process to develop a more moderate proposal known as the "Every Child Achieves Act". The latter effort was finalized in the late summer and lawmakers began closed-door negotiations to reconcile these two radically different bills.

The actual reconciliation process largely took place behind the scenes and once broad agreement was reached, the House and the Senate formerly convened a "conference committee" to further develop this consensus into legislation. This framework agreement eventually was transformed into the "Every Student Succeeds Act" (ESSA). ESSA was subsequently passed by both the House and the Senate in December 2015 and signed into law by President Obama on December 16, 2015.

On the whole, ESSA substantially reduces federal mandates and authority that define NCLB and devolves most policy and decision making to the state and local level. Nearly every aspect of the law— standards, accountability, planning, assessments, interventions— emphasizes



state and local autonomy and USDE is expressly prohibited from doing a great number of things under the new legislation.

Throughout the development of this law, Advance CTE was extremely successful in imbuing ESSA with CTE policies that can be found throughout. In early 2016, Advance CTE released a [member resource on ESSA](#) highlighting the many CTE provisions found in the new legislation as well as an overview of the ESSA's implications for the Perkins Act and CTE more generally.

ESSA implementation is already underway and some of the law's provisions went into effect the day it was signed into law. Advance CTE has been monitoring this process and plans to engage as appropriate as the law continues to be rolled out over the next two years. The main implementation areas we are focusing on include, but are not limited to:

- State and local planning processes;
- Development of state accountability systems (with a particular focus on career readiness indicators);
- CTE's role in ESSA's definition for a "Well-Rounded Education";
- Standards development and alignment with CTE;
- Leveraging dual / concurrent enrollment provisions in ESSA; and
- Fiscal provisions such as Maintenance of Effort and Supplement, Not Supplant requirements.

### **Workforce Innovation and Opportunity Act (WIOA)**

The U.S. Department of Labor (USDOL) has delayed the release of final regulations for the Workforce Innovation and Opportunity Act (WIOA). Announcing in early 2016 that these final rules would be released in "June 2016", USDOL has made several clarifications regarding provisions of WIOA that will now also be delayed in the upcoming program year. Of significant importance is USDOL's clarification that WIOA's ["one-stop infrastructure funding" provision will be delayed](#) from going in to effect until the 2017 program year, rather than this year as outlined in the law. This is intended to afford states additional time to implement these provisions since their final interpretation will be released to coincide with PY 2016.

Despite USDOL's ongoing difficulties in promulgating final rules for this law in a timely fashion, the agency did move forward with final WIOA state plan submissions. In February USDOL released [the final required elements](#) for these plans. Prior to this release, Advance CTE developed and shared [an FAQ resource for members](#) to assist in the plan submission process. On April 1, 2016 all states submitted WIOA plans to USDOL for review and approval.

As a reminder, WIOA contains a state planning provision that allows states to incorporate Perkins into their WIOA state plans—something known as a "combined state plan". Seven states submitted combined state plans that included Perkins: Delaware, Minnesota, Nebraska, New Hampshire, Ohio, Pennsylvania, and Virginia. Advance CTE staff are currently engaged with a coalition of partner groups which are reviewing this submitted plans in an effort to lift up best-practices and examples for future collaborative work. Those efforts are ongoing. Advance CTE

is also working with the USDOL and other federal agencies to develop additional technical assistance and guidance for states once final rules and regulations for WIOA are released.

### **Higher Education Act (HEA)**

Congressional efforts to reauthorize the Higher Education Act (HEA) have largely stalled this calendar year. Given the upcoming Presidential election and the high likelihood that the Senate could change majority parties next year, lawmakers have been unwilling to formally consider a large reauthorization process such as HEA. In the interim, issues that have come to the fore on the campaign trail—such as college affordability and campus safety—have generated interest in smaller piecemeal legislation that have been introduced or are being developed in this Congress. Advance CTE continues to advocate for its new HEA priorities and plans to be part of the process when it is taken up by lawmakers—something that increasingly appears to be set for calendar years 2017 or 2018.

Federal education policy should not only assist states, schools and colleges in meeting current needs but also seek to support systems as they innovate in response to future or anticipated needs. The National Assessment of Career and Technical Education has long-cautioned federal policymakers that the Carl D. Perkins Career and Technical Education Act (Perkins) has indeed been a reflection of current needs, as it has evolved since the Smith-Hughes Act but in that evolution it has shed few of its mandates, requirements, or uses of funds. To that end, the law has become a reflection of nearly a century's worth of education and workforce demands, diluting its focus, effectiveness and ability to drive innovation.

To meet the needs of the future economy, NASDCTEc and ACTE chose to begin our process for determining Perkins priorities by taking a step back, assessing what the needs of the field are or will be and considering what role the federal investment in CTE should have as compared to state and local investments. To that end, this document proposes a set of recommendations and aligned legislative language that will bring clarity by streamlining the Perkins Act to focus on increasing access to high-quality CTE programs of study that are responsive to economic priorities. To accomplish this goal, it was necessary to craft new language that would in certain places replace entire sections of the current statute, while in other places, simply adapt existing language.

Our recommendations are based upon a set of design principles:

- **We believe the law should focus on increasing equitable access to high-quality CTE programs that are responsive to economic priorities.**  
To accomplish this, we propose that the federal investment focus on the design and delivery of quality CTE programs of study that ensure a spectrum of career exploration through career preparation opportunities for all students, regardless of their geographic location, race, gender, disability status, socioeconomic background, or any other population characteristic.
- **We believe more coordination is needed between planning, spending and accountability.**  
To accomplish this, we drafted new state and local plan language adding a needs assessment, significantly reduced and refocused uses of funds, and integrated requirements to ensure decisions and investments are guided by data.
- **We believe the law should continue to prioritize, and in fact should seek, to strengthen connections between secondary and postsecondary education.**  
To accomplish this, we propose that all programs funded by the Act meet a more specific "CTE Program of Study" definition, linking secondary and postsecondary education and leading to meaningful credentials; as well as a state-level focus on systems alignment.
- **We believe that the law should emphasize increased engagement with business and industry in the design and implementation of programs.**  
To accomplish this, we propose more robust stakeholder involvement in local planning and program delivery and required alignment of programs to labor market demands.
- **We believe the law should be streamlined to make it clearer and more consistent by ending duplication between and within sections.**  
To accomplish this, we have significantly streamlined the law to focus on outcomes while giving states and local communities flexibility in how best to meet their state and/or local community's unique needs, as well as included significant WIOA alignment provisions.

This set of recommendations is informed by and reflective of research, builds upon the positive momentum begun under Perkins IV and focuses on what states, schools and colleges know works, while also ensuring currency and innovation of programs, expanding stakeholder engagement and a setting a high bar for quality. Our goal is that through this proposal CTE can help more students find success and to ensure country's economic strength and prosperity. What follows is language that covers the purposes, state and local plan sections, state and local uses of funds, accountability provisions, as well as a few new definitions.

## Carl D. Perkins Career and Technical Education Act Reauthorization Recommendations

### Title II – CTE Innovation Fund

In addition to the foundational support for CTE provided through Title I of the Perkins Act, federal resources for CTE should serve as a driver of innovative programs and practices. These funds should be over and above current funding levels, must focus on new ideas that cannot be implemented solely with the resources provided through the Basic State Grant program, and be offered on a short-term basis to launch, but not sustain, programs. Scalability and replicability should be key considerations, with provisions included for the sharing of successful practices. To that end, ACTE and NASDCTE propose a new CTE Innovation Fund to replace the currently unfunded Title II of the Perkins Act.

Our recommendations for a CTE Innovation Fund include:

- Funding the identification, development, evaluation, and expansion of new and innovative, research- and evidence-based CTE practices, programs, and strategies;
- Supporting partnerships of school districts, area CTE schools, institutions of higher education, postsecondary vocational institutions, and business or industry representatives, as well as other stakeholders;
- Increasing CTE student achievement, while reducing gaps in program participation and student achievement;
- Supporting state efforts to convene local entities within communities of practice, build capacity, offer technical assistance, and provide for the evaluation and dissemination of best practices;
- Improving the effectiveness of CTE teachers, leaders and counselors in meeting the future needs of both students and employers;
- Increasing the prevalence and availability of specific elements leading to high-quality implementation of CTE programs of study; and
- Increasing CTE student achievement, while reducing gaps in program participation and student achievement.

## **NASDCTEc-ACTE Legislative Recommendations & Senate HELP Committee's Bipartisan Reauthorization Principles**

The National Association of State Directors of Career Technical Education Consortium (NASDCTEc) and the Association of Career and Technical Education (ACTE) applaud the Senate HELP Committee's ongoing efforts to reauthorize the Carl D. Perkins Career and Technical Education Act (Perkins).

We were especially encouraged by the list of bipartisan principles recently released by the Committee that will be used as the foundation to renew this critically important law. These eight principles share much in common with our organizations' vision for Perkins reauthorization and we'd like to highlight and expand upon those points of intersection below.

### **"Make it easier for States and locals to run their CTE programs to serve all students who desire to gain access to CTE coursework, including students with disabilities."**

Central to our recommendations for Perkins V is a commitment to ensuring all students have equitable access to high-quality CTE programs. This is achieved through our focus on increasing program quality through a new definition for CTE programs of study (POS). Throughout our recommendations we have strengthened Perkins' planning provisions related to student access to, participation in, and achievement as a result of CTE POS— all in an effort to ensure that every student has access to a high-quality CTE program. Our recommendations make clear that the next iteration of Perkins must broaden its focus on equity beyond simply gender. To do this, we have proposed a new local needs assessment that would more intentionally connect Perkins' planning, spending, and accountability requirements in a way that directs resources towards ensuring that all students are able to equitably participate and achieve within the context of a CTE POS, regardless of their geographic location, race, gender, disability, socioeconomic background, or any other population characteristic.

### **"Increase access to, and support of, career counseling for all CTE students."**

Before students can pursue their interests and passions in the context of a CTE program of study, they must first become acquainted with the career opportunities available to them. Our recommendations direct states and local Perkins recipients to provide career exploration and development activities in a coordinated manner at both levels of the law's implementation. These activities would equip career counselors with relevant labor market information as they provide guidance and counseling to students. Significantly, our recommendations would empower students and their families to make important decisions about their education aligned with their career goals through participation in these activities.

### **"Maintain CTE as a formula program."**

We strongly endorse the Committee's commitment to providing foundational support to the greatest number of programs and institutions by maintaining Perkins' formula grant structure. Our recommendations wholly support this principle and go on to emphasize the importance of maintaining the autonomy of the State Perkins Eligible Agency as the entity in each State with the responsibility of administering the Perkins grant to ensure formula funds flow to local recipients.

### **"Align with ESEA and WIOA (where applicable) to improve the efficiency and effectiveness of the education and workforce development programs."**

Alignment to ESEA and WIOA is a key theme that is evident throughout our recommendations. While a separate document covers all of the specific elements of our proposal that align with WIOA, we have also based much of the local application and needs assessment components of our language on the work currently underway in the Senate to reauthorize ESEA. Additionally, and in order to reduce the

overall reporting burden of states, we have aligned reporting systems and related definitions with those already required within ESEA to the extent practical. Throughout our legislative proposal we have also heavily emphasized the need to continue to integrate CTE and academic instruction—something that we hope will be continued in Perkins V and in the next iteration of ESEA.

**“Support the expansion of public/private collaborations with secondary and post-secondary programs, including alignment with State or locally-determined in-demand industries and occupations.”**

Effectively engaging employers is all about relationships. While it’s difficult to legislate strong relationships at the federal level, our organizations are committed to ensuring that CTE programs of study, as well as the institutions and school districts that house them, are engaging with the employer community in a way that benefits students and employers alike. Our recommendations seek to ensure that businesses of *all* sizes have the opportunity for meaningful input into the development and implementation of CTE POS in both the state and local plan sections of our proposal. Through an annual local needs assessment and continuous required consultation with the employer community, we ensure that CTE programs are regularly assessing the relevancy of what is being offered to local labor market needs.

**“Support efforts to integrate into and strengthen career pathways at the state and local levels.”**

As mentioned above, our legislative recommendations hinge on the next Perkins law supporting CTE POS as the primary delivery framework for CTE. While CTE POS and career pathways—as defined under WIOA—share much in common, there are still important distinctions between the two concepts. The manner in which we have defined a CTE POS allows for it to serve as the delivery mechanism for the *educational component* of a career pathway as understood through WIOA. We have made several attempts throughout our proposal to encourage states and local Perkins recipients to support and collaborate with existing career pathways work where applicable.

**“Address unfunded programs.”**

As noted elsewhere in our submission, we have proposed a comprehensive replacement for Title II or “Tech Prep” of current Perkins law—a section that has been unfunded since 2010. This proposal would transform Title II of Perkins into a formula grant program, above and beyond that of Title I, to support innovation within the CTE enterprise. Our Title II proposal would allow for even greater state and local support of public-private partnerships focused on innovative approaches to delivering CTE. We have also proposed to replace Section 118 of the Perkins Act— a piece of the law that has been unfunded since 2006— with a conforming amendment for Title III of WIOA. Our intent with this recommendation is to more effectively coordinate the activities authorized under Perkins with the labor market information system already established in WIOA without the need for additional funding.

**“Improve evaluation and research to support innovation and best practices.”**

We applaud the Committee’s interest in evaluation and research within the CTE enterprise. Our legislative recommendations propose high-quality, frequent, and comprehensive research and evaluation of CTE through the continued use of a National Research Center for CTE as well as through the National Center for Education Statistics. To make research more relevant and actionable, we propose a streamlined research agenda that focuses on the elements of high-quality implementation of a CTE program of study and assessing the overall impact of Perkins’ implementation. This would include the dissemination of research findings and technical assistance to help states incorporate evidence-based best practices to replicate high-quality CTE.

## **Carl D. Perkins Career and Technical Education Act WIOA-Alignment Recommendations**

The Carl D. Perkins Career and Technical Education Act (Perkins) sits at a critical juncture between national, state, and local education and workforce development systems. The need for cross-system collaboration between these communities is more important than ever before, and one important step is to appropriately and effectively align the federal investments made through the Workforce Innovation and Opportunity Act (WIOA) and Perkins. This alignment is critical given the increasingly complex education and training that is necessary for our nation’s students to succeed in the 21<sup>st</sup> century economy.

To accomplish this, career and technical education (CTE) must strike the appropriate balance between the educational needs of students and the talent pipeline needs of employers. To that end, NASDCTEC and ACTE view the ongoing implementation of WIOA and the upcoming reauthorization of the Perkins Act as an important opportunity to build upon existing efforts to efficiently collaborate across these systems and to develop and strengthen mechanisms to further encourage this work.

Our legislative recommendations for the Perkins Act’s renewal contain the following recommendations that will support the long-standing relationship between that law and the workforce system, while continuing to honor CTE’s important role in our K-12 and postsecondary education systems.

- **Emphasizing student attainment of industry-recognized credentials:** The passage of WIOA created a new statutory definition for “recognized postsecondary credentials” that encompasses the full spectrum of degrees, certifications, and credentials available to students beyond a high school diploma—all currently recognized by the employer community. We therefore recommend as part of a Program of Study (POS) framework, that *all* Perkins-funded programs lead to student attainment of these credentials, which would reinforce the important work already underway with WIOA in this area. Moreover, our recommendations would hold states and local programs accountable for student attainment of these credentials on an annual basis and seek to increase these levels over time.
- **Coordinating with the Wagner-Peyser system:** Ensuring that CTE programs supported by Perkins meet the current needs of state and local employers, while simultaneously balancing that degree of labor market alignment with the potential longer-term needs of students, is an aspect of Perkins and WIOA alignment that requires a deft touch. An effective strategy for strengthening labor market alignment in the next iteration of Perkins is to ensure that state Perkins agencies are an end-consumer of the labor market information and analyses that are a product of the workforce and labor market information system established in Title III of WIOA. This will ensure that state Perkins agencies and local programs have the necessary information to ensure CTE programs have relevancy to state and local employment opportunities.
- **Engaging employers through sector strategies and partnerships:** One of the key innovations of WIOA is the law’s emphasis on the creation and development of industry-led sector partnerships at the state, regional, and local levels. This is an effective mechanism for ensuring that the employer community has a *meaningful* level of input—and significant ownership—for program development and implementation. We recommend that where these partnerships exist, they should be leveraged to inform the development and implementation of CTE POS.



- **Complimenting Career Pathways with CTE POS:** The concept of career pathways (i.e. coordinating various education and training programs to meet the needs of a particular group or an individual) has been in existence for some time. WIOA formalized a definition for career pathways that has much in common with a CTE POS—an important innovation that stems from current Perkins law that we recommend be expanded in the upcoming reauthorization. There are however important differences between the two concepts and where possible, work to develop and implement either should be done in a coordinated fashion. Put simply, CTE POS can be an effective delivery mechanism for the education portion of a career pathway. Our legislative recommendations therefore *compliment* the work being done on career pathways within the workforce community via Perkins state and local plan development and uses of funds requirements.
- **Combined State planning options:** WIOA stresses the importance of developing a statewide strategic vision for workforce development. This strategic vision can be an important contribution to a state’s Perkins planning as well. In order to make the most of this opportunity, our legislative recommendations incorporate a combined state planning option for Perkins’ participation in a WIOA combined state plan, which emphasizes several key areas for joint planning and cross-system coordination. However, the decision should ultimately be left for states to decide, based on their unique governance and programming needs.
- **Interfacing with workforce boards and stakeholders:** Although WIOA currently lacks required representation of the CTE community on local and state workforce development boards (WDBs), we acknowledge and seek to strengthen the important contributions and insights that these stakeholders can bring to bear for the development of state and local Perkins plans. Direct engagement with WIOA’s WDBs throughout the development and implementation of these Perkins plans are therefore a core component of our legislative recommendations.
- **Aligning data systems, definitions, and performance negotiations:** The creation of common performance metrics for all core WIOA programs is a key component of the new law. Our legislative recommendations for the next iteration of Perkins similarly call for more streamlined metrics to hold CTE programs and states accountable for student achievement and outcomes. These proposed metrics are more appropriate for CTE programs given their dual responsibilities both for education and job-training. As such, they are aligned to WIOA’s six core indicators of performance where appropriate in a way that ensures that data definitions and systems are being used to create efficiencies and reduce administrative burden within and across workforce and education reporting systems. Further, we recommend that states have the option to use an objective statistical adjustment model as used in WIOA for the purposes of negotiating performance targets, and that states use UI wage records to report on employment information as in the WIOA system consistent with state law.

*Should you have any questions related to these recommendations, please contact Steve Voytek, NASDCTEC’s Government Relations Manager ([svoytek@careertech.org](mailto:svoytek@careertech.org)) or Alisha Hyslop, ACTE’s Public Policy Director ([AHyslop@acteonline.org](mailto:AHyslop@acteonline.org)).*



The Elementary and Secondary Education Act (ESEA) is the primary federal law governing most national elementary and secondary education programs. Originally passed in 1965, ESEA was last reauthorized in 2001 as the No Child Left Behind Act (NCLB). In 2007, NCLB's authorization expired and the law had been due for renewal since that time.

In 2015, Congress successfully passed the Every Student Succeeds Act (ESSA), which reauthorizes the law through 2020. The new ESEA legislation seeks to remedy many common criticisms of NCLB, particularly the federal government's expanded role in K-12 education under NCLB, by providing states and local school districts with significant flexibility regarding how to implement the elements of the new legislation while also significantly reducing the federal footprint in the nation's schools.

ESSA's emphasis on state and local autonomy will provide many opportunities for innovation and experimentation in the K-12 education environment, particularly with regards to Career Technical Education (CTE). While there are many provisions in ESSA that hold promise for the CTE community, it will be incumbent upon states to implement the law in such a way that fully leverages the potential of CTE.

Below is an analysis of the new law with a particular emphasis on these points of opportunity for the CTE community. Please note that all citations, unless otherwise specified, correspond to the enrolled version of ESSA, which can be accessed [here](#).

## Timeline for Implementation

Many of ESSA's provisions became effective on December 17, 2015 — the day ESSA was signed into law. However, given that most ESSA programs are forward-funded (i.e. provided in advance), the most recent Fiscal Year (FY) 2016 appropriations legislation superseded some of the law's embedded timelines.

It is important to note that many of the legislation's "big" pieces, such as new the state ESSA accountability systems and plans, are required to go into full effect at the start of the 2017-18 school year.<sup>1</sup> Another important deadline states should be aware of is August 1, 2016 — the day existing state ESEA waivers will expire.<sup>2</sup>

At present, it is not clear when states' ESSA plans will officially be due for submission to the U.S. Department of Education (USDE) for approval. The federal rulemaking process, which will likely begin in late spring 2016, will make that deadline clearer. Given that states' new accountability systems for ESSA must be operational by the 2017-18 school year, Advance CTE anticipates the deadline for state ESSA plan submission to be sometime in 2017, following the federal rulemaking process.

<sup>1</sup> Sec. 5(e)(1)(B)

<sup>2</sup> Sec. 4(c)

## Limits on the Role of the U.S. Secretary of Education

A recurrent theme throughout ESSA is a regression of the federal role in K-12 education. The new law contains a number of provisions that will significantly limit the U.S. Secretary of Education's responsibilities and authority with regards to the implementation of ESSA. As a result, the Secretary is prohibited from requiring the following as a condition for approving a state plan or waiver (Note: this list is not exhaustive):<sup>3</sup>

- Requiring states to add new / additional requirements to the state plan;
- Requiring states to add or delete specific elements to their standards;
- Prescribing specific assessments or items to be used in assessments;
- Prescribing specific goals for state progress under their new accountability system
- Prescribing specific accountability indicators that states must use;
- Prescribing the weight a state's accountability measures should have;
- Prescribing a specific methodology that states must use to differentiate and identify low-performing schools; and
- Prescribing school improvement strategies or exit criteria.

The Secretary is also strictly prohibited from issuing new non-regulatory guidance that could be construed as falling beyond the scope of the requirements contained in Title I of ESSA.<sup>4</sup> The law also prevents USDE from developing non-regulatory guidance that, "purports to be legally binding," or that requires additional data collection beyond existing federal, state, and local reporting requirements.<sup>5</sup>

## ESSA: A General Provision of Note

***Four-Year Authorization Period:*** ESSA authorizes programs for four years in total, rather than a longer period of time that is much more common for reauthorization efforts of this size.<sup>6</sup> This decision was made intentionally to allow the next president to revisit the law if they would like to.

***Specific Authorization Levels:*** ESSA prescribes specific authorization levels for each of the Titles contained in the new law. It is important to note that these funding levels are merely suggestions from the law's authors. Congressional appropriators must ultimately decide how much each of these sections of the law receives through the annual budget and appropriation process in Congress. As a result, Congressional appropriators may choose to ignore these authorization levels and appropriate funds at a higher or lower level than those suggested in the statute.

***Title I-Part A:*** Maintains same basic architecture for Title I aid and makes no changes to underlying formula determining state allocations. Grants made under this section of the law will continue to flow to local school districts serving high numbers and percentages of students from low-income families.

***Standards:*** Maintains NCLB approach of standards-based reform by requiring states to establish "challenging" academic standards in English / Language Arts (ELA), Mathematics and Science. The USDE

<sup>3</sup> Sec. 1111(e)

<sup>4</sup> Sec. 1111(e)(1)(A)

<sup>5</sup> Sec. 1111(e)(1)(C)

<sup>6</sup> Sec. 1002

is expressly prohibited from developing these standards or encouraging their development monetarily or otherwise.

**Assessments:** Maintains requirements for annual assessments in ELA, Mathematics and Science in grades 3 through 8 and at least once in high school.

**Accountability:** ESSA repeals NCLB’s “Adequate Yearly Progress” (AYP) provisions with a state-defined accountability system based on “multiple measures,” each disaggregated by student subgroups:<sup>7</sup>

- Annual assessments in subjects noted above;<sup>8</sup>
- High school graduation rates;
- Another “academic” indicator for elementary and middle schools;
- English language proficiency for ELL students; and
- At least one indicator of “school quality or student success”.

**School Interventions:** Starting in the 2017-18 school year, states must identify and intervene in the lowest-performing 5 percent of schools.<sup>9</sup> While earlier versions of ESSA proposed specific school-wide intervention strategies for states, the final version forgoes this type of prescriptive guidance in favor of maximum flexibility for states in the identification and intervention processes (see also: *Limitations on the Role of the U.S. Secretary of Education*).<sup>10</sup> As such states have the ability to incorporate CTE into their turnaround strategies for schools and districts if they choose to do so. However, this decision will ultimately be left to the SEA’s discretion and ESSA makes clear that states, not federal law or USDE, will determine how to turn around low-performing schools.

**Public Accountability:** ESSA maintains the requirement that states and school districts publish report cards that make publicly available information related to the state’s accountability system and a host of other important information.<sup>11</sup>

**Program Consolidation:** ESSA consolidates or eliminates 49 existing programs into a new block grant called “Student Support and Academic Enrichment Grants”.<sup>12</sup> More information related to these grants and funding opportunities for CTE can be found in the Title IV section of this document.

**Maintenance of Effort (MOE):** ESSA maintains the current 90 percent MOE requirement, but strengthens the process for states to waive this requirement in exceptional circumstances (such as a natural disaster or a change in the organizational structure of the state) and gives states a transition period of one year for meeting this requirement if it has done so in the previous five years.<sup>13</sup>

**Supplement, not Supplant (SnS):** ESSA broadly maintains this requirement, but will now only require states to demonstrate compliance every two years rather than annually. Further, states and local districts will have additional flexibility when having to demonstrate that individual costs are

<sup>7</sup> Sec. 1111(c)

<sup>8</sup> Sec. 1111(c)(C)(ii). *It is important to note that this measure must be weighted substantially higher than all other indicators in a state’s accountability system.*

<sup>9</sup> Sec. 1111(c)(4)(D)

<sup>10</sup> Sec. 1111(d)

<sup>11</sup> Sec. 1111(h)(1) & Sec. 1111(h)(2)

<sup>12</sup> Sec. 4101

<sup>13</sup> Sec. 8019

supplemental.<sup>14</sup> This is an area of the law that USDE will likely develop regulations for in the coming year.

## CTE Opportunities: Title I

**Standards Alignment:** States **must** demonstrate in their state plans that their “challenging academic standards” are aligned with state CTE standards. Further, states must align these standards to the entrance requirements for credit-bearing coursework for higher education in the state.<sup>15</sup>

**Well-rounded Education:** A main point of emphasis in ESSA is ensuring that every student receives a “Well-rounded Education” (formerly known as core academic subjects). CTE is now included as part of the statutory definition for a “Well-rounded Education”.<sup>16</sup> CTE’s inclusion in this definition will open up new opportunities for states and LEAs to use ESSA funding for CTE programs and activities. However, the extent to which this will be realized is largely up to the discretion of those entities and is also contingent on what portions of the new law the definition is being used.

**State Planning Coordination:** State ESSA plans **must** be developed in coordination with the state’s Carl D. Perkins Act (Perkins) plan and, at the local level, applications must be submitted in coordination with a local Perkins plan, as appropriate.<sup>17</sup>

**Accountability:** ESSA provides states with broad authority for how to develop and implement their new K-12 accountability systems. Five measures are required as noted above but only four are defined in the new law. The fifth accountability metric must be a measure of “school quality or student success”. States are responsible for determining what this metric will be.<sup>18</sup> ESSA provides a few suggestions for states to use such as measures of postsecondary readiness or student access to advanced coursework. However as with most of ESSA, states must ultimately determine what this measure will be, and it must be both objective and allow for meaningful comparisons among schools and districts within a state. It is important to note that with this new flexibility states have a greater ability than before to promote college and career readiness among their students via their accountability systems. As such, this fifth metric should be looked to as a key opportunity during the law’s implementation to embed CTE / career readiness measures within the state’s accountability system. [Read more on these efforts here.](#)

**Dual / Concurrent Enrollment Programs:** For the first time, ESSA provides a formal definition for dual or concurrent enrollment programs as well as for early college high schools.<sup>19</sup> The new law seeks to promote these programs and opportunities for students in a variety of ways including by allowing LEAs

<sup>14</sup> Sec. 1012

<sup>15</sup> Sec. 1111(b)(1)(D)(i)

<sup>16</sup> Sec. 8002(52). “WELL-ROUNDED EDUCATION.—The term ‘well-rounded education’ means courses, activities, and programming in subjects such as English, reading or language arts, writing, science, technology, engineering, mathematics, foreign languages, civics and government, economics, arts, history, geography, computer science, music, career and technical education, health, physical education, and any other subject, as determined by the State or local educational agency, with the purpose of providing all students access to an enriched curriculum and educational experience.”

<sup>17</sup> Sec. 1111(a)(1)(B) & Sec. 1112(a)(1)(B)

<sup>18</sup> Sec. 1111(c)(4)(B)(v)

<sup>19</sup> Sec. 8002(15) & Sec. 8002(17)

to use Title I funds for these programs and for providing teachers opportunities for joint professional development aimed at integrating academic coursework with CTE.<sup>20</sup>

**Public Report Cards:** ESSA maintains NCLB’s requirement that states and local districts create public report cards that are intended to publish information related to performance on ESSA’s new accountability measures along with other important information such as student participation in and completion of dual or concurrent enrollment programs.<sup>21</sup> States **must** make this available to the wider public in an accurate and timely fashion. Significantly, states **may** elect to include Perkins accountability information on these report cards, along with any other information that they deem important.<sup>22</sup>

**Work-based Learning:** If an LEA deems it appropriate, a local application for Title I funding **may** include a description for how CTE and academic instruction is delivered in a coordinated manner that affords students the opportunity to participate in work-based and experiential learning.<sup>23</sup>

**Effective Student Transitions:** A local application for Title I funding **must** also include language for how an LEA plans to support “effective student transitions” between high school and postsecondary education. In particular, LEAs are now encouraged to describe how they will ensure these student transitions by articulating their coordination efforts with institutions of higher education and employers as well as through other efforts such as career counseling, early college high schools or dual / concurrent enrollment opportunities, as applicable.<sup>24</sup>

## CTE Opportunities: Title II & Teacher Certification Provisions

**Highly-qualified Teacher Requirements:** ESSA fully repeals NCLB’s “highly-qualified teacher” requirement and replaces it with the term “effective” throughout the new law. States are responsible for determining teacher certification and licensure requirements and processes for the state, including “alternative” routes to certification.<sup>25</sup> ESSA amends all other federal laws making use of the highly-qualified teacher terminology.

**Professional Development Opportunities:** ESSA continues to provide states and LEAs with separate funding under Title II to support professional development opportunities and programs for teachers, school leaders and administrators. State education agencies **may** choose to use a portion of these funds to prepare teachers, principals and other school leaders to integrate academic and CTE instructional strategies, which **may** also include training on how to understand and make use of labor market information and ways to ensure effective student transitions to postsecondary education and the workforce.<sup>26</sup>

<sup>20</sup> Sec. 1114(e)(2)(A)

<sup>21</sup> Sec. 1111(h)(1)(C)(viii)(I)(II)(bb)

<sup>22</sup> Sec. 1111(h)(1)(C)(xiv)

<sup>23</sup> Sec. 1112(b)(12)

<sup>24</sup> Sec. 1112(b)(10)

<sup>25</sup> Sec. 9214

<sup>26</sup> Sec. 2101(c)(4)(B)(xviii)

## CTE Opportunities: Title IV

**State Role in New Block Grant:** ESSA consolidates 49 existing programs into a new block grant, known as “Student Support & Academic Enrichment Grants” available to states via a prescribed formula. Funding for these grants is set to begin in FY 2017 along with all other noncompetitive programs authorized by the law.<sup>27</sup> ESSA contains an authorization level of \$1.605 billion in the first year and \$1.6 billion for each fiscal year thereafter until 2020.<sup>28</sup> These grants are intended to ensure that students receive a “Well-rounded Education,” improve school conditions for student learning and enhance the use of technology to support student achievement.<sup>29</sup> Five percent of the funds allotted to a state for this grant program may be reserved for statewide activities. The allowable uses of funds vary greatly, but states now have the ability to spend this funding on the following activities:

- Technical assistance for LEAs to ensure they are meeting the above purposes of the grant program;<sup>30</sup>
- Coordination and integration efforts with other funding streams and programs that meet the requirements of the grant program (this may include the Perkins Act and other federally funded programs);<sup>31</sup>
- Accelerated learning programs, such as dual or concurrent enrollment programs and early college high schools;<sup>32</sup>
- Reimbursement for low-income students for the costs of their participation in accelerated learning programs;<sup>33</sup>
- Costs of instruction and examination fees for AP and IB programs;<sup>34</sup> and
- CTE programs and activities that meet the requirements of ESSA’s definition for a “Well-rounded Education.”<sup>35\*\*</sup>

\*\* It is important to note that CTE is included in the definition of a “Well-rounded Education”. It is therefore possible to use funds allotted under this section of ESSA for CTE programs at the discretion of the state education agency.

**Local Role in New Block Grant:** The above noted grant program requires that 95 percent of the state’s allocation be disbursed to LEAs for district and school-level activities. Schools and districts within the state that have the greatest need are required to be prioritized under this grant program. Significantly, LEAs must conduct a “needs assessment” prior to grant funding that should examine student opportunities and access to well-rounded educational activities, personalized learning, and school

<sup>27</sup> Sec. 5(b)

<sup>28</sup> Sec. 4112. It is important to note that just like all other authorization levels contained in ESSA, annual funding for these grants is ultimately contingent on Congressional appropriators allocating funding for this portion of the law.

<sup>29</sup> Sec. 4101

<sup>30</sup> Sec. 4104(b)(1). It is important to bear in mind that this block grant seeks to ensure that students are receiving a “well-rounded education” which now includes CTE. It is therefore possible to interpret the purpose of this block grant, at least in part, to extend to CTE-related activities and efforts.

<sup>31</sup> Sec. 4104(b)(2)

<sup>32</sup> Sec. 4104(b)(3)(A)(i)(IV)(aa)

<sup>33</sup> Sec. 4104(b)(3)(A)(ii)

<sup>34</sup> Sec. 4104(b)(3)(A)(i)(IV)(bb)

<sup>35</sup> Sec. 4104(b)(3)(A)(i)(VII)

conditions.<sup>36</sup> The allowable uses of funds at the local level are much more comprehensive and include, but are not limited to:

- Supporting partnerships with postsecondary institutions, employers, and other entities with a “record of success” in implementing activities supported by this grant;<sup>37</sup>
- College and career counseling, guidance, and exploration activities, including training guidance counselors to effectively use labor market information to provide college and career planning;<sup>38</sup>
- Supporting the improvement of STEM instruction and student engagement in STEM subjects, as well as supporting the development of schools specializing in these subjects;<sup>39</sup>
- Supporting accelerated learning programs noted above, increasing the availability of these programs, reimbursing low-income students for the costs of these programs, and increasing student enrollment in accelerated learning programs;<sup>40</sup>
- Strengthening the technological capacity and infrastructure of schools;<sup>41</sup>
- Personalizing the student learning experience using technology and also supporting blended learning experiences for both students and teachers;<sup>42</sup>
- Increasing access for rural, remote and underserved areas to use digital learning resources;<sup>43</sup>
- CTE programs and activities that meet the requirements of ESSA’s definition for a “Well-rounded Education”.<sup>44</sup> \*\*

\*\* It is important to note that CTE is included in the definition of a “Well-rounded Education”. It is therefore possible to use funds allotted under this section of ESSA for CTE programs at the discretion of the local education agency.

**21<sup>st</sup> Century Community Learning Centers:** One of the few individual programs that will remain under ESSA, 21<sup>st</sup> Century Community Learning Centers are another funding stream available to states and local school districts to supplement the K-12 experience during non-school hours. At the state and local levels, these centers are required to fund a multitude of programs and activities that relate to a “Well-rounded Education,” including CTE.<sup>45</sup> Importantly, LEAs are encouraged to fund programs that partner with “in-demand fields of the workforce” as defined by the Workforce Innovation and Opportunity Act or that build “career competencies” such as programs funded by the Perkins Act.<sup>46</sup>

<sup>36</sup> Sec. 4106(d)

<sup>37</sup> Sec. 4107(a)(2)

<sup>38</sup> Sec. 4107(a)(3)(A)

<sup>39</sup> Sec. 4107(a)(3)(C)

<sup>40</sup> Sec. 4107(a)(3)(D)

<sup>41</sup> Sec. 4109(a)(2)

<sup>42</sup> Sec. 4109(a)(1) & (3)

<sup>43</sup> Sec. 4109(a)(6)

<sup>44</sup> Sec. 4107(a)(3)(J)

<sup>45</sup> Sec. 4201(a)(2)

<sup>46</sup> Sec. 4205(a)(14)



## Conforming Amendments to Perkins

*The Every Student Succeeds Act contains several “conforming amendments” that have altered the Carl D. Perkins Career and Technical Education Act (Perkins) in a few ways. Below is a highlighted, but not exhaustive, list of these changes to current Perkins law. Portions of current Perkins law that are no longer funded or have never been funded, such as Title II or Sec. 118 of the Perkins Act, are not listed here.*

**Perkins Accountability:** Secondary Perkins accountability indicators 1S1, 1S2 and 4S1 will all now be calculated using ESSA’s new or changed methods for assessing student academic achievement and calculating cohort graduation rates.<sup>47</sup> The USDE’s Office of Career, Technical, and Adult Education (OCTAE) will likely release updated guidance for states to reflect these changes.

**State Perkins Plans:** With ESSA’s emphasis on a “Well-rounded Education”, NCLB’s “core academic subjects” terminology has been dropped in favor of this new definition. As mentioned above, ESSA defines this new term to include CTE and as such states’ Perkins plans must now include a description for how this concept will be supported.<sup>48</sup> ESSA also makes changes to current state Perkins plan requirements related to state-identified standards, updating Perkins to align with ESSA’s new terminology related to “challenging state academic standards” as defined by that law.<sup>49</sup> OCTAE will likely release updated guidance to states to reflect these changes.

**Perkins State Leadership:** ESSA makes a small modification to Perkins’ current required uses of funds for state leadership activities funding. As mentioned above, ESSA updates Perkins to clarify that states may now use a portion of their Perkins allocation designated for this purpose to ensure students are receiving a “Well-rounded Education”.<sup>50</sup> OCTAE will likely release updated guidance to states to reflect these changes.

**Local Perkins Plans and Uses of Funds:** ESSA makes similar changes to Sections 134 (Local Perkins Plans) and 135 (Local Uses of Funds) to update those sections to align to ESSA’s new terminology related to standards and to a well-rounded education.<sup>51</sup>

## Additional Implementation Resources

- [USDE ESSA Resource Page](#)
- [Advance CTE Updates on ESSA Implementation](#)

*For more information on this resource, please contact Steve Voytek, Advance CTE’s Government Relations Manager ([svoytek@careertech.org](mailto:svoytek@careertech.org)).*

<sup>47</sup> Sec. 9215(n)(3) & Perkins Sec. 113(b)

<sup>48</sup> Sec. 9215(n)(6)(B) & Perkins Sec. 122(c)(7)(A)(i)

<sup>49</sup> Sec. 9215(n)(6)(A) Perkins Sec. 122(c)(1)(I)(i)

<sup>50</sup> Sec. 9215(n)(7) & Perkins Sec. 124(b)(4)(A)

<sup>51</sup> Sec. 9215(n)(8), Sec. 9215(n)(9) & Perkins Sec. 134(b)(3), Sec. 135(b)(1)(A), respectively.



## DECA

Board Liaison Report

Wayne Kutzer

DECA continues to grow in membership. Current numbers are: 215,000 members, 3500 High School chapters, 275 Collegiate chapters, and 5,500 Advisors in all 50 United States, the District of Columbia, Canada, China, Germany, Guam, Mexico, Puerto Rico and Spain.

DECA just completed their “BE EPIC” International Career Development Conference (ICDC) in Nashville. Over 17,500 members and advisors attended. Who competed in 55 competitive events. The new secondary officers for 2016 - 2017 were elected. They are:

Donald LeCompte - Pennsylvania, President

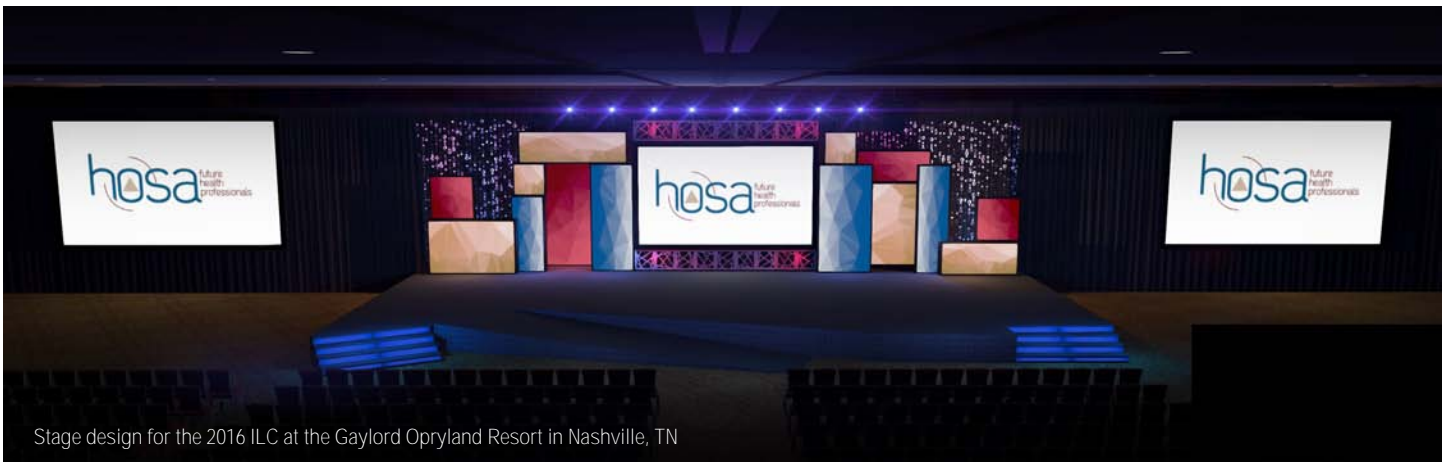
Brandon Allen - Michigan, Central Region Vice President

Emily Fraser – Ontario, North Atlantic Region Vice President

Victoria Meng – Texas, Southern Region Vice President

Rohan Ghiya – Arizona, Western Region Vice President

DECA has built a successful industry partnering program that supports and guides the organization. The National Advisory Board (NAB) represents nearly 100 business and industry partners also serve as judges and mentors during DECA’s yearlong local, state, and national programming.



Stage design for the 2016 ILC at the Gaylord Opryland Resort in Nashville, TN



## Over 9,300 HOSA-Future Health Professionals will gather in Nashville, Tennessee, to participate in the International Leadership Conference, June 22-25, 2016!



2015-2016 National Executive Council. HOSA-Future Health Professionals is an international student-led organization providing a unique program of leadership development, motivation, and recognition exclusively for middle school, secondary, postsecondary, collegiate and adult education students with an interest in health or health care. This year's National Executive Council also represents the ethnically diverse membership it leads.

The team is led by Amit Sandhu, serving as National President (CA) (back row, left). Tavarus Rowe, Postsecondary/Collegiate Board Representative (SC); Julius Wade (FL); Akshar Patel (NJ). (front row, l) Santina Cherian (OK); Tammy Phillips (OK); Elizabeth Carnesi (AZ); Aditya Vinjamuri (NJ).

The mission of HOSA-Future Health Professionals is to enhance the delivery of compassionate, quality health by providing opportunities for knowledge, skills, and leadership development of all HOSA students, therefore, helping students meet the needs of the global health community.

### A SPECIAL INVITATION

HOSA-Future Health Professionals has much to celebrate and it would be our honor to have each State Director join us for the 2016 International Leadership Conference to see firsthand how much HOSA has changed in the past forty years!

HOSA is now international! HOSA will be hosting its first International Leadership Conference welcoming membership from Canada, Mexico, Italy, Germany and American Samoa.

As HOSA celebrates its 40<sup>th</sup> Anniversary, we reflect back to its beginning at the Inn of Six Flags in Arlington, Texas, where 384 delegates from six states participated in the Constitutional Convention and HOSA was born. Fast forward to forty years later and HOSA will recognize its 200,000<sup>th</sup> member as HOSA will have a record-breaking year of 203,000 members. We will also have exceeded our expectations with over 9,300 HOSA members, advisors, partners and guests at the ILC.

**ILC highlights:** honor HOSA's heroes; unique learning opportunities about current and relevant health trends and innovative ideas at 85 educational workshops; 57 competitive events that showcase the technical skills and competencies developed through health and biomedical science class instruction; and an exciting HOSA expo.

We look forward to celebrating the unique journey of HOSA—past, present and future! Please join us in June!

## HOSA-Future Health Professionals —

### The Organization

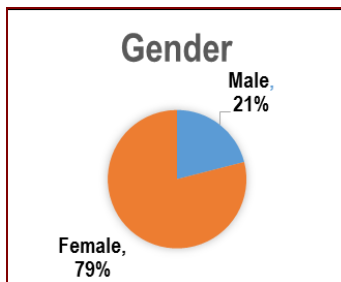
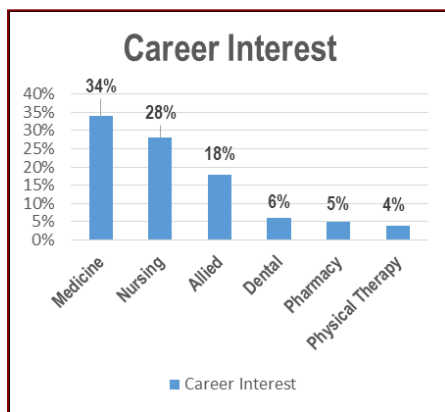
During the 2015-2016 school year HOSA reached over 200,000 active members in 49 states within the US, Puerto Rico, Canada, Mexico, American Samoa, Italy, and Germany. Since its creation in 1976 the organization has helped prepare over 2.5 million leaders going into the health industry. Through the HOSA Competitive Events program over 80,000 students have competed during the 15-16 school year at the regional and state/country levels in 56 health related events.

48+7=55

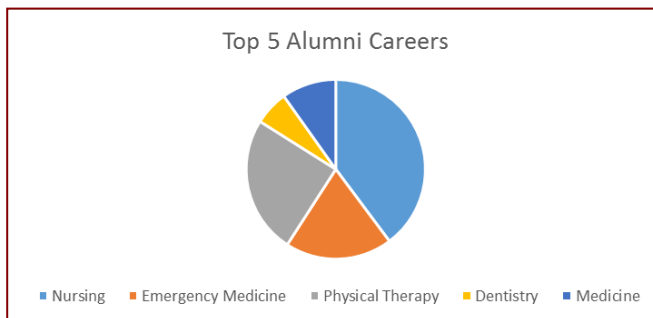
Forty-eight states, plus Puerto Rico, District of Columbia, Canada, Germany, Mexico, Italy and American Samoa are led by HOSA state advisors and are affiliated with HOSA-Future Health Professionals.

### HOSA Demographics

There is an increasing interest in the pursuit of Medicine by HOSA members followed by Nursing and Allied Health.



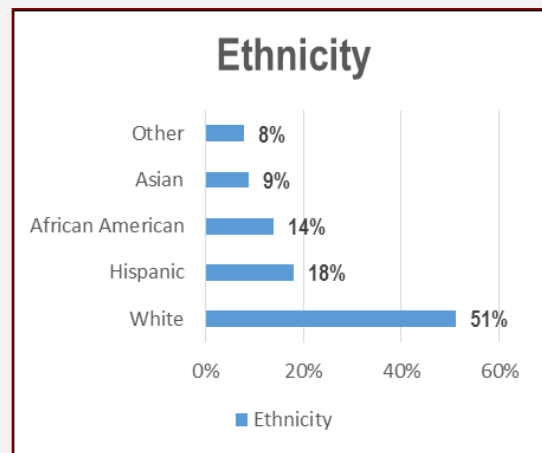
HOSA is no longer a female student organization nor is the focus limited to nursing careers. The percentage of males continues to increase as classroom and chapter activities provide a foundation for future health professionals rather than focusing only on nursing or the allied health professions.



HOSA attracts those students who wish to prepare themselves to be future health professionals. The health industry depends on HOSA to keep the pipeline full of qualified future health professionals!

### Cultural Competency

HOSA-Future Health Professionals recognizes the importance of recruiting ethnically diverse students to ensure that future health professionals better reflect the patients they serve. HOSA leadership realizes that members must learn how to work with patients from a variety of backgrounds. It is called **“cultural competency.”** HOSA has a unique vehicle to develop cultural competency through the participation in the HOSA chapter as a member, elected officer, or committee chair. Since HOSA chapters are diverse (49 percent in 2016), as members are engaged in community service projects in more diverse communities, and as members are involved in job shadowing and clinical rotations in health facilities as part of an in-school program, HOSA members will be much more culturally competent than students who graduate and were not engaged in a health industry pipeline program like HOSA-Future Health Professionals. Is HOSA diverse? Look again at the members of the 2015-2016 National Executive Council on the first page who were elected by the National Delegate Assembly. HOSA members value diversity and are culturally competent!



### Interagency Health Leaders Roundtable—Creating Strategic Effect in an Austere Environment at the National Defense University in Washington, D.C.

HOSA was honored to supply four of the 100 individuals selected to attend the quarterly roundtable with the goal to continue the dialogue regarding possible futures for global and strategic health, interagency health leadership development and technology and innovative medicine. During the plenary session, attendees heard experts in global and strategic health discuss ways to implement partnerships that address global health security and diplomacy challenges.

Participants broke into working groups which allowed for strategic discussion regarding the farsighted topics. The Roundtable values the engagement of youth and have found that HOSA members provide a unique perspective on the issues being discussed and are integral to the final deliverables.

Pictured with Assistant Secretary of Defense Jonathan Woodson are HOSA Representatives: Elizabeth Carnesi, National President-Elect; Rahma Mkuu, 2011 PS/Collegiate Vice President; Aditya Vinjmauri, PS/Collegiate Vice President; and Jessica Fults 2014 Regional Vice President.



# HOSA-100 NATIONAL ADVISORY COUNCIL CHAIR, DR. BRUCE GREEN, WELCOMES RECENT MEMBERS

**Dr. Bruce Green, MD, Director, Deloitte Consulting LLP, Chief Medical Officer, Deloitte's Federal Health Practice, Chairs the HOSA-100 National Advisory Council for a second term.** Dr. Green is an advisor to Deloitte's Federal and Commercial Health clients and a thought leader in clinical public health leadership and preparedness. Bruce was the 20th Air Force Surgeon General and the functional manager of the U.S. Air Force Medical Service. He has a MD and a MPH from the Harvard School of Public Health and is board certified in Aerospace Medicine.



The second year of the National Advisory Council was focused on recruitment — and the year has been successful. NAC members include: CAPT Robert J. Tosatto, Medical Reserve Corps; Ernie DuPont, Workforce Initiatives, CVS Health; Tamara Rozhon, President, GRS Academy, Genesis; Doug Wolf, Strategic Initiatives; Boys & Girls Clubs of Columbus; Mona Morales, Executive Director, Partners in Leadership, LLC; and Paul Grundy, Chief Medical Officer & Director Healthcare Transformation IBM. HOSA-Future Health Professionals welcomes two new members to the National Advisory Council:



**Sean Callinicos, Senior Vice President, Government Relations, Cardinal Health**

HOSA welcomes Sean Callinicos as the newest member to join the HOSA-100 National Advisory Council. Cardinal Health, Inc. is a Fortune 500 health services company based in Dublin, Ohio. The company specializes in distribution of pharmaceuticals and medical products, serving more than 100,000 locations. The company also manufactures medical and surgical products, including gloves, surgical apparel and fluid management products. In addition, it operates the nation's largest network of radiopharmacies. Cardinal Health provides medical products to over 75 percent of hospitals in the United States. In 2013, Cardinal Health joined with CVS Health to form the largest generic drug sourcing operation in the United States called Red Oak Sourcing.

Cardinal Health Foundation is the charitable arm of Cardinal Health and gives an annual product donation of over \$9 million and provides up to \$1,000 in matching funds for every Cardinal Health employee that makes a charitable donation. Cardinal Health is very involved in efforts to improve safety initiatives in children's hospitals.

**Dr. Robert Popovian, Pharm.D., M.S., Sr. Director, US Government Relations, Pfizer Inc.**

Pfizer Inc. is an American global pharmaceutical corporation headquartered in New York City, with its research headquarters in Groton, Connecticut. It is among the world's largest pharmaceutical companies. Pfizer is listed on the New York Stock Exchange, and its shares have been a component of the Dow Jones Industrial Average since 2004.

Dr. Popovian has almost two decades of experience in numerous facets of biopharmaceutical and health care industry with a strong track record of expertise, innovation and results in Health Care Policy and Economics, Government Relations, Medical Affairs, and Strategic Planning. He has published and presented extensively on the impact of biopharmaceuticals and health policies on health care costs and clinical outcomes and writes a monthly column published in Morning Consult regarding health policy and economic issues relevant to the biopharmaceutical industry. The Pfizer Foundation is a charitable foundation established by Pfizer Inc. Its mission is to promote access to quality health care, to nurture innovation, and to support the community involvement of Pfizer colleagues.



## 2016 HOSA, Inc. Board of Directors

In January, the HOSA, Inc. Board of Directors met for its annual meeting in Southlake, Texas, and elected new Board officers. Lloyd DeVault, State Advisor and Executive Director of Florida HOSA, was elected Chair. Brock Rops, South Dakota State Advisor and Area Health Education Center Coordinator at the University of South Dakota, was elected Chair-Elect. Dr. Peggy Enslin, Delaware HOSA State Advisor and Education Associate for Health Sciences at the Delaware Department of Education as well as a registered nurse was elected as Board Secretary.





National Association of Parliamentarians — Henry Robert II, Roberts Rules of Order, meets National Officer Julius Wade (left) - Julius will be attending Harvard in the fall.



TEXAS HOSA REPRESENTS NATIONAL HOSA AT ASSOCIATION OF MILITARY SURGEONS OF THE UNITED STATES ANNUAL CONFERENCE



Advisor Recognition



We WON!



Santina Cherian, along with three additional national officers, provided a workshop at the ACTE Career Vision Convention. Santina will be attending New York University in the fall.

For more information about HOSA-Future Health Professionals and/or to attend the National Leadership Conference, contact:  
**Jim Koeninger, Ph.D., Executive Director,**  
[jim.koeninger@hosa.org](mailto:jim.koeninger@hosa.org)  
548 Silicon Drive, Suite 101 Southlake, TX 76092 972.874.0062



2015-2016 Washington Leadership Academy

*SkillsUSA report submitted by: Kathleen Cullen*

Starting with the Spring 2016 issue, readers can experience SkillsUSA Champions magazine in a whole new way at: [www.skillsusa.org](http://www.skillsusa.org). The digital format is now responsive for viewing on all electronic devices, and the content can be easily shared via email and social media. It's much more engaging and interactive than the previous format. I encourage you to take a look.

SkillsUSA is enjoying a record-breaking year for membership. Early March numbers showed 317,338 members in the system with middle-school membership up to 1,297. This is the best membership year in their history and makes SkillsUSA one of the largest individual student member organizations in the nation.

Following the national conference last year five Northeastern state association directors, Connecticut, Massachusetts, Maine, New York (high school) and Rhode Island, took up the challenge to participate in the first ever USA/Skills Quebec Competitions. This resulted in a friendly "practice" competition held in the month of May between Canada and Skills which Tim Lawrence, Executive Director of Skills has affectionately termed the "Can-Am Challenge."

A number of SkillsUSA state events were held in April and in between state events SkillsUSA participated in an inaugural meeting involving representatives from American Council for Construction Education, American Fuel & Petrochemical Manufacturers, Associated Builders and Contractors, Associated General Contractors, Construction Industry Institute, Construction Industry Roundtable, Construction Users Roundtable, Home Builders Institute National Academy of Construction, and Association for Career and Technical Education. The newly formed stakeholder group --- the National Construction Career Coalition --- will have its second meeting on Friday, June 24, during the National Leadership and Skills Conference.

In the month of April, Skills program manager in Business Partnerships and Development, attended an event at the National Press Club in Washington, D.C. The symposium, "Making the Business Case for Employer Talent Investment," was sponsored by the Lumina Foundation, UpSkill America and Business Champions, with nearly 20 speakers and panelists. The topic was the return on investment on upskilling current employees, specifically front-line workers. This provided an opportunity for SkillsUSA to highlight their role as a verified talent pipeline and skills gap solution.

Also in April staff participated in a panel discussion with the Association for Career and Technical Education. The panel talked about ways to improve the U.S. construction workforce development system during a two-day meeting held by IMPACT.

April also presented an opportunity for Skills to be part of a panel discussion in the Rayburn Building on proposed HR 2224, the Youth Access to American Jobs Act, sponsored by two Washington state Democratic congressmen, Rick Larsen and Jim McDermott. Other panelists included the American Association of Community Colleges, the National Skills Coalition and Precor Corp., which manufactures and distributes fitness equipment in North Carolina. Each panelist described his or her organization and offered thoughts about apprenticeships, employer needs, the technical workforce and the proposed bill. The bill proposes 10 public-private pilot programs allying local education agencies, community colleges and state apprenticeship and labor-management training programs. It is a 2+2+2 concept: two years of

high-school STEM-focused curricula, two years of manufacturing-related community college and then two years of apprenticeship.

The next big event will be the Skills USA National Leadership and Skills Conference to be held in Kentucky in June.

## **Lost Inventory Update**

*Report submitted by Karen Hornberger, Finance and Office Manager*

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### **Lost Inventory:**

Resolution for the lost Career Clusters inventory has been fully achieved. The staff was able to put an agreement in place with Vivayic to do a Strategic Analysis of the Common Career Technical Core (CCTC). This analysis gathered information from our members their current implementation of and preferred strategic next steps with CCTC. The report was presented to the Board in February 2016.

The value of reprinting the lost inventory and the proposed cost of the total project was \$23,365 which is now reflected in our financials as a \$16,132.74 reduction to inventory and an in-kind expense for the balance of the services performed or \$7,232.26.



## Member Services Update

*Report submitted by Andrea Zimmermann, Senior Associate, Member Engagement and Leadership Development*

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As a result of the New Skills for Youth initiative, Advance CTE had the opportunity to add staff capacity, and in doing so, was able to make other adjustments to staff responsibilities for the ultimate benefit of the organization.

As such, a new position was created, “Senior Associate, Member Engagement and Leadership Development.” The description is as follows:

*Public Description:* The Senior Associate is responsible for coordinating outreach and engagement with Advance CTE members, ensuring the organization is anticipating and meeting members’ needs, and helping to advance our organizational goals.

*Internal Description:* The Senior Associate ensures there is a mutually beneficial relationship between Advance CTE and its members: members get and see the value of their membership and Advance CTE is better positioned to advance its mission and vision as a result of its well-informed, well-equipped and deeply engaged members.

With the advent of the newly approved strategic plan, staff will work over the coming months to develop a comprehensive strategy for member engagement, professional learning, and new member on-boarding.

### **New State Director On-Boarding Program**

Since the 2015 Spring Meeting, 10 new State CTE Directors have taken the reins in their states, and over the past two years, there have been a total of 18 new State Directors, impacting more than one-third of the states. Of these new directors, their background and experience prior to this position were:

<b>State CTE Office</b>	<b>Background in CTE/ Workforce Development</b>	<b>No CTE/Workforce Development background</b>
9	7	2

Recognizing a need to better support this influx of new State Directors, staff restructured Advance CTE’s State Director on-boarding program in the fall of 2015. With the new staff capacity for member services, this program will be built out further in 2016, as well as considerations for new Associate members.

In FY 2015-16, the following activities were provided to new State Directors:

- Sending a mailing welcoming them to their role and explaining their Advance CTE membership
- Holding a one-on-one call with new State Director to learn how Advance CTE can best support them
- Writing a blog posting on the Learning that Works blog introducing them to the CTE community (you can read the blog posts in the hyperlinks within the table)

- Matching them with an experienced State Director for support

**FY 2016 Mentor Matches**

<b>New State Director</b>	<b>State</b>	<b>Start Date</b>	<b>Mentor State Director</b>	<b>State</b>	<b>Date of Match</b>
Lori Matyjas	CT	6/1/2015	Marie Barry	NJ	11/30/2015
<a href="#">Sarah Heath</a>	CO	7/1/2015	Eleni Papadakis	WA	1/25/2016
<a href="#">Rita Johnson</a>	KS	7/1/2015	Rich Katt	NE	11/12/2015
<a href="#">Karen Salmon</a>	MD	8/17/2015	Kathy Oliver	MD	11/12/2015
<a href="#">Jeralyn Jargo</a>	MN	9/1/2015	Kathy Cullen	WI	11/3/2015
Jay Ramsey	VT	11/9/2015	Rich Katt/Cory Epler	NE	2/1/2016
Eric Feldborg	NH	1/15/2016	Pradeep Kotamraju	IA	3/1/2016
<a href="#">Ronald Roveri</a>	SC	1/20/2016	Jo Anne Honeycutt	NC	3/1/2016
Emily Passias	OH	3/1/2016	TBD (In May)	TBD	TBD
Blaine Henningsen	MO	3/11/2016	TBD (In May)	TBD	TBD

**Forthcoming retirements:** Mr. Russell Weikle, California’s State CTE Director, will retire May 31, 2016.

**Position:** Senior Associate, Member Engagement & Leadership Development

**Public Description:** The Senior Associate is responsible for coordinating outreach and engagement with Advance CTE members, ensuring the organization is anticipating and meeting members' needs, and helping to advance our organizational goals.

**Internal Description:** The Senior Associate ensures there is a mutually beneficial relationship between Advance CTE and its members: members get and see the value of their membership and Advance CTE is better positioned to advance its mission and vision as a result of its well-informed, well-equipped and deeply engaged members.

## Roles & Responsibilities

- Develops and implements a comprehensive strategy for member engagement
  - Creates and manages internal process for tracking members as they start and continue their membership
  - Identifies gaps in current professional development and resource offerings
  - Facilitates potential focus groups to inform professional development and resource offerings to ensure Advance CTE is providing robust support to all members across the CTE spectrum, including an initial focus on engagement and support of postsecondary members.
  - Develops and supports a strategy for ongoing member utilization of Advance CTE resources and coordinated staff-to-member engagement and communications
  - Ensures accurate and up-to-date member information database
- Leads and continuously improves upon year-round onboarding program for “new” State Directors, with possible expansion for all members
  - Creates and manages internal process for onboarding and supporting “new” State Directors, including roles/responsibilities of other staff members
  - Leads and coordinates mentorship program
  - Develops and manages a process for supporting new non-State Director members
  - Contributes to process of onboarding of new Board members and officers
- Develops and leads year-round professional development offerings for members
  - Oversees strategy for two annual meetings a year, including goal of embedding more leadership-focused sessions into mix
  - Develops and maintains strategies/processes for improving member-to-member communication (e.g., communities of practice, listserv, etc.)
  - Develops and informs other planned and on-demand professional development events, resources and tools in partnership with other staff, both content- and leadership-focused.
  - Manages and runs quarterly state engagement meeting and process
  - Supports Advance CTE’s partnership with ACTE around CareerTech VISION to help ensure Career Clusters are prominent and the event is of the highest value for our members  
(starting with 2017 VISION)
- Administers surveys and develops reports to support member engagement and to communicate engagement of members

- Conducts an annual membership survey that offers consistent and comparable data on member engagement, professional development needs and overall satisfaction with organization
- Leads the development of an annual report, sharing Advance CTE's accomplishments with our members and partners
- Utilizes 2 minute round up in support of members' professional learning
- Involvement and collaboration with other projects
  - Provides input and guidance into state policy strategy, communications strategy and advocacy plan to ensure coordination with member engagement strategy
  - Leads and supports other initiatives aligned with organizational needs and interest/skills (e.g., IDIQ, other projects to be identified in the future)

## Partnerships Update

*Report submitted by Kate Kreamer, Deputy Executive Director  
and Kimberly Green, Executive Director*

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Advance CTE continues to enjoy a broad array of partnerships with organizations representing the full range of CTE stakeholders – educators, policymakers, employers and even students. We currently have about 55 active partners, although the value and strength of these partnerships does vary considerably. Below is an overview of some of our highest-impact partnership activities, contracts (and potential funding streams) from partner organizations and a full list of our most critical partners.

### Major Resources

- Since September 2016, Advance CTE has:
  - Released three papers in partnership with organizations (ACTE, Asia Society/Longview Foundation and Achieve)
  - Co-hosted webinars with six different partner organizations
  - Presented at over twenty events of partner organizations, in person and/or virtually

### Major Initiatives

- *Future of CTE Summit*: One of our most significant opportunities for building and strengthening partnerships is The Future of CTE Summit. Through our design team, we regularly engaged with co-convening organizations, including Association for Career and Technical Education (ACTE), Council of Chief State School Officers (CCSSO), Council of State Governments (CSG), National Association of State Boards of Education (NASBE), National Governors Association (NGA), National Skills Coalition (NSC), the U.S. Chamber of Commerce Foundation, and the National Council of State Directors of Community Colleges, an affiliate of the American Association of Community Colleges (AACC). We have unquestionably built stronger relationships with the majority of these organizations as a result of this Summit – largely to the benefit of our overall State Policy Strategy.
  - We have built an incredibly strong relationship with CCSSO as the project co-leads for New Skills for Youth Initiative
  - We have presented to NGA’s Policy Academy on Work-Based Learning and Competency-Based Education (twice).
  - We have presented at Council of State Governments and National Council of State Legislatures multiple times in the past year
  - We have partnered with National Skills Coalition on a number of efforts, largely focused around WIOA implementation
  - We have presented to NASBE and are working to map out future opportunities for collaboration.
- **Shared Vision for the Future of CTE**: Continuing on the success of the Summit, all of the co-conveners except for the Council of State Governments (the organization underwent a staffing change resulting in no education-focused leadership) have been involved in the development and release of Putting Learner Success First: A Shared Vision for the Future of

CTE. Advance CTE will work with the partner organizations to release a suite of resources and materials for our diverse memberships and communities.

- Our leadership sits on the advisory boards of the National Technical Honor Society, National Career Academy Coalition, Manufacturing Skills Standards Council, American National Standards Institute, National Alliance for Partnerships in Equity, the National Visiting Committee for Supply Chain Management, and the Pearson Employability Advisory Committee.

**New partnerships/initiatives of interest:** Below are a variety of new initiatives or emerging partnerships of interest:

- We have an emerging partnership with the **Aspen Institute**'s leadership program, having been invited to serve on the selection committee for the Aspen Institute Community College Excellence program.
- Staff are advisors to OCTAE in planning the **OCED Summit on Work-Based Learning** (scheduled for this summer).
- Staff serves on the OCTAE-funded Technical Working Group **on equity in CTE**.
- Staff was selected to serve on WorkCred's (an affiliate of ANSI) **Credentialing Advisory Committee**.
- Staff also serve on a certifications subcommittee, an offshoot of the Lumina Credentials Summit.
- Staff have been tapped to serve on a U.S. Department of Labor panel focused on apprenticeship and Career Technical Education

<b>FULL LIST OF PARTNERS</b>	
Achieve	National Alliance for Partnerships in Equity
ACT	National Association of Secondary School Principals
Alliance for Excellent Education	National Association of State Boards of Education
American Association of Community Colleges	National Association of Workforce Boards
American Federation of Teachers	National Career Academy Coalition
America's Promise Alliance	National Career Development Association
ANSI/WorkCred	National Conference of State Legislatures
Appalachian Regional Comprehensive Center	National Council on Agriculture Education/National FFA
Asia Society /Longview Foundation	National Education Association
Association for Career and Technical Education	National Skills Coalition
Boeing	National Technical Honor Society
Campaign to Invest in America's Workforce	NCC-CTSO
Center for Great Teachers & Leaders (AIR)	National Council of State Directors of Community Colleges

Center for Law and Social Policy	New America Foundation
College & Career Readiness & Success Center (AIR)	National Governors Association
Committee for Education Funding	Opportunity America
CORD	Perkins Coalition (education)
Council of Chief State School Officers	Perkins Coalition (employers)
Education Commission of States	RTI/NCiCTE
Education Trust	Southern Regional Education Board
Ford Motor Fund Company	Transportation Learning Center
Hope Street Group	U.S. Chamber/US Chamber Foundation
IBM	U.S. Department of Labor
Industry Workforce Needs Council	U.S. Department of Transportation
International Baccalaureate	U.S. Department of Education (OCTAE)
Jobs for the Future	Workforce Data Quality Campaign
MSSC	

## ***PUBLICATIONS***

Since September 2015, Advance CTE has published four major policy briefs/reports on topics of interest from the field.

- Connecting Classroom to Careers Series
  - [Setting a Statewide Vision for Work-based Learning](#) (October 2015)
  - [Removing Legal Barriers Around Work-based Learning](#) (April 2016)
  - The Connecting the Classroom to Careers series takes a closer look at the state's role in expanding high-quality work-based learning opportunities for all students, with a particular focus on untangling the major barriers at the K-12 level. Each installment explores a specific issue and highlight innovative or leading state approaches, as well as key policy questions and relevant resources that state and local leaders should consider as they examine their own systems.
- [Preparing a Globally Competent Workforce Through High-Quality Career and Technical Education](#) (January 2016) *(with Asia Society, Longview Foundation and ACTE)*
  - This paper explores why it is so critical that global competencies are embedded throughout CTE programs of study to ensure students are fully prepared for the competitive economy, and offers examples of local CTE programs successfully integrating global concepts through partnerships, projects and other student experiences.
- [State Policies Impacting CTE: 2015 Year in Review](#) (January 2016) (with ACTE)
  - The third in our annual reports that take a state-by-state look at CTE-related policies passed in all 50 states and DC.
- [Updated state-by-state advocacy snapshots.](#)
  - These fact sheets have not been updated since 2011 and are being redesigned for use by CTE advocates to explain and make the case for CTE in their states (September 2015)

**Looking ahead,** Advance CTE has the following publications planned through the end of 2016.

- *Putting Learner Success First: A Shared Vision for the Future of CTE* (with ACTE, CCSSO, NASBE, NGA, NCSDE, NCS and US Chamber of Commerce Foundation) (May 2016)
  - Supplemental documents to the Vision throughout the Summer of 2016
- *How States are Making Career Readiness Count: A 2016 Update* (May 2016) (with Achieve)
- *Connecting Classroom to Careers Series* briefs on intermediaries (May 2016), measuring WBL (June 2016), and scaling high-quality WBL (July 2016)
- Brief/white paper on employer engagement, drawn from employer roundtables held in Nashville, TN and Pinellas, FL (August-September 2016)
- State of CTE report (likely on teacher certification and expert recruitment) (October 2016)



- Snapshot case studies on the 25 New Skills for Youth Phase 1 states (December 2016)
- Other reports, briefs and resources as defined through New Skills for Youth

### **WEBINARS**

Since September 2015, Advance CTE only hosted six webinars:

<b>Webinar Topic</b>	<b>Month</b>	<b># Participants</b>
A co-hosted <a href="#">webinar</a> with Appalachian Regional Comprehensive Center on work-based learning in Tennessee	October 2015	61
A webinar with past Excellence in Action award winners as part of our recruitment efforts for the 2016 awards	November 2015	NOTE: The attendee report accidentally was deleted by Cisco
Co-hosted <a href="#">webinar</a> with The Northeast Center of the National Transportation Network on innovative teaching and transportation industry partnerships	November 2015	NOTE: We didn't host it and didn't receive final participant info
Co-hosted <a href="#">webinar</a> with Achieve to release our paper on competency-based pathways and CTE	November 2015	NOTE: We didn't host it and didn't receive final participant info
Co-hosted webinar with ACTE for our 2015 State Policy Review	January 2016	83
Co-hosted webinar with Asia Society, Longview Foundation and ACTE to release our joint paper on CTE and global competency	January 2016	108

**Looking ahead,** Advance CTE will host a number of webinars through the end of 2016. To date the following are planned:

- Advance CTE will be co-hosting two webinars in partnership with the Department of Labor, Office of Apprenticeship in June/July 2016
- Webinar on *Putting Learner Success First* in July 2016
- Webinar to release State of CTE report in October/November 2016

In addition to live webinars, Advance CTE has a library of [on-demand webinars](#), the most recent additions being *Programs of Study* and *Reflect, Transform & Lead*. We now have eight on-demand webinars available, including:

- Advocacy 101: Making the Case for CTE
- Career Clusters 101
- Programs of Study
- Reflect, Transform & Lead: An Overview of the Vision for CTE
- The Common Career Technical Core: The Basics

- The Common Career Technical Core: The Development Process
- Sequestration
- The Federal Budget & Appropriations Process: What's the Difference?

## **Year-Round Sponsorship Pilot**

*Report submitted by Karen Hornberger, Finance and Office Manager*

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Last year, we implemented a Board-approved pilot of a year-round sponsorship program. This pilot stemmed from a concern about potentially declining sponsor income due to the challenging economy, as well as requests from some sponsors that preferred to be invoiced once per year rather than multiple times per year. Further, Advance CTE held one only event in 2015 that was eligible for sponsorships as The Future of CTE Summit, held in place of our fall meeting, did not have any sponsors.

The year-round sponsorship opportunity was to be piloted for one year, giving sponsors the chance to send in a single sponsor payment to the organization and in exchange the sponsor would receive special benefits (e.g. members only webinars, extra blog posts, increased visibility on our website, etc.) The opportunity to participate in this pilot was made available to all organizations that sponsored at the Gold or Diamond level at the Spring 2015 meeting.

The pilot ended in December 2015. Due to the lack of participation (only two out of nine eligible sponsors participated) and the lack of sponsors utilizing the benefits afforded through the pilot, staff do not recommend institutionalizing this pilot.

Further, it should be noted that sponsorships have been steady, exceeding budget expectations. To date, we have eighteen sponsors for Spring meeting with sponsorship income of \$42,500.

**Advance CTE Financial Report**  
*Report prepared by Karen Hornberger, Finance and Office Manager*

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This report provides summary financial information for the period of July 1, 2015 through March 31, 2016 or 75% of the fiscal year.

**INCOME:**

Overall income is at 83% and exceeds targets in most categories. All states have paid dues except for one and that state has submitted a contract to pay at the end of the fiscal year. Spring registrations are lagging slightly but we have met our annual goal due to exceeding targets for the Fall Summit. Sponsorships for the spring meeting have surpassed budgeted projected by \$2500. Interest is also exceeding income goals at 111%, despite only 75% of the fiscal year having passed. Other income has exceeded expectations with two unexpected contracted projects with ACTE, WGBH and speaking invitations.

**EXPENSES/LIABILITIES:**

To date, 66% of budgeted expenses have been spent. The majority of expense categories are on target. Accounting fees are being watched, as they may exceed budget. The salary and benefits category reflects The Center to Advance CTE's reimbursement of \$86,701.48 for the first half of the fiscal year. January 2016 going forward, the budget reflects Advance CTE paying for the full salary and benefits of staff, with this half of the fiscal year being reimbursed after June 30, 2015. Merrill Lynch investments fees are higher than projected because more funds are invested than anticipated. Interest is proportionally above target and in line with the investment fees.

**ASSETS:**

As of March 31, the Association's fiscal position is stable with total assets at \$3,085,371.17 and total equity at \$2,317,324.06. This represents a 7.96% increase in assets and an 8.66% decrease in equity compared to 2015. The increase in assets is due to the invoicing of FY17 membership dues that were recorded in March 2016 and the decrease in equity is due to the drawdown of reserves for the summit.

**INVESTMENTS:**

The reports have been prepared by Mark Friese, advisor from Merrill Lynch and reflect investments aligned to the Board-approved investment policy statement. At this time, no modifications are requested for the investment portfolio. The equity portion of the portfolio is exceeding last year's cumulative performance 3.85% compared to (.58%) The overall portfolio is also doing well, at 2.76% compared to (.72%) last year.

**APPROVED ADVANCE CTE FY16 BUDGET**

	Approved FY16	Actual Expenses as of March 31, 2016	Expenses to Budget	Explanatory Notes
<b>INCOME</b>			75% of the fiscal year	
State Memberships	\$499,774.10	\$517,888.00	104%	Actuals as of March 31, 2016. California has paid 1/2 their contracted dues amount, Puerto Rico and the Virgin Islands remain unpaid. Virgin Island and Puerto Rico memberships are discontinued.
Associate & Org. Memberships	\$41,433.75	\$44,975.00	109%	Actuals as of March 31. Increased Organizational Memberships has helped us reach our budgeted amount.
Conference Registrations	\$147,500.00	\$146,810.00	100%	\$70,000 was budgeted income for Fall Summit - received \$81,500. Spring registrations were budgeted at \$77,500 and are at \$65,310 as of May 6.
Conference Sponsorships	\$50,000.00	\$52,500.00	105%	FY16: Based on no sponsors for the Fall Summit, year-round sponsorship of \$10,000 included. Spring Meeting was budgeted at \$40,000 and has received \$42,500.
Interest/Dividend	\$59,400.00	\$66,045.30	111%	Interest/Dividends through March 31, 2016
Contract approved increases/bonus	n/a	\$0.00	0%	Evaluation of Executive Director for FY 15 nor 16 has been completed.
Other income	\$2,000.00	\$12,962.02	648%	Increases reflect several small grants (\$9400), a rebate (\$2500), honoraria (\$800) and other speaking fees.
Reserve withdrawal	\$100,507.55	\$0.00	0%	None needed due to income/expense ratio thus far in the fiscal year.
Reserve withdrawal for Future of CTE Summit	\$204,170.00	\$126,845.37	62%	On Target - \$80,000 PWC facilitator fee, \$4,403 PWC rooms, \$2,774.72 PWC Meals, 893.88 Electrical and Internet, and \$18,773.79 for PWC travel expenses. \$14,794.85 used for meals for non-paying attendees.
Reserve fund withdrawal - payment to The Center to Advance CTE.	\$63,105.00	\$0.00	0%	FY16: Advance CTE agreed to support The Center to Advance CTE in some projects until The Center to Advance CTE restored its funding streams. Some projects were previously paid for by Advance CTE. This amount represents support for CCTC-CCSS (\$38,400) alignment study, the Excellence in Action Awards (\$19,705), and CTE Campaign (\$5,000).
<b>TOTAL REVENUES</b>	\$1,167,890.40	\$968,025.69	83%	
<b>EXPENSES</b>				
<b>Allocated Expenses to Specific Projects</b>				
Speakers	\$1,000.00	\$0.00	0%	Expenses are budgeted for the Spring Meeting only.
Meals (Hotels/Catering)	\$152,550.00	\$53,363.55	35%	Includes F&B for Summit of \$49,528.20 and \$3835.35 for the Board retreat.
Travel/Lodging	\$34,785.00	\$16,493.93	47%	FY 16 travel through March 31 includes staff airfare and travel expenses to Fall Summit (\$2288.15) plus local travel to meetings and events (\$5338.43) and Board travel to ACTE Board and Retreat (\$8867.35)
Awards/Gifts	\$1,787.85	\$168.45	9%	Gavel for President; balance of expenses will occur with the Spring meeting.

Audio Visual	\$10,000.00	\$240.20	2%	Small amount incurred for Board retreat in February. These balance of these expenses are dedicated to the Spring meeting.
Printing/Copying	\$8,250.00	\$695.65	8%	Below budget due to lack of reauthorization effort anticipated (limited Congressional activity). Will increase with spring meeting and rebrand printing in late spring.
Communications (telephone/communications)	\$10,462.99	\$7,732.12	74%	This includes pre-payment of \$1170 in website updates. Pre payment reduced hourly rate. Hours will be draw down upon use. Also includes is the annual fee for the webinar platform and monthly phone/internet access changes through March 31, 2016.
Postage/Overnight	\$3,650.00	\$266.61	7%	budget modification to send packets to new members with branding information. Staff chose not to send out materials, so we will be under budget here.
Supplies	\$3,750.00	\$374.43	10%	Signage and supplies for Future of CTE Summit; Approved amount increased by \$1,750 for "DBA" budget modification. DBA funding has not been spent yet. These funds will be spent, along with spring meeting supplies.
Education/Training	\$3,500.00	\$165.00	5%	Professional development plans are in place but due to work load and be unable to be implemented.
Subscriptions/Dues (publications and subscriptions)	\$8,821.77	\$6,561.25	74%	On target given subscription renewal cycles and Includes monthly fees for Basecamp (project planning) and Dr. Back Up (off site file back up service) and Constant Contact annual renewal.
Bank Charges -CC FEES	\$3,450.00	\$2,691.70	78%	Includes credit card fees up to March 31 and includes processing Fall Summit registrations and late memberships and spring registrations
Reimbursement to The Center to Advance CTE for project-specific work	\$63,105.00	\$0.00	0%	None of this work has been completed yet, this no charges have been incurred. The CCTC-CCSS alignment study on hold pending Vivayic report (to be presented at the Board retreat). The Excellence in Action Awards will happen in May. The state policy work will be reconciled at year end.
Legal fees	\$2,000.00	\$922.65	46%	Approved amount of \$2000 for legal fees for the DBA budget modification was added to project and not the G&A legal fees budgeted
Contractors (consultants)	\$165,570.00	\$139,112.87	84%	\$126,845.37 for PWC's food, rooms, contract amount and expenses which includes \$893.88 for electrical/internet at the Summit. Branding Consultants/Fratelli Group \$3,500. Board retreat facilitator \$8767.50. Note: Approved amount increase by \$6,000 for "DBA" budget modification.
<b>Subtotal - Specific Projects</b>	<b>\$472,682.61</b>	<b>\$228,788.41</b>	<b>48%</b>	
<b>General &amp; Administrative Expenses</b>				

				Reconciliation of salary/benefits was made at the end of December, so this reflects the association's salaries through December 31, 2015 and full salaries between January 1 and March 31, 2016.
Salaries	\$421,831.36	\$312,060.48	74%	
Bonuses	\$0.00	\$0.00	0%	Once final FY15 Financial Statements have been approved for the audit, a bonus pool will be recommended to the Board.
Full employee benefits	\$86,093.26	\$81,474.78	95%	Reconciliation of salary/benefits was made at the end of December, so this reflects the association's salaries through December 31, 2015 and full salaries between January 1 and March 31, 2016. Also includes annual payment of workers compensation insurance of \$1357 and semi-annual life insurance premiums.
Rent	\$116,336.95	\$85,120.41	73%	Includes rent through March 31, 2016
Licenses/Fees	\$3,183.25	\$2,720.00	85%	Includes annual plan fee for 401K and Corporation Service representation fee paid annually.
Office Supplies	\$750.00	\$329.38	44%	
Communications	\$250.00	\$88.73	35%	
Postage/Overnight	\$216.88	\$158.58	73%	On target and includes Stamps.com fee from July through March 31, 2016
Printing/Copying	\$10.00	\$0.00	0%	
Equipment & Furniture	\$4,222.47	\$2,094.99	50%	Includes copier lease through March 31, association's portion of the annual networking fee and equipment repair of \$453.21
Bank Charges	\$35.00	\$0.00	0%	
Merrill Lynch Charges	\$25,000.00	\$23,663.37	95%	Fees as of March 31. Because more funds are invested, the fees are higher than projected (but interest is also proportionally above target).
Accounting	\$28,200.00	\$23,164.60	82%	Includes payroll fee, accounting fees for monthly reconciliation, audit, 990 and the fee for the annual audit.
Legal	\$3,190.00	\$0.00	0%	Annual review of personnel policies will occur in May. Likely to be below budget.
Insurance - Directors	\$5,138.62	\$5,003.35	97%	Includes annual fees for umbrella business policy, directors and officers liability and the fidelity bond. Also includes first, second and third quarter of key person insurance.
Liaison & Meetings	\$750.00	\$460.47	61%	Lunch for staff planning retreat and holiday party
<b>Total G &amp; A Expenses</b>	<b>\$695,207.79</b>	<b>\$536,339.14</b>	<b>77%</b>	
<b>Total Project Expenses</b>	<b>\$472,682.61</b>	<b>\$228,788.41</b>	<b>48%</b>	
<b>TOTAL EXPENSES</b>	<b>\$1,167,890.40</b>	<b>\$765,127.55</b>	<b>66%</b>	
<b>INCOME LESS EXPENSES</b>	<b>\$0.00</b>	<b>\$202,898.14</b>		

**Advance CTE  
Balance Sheet  
As of March 31, 2016**

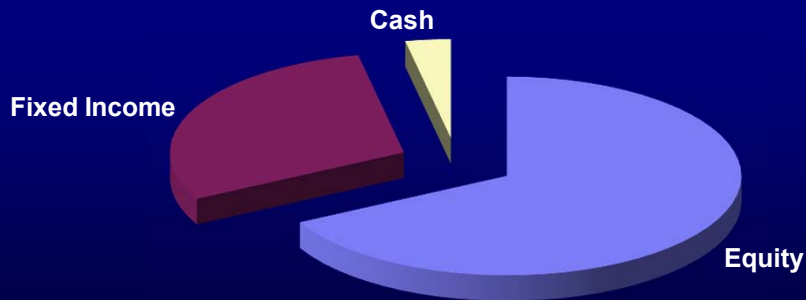
	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1010 Cash- Bank of America	36,732.45
1017 Merrill Lynch Cash - 749	127,345.11
1018 Merrill Lynch Cash - 7WD	16,376.08
<b>Total Bank Accounts</b>	<b>\$ 180,453.64</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	560,058.19
<b>Total Accounts Receivable</b>	<b>\$ 560,058.19</b>
<b>Other current assets</b>	
<b>1100 Investments</b>	
1131 Government Bonds	609,126.15
1159 Equities	1,684,287.05
<b>Corporate Bonds</b>	
1126 Entergy Mississippi	34,993.29
<b>Total Corporate Bonds</b>	<b>\$ 34,993.29</b>
<b>Total 1100 Investments</b>	<b>\$ 2,328,406.49</b>
1275 Security Deposit	9,000.00
1280 Due from Foundation	29.81
1299 Accrued Interest Receivable	2,242.54
1300 Prepaid Expense	679.07
<b>Total Other current assets</b>	<b>\$ 2,340,357.91</b>
<b>Total Current Assets</b>	<b>\$ 3,080,869.74</b>
<b>Other Assets</b>	
1400 Furniture and Fixtures	25,107.21
1405 Accumulated Depreciation - Furniture and Fixtures	-24,137.84
1410 Equipment	17,255.43
1450 Accumulated Depreciation- Equipment	-13,723.37
<b>Total Other Assets</b>	<b>\$ 4,501.43</b>
<b>TOTAL ASSETS</b>	<b>\$ 3,085,371.17</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 Accounts Payable {105}	-15,142.37
<b>Total Accounts Payable</b>	<b>-\$ 15,142.37</b>
<b>Other Current Liabilities</b>	
2070 Accrued Vacation	77,625.57
2099 Deferred Revenue	
2139 Deferred State Dues FY 15-16	163,799.00
2140 Deferred Associate Dues FY 15-16	18,373.00



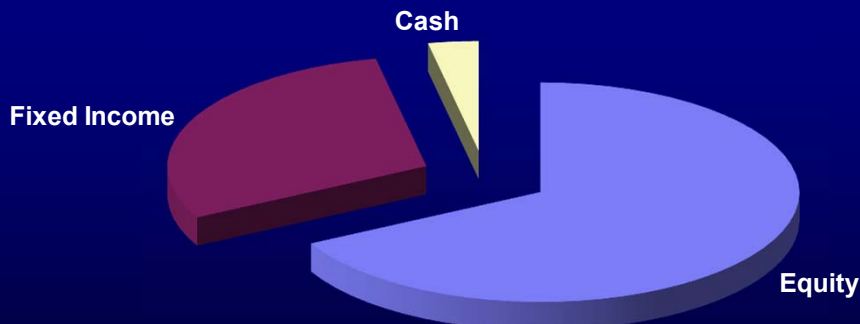
2142 Deferred State Dues FY 16-17	523,380.00
2143 Deferred Associate Dues FY 16-17	75.00
<b>Total 2099 Deferred Revenue</b>	<b>\$ 705,627.00</b>
<b>Total Other Current Liabilities</b>	<b>\$ 783,252.57</b>
<b>Total Current Liabilities</b>	<b>\$ 768,110.20</b>
<b>Total Liabilities</b>	<b>\$ 768,110.20</b>
<b>Equity</b>	
3000 Net Assets	1,954,431.63
3900 Earnings	463,034.76
Net Income	-100,142.33
<b>Total Equity</b>	<b>\$ 2,317,324.06</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 3,085,434.26</b>

Advance CTE  
 Current Asset Allocation  
 Association Accounts 749-04H01 & 7WD-04H50  
 Period: July 1, 2015- March 31, 2016

<b><i>Current Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	67%	\$ 1,632,302
	Fixed Income	30%	\$ 718,448
	Cash	3%	\$ 76,117
	Sub-Total	100%	\$ 2,426,867
	Cash Reserves		\$ -
	Total Portfolio Value		\$ 2,426,867



<b><i>Proposed Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	67%	\$1,632,302
	Fixed Income	30%	\$718,448
	Cash	3%	\$76,117
	Sub-total	100%	\$2,426,867
	Cash Reserves		\$0
	Portfolio Value	100%	\$2,426,867



# Relative Performance - Equity: Yearly



Performance period: 07/01/2015 to 03/31/2016

Period	Actual ROR(%)		Dow Jones Industrial Average Price Return(%)		MSCI World Index(%)		S&P 500 Price Return(%)	
	Year	Cum	Year	Cum	Year	Cum	Year	Cum
<b>2016</b>	<b>4.45</b>	<b>3.85</b>	<b>1.49</b>	<b>0.37</b>	<b>(0.88)</b>	<b>(5.04)</b>	<b>0.77</b>	<b>(0.16)</b>
US Equity	4.45	4.02						
<b>2015</b>	<b>(0.58)</b>	<b>(0.58)</b>	<b>(1.10)</b>	<b>(1.10)</b>	<b>(4.20)</b>	<b>(4.20)</b>	<b>(0.93)</b>	<b>(0.93)</b>
US Equity	(0.42)	(0.42)						
International Equity	(13.93)	(13.93)						

With respect to performance shown, various factors, including unpriced securities, and certain adjustments, holdings or activity may cause report results to differ from actual performance. Report results may also differ from results reported by other Merrill Lynch services. Past performance does not guarantee future results.

Reference Indices are included in this report as a general source of information regarding the performance of various types of investments. Allocation models and Indices should not be used to benchmark the performance of a specific account or portfolio. Your Financial Advisor can provide further information regarding the particular allocation models and Indices shown, including how the composition of an index compares to the composition of your account or portfolio.

# Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2015 to 03/31/2016

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2016	2,492,647	(100,000)	15,932	65,774	2,474,353	3.50	2.76
2015	2,559,296	(50,000)	46,317	(62,966)	2,492,647	(0.72)	(0.72)
<b>Total</b>	<b>2,559,296</b>	<b>(150,000)</b>	<b>62,249</b>	<b>2,808</b>	<b>2,474,353</b>		<b>2.76</b>

Note that various factors, including unpriced securities, and certain adjustments, holdings or activity may cause report results to differ from actual performance. Report results may also differ from results reported by other Merrill Lynch services. Past performance does not guarantee future results.

## Account Review Summary 07/01/2015 - 03/31/2016

Advance CTE

Account 749-04H01

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
<b>Association-E.T.F.'s (749-04H01)</b>									
<i>Ishares DJ US Consumer Goods (IYK)</i>	340	\$ 24,558	07/10/12			\$ 38,264	\$ 13,706		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	13	\$ 939	07/10/12	02/01/16	\$ 1,381	\$ -	\$ -	\$ 442	
<i>Ishares DJ US Consumer Goods (IYK)</i>	72	\$ 5,337	10/31/12			\$ 8,103	\$ 2,766		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	5	\$ 471	01/22/14			\$ 563	\$ 92		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	69	\$ 6,946	08/24/15			\$ 7,765	\$ 819		n/a
<i>Ishares Dow Jones US Energy (IYE)</i>	289	\$ 10,944	07/10/12	08/13/15	\$ 11,280	\$ -	\$ -	\$ 336	
<i>Ishares Dow Jones US Energy (IYE)</i>	59	\$ 2,416	10/31/12	08/13/15	\$ 2,303	\$ -	\$ -	\$ (113)	
<i>Ishares Dow Jones US Energy (IYE)</i>	30	\$ 1,489	01/22/14	08/13/15	\$ 1,171	\$ -	\$ -	\$ (318)	
<i>Ishares Russell Midcap (IWR)</i>	1000	\$ 96,760	10/20/06			\$ 162,920	\$ 66,160		n/a
<i>Ishares Russell Midcap (IWR)</i>	466	\$ 26,967	04/03/09			\$ 75,921	\$ 48,954		n/a
<i>Ishares Russell Midcap (IWR)</i>	298	\$ 32,577	10/31/12			\$ 48,550	\$ 15,974		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	502	\$ 35,305	07/10/12			\$ 54,467	\$ 19,162		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	13	\$ 914	07/10/12	02/01/16	\$ 1,315	\$ -	\$ -	\$ 400	n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	73	\$ 5,134	07/10/12	08/24/15	\$ 7,022	\$ -	\$ -	\$ 1,888	n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	119	\$ 8,376	10/31/12			\$ 12,912	\$ 4,535		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	28	\$ 2,118	05/10/13			\$ 3,038	\$ 920		n/a
<i>Ishares TR Dow Jones (DVY)</i>	46	\$ 2,212	08/12/11			\$ 3,757	\$ 1,545		n/a
<i>Ishares TR Dow Jones (DVY)</i>	58	\$ 2,788	08/13/11	02/01/16	\$ 4,328	\$ -	\$ -	\$ 1,539	
<i>Ishares TR Dow Jones (DVY)</i>	826	\$ 45,742	06/07/12			\$ 67,459	\$ 21,717		n/a
<i>Ishares TR Dow Jones (DVY)</i>	1733	\$ 97,546	07/10/12			\$ 141,534	\$ 43,988		n/a
<i>Ishares TR Dow Jones (DVY)</i>	541	\$ 31,251	10/31/12			\$ 44,183	\$ 12,932		n/a
<i>Ishares TR Dow Jones (DVY)</i>	32	\$ 2,100	05/10/13			\$ 2,613	\$ 513		n/a
<i>Ishares TR Dow Jones (DVY)</i>	851	\$ 59,965	12/10/13			\$ 69,501	\$ 9,536		n/a
<i>Ishares TR Dow Jones (DVY)</i>	277	\$ 19,729	01/22/14			\$ 22,623	\$ 2,894		n/a
<i>Ishares TR Dow Jones (DVY)</i>	109	\$ 7,711	02/14/14			\$ 8,902	\$ 1,191		n/a
<i>Ishares TR Dow Jones (DVY)</i>	57	\$ 4,605	12/30/14			\$ 4,655	\$ 50		n/a
<i>Ishares TR Dow Jones (DVY)</i>	96	\$ 7,671	02/19/15			\$ 7,840	\$ 169		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	91	\$ 3,446	02/23/10			\$ 3,552	\$ 106		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	57	\$ 2,158	02/23/10	02/01/16	\$ 2,187	\$ -	\$ -	\$ 29	n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	471	\$ 17,977	07/15/10			\$ 18,383	\$ 406		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	322	\$ 12,593	07/10/12			\$ 12,568	\$ (25)	93	n/a

S&P US PFD STK Index Fund (PFF)	292	\$ 11,689	10/31/12			\$ 11,397	\$ (292)		n/a
S&P US PFD STK Index Fund (PFF)	254	\$ 10,400	05/10/13			\$ 9,914	\$ (487)		n/a
Vanguard Consumer (VCR)	258	\$ 16,731	04/26/11			\$ 32,007	\$ 15,276		n/a
Vanguard Consumer (VCR)	12	\$ 778	04/26/11	02/01/16	\$ 1,391	\$ -	\$ -	\$ 613	
Vanguard Consumer (VCR)	38	\$ 2,464	04/26/11	08/24/15	\$ 4,514	\$ -	\$ -	\$ 2,050	
Vanguard Consumer (VCR)	62	\$ 4,589	10/31/12			\$ 7,692	\$ 3,102		n/a
Vanguard Consumer (VCR)	6	\$ 632	01/22/14			\$ 744	\$ 112		n/a
Vanguard Dividend (VIG)	413	\$ 21,756	08/03/11			\$ 33,556	\$ 11,800		n/a
Vanguard Dividend (VIG)	73	\$ 3,846	08/03/11	02/01/16	\$ 5,544	\$ -	\$ -	\$ 1,698	
Vanguard Dividend (VIG)	429	\$ 24,144	06/07/12			\$ 34,856	\$ 10,712		n/a
Vanguard Dividend (VIG)	1734	\$ 98,102	07/10/12			\$ 140,888	\$ 42,786		n/a
Vanguard Dividend (VIG)	538	\$ 31,647	10/31/12			\$ 43,713	\$ 12,066		n/a
Vanguard Dividend (VIG)	812	\$ 59,982	12/10/13			\$ 65,975	\$ 5,993		n/a
Vanguard Dividend (VIG)	266	\$ 19,716	01/22/14			\$ 21,613	\$ 1,897		n/a
Vanguard Dividend (VIG)	107	\$ 7,855	02/14/14			\$ 8,694	\$ 839		n/a
Vanguard Dividend (VIG)	56	\$ 4,599	12/30/14			\$ 4,550	\$ (49)		n/a
Vanguard Dividend (VIG)	94	\$ 7,748	02/19/15			\$ 7,638	\$ (111)		
Vanguard Industrial ETF (VIS)	286	\$ 10,466	04/03/09	08/21/15	\$ 28,677	\$ -	\$ -	\$ 18,211	
Vanguard Industrial ETF (VIS)	24	\$ 965	05/13/09			\$ 2,525	\$ 1,560		n/a
Vanguard Industrial ETF (VIS)	14	\$ 563	05/13/09	02/01/16		\$ -	\$ -	\$ (563)	
Vanguard Industrial ETF (VIS)	335	\$ 13,469	05/13/09	08/21/15	\$ 33,590	\$ -	\$ -	\$ 20,121	
Vanguard Industrial ETF (VIS)	374	\$ 19,968	07/15/10			\$ 39,349	\$ 19,381		n/a
Vanguard Industrial ETF (VIS)	210	\$ 14,507	10/31/12			\$ 22,094	\$ 7,588		n/a
Vanguard REIT ETF (VNQ)	349	\$ 25,632	05/10/13			\$ 29,246	\$ 3,614		n/a
Vanguard REIT ETF (VNQ)	14	\$ 1,028	05/10/13	02/01/16	\$ 1,084	\$ -	\$ -	\$ 56	
Ishares S&P Developed (WPS)	194	\$ 7,837	05/10/13			\$ 7,093	\$ (745)		n/a
CBRE Clarion Global (IGR)	779	\$ 7,648	05/10/13	02/01/16		\$ -	\$ -	\$ (7,648)	n/a
CBRE Clarion Global (IGR)	1965	\$ 15,114	12/10/13			\$ 15,347	\$ 233		n/a
CBRE Clarion Global (IGR)	968	\$ 7,446	12/10/13	02/01/16		\$ -	\$ -	FALSE	
Powershares Inter Dvd Achiev (PID)	2083	\$ 37,619	02/14/14	08/24/15	\$ 30,640	\$ -	\$ -	\$ (6,979)	
Wisdomtree Total Divid ETF (DTD)	145	\$ 9,559	12/10/13	02/01/16	\$ 9,989	\$ -	\$ -	\$ (9,559)	n/a
Wisdomtree Total Divid ETF (DTD)	234	\$ 15,427	12/10/13			\$ 17,370	\$ 1,943		
Wisdomtree Total Divid ETF (DTD)	195	\$ 13,026	01/22/14			\$ 14,475	\$ 1,449		n/a
Wisdomtree Total Divid ETF (DTD)	529	\$ 35,327	01/22/14			\$ 39,268	\$ 3,941		n/a
Wisdomtree Total Divid ETF (DTD)	27	\$ 1,789	02/14/14			\$ 2,004	\$ 215		n/a
Wisdomtree Total Divid ETF (DTD)	61	\$ 4,614	12/30/14			\$ 4,528	\$ (86)		n/a
Wisdomtree Total Divid ETF (DTD)	25	\$ 1,896	02/19/15			\$ 1,856	\$ (41)		n/a

Wisdomtree Tr Midcap Div Fc (DON)	230	\$ 16,851	12/10/13			\$ 19,805	\$ 2,955		n/a
Wisdomtree Tr Midcap Div Fc (DON)	112	\$ 8,206	12/10/13	02/01/16	\$ 8,697	\$ -	\$ -	\$ 491	
Wisdomtree Tr Midcap Div Fc (DON)	322	\$ 24,124	01/22/14			\$ 27,727	\$ 3,603		n/a
Wisdomtree Tr Midcap Div Fc (DON)	175	\$ 13,107	01/22/14			\$ 15,069	\$ 1,962		n/a
Wisdomtree Tr Midcap Div Fc (DON)	21	\$ 1,566	02/14/14			\$ 1,808	\$ 242		n/a
Wisdomtree Tr Midcap Div Fc (DON)	55	\$ 4,669	12/30/14			\$ 4,736	\$ 67		n/a
Wisdomtree Tr Midcap Div Fc (DON)	20	\$ 1,733	02/19/15			\$ 1,722	\$ (11)		n/a
Ishares US Financial Services ETF (IYF)	72	\$ 5,989	01/22/14			\$ 6,091	\$ 102		n/a
Ishares US Financial Services ETF (IYF)	11	\$ 915	01/22/14	02/01/16	\$ 889	\$ -	\$ -	\$ (26)	
Ishares US Financial Services ETF (IYF)	221	\$ 18,382	10/21/14			\$ 18,697	\$ 314		n/a
Prudential Jennison Health (PHSZX)	961.013	\$ 47,368	10/01/14			\$ 36,922	\$ (10,446)		n/a
Prudential Jennison Health (PHSZX)	62.067	\$ 3,060	10/01/14	02/01/16		\$ -	\$ -	\$ (3,060)	
Powershares Exch Traded Fund (PEY)	84	\$ 1,074	08/24/15			\$ 1,199	\$ 124		n/a
Powershares Exch Traded Fund (PEY)	269	\$ 3,441	08/24/15	02/01/16	\$ 3,525	\$ -	\$ -	\$ 84	
Powershares Exch Traded Fund (PEY)	2443	\$ 30,854	08/24/15			\$ 34,862	\$ 4,007		n/a
Vanguard High Div Yield ETF (VYM)	954	\$ 62,386	08/21/15			\$ 65,864	\$ 3,478		n/a
Vanguard High Div Yield ETF (VYM)	164	\$ 11,134	08/13/15			\$ 11,323	\$ 189		n/a
Vanguard High Div Yield ETF (VYM)	53	\$ 3,598	08/13/15	02/01/16	\$ 3,427	\$ -	\$ -	\$ (171)	
<b>Total</b>		\$ 1,266,894				\$ 1,684,287	\$ 417,393		
<b>Association-Preferred Stock (749-04H01)</b>									
Entergy Mississippi Inc	1000	\$ 26,653	06/23/03			\$ 26,490	\$ (163)		5.55%
Entergy Mississippi Inc	100	\$ 2,662	06/23/03			\$ 2,649	\$ (13)		5.55%
Entergy Mississippi Inc	221	\$ 5,802	10/31/12			\$ 5,854	\$ 53		5.55%
<b>Total</b>						\$ 34,993	\$ (122)		
<b>Association-Money Market (749-04H01)</b>						\$ 127,345			
<b>749-04H01 Account Total</b>						\$ 1,846,625	\$ 417,270		

**Fees for period:** \$17,796.93

**Fees based on assets:** \$17,796.93

The information set forth herein was obtained from sources we believe reliable, but we do not guarantee its accuracy. Past returns are not a guarantee of future results.

**National Association of State Directors of Vocational  
 Account Review Summary 07/01/2015 through 03/31/2016**

**Account 7WD-04H50 (Association)**

Cost Basis	Buy/Sell	3/31/2016		Gain/Loss
\$596,664	Various	\$609,126		\$12,462












**Managed Fixed Income Portfolio**

<b>Estimated Accrued Interest</b>	\$2,243
<b>Money Market</b>	\$16,376
<b>Account Total</b>	<b>\$627,745</b>



# Sector Analysis - Summary

As of Close of Business: 04/29/2016

Sector	Total Holdings(%)		Current Holdings		Gap-Model vs. Current(%)	All Equity compared to Custom Model		
	0%	25%	Current(%)	Model(%)		ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
<b>Equity</b>								
Health Care			8.10	14.70	6.60	140,275	380,381	240,106
Consumer Staples			13.19	10.60	(2.59)	228,214	274,289	46,075
Information Technology			11.52	20.70	9.18	199,376	535,639	336,263
Consumer Discretionary			13.88	12.90	(0.98)	240,204	333,804	93,600
Industrials			14.90	10.00	(4.90)	257,883	258,763	880
Materials			4.53	2.60	(1.93)	78,415	67,278	(11,136)
Financials			16.37	15.90	(0.47)	283,258	411,433	128,175
Telecommunication Services			1.43	3.00	1.57	24,672	77,629	52,956
Utilities			11.24	3.00	(8.24)	194,476	77,629	(116,847)
Energy			4.73	6.60	1.87	81,867	170,783	88,917
Equities Blend			0.12	0.00	(0.12)	2,155	0	(2,155)
<b>Total</b>						<b>1,730,794</b>		

\* Total represents the sum of all cash and cash equivalents including short positions with associated credit balances.

# Sector Analysis - Summary

As of Close of Business: 04/29/2016

## Date of Composition Information Obtained for Pooled Investments

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, or external account proxies, the portfolio holdings reported by the fund as of the date identified below are reflected in the current portfolio analysis. Note that mutual funds change their portfolio holdings on a regular (often daily) basis. Accordingly, this analysis may not accurately reflect the current composition of the accounts included.

### Mutual Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PHSZX	PRUDENTIAL JENNISON	03/31/2016			

### Closed End Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IGR	CBRE CLARION GLOBAL	12/31/2015			

### Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IEI	ISHARES 3-7 YEAR	No Date Reported	PEY	POWERSHARES EXCH TRADED	03/31/2016
CIU	ISHARES INTERMEDIATE	No Date Reported	VCR	VANGUARD CONSUMER	03/31/2016
IWR	ISHARES RUSSELL MIDCAP	03/31/2016	VIG	VANGUARD DIVIDEND	03/31/2016
DVY	ISHARES SELECT	03/31/2016	VYM	VANGUARD HIGH DVD YIELD	03/31/2016
IYK	ISHARES U.S. CONSUMER	03/31/2016	VIS	VANGUARD INDUSTRIAL ETF	03/31/2016
IYF	ISHARES U.S. FINANCIAL	03/31/2016	VNQ	VANGUARD REIT ETF	03/31/2016
PFF	ISHARES U.S. PREFERRED	03/31/2016	BND	VANGUARD TOTAL BOND MKT	No Date Reported
IYW	ISHARES U.S. TECHNOLOGY	03/31/2016	DTD	WISDOMTREE TOTAL DIVID	03/31/2016
WPS	ISHRS S&P DEVELOPED EX-	03/31/2016	DON	WISDOMTREE TR MIDCAP DIV	03/31/2016

# Size and Style Analysis - Summary

As of Close of Business: 04/29/2016

Size And Style	Total Holdings(%)		ML Holdings(\$)
	0%	50%	
<b>Equity</b>			
Large Cap Growth		26.84	464,607
Large Cap Value		30.09	520,877
Small/Mid Cap Growth		16.73	289,569
Small/Mid Cap Value		24.00	415,378
International Equity		1.87	32,364
Equities Blend		0.46	7,999
<b>Total Equity Assets</b>			<b>1,730,794</b>

\* Total represents the sum of all cash and cash equivalents including short positions with associated credit balances.

# Size and Style Analysis - Summary

As of Close of Business: 04/29/2016

## Date of Composition Information Obtained for Pooled Investments

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, or external account proxies, the portfolio holdings reported by the fund as of the date identified below are reflected in the current portfolio analysis. Note that mutual funds change their portfolio holdings on a regular (often daily) basis. Accordingly, this analysis may not accurately reflect the current composition of the accounts included.

### Mutual Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PHSZX	PRUDENTIAL JENNISON	03/31/2016			

### Closed End Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IGR	CBRE CLARION GLOBAL	12/31/2015			

### Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IEI	ISHARES 3-7 YEAR	03/31/2016	PEY	POWERSHARES EXCH TRADED	03/31/2016
CIU	ISHARES INTERMEDIATE	03/31/2016	VCR	VANGUARD CONSUMER	03/31/2016
IWR	ISHARES RUSSELL MIDCAP	03/31/2016	VIG	VANGUARD DIVIDEND	03/31/2016
DVY	ISHARES SELECT	03/31/2016	VYM	VANGUARD HIGH DVD YIELD	03/31/2016
IYK	ISHARES U.S. CONSUMER	03/31/2016	VIS	VANGUARD INDUSTRIAL ETF	03/31/2016
IYF	ISHARES U.S. FINANCIAL	03/31/2016	VNQ	VANGUARD REIT ETF	03/31/2016
PFF	ISHARES U.S. PREFERRED	03/31/2016	BND	VANGUARD TOTAL BOND MKT	03/31/2016
IYW	ISHARES U.S. TECHNOLOGY	03/31/2016	DTD	WISDOMTREE TOTAL DIVID	03/31/2016
WPS	ISHRS S&P DEVELOPED EX-	03/31/2016	DON	WISDOMTREE TR MIDCAP DIV	03/31/2016

**Finance/Audit Committee Appointments:** Two Finance/Audit Committee appointments will expire on June 30, 2016. The first is Bernadette Howard (Advance CTE Board representative). The second is Tim Hodges (The Center to Advance CTE Board representative). These are appointed positions by the Advance CTE Board of Directors.

The Committee is charged by the Board to:

- Review and recommend approval of an annual operating budget;
- Regularly review financial results;
- Ensure the maintenance of an appropriate capital structure; and,
- Oversee the management of organization-wide financial assets.

The Finance/Audit Committee meet quarterly by conference call and in person at annual conferences, when necessary. The positions are for a two-year term beginning July 1, 2016.

**Board Action:**

- To appoint an Advance CTE Board member to fulfill the two-year term. This position must be filled by an Advance CTE Board member. The term expires on June 30, 2018.
- To appoint a Center to Advance CTE Board member to fulfill the two-year. This position must be filled by a Center to Advance CTE Board public member. The term expires on June 30, 2018.

Note: If Tim Hodges is selected to continue on the Finance/Audit Committee he could only do so for a partial term, as his Board term ends June 30, 2017.

**Advance CTE/ The Center to Advance CTE  
Finance/Audit Committee Roster  
FY 15-16**

**Advance CTE/The Center to Advance  
CTE Secretary/Treasurer**

Dr. Pradeep Kotamraju  
Director, Career and Technical Education  
Bureau Chief  
Division of Community Colleges  
Iowa Department of Education  
400 East 14th Avenue  
Grimes State Office Building  
Des Moines, IA 50319  
Phone: 515-281-4716  
Fax: 515-242-5988  
Email: pradeep.kotamraju@iowa.gov

Ms. Bernadette Howard  
State CTE Director  
Career and Technical Education  
University of Hawaii  
Lower Campus Road  
Lunalilo Portable 1  
Honolulu, HI 96822-2849  
Phone: 808-956-4791  
Fax: 808-956-9096  
Email: mbhoward@hawaii.edu  
**Board Member, Advance CTE**  
**Term:** July 1, 2014 – June 30, 2016

**Advance CTE/The Center to Advance  
CTE Past President**

Ms. Marie Barry  
State CTE Director  
Office of Career and Technical Education  
New Jersey Department of Education  
100 Riverview Plaza  
P.O. Box 500  
Trenton, NJ 08625  
Phone: 609-633-0665  
Fax: 609-984-5347  
Email: marie.barry@doe.state.nj.us

Dr. Timothy D. Hodges  
Research Director  
Gallup  
1001 Gallup Dr.  
Omaha, NE 68102  
Phone: 402-938-6729  
Email: Tim\_Hodges@gallup.com  
**Board Member, The Center to Advance  
CTE**  
**Term:** July 1, 2014 – June 30, 2016

Dr. Sheila K. Ruhland  
President  
Tacoma Community College  
6501 S. 19<sup>th</sup> Street  
Tacoma, WA 98466  
Phone: 253-566-5100  
Fax: 253-566-5100  
Email: sruhland@tacomacc.edu  
**Board Member, Advance CTE**  
**Term:** July 1, 2015 – June 30, 2017

Ms. Connie Beene  
Director of Federal Initiatives for Technical  
Education  
Kansas Board of Regents  
100 SW Jackson Street, Suite 520  
Topeka, KS 66612  
Phone: 785-296-3.958  
Email: cbeene@ksbor.org  
**Associate Member Representative**  
**Term:** July 1, 2015 – June 30, 2017

**Secretary/Treasurer Nomination Report**  
*Report prepared by Karen Hornberger, Finance and Office Manager*

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The Nominations Committee is made up of Advance CTE/The Center to Advance CTE Past Presidents, including, Marie Barry, Rich Katt, and Pat Ainsworth. They were tasked with developing a slate of candidates to serve as officers for Advance CTE and The Center to Advance CTE in 2016-2017.

**Advance CTE and The Center to Advance CTE 2016-2017 Slate of Officers**

As is the tradition, the Committee recommends that the Executive Committee move “up” one position, Jo Anne Honeycutt to President, Pradeep Kotamraju to Vice President and Rod Duckworth to Past President.

A call for nominations was sent out to all State CTE Directors in mid-January, which included the nominations criteria and form. With three nominations submitted, the Nomination Committee reviewed the criteria for nomination and the candidates’ credentials against those criteria. . It was unanimously agreed upon to move two of the three candidates forward for consideration by the membership. Tiffany Sanderson was not moved forward as a candidate for Secretary/Treasurer. After confirming both approved candidates met the criteria for service, the Chair of the Nominations Committee spoke with each candidate to affirm their interest and ability to serve on the ballot. The Nomination Committee is pleased to announce two very strong candidates for Advance CTE/The Center to Advance CTE Secretary/Treasurer:

- Phil Cleveland - Alabama
- Bernadette Howard - Hawaii

**Board Action:**           **Vote to accept the Nominations Committee’s report as presented.**

## Personnel Policy Updates

*Report submitted by Karen Hornberger, Finance and Office Manager*

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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.

The following is a summary of the recommended updates/modifications to the Advance CTE /The Center to Advance CTE personnel policies:

- Add clarifying language to the policies for a law that will become effective October 1, 2016 in Montgomery County, Maryland (where the office is located). The Montgomery County Council enacted a paid sick leave law that allows sick leave to be used for sick family members and other purposes beyond the employee's own illness. This will not require Advance CTE to provide additional paid leave time, but it does expand the reasons for taking paid sick leave. The updated language has been added to page 10 of the personnel policies
- Personnel policies have been updated to reflect the DBA name for both organizations with clarification stating that employment is held with National Association of State Directors of Career Technical Education Consortium and the National Career Technical Education Foundation.
- Lastly, a clarification was added to the bereavement leave policy. The policy currently states that additional leave can be authorized by the President or Executive Director beyond the standard three days of bereavement leave. It did not clarify what type of leave this additional leave would be – paid leave but not deducted from the employee's annual leave balance, paid leave but deducted from the employee's annual leave balance or unpaid leave. The recommended language clarifies this policy to be consistent with a recent decision made by leadership, which limits the additional leave to paid leave drawn down from the employee's accrued annual leave or unpaid leave.

**Board Action:** Vote to approve the recommended modifications to the personnel policies.



# PERSONNEL POLICIES

**ADVANCE**  **CTE**

*State Leaders Connecting Learning to Work*

The Center to

**ADVANCE**  **CTE**

**May 2016**

## SECTION I: INTRODUCTION

The purpose of this handbook is to set forth the policies and practices of the National Association of State Directors of Career Technical Education Consortium (NASDCTEc)/Advance CTE and the National Career Technical Education Foundation (NCTEF)/The Center to Advance CTE with regard to working conditions, employee benefits, and other policies affecting employment.

All staff are considered employees of The National Association of State Directors of Career Technical Education Consortium (NASDCTEc) and The National Career Technical Education Foundation (NCTEF). Both organizations operate under a "doing business as" or DBA. For NASDCTEc, the DBA is Advance CTE/The Center to Advance CTE. For NCTEF, the DBA is The Center to Advance CTE/The Center to Advance CTE.

**THIS HANDBOOK DOES NOT CREATE A CONTRACT, IMPLIED OR EXPRESS, OR PART OF A CONTRACTUAL AGREEMENT WITH ANY Advance CTE/The Center to Advance CTE EMPLOYEES. Advance CTE/The Center to Advance CTE follows the practice of employment – at-will and thus, reserve the right to terminate employee at any time, with or without cause.**

The organizational policies are established by a sixteen member Board of Directors that employ an Executive Director empowered to hire and fire staff and manage the affairs of the national association and the headquarters office.

Advance CTE/The Center to Advance CTE reserves the right to revise, supplement, or rescind any policies or procedures in this handbook as deemed appropriate, in its sole and absolute discretion. The policies and procedures in this manual supersede any pre-existing documents.

### **Equal Employment Opportunity Policy:**

Advance CTE/The Center to Advance CTE's Employment Policy is to comply with all applicable federal, state and local laws regarding equal employment opportunity and prohibiting discrimination. These laws and regulations apply to all aspects of employment.

## SECTION II: OPERATING PROCEDURES

### **II. A Hiring:**

Advance CTE/The Center to Advance CTE's policy is to select qualified persons, whether from within Advance CTE/The Center to Advance CTE or from outside, on the basis of ability, experience, education, and training.

### **II. B Working Hours:**

Advance CTE/The Center to Advance CTE's normal working hours for regular full time employees are from 9:00 a.m. to 5:00 p.m., Monday through Friday.

Advance CTE/The Center to Advance CTE recognizes **that circumstances beyond the employee's control** may occasionally cause him/her to be absent from work for all or part of a day. Whenever an unexpected delay prevents an employee from arriving on time at the office, the employee must notify Advance CTE/The Center to Advance CTE headquarters as soon as possible and give an estimate of how long the delay will be. Unauthorized absence or tardiness will not be tolerated and will result in disciplinary action.

An employee who is absent for three consecutive days without prior notice to the Executive Director or President is presumed to have resigned without notice. Under these circumstances, Advance CTE/The Center to Advance CTE **will not pay out the employee's accrued annual leave.**

### **II. C Overtime Hours:**

When workload requirements cannot be met during regular working hours, nonexempt employees may be required to take part in overtime work assignments. Nonexempt employees are subject to the minimum wage and overtime provisions of the Fair Labor Standards Act. Employees who are classified

as nonexempt will be paid overtime at the rate of one and one half times the regular hourly pay only after a full workweek of 40 hours. Overtime work is based on actual hours worked, and must always be approved by the Executive Director in writing before it is performed. Overtime compensation does not apply to exempt employees.

#### **II. D Flexible Work Schedule:**

Advance CTE/The Center to Advance CTE's normal working hours for regular full time employees are from 9:00 a.m. to 5:00 p.m., Monday through Friday. However, working hours can be adjusted to meet the specific needs of the employee or Advance CTE/The Center to Advance CTE, including compressed **work weeks, flexible hours, etc.** **The employee's type of work and performance will be considered in** approving requests. Alternative work schedule arrangements must be made **with the employee's direct supervisor** and approved by the Executive Director. The flexible work schedule is at the discretion of Advance CTE/The Center to Advance CTE as to the terms and/or duration and Advance CTE/The Center to Advance CTE may remove the right to the flexible work schedule at any time. All requests for an alternate work schedule must be submitted in writing and approved at least two weeks prior to the start date of the flex schedule. Employees are eligible for this benefit upon the completion of the six-month probationary period.

#### **II. E Flexible Location:**

Advance CTE/The Center to Advance CTE understands that employees may have projects or circumstances that make it necessary and/or conducive to working from home or an alternate work location than the Advance CTE/The Center to Advance CTE offices. Alternative work locations **arrangements must be made with employee's direct supervisor and approved by the Executive Director.** All alternate work location arrangements are at the discretion of Advance CTE/The Center to Advance CTE as to the terms and/or duration and Advance CTE/The Center to Advance CTE may remove the **right to the alternate work location at any time.** **The employee's type of work and performance will be** considered in approving requests. All requests for an alternate location schedule must be submitted in writing and approved at least two weeks prior to the start date. Employees are eligible for this benefit upon the completion of the six-month probationary period.

#### **II. F Lunch Policy:**

Employees are allowed one half of one hour for lunch. If additional time is desired for lunch, the **employee shall make arrangements with the employee's direct supervisor or Executive Director on how** best to accommodate this request.

#### **II. G Timesheets:**

Time sheets are due three working days after the end of a pay period. If that day falls on the weekend, time sheets are due the following Monday. Time sheets must be signed by both the employee and the **employee's direct supervisor or Executive Director.** Employees are expected to record all working time, **leave taken, and holidays earned/used for proper crediting to the employee's leave account.** All employees are required to submit weekly reports.

#### **II. H Pay Period:**

Advance CTE/The Center to Advance CTE employees are paid on the 15<sup>th</sup> and last day of each month. If a payday falls on a weekend or holiday, checks are distributed on the preceding Friday or the day preceding the holiday.

#### **II. I Travel Expenses:**

Prior to any travel taking place, all Advance CTE/The Center to Advance CTE employee travel must be **approved by the employee's director supervisor, Executive Director or President.** **Employees plan travel** in advance to obtain the most reasonable rates.

Upon approval, employees will be reimbursed for automobile travel, for Advance CTE/The Center to Advance CTE business, at the current Federal reimbursement rate. Employees will be reimbursed for meals according to the reimbursement policy. Meals not available at the meeting/event/conference the

employee is staffing or attending will be reimbursed. Employees are asked to use judgment and discretion when incurring business related expenses. Advance CTE/The Center to Advance CTE will not reimburse for the purchase of alcoholic beverages. All expense reimbursements are subject to approval by the Assistant Director of Operations or Executive Director must abide by the reimbursement policy and must be submitted on an approved expense form with receipts.

**II. J Expense Reimbursement:**

All expense reimbursements are subject to approval by Executive Director and must be submitted on an approved expense form. Employees are to use fiscal discretion in incurring costs and are encouraged to be reasonable in their expenditures. All expenditures must be guided by budget allocations and must meet expense reimbursement guidelines or are subject to disallowance.

Advance CTE/The Center to Advance CTE will reimburse employees for applicable business-related expenses incurred and approved. The expense form must be turned in within thirty days of the date the expense was incurred or the completion of travel. All expenses must be accompanied by an original receipt, with the exception of portage and miscellaneous expenses where receipts are not available for or appropriate (e.g. metro expenses). Housekeeping tips and entertainment costs will not be reimbursed. All meal expenses (including those charged against a hotel room) must include an itemized receipt. Any meal charges to a credit card must include itemized break down of the meal plus the summary receipt that includes the meal total and tip. Reimbursement of internet charges will be made only when the employee has business-related communications to conduct. Reimbursement of luggage fees will only be approved for business trips requiring three or more days of travel or if approved in advance.

**The Finance and Operations Manager will review the Executive Director's expense reports to assure appropriate expenditure of Advance CTE/The Center to Advance CTE funds. In addition, the Executive Director's expense reports will be forwarded to the Executive Committee at the end of each quarter for review and approval.**

**II. K Payroll Deductions:**

Advance CTE/The Center to Advance CTE is required by law to withhold applicable federal and state/District of Columbia income taxes and FICA (Social Security) contributions from employees' paychecks. The amount of the tax deduction is based on the employee's salary, the number of tax exemptions claimed on the withholding statements and the tax rate.

**II. L Garnishment of Employee Wages:**

Advance CTE/The Center to Advance CTE is obligated to comply with any court order received for the garnishment of employee wages. The amount withheld is stipulated by court order.

**II. M Probationary Period:**

Employees are considered on probation for the first six months of employment. During the probationary period, employees can accrue annual, sick, and compensatory leave. Annual leave cannot be taken until the probationary period expires. Employees are not eligible for life insurance benefits until the probationary period expires. At the end of the first 90 days of employment, employees will receive an evaluation. A second review will be conducted at the end of the first six months of employment. Employees can be terminated at any time during the probationary period without cause. Successful completion of the probationary period does not alter the employment at-will employee relationship.

**II. N References:**

Requests for information about former employees must be provided by the Executive Director or President and are limited to verification of employment dates and job title(s).

Any employee who leaves Advance CTE/The Center to Advance CTE may request a letter of recommendation from his or her immediate supervisor or from any other employee who is qualified to

vouch for the employee's performance and other work-related qualities. However, the only official verification and recommendation, if any, will be the one issued by the Executive Director.

## **II. O Dress Code:**

Advance CTE/The Center to Advance CTE requires employees to present a neat, professional, and businesslike image to co-workers, members, and the public. Therefore employees must be dressed in appropriate, clean and tidy business attire. Business attire does not include shorts, crop tops, flip flops, exercise attire, strapless tops, any attire with team logos, political logos, or wording/phrases not associated with the organization. Fridays is considered a casual day and jeans are allowed but only if this **does not interfere with appropriate attire for the employee's duties, meetings, etc. on that day. If an employee's attire is found to be in violation of this policy, disciplinary action will be taken, at the discretion of the Executive Director.** Grooming and hygiene are an equally important part of a professional appearance. Hair should be clean and neat; extreme styles and colors are not acceptable. Tattoos and body piercings (other than modest earrings for women) shall not be visible. Advance CTE/The Center to Advance CTE will accommodate requests for dress and grooming that deviate from **this Dress Code based on an employee's religious practices as required by law.**

## **II. P "Green" Policy:**

Advance CTE/The Center to Advance CTE strives to be environmentally conscious and to reduce the **organization's carbon footprint. Further, recycling is a mandate for employers residing in Montgomery County, Maryland.** Fines can be levied on non-compliant organizations. Recycling bins are provided for **employee use, as well as briefing materials explaining the county's recycling requirements.** Further, employees are encouraged to use recycled paper for drafts of work products (a central paper recycling station has been established) and to recycle all toner cartridges. Employees are requested to turn off their computers and office lights at the close of the business day.

## **II. Q Kitchen Policy:**

Advance CTE/The Center to Advance CTE employees have been provided with kitchen facilities. All unmarked condiments and food will be disposed of at close of business each Friday. The building cleaning staff will not clean the kitchen appliances therefore all staff is requested to be courteous and clean up after themselves.

## **SECTION III: CODE OF CONDUCT**

### **III. A Alcohol and Drug Free Workplace Policy:**

Advance CTE/The Center to Advance CTE is committed to providing an employment environment that is drug-free, healthful, and safe. While employees are performing their job duties, no employee may use, possess, distribute, sell, be under the influence or engage in the unlawful manufacture, distribution, dispensation, possession, or use of illegal drugs. Any violation will be reported to the appropriate legal authorities.

Employees may not bring alcoholic beverages to work or be under the influence of alcohol while working. Violations of the drug and alcohol policies will result in disciplinary action, up to and including termination of employment.

### **III. B Employee Relations:**

Advance CTE/The Center to Advance CTE believes that effective communication is essential to a productive work environment and that all employees should have knowledge of its missions, objectives, priorities, policies, and administrative guidelines. Staff meetings will be held to communicate and gather feedback on important organizational issues. Ideas and creativity to strengthen the organization **are always welcome and should be communicated to the employee's supervisor, Executive Director or President.**

### **III. C Whistleblower Policy:**

Advance CTE/The Center to Advance CTE/Center to Advance CTE/The Center to Advance CTE Boards of Directors believe it is essential to have a safe and comfortable work environment and as such the Board of Directors of both organizations have adopted a whistleblower policy. This policy is in attachment A of the personnel policies and is to be reviewed and signed by each employee annually. There will be no retaliation for reporting incidents that qualify as whistleblowing.

### **III. D Conflict of Interest Policy:**

The Advance CTE/The Center to Advance CTE Boards of Directors approved a conflict of interest policy that must be reviewed and signed by all staff and Board members annually or as circumstances may dictate. A copy of the policy is included in attachment B.

### **III. E Immigration Law Compliance:**

Advance CTE/The Center to Advance CTE is committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin.

In compliance with the Immigration Reform and Control Act of 1986, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility. Former employees who are rehired must also complete the form if they have not completed an I-9 with Advance CTE/The Center to Advance CTE within the past three years, or if their previous I-9 is no longer retained or valid.

An Advance CTE/The Center to Advance CTE employee, who, knowingly, or unknowingly breaks the immigration and/or labor laws of the U.S., may be committing a crime and the organization does not condone such activity. Accordingly, persons who engage in such behavior may be subject to disciplinary action, which may include dismissal.

### **III. F. Harassment:**

Advance CTE/The Center to Advance CTE is committed to assuring all employees a bias-free work environment. Harassment based on a protected characteristic or status, such as race, sex, religion, disability, national origin, age, color, marital status, sexual orientation, or gender identity is strictly prohibited. Harassment may consist of insults, jokes, or other comments or conduct that may create a hostile, intimidating, or **offensive work environment or otherwise interfere with an employee's work performance.**

Sexual harassment in particular has also been defined by government regulations as "unwelcome sexual advances, request for sexual favors, and other verbal or physical **conduct of a sexual nature... when submission to such conduct if made, either explicitly or implicitly, a term or condition of the individual's employment, ... (when) submission to or rejection of such conduct... is used as the basis for employment decisions affecting such individual.**"

Harassment in the form of unwelcome sexual advances, request for sexual favors, and other verbal or **physical conduct of a sexual nature is also unlawful if it unreasonably interferes with an individual's work performance or creates an intimidating, hostile or offensive work environment.**

Employees found to have engaged in harassment will be disciplined as appropriate, up to and including discharge.

If an employee believes that he or she has been the victim of harassment, whether by a co-worker or a third party (e.g., a vendor, member, consultant, etc.) the employee should immediately discuss the situation with the Executive Director or President. To the degree possible, the investigation will be conducted in such a manner as to protect the privacy of all concerned. There will be no retaliation for reporting incidents of harassment.

### **III. G. No Smoking Policy:**

Smoking is prohibited in the Advance CTE/The Center to Advance CTE offices.

### **III. H. Ethics:**

Employees of Advance CTE/The Center to Advance CTE hold a position of trust. All employees are required to maintain the highest ethical standards.

### **III. I Handling of Advance CTE/The Center to Advance CTE Funds:**

Integrity in the handling of all Advance CTE/The Center to Advance CTE monies is of the utmost importance. No one may obligate Advance CTE/The Center to Advance CTE financially without the prior approval of the Executive Director.

Advance CTE/The Center to Advance CTE may perform a credit/consumer report on prospective employees or current employees who have a fiscal responsibility within the organization. All employees must cooperate in providing the necessary information to, and signing the necessary documents for, Advance CTE/The Center to Advance CTE. All information will be kept confidential by Advance CTE/The Center to Advance CTE and a copy of such report may be requested by the employee.

### **III. J Network and Computer Use Policy**

Network systems and computer resources are tools provided by Advance CTE/The Center to Advance CTE to assist users with their professional duties. Since all items contained within these systems are property of Advance CTE/The Center to Advance CTE, users are reminded that this is not a private means of communication and all aspects of the system are accessible by Advance CTE/The Center to Advance CTE. This means that all messages composed, sent or received on the network systems and computer resources; voicemails, texts, instant messages, and other electronic communications are the property of Advance CTE/The Center to Advance CTE.

Network systems and computer resources must not be used to create or transmit material that is derogatory, defamatory, obscene or offensive, such as slurs, epithets or anything that might be construed as harassment or disparagement. Similarly, they systems must not be used to solicit others for commercial purposes, causes, outside organizations, chain messages or other non-job-related purposes.

Unlicensed software should not be loaded or executed on the network systems, and licensed software should not be copied onto any media other than for the purpose of backing up hard drive.

Personal use of such tools is permissible on a limited basis. This limited personal use should not be during charged time and should not interfere with job performance. Personal messages may not be broadcast to groups of people or other employees except to appropriate forums (such as designated listservs). Permission for organization-wide broadcasting of personal messages must be obtained from **the user's supervisor. Distribution of chain letters, junk mail, jokes, executables, and other large attachments for purely recreational purposes is prohibited.**

Users expressly waive any right of privacy in anything they create, store, send or receive on the **organization's information system.** Advance CTE/The Center to Advance CTE can, but is not obliged to, monitor e-mails and internet/computer activity without prior notification. If there is evidence that users are not adhering to the guidelines set out in this policy, Advance CTE/The Center to Advance CTE reserves the right to take disciplinary action, including termination and/or legal action.

All passwords must be made known to Advance CTE/The Center to Advance CTE upon request. The use of passwords to gain access to the computer system or to secure specific files does not provide users with an expectation of privacy in the respective system or document.

### **III. K. Telephone, Internet, and Electronic Mail Policy:**

The Advance CTE/The Center to Advance CTE telephone systems and messaging resources and all items contained within these systems are the property of Advance CTE/The Center to Advance CTE. This means that all messages composed, sent or received on the telephone systems and messaging resources, including voicemails are the property of Advance CTE/The Center to Advance CTE.

Telephone calls are an important means of communication with Advance CTE/The Center to Advance CTE members, customers, and partners and therefore should be handled promptly, efficiently and in a courteous manner. All telephone messages should include the time and date of the call and the correct name, organization, and the telephone number of the caller.

Advance CTE/The Center to Advance CTE discourages excessive use of the telephone and electronic mail for personal business. Advance CTE/The Center to Advance CTE recognizes that it may be necessary to make or accept a limited number of personal calls and electronic mail communications while at work. However, the frequency and time spent on personal business must be kept to a minimum.

Employees may not conduct business for profit or gain from Advance CTE/The Center to Advance CTE telephones or electronic mail. Calls to 1-900 numbers, or other pay per call/premium rate telephone numbers, are prohibited. Advance CTE/The Center to Advance CTE staff should utilize the most cost-effective method of telephone use when on travel for association or foundation business.

Advance CTE/The Center to Advance CTE may monitor usage of the Internet by employees, including reviewing a list of sites accessed by an individual. No individual should have any expectation of privacy in terms of his or her usage of the Internet. In addition, Advance CTE/The Center to Advance CTE may restrict access to certain sites that it deems are not necessary for business purposes. The Internet must not be used to access, create, transmit, print or download material that is derogatory, defamatory, obscene, or offensive, such as slurs, epithets, or anything that may be construed as harassment or disparagement. The Internet must not be used to access, send, receive or solicit sexually-oriented messages or images. Downloading or disseminating of copyrighted material that is available on the Internet is an infringement of copyright law. Permission to copy the material must be obtained from the publisher.

Employees found to be utilizing the internet or electronic mail for inappropriate or illegal uses will be terminated immediately and will not be eligible for payout of annual leave. Further, if any suspected illegal usage of the internet or electronic mail is found, authorities will be contacted without exception.

### **III. L. Employer Property:**

Desk computers and computer disks, filing cabinets, electronic mail, and other items utilized in the course of business are property of Advance CTE/The Center to Advance CTE. Such property shall be utilized for business purpose only and may be searched by Advance CTE/The Center to Advance CTE as necessary. The Executive Director shall keep all passwords in a confidential file.

### **III. M Employer Intellectual Property:**

Advance CTE/The Center to Advance CTE invests significant resources in the products, materials and services it provides to its membership and other consumers. All rights, title, and interest, including copyright, in and to all work of any kind created or produced (e.g. workshop, presentation, service, technical assistance, article, product, research paper, etc.) by and as an Advance CTE/The Center to Advance CTE employee, temporary employee, or intern for the purposes of Advance CTE/The Center to Advance CTE shall be **considered a “work for hire”** and Advance CTE/The Center to Advance CTE shall own all rights, title, and interest, including copyright, in and to all work of any kind created or produced (e.g. workshop, presentation, service, technical assistance, article, product, research paper, etc.) by and as a Advance CTE/The Center to Advance CTE employee, contractor, temporary employee, intern, or volunteer for the purposes of Advance CTE/The Center to Advance CTE, whether done on or off premises. No employee is permitted to use these products (in any form) for personal gain either while employed by Advance CTE/The Center to Advance CTE or after the employee has left the organization unless expressly given permission to do so by Advance CTE/The Center to Advance CTE. Each employee agrees to provide any necessary assistance to protect, enforce, or perfect Advance CTE/The Center to



Advance CTE intellectual property rights. Further, each employee agrees not to register, file, obtain or attempt to register, file, or obtain in his or her own name any patent, copyright, or trademark relating to any work product.

#### **IV. N *Internet Postings/Social Media Policy:***

Employees who effect postings via the Internet, including but not limited to social networking websites such as Facebook, and which can be viewed by persons outside of Advance CTE/The Center to Advance CTE, should adhere to the following guidelines:

1. Be aware of your relationship with Advance CTE/The Center to Advance CTE in online social networks. Ensure your profile and related content will not cause embarrassment or bring disrepute upon Advance CTE/The Center to Advance CTE, or subject Advance CTE/The Center to Advance CTE to scorn, by virtue of its employment relationship with you.
2. Do not disparage or criticize: (1) the quality or content of products, services, and other offerings of Advance CTE/The Center to Advance CTE; (2) policy or legislative positions of Advance CTE/The Center to Advance CTE; (3) suppliers, advertisers, and vendors of Advance CTE/The Center to Advance CTE; or (4) the field of career technical education.
3. If you discuss matters related to career technical education or other matters within the scope of interest or activity of Advance CTE/The Center to Advance CTE, be clear that you are speaking for yourself and not on behalf of Advance CTE/The Center to Advance CTE.
4. Do not post or disclose confidential or other proprietary information of Advance CTE/The Center to Advance CTE. Ask permission to publish or post materials owned by Advance CTE/The Center to Advance CTE.
5. Do not cite or reference members, volunteers, supporters, customers, or constituents without their approval.
6. Do not use ethnic slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in the workplace.
7. Internet postings should not violate any other applicable policy of Advance CTE/The Center to Advance CTE.

Nothing in this policy is designed to interfere with, restrain, or prevent communications by non-supervisory employees regarding terms and conditions of employment.

#### **IV. O *Outside Employment and Other External Activities***

Employees must obtain approval from the Executive Director or President before accepting outside employment. Approval will be based on possible conflict of interest, any interference with the **employee's ability to perform his or her duties for Advance CTE/The Center to Advance CTE**, and interference with regular working hours. Activity related to outside employment may not take place **during the employee's regular hours nor involve the use of the Advance CTE/The Center to Advance CTE resources.**

Any employee who wishes to serve in an advisory capacity for another organization or serve on the board of any organization must first obtain approval from the Executive Director or President. Approval **will be granted based on possible conflict of interest and interference with the employee's ability to perform his or her duties for Advance CTE/The Center to Advance CTE.**

### **SECTION IV: LEAVES AND HOLIDAYS**

#### **IV. A *Annual Leave:***

Employees begin to accrue leave time from the date of employment. Employees may use annual leave after completion of the six-month probationary period. Leave time will be accrued with each pay period. DPY = days per year

Length of employment:

1 - 3 years  
3 - 5 years  
5 - 9 years  
9 + years

Annual Leave:

3.34 hours per pay period (10 DPY)  
5 hours per pay period (15 DPY)  
6 hours per pay period (18 DPY)  
7 hours per pay period (21 DPY)

Employees may accrue annual leave up to a maximum of thirty days. Any leave above the thirty-day cap will be transferred to the employees sick leave account. Annual leave time will be pro-rated for part-time employees.

Upon departure from Advance CTE/The Center to Advance CTE, employees shall receive a lump sum payment for accumulated annual leave-to-date. Calculation of the final annual leave balance (how much time is available and at what compensation level) will be based on the last day worked.

An employee hired on or before the fifteenth of the month accrues annual leave for that month. An employee hired after the fifteen of the month begins accruing annual leave the following month. Employees who resign or are terminated on or before the fifteenth the month do not accrue annual leave for that month.

Employees must request annual leave, in writing, at least two weeks before the employee intends to use **the leave. The employee's direct supervisor must approve** the annual leave request. If leave is requested less than two weeks from the date the employee wishes to use the leave, the leave may be disallowed or approved as leave without pay. In general, annual leave will not be authorized the two weeks prior to an annual conference or meeting (e.g. spring meeting, fall meeting, etc.).

**Use of annual leave must be approved in advance by employee's direct supervisor or the Executive Director.** If an employee has given notice of leaving Advance CTE/The Center to Advance CTE's employment, the employee is not allowed to use annual leave during the last two weeks of employment with the organization.

#### **IV. B Sick Leave:**

Advance CTE/The Center to Advance CTE offers 12 paid sick leave days per year, one per month, to permanent staff. This leave can be accrued to a maximum of 90 days. Sick leave will be pro-rated for part-time employees. For absences of more than five consecutive days, the Executive Director may **request a doctor's statement. Sick leave is not compensable** upon departure or termination.

Sick leave may be used in the event that the employee or family member is sick. A "family member" is a spouse, child, parent, or grandparent, or other persons so classified by applicable law. Additionally, employees may use sick leave for themselves or family members who are victims of domestic violence, sexual assault, or stalking, in order to obtain medical attention and victims services.

If an employee is sick, the employee must notify his/her immediate supervisor prior to his/her regularly scheduled start time of the day the employee will be absent. If the employee does not provide such notification, the leave will be deducted as annual leave rather than sick leave.

**If the employee is using sick leave for a doctor's appointment**, the leave request must be made in writing as soon as practicable after the employee determines the need for the appointment, and ideally at least **two weeks before the date of the appointment. The leave request must be approved by the employee's supervisor.**

All sick leave must be submitted in writing to the employee's direct supervisor.

#### **IV. C Additional Leave:**

Advance CTE/The Center to Advance CTE permanent employees who have successfully completed the probationary period leave will have off between the Christmas and New Year holiday. This leave will not be deducted from an employee's annual leave balance. **This leave cannot be transferred or accrued. The**

dates for this leave will be set by the Executive Director annually and are not compensable upon departure or termination.

#### **IV. D Bereavement Leave:**

Bereavement leave may be granted for the death of a close family member, such as a spouse, child, mother, father, sister, brother, parent-in-law, grandparents or other individuals as approved by the Executive Director or President. Generally, three days is approved for bereavement leave, however the Executive Director or President may extend or limit this leave as appropriate. Additional leave to be taken would need to be deducted from the employee's accrued annual leave or be unpaid leave.

#### **IV. E Inclement Weather Absence or Early Dismissal:**

**When the federal government's "liberal leave" policy is in effect, employees should follow that schedule.** If an employee is unable to make it in, he/she must notify the Executive Director. In this case, annual leave will be charged for scheduled work missed. When the federal government closes due to inclement weather, Advance CTE/The Center to Advance CTE's offices will also be closed. If the office is closed, time is recorded as administrative leave.

The Executive Director determines when an early dismissal is appropriate, generally following the lead of the federal government. Administrative leave is charged for time off due to early dismissal. Unless the office is officially closed, employees are expected to avoid leaving early, unless they have hazardous traveling conditions or special family needs, such as schools closing. In this case, annual leave will be charged for work missed.

#### **IV. F Court Leave:**

Employees are encouraged to fulfill their civic responsibilities, including participation in jury duty. Time off for jury duty will be granted to all employees upon presentation of the summons. Exempt employees who are on jury duty for less than one workweek will be paid the difference between their regular pay and jury duty pay for that workweek. For circumstances, where jury duty calls for a commitment beyond one workweek, compensation will be negotiated with the Executive Director and or President. Advance CTE/The Center to Advance CTE reserves the right to request employees to seek permission from the courts to have their jury duty rescheduled, under appropriate circumstances.

#### **IV. G Holidays:**

Advance CTE/The Center to Advance CTE observes **all ten federal holidays: New Year's Day, Martin Luther King Jr.'s Birthday, President's Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving Day and Christmas Day.** **Presidential Inauguration Day** is also observed. In addition, Advance CTE/The Center to Advance CTE's offices are closed the Friday after Thanksgiving.

Exempt employees who work on a holiday will be entitled to another day off, to be approved and scheduled in advance. Part-time employees who work on a holiday will be entitled to overtime compensation.

Holidays that fall on Saturday will normally be observed on the preceding Friday. Holidays that fall on Sunday will normally be observed on the following Monday.

#### **IV. H Leave Without Pay:**

While neither Advance CTE/The Center to Advance CTE are subject to the Federal Family and Medical Leave Act, unpaid leave may be granted, on a case-by-case basis for (1) the birth of a child of the employee; (2) the adoption of a child by the employee; (3) the care of a family member of the employee who has a serious health condition; or (4) a serious health condition of the employee that renders the **employee unable to perform the functions of the employee's position.**

Employees who have been employed by Advance CTE/The Center to Advance CTE for 12 months are eligible for up to twelve weeks leave without pay for requests that meet the criteria above. If such leave is granted, Advance CTE/The Center to Advance CTE may also agree to pay for the health insurance

coverage as described in V.B. during the leave period, on the condition that the employee returns to full time employment with Advance CTE/The Center to Advance CTE after the twelve-week period. If the employee does not return or voluntarily departs Advance CTE/The Center to Advance CTE within six months of returning following the leave without pay period, the employee will be responsible for reimbursing Advance CTE/The Center to Advance CTE for these health care costs. These costs will be deducted from the final paycheck. No other benefits are available to the employee during the twelve-week leave without pay period.

## **SECTION V: EMPLOYMENT BENEFITS**

### **V. A *Group Life Insurance:***

Advance CTE/The Center to Advance CTE provides term life insurance coverage through Forest T. Jones, Inc. in an amount equal to one and one half times the employee's salary. Life insurance is offered in \$20,000 increments. Coverage will be at the closest increment to one and one half times the employee's salary. Employees are eligible for this benefit upon the completion of the six-month probationary period and begin the first full pay period after the probationary period expires. **If the employee is deemed ineligible for life insurance by the life insurance company, Advance CTE/The Center to Advance CTE is unable to offer this benefit to the employee.**

### **V. B *Health Insurance:***

Advance CTE/The Center to Advance CTE provides health care coverage for all employees through the association's health insurance plan. Employees may elect to have family coverage, at the employee's own expense. Employees are eligible for health insurance coverage on the first day of the month following 30 days continuous eligible employment. Upon termination of employment the coverage will end on the last day of the month in which employment terminates.

### **V. C *Retirement Program:***

Employees are eligible for to participate in the Advance CTE/The Center to Advance CTE 401(k) retirement plan on the first day of the first full month after an employee has been employed by Advance CTE/The Center to Advance CTE for 12 months. Advance CTE/The Center to Advance CTE will contribute nine percent of the employee's gross current salary to the retirement plan.

### **V. D *Part-time employees:***

Regular part-time employees who work at least 20 hours per week may be eligible for employee benefits. Part-time employees are not eligible for participation in the health insurance plan, life insurance benefits, or paid holiday leave. Per plan documents, part-time employees are eligible for participation in the 401(k) after meeting eligibility criteria.

### **V.E. *Transportation Reimbursement***

With appropriate documentation, employees are eligible to receive up to one hundred and fifty five dollars per month to offset the employee's commuting expenses. Employees will receive these benefits via an electronic transfer to the employee's SmartTrip card or direct payment to the landlord for parking. The employee is responsible for purchasing his/her SmartTrip card. Staff can request that some or all of this benefit be in the form of a reimbursement of other commuting expenses (e.g. MARC, VRE, parking, bus tokens, etc.) pending approval of the appropriate documentation (e.g. receipts). Employees are eligible for this benefit upon the completion of the six-month probationary period.

### **V.F. *Disability Coverage***

Staff will be given the opportunity to purchase disability coverage through a third-party vendor. This benefit is at the employee's expense and is available only upon completion of the probationary period.

## SECTION VI: EMPLOYEE EVALUATIONS

### VI. A **Performance Evaluation:**

Advance CTE/The Center to Advance CTE believes that performance evaluation is a continuous process of feedback and two-way communication between employees and the Executive Director or President. Each employee is entitled to a timely, semi-annual formal assessment of his or her performance and abilities. This ensures that employees have a clear definition of the role they play in achieving the objectives of the organization, as well as an understanding of the criteria that will be used in their formal performance evaluation.

Explicit and objective evaluations are encouraged. Evaluations will be conducted openly and constructively, while avoiding using subjective criteria for measuring performance. An employee is evaluated against the responsibilities of the position.

The performance evaluation process:

- Is an opportunity for the employee and the Executive Director or President to discuss the responsibilities of the position and **exchange ideas on the position's potential development;**
- Clarify expectations of both the Executive Director or President and the employee;
- **Identify the employee's areas of strength and areas of needed development;**
- Identify training needs; and
- Provide a basis for setting merit salary increase and determining promotions.

Employees are rated using the following categories:

**Outstanding Performance:** Job performance is exceptional and consistently exceeds the requirements and expectations of the position in all areas. The employee has made extraordinary contributions to Advance CTE/The Center to Advance CTE and has shown a high degree of initiative, resourcefulness, and good judgment. This is a level 5 on the performance evaluation scale.

**Commendable Performance:** Job performance clearly exceeds the requirements and expectations of the position in most areas. The employee provides high quality work and possesses exceptional knowledge about his or her responsibilities. This is a level 4 on the performance evaluation scale.

**Satisfactory Performance:** Job performance fully meets the requirements and expectations in all area of the position. Areas for improvement are noted. This is a level 3 on the performance evaluation scale.

**Marginal Performance:** Job performance meets minimal requirements. Major areas for improvement are noted. The employee may be placed on a performance improvement program, normally for thirty days. If improvement to a fully satisfactory performance is not noted within this period, the employee may be terminated. This is a level 2 on the performance evaluation scale.

**Unsatisfactory Performance:** Job performance is below an acceptable level. The employee may be placed on a performance program, normally for 30 days. If improvement to a fully satisfactory performance is not noted within this period, the employee will be terminated. This is a level 1 on the performance evaluation scale.

The discharge of an employee for unsatisfactory performance generally may be preceded by verbal and written warnings and suspension. However, at management discretion, employees may be separated from Advance CTE/The Center to Advance CTE without prior warning. Nothing in this policy provides any contractual rights regarding employee discipline or counseling, and this policy in no way shall be read as modifying the at-will employment relationship between Advance CTE/The Center to Advance CTE and its employees.

### VI. B **Performance Evaluation Procedures:**

At the end of the first 90 days of employment, employees will receive an evaluation. A second review will be conducted at the end of the first six months of employment. Written performance evaluations are given to all employees at the end of their initial three months of employment, on their first

anniversary date and annually thereafter. After the first anniversary date, verbal performance check ins are given at each six-month point.

**Completed performance reviews must be signed by employee's director supervisor, the Executive Director and the employee.**

## **SECTION VII: TERMINATION**

Employees can be terminated voluntarily or involuntarily. Every effort is made to effect a smooth transition from the organization, ensuring that employees are granted all rights and benefits to which they are entitled.

### **VII. A Voluntary Termination:**

Advance CTE/The Center to Advance CTE would appreciate employees providing the Executive Director or President of the association with at least 30 days written notice before leaving Advance CTE/The Center to Advance CTE.

### **VII. B Involuntary Termination:**

It is not possible to list all forms of behavior that would warrant dismissal and are considered unacceptable in the workplace. The following are examples of infractions of rules of conduct that may result in disciplinary action, up to and including termination of employment:

- Theft or inappropriate removal of possession of Advance CTE/The Center to Advance CTE property;
- Falsification of time keeping records or expense reports;
- Working under the influence of alcohol or illegal drugs;
- Possession, distribution, sale, transfer, or use of illegal drugs in the workplace, while on duty or while operating employer-owned equipment;
- Fighting or threatening violence in the workplace;
- Insubordination or other disrespectful conduct;
- Sexual harassment;
- Lack of work, funds or elimination of position;
- Unsatisfactory performance or conduct; inability to perform the essential functions of the job.

Employment with Advance CTE/The Center to Advance CTE is at the mutual consent of Advance CTE/The Center to Advance CTE and the employee and either party may terminate that relationship at any time, with or without cause, and with or without advance notice.

The Executive Director will approve all terminations and suspensions.

### **VII. C Accrued Pay and Leave:**

Terminated employees are entitled to a final paycheck on their last day of employment, provided all keys, passwords, association/foundation property and equipment are returned. The final check will include all earnings through the last day of employment and payment for up to thirty days of accrued **vacation at the employee's regular rate of pay, less any outstanding expenses or overdrawn sick leave or other uncleared financial obligations.**

### **VII. D Unemployment Compensation:**

Advance CTE/The Center to Advance CTE contributes **to the Maryland's unemployment compensation** program, which provides weekly salary payments to unemployed persons. Advance CTE/The Center to Advance CTE's contributions are established by the Maryland government. Eligibility for unemployment compensation is determined by the unemployment compensation agency in the state in

which the unemployment person files, not Advance CTE/The Center to Advance CTE/. Advance CTE/The Center to Advance CTE will verify the reason for termination, which is stated on the **employee's application for unemployment compensation.**

**EMPLOYEE ACKNOWLEDGEMENT FORM**

I have received and read this revision of the Advance CTE/The Center to Advance CTE **personnel policies** and I understand that it is my responsibility to follow the policies contained in it, as well as any revisions made to it. I understand that the handbook is a statement of policies and is not an express or implied contract of employment or a legal document.

I further understand that I am employed at-will, that both Advance CTE/The Center to Advance CTE and I are free to terminate the employment relationship at our discretion, and that no supervisor or other employee, other than the Executive Director, has the authority to alter this relationship.

Since the information, policies, and benefits described here are necessarily subject to change, I acknowledge that further revisions to the Advance CTE/The Center to Advance CTE **personnel policies** may occur.

Acknowledged and Accepted by:

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_



## **APPROVED WHISTLEBLOWER POLICY**

Should any person have knowledge of any illegal or unethical conduct in connection with the finances or other aspect of Advance CTE/The Center to Advance CTE operations, that person should inform the Executive Director. If the alleged wrongdoing concerns the Executive Director, then the Advance CTE/The Center to Advance CTE President or other Executive Committee member of Advance CTE/The Center to Advance CTE should be notified instead.

Should the Executive Director, President, or other Officer or Director of Advance CTE/The Center to Advance CTE/Center to Advance CTE/The Center to Advance CTE receive information regarding alleged illegal or unethical conduct in connection with the finances or other aspect of Advance CTE/The Center to Advance CTE operations, that person shall inform the Executive Committee.

The Executive Committee shall investigate all credible allegations. At all times respecting the privacy and reputation of individuals involved to the extent possible, the Executive Committee shall inform the Board of Directors if any material allegation is confirmed, or if the Committee otherwise believes that the Board of Directors should be made aware of the situation. Should any member of the Executive Committee be the subject of an allegation of wrongdoing, that member shall recuse themselves from any investigation, deliberation, and decision-making.

There will be no punishment or other retaliation for the good faith reporting of conduct pursuant to this policy. If the person providing the information requests anonymity, this request will be respected to the extent that doing so does not impede any investigation or resolution.

*[Note: This Whistleblower Policy is a unilateral expression of Advance CTE/The Center to Advance CTE policy and, as with all personnel policies, does not create an express or implied contract or change the at-will nature of employment with Advance CTE/The Center to Advance CTE].*

Employee's name: \_\_\_\_\_

Employee's signature: \_\_\_\_\_

Witness signature: \_\_\_\_\_

Witness title: \_\_\_\_\_

Date: \_\_\_\_\_

**Advance CTE/The Center to Advance CTE  
EMPLOYEE CONFLICT OF INTEREST POLICY**

**PURPOSE:** This Conflict of Interest Policy has been adopted to protect the integrity of purchasing and other decisions and actions of Advance CTE/The Center to Advance CTE.

**DISCLOSURE:** An employee shall disclose to the Executive Director any business or personal relationship of the Employee with any vendor or other firm, organization, or individual with which Advance CTE/The Center to Advance CTE do business or are actively considering doing business.

**IMPROPER INFLUENCE:** An employee shall not attempt to influence any decision of Advance CTE/The Center to Advance CTE to do business with any vendor or other firm, organization, or individual with which the Employee has a business or personal relationship.

**GIFTS AND GRATUITIES:** No employee shall accept gifts, services, transportation, meals, lodging, entertainment, or similar items or benefits from a vendor or other firm, organization, or individual with which Advance CTE/The Center to Advance CTE has, or is actively considering, a contractual or other business relationship, with a value totaling more than \$250 annually. This prohibition shall not apply to complimentary lodging, meals, or transportation provided by hotels, convention centers, or convention and visitors bureaus in connection with meetings or events of Advance CTE/The Center to Advance CTE, including site visits.

**FEES FOR ADVISORY SERVICES:** No employee shall accept any fee or other consideration for advising or consulting services provided to any person who has an interest in an issue, matter, or transaction related to the interests of Advance CTE/The Center to Advance CTE.

Employee's name: \_\_\_\_\_

Employee's signature: \_\_\_\_\_

Witness signature: \_\_\_\_\_

Witness title: \_\_\_\_\_

Date: \_\_\_\_\_

**New Preamble for Perkins Recommendations**  
*Report submitted by Steve Voytek, Government Relations Manager*

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In February the Advance CTE Board of Directors instructed staff to re-work the organization's current Perkins recommendations to more effectively reflect the membership's position on Perkins' role in the context of other federal legislation. Below is a re-worked introduction section to Advance CTE's current Perkins recommendations that reflects this conversation (proposed new language in italics).

*The Carl D. Perkins Career and Technical Education Act (Perkins) supports Career Technical Education (CTE) programs by strengthening connections between secondary and postsecondary education, aligning to the needs of the economy, and improving the academic and technical achievement of students who choose to enroll in these programs.*

*Perkins sits at a critical intersection between the nation's K-12 and postsecondary education and workforce development systems. Future legislation should therefore build upon Perkins' role as a bridge builder between and among existing federal programs such as the Every Student Succeeds Act, the Higher Education Opportunity Act, and the Workforce Innovation and Opportunity Act. Since its inception, Perkins has afforded states and local communities the opportunity to implement a vision for CTE that uniquely supports the range of educational needs of students - exploration through career preparation - and balances those with the current and emerging needs of the economy.*

*Advance CTE, formerly the National Association of State Directors of Career Technical Education Consortium (NASDCTEc), believes that the renewal of Perkins, the federal investment in CTE, should build upon this vision and strengthen the law's focus on ensuring that students have equitable access to high-quality CTE programs of study. Doing so will more effectively serve the needs of our nation's students while meeting the current and future demands of the modern economy.*

*The below recommendations seek to accomplish this purpose and build upon the strong foundational legacy of nearly four decades of Perkins legislation.*

**Board Action:** Approval of the updated preamble to Advance CTE's formal Perkins recommendations.

**Resource:** Current Preamble to Advance CTE's Perkins Recommendations

*The Carl D. Perkins Career and Technical Education Act (Perkins) supports Career Technical Education (CTE) programs by strengthening connections between secondary and postsecondary education, aligning to the needs of the economy, and improving the academic and technical achievement of students who choose to enroll in these programs.*

*Advance CTE, formerly the National Association of State Directors of Career Technical Education Consortium (NASDCTE), believes that the federal investment in CTE legislation, Perkins, should be strengthened by re-focusing the law to ensure equitable access to high-quality CTE programs of study. to better position CTE to help build the solutions needed to close the skills gap and improve student achievement. Therefore, NASDCTE believes that federal CTE legislation needs a clearer focus and that its purpose should be “to develop the academic and CTE skills of students to ensure America's global competitiveness through programs of study, partnerships with employers, and further education and careers.” These recommendations seek to accomplish this purpose and promote innovation, accountability, and equitable access to high-quality CTE that meet the needs of our nation’s students and employers*

In April 2015, the Board of Directors approved the organization’s first-ever State Policy Strategy. This strategy articulated five objectives and four major strategies that would be undertaken to meet those objectives, specifically:

**Objectives:**

To help states advance high-quality CTE, Advance CTE/The Center to Advance CTE will:

1. Keep Advance CTE membership up to date of major state policy activity relating to CTE
2. Elevate Advance CTE/The Center to Advance CTE’s profile across states and nationally as a state policy leader in CTE
3. Through partnerships, build consensus among the national education community and relevant governing organizations around the role of CTE/ “career” in the CCR agenda
4. Provide clear guidance to Advance CTE members and other state policymakers on effective and positive CTE/career readiness-focused policies
5. Support state implementation of Perkins and other relevant federal policy as well as other state-level policies, specifically programs of study and related areas, to help advance high-quality CTE across the country

**Major Strategies:**

To meet these objectives, Advance CTE/The Center to Advance CTE will:

1. Develop and maintain resources to support state CTE policy development such as up-to-date state profiles, a members-only database of state CTE policies, a policy framework of CTE/career readiness policies, regular publications and blog posts on key legislative and regulatory policy
2. Forge strategic partnerships with key education and governing groups to advance and enhance Advance CTE/The Center to Advance CTE’s state CTE policy efforts through collaborative deliverables
3. Provide cross-state solutions, resources and technical assistance related to state implementation of federal policy, the Common Career Technical Core, programs of study; and support state-led projects such as the Career Clusters® Leadership Pilot
4. Craft and execute a dissemination strategy aligned to the Advance CTE/The Center to Advance CTE communication strategy to ensure resources are reaching key audiences

In the past year, staff have made significant progress on this Board-approved Strategy, with major accomplishments described below. However, it is worth noting that a number of planned activities and resources were either put on hold or redirected given the opportunity that emerged around the New Skills for Youth grant.

State policy and leadership remains a high priority for Advance CTE as well as its membership. The most recent membership survey revealed that it is the third highest priority for both State CTE Directors and associate members.

Over the past year, staff have actively pursued multiple components of the strategy.

1. Advance CTE developed a wide array of resources to support state CTE policy including:
  - Regular [state policy updates](#) on the Learning that Works blog and other Advance CTE communications
  - Our third annual “[Year in Review](#)” publication and related [webinar](#) on state legislative and regulatory activity, produced in partnership with ACTE. The members-only [State Policy Tracker tool](#) was also released as a companion to the annual Year in Review publication
  - The launch of “Connecting the Classroom to Careers” series, specifically “[Setting a Statewide Vision for Work-based Learning](#)” and “[Removing Legal Barriers Around Work-Based Learning](#)”
  - Policy briefs including “[Endorsements, Electives & More: CTE & State Graduation Requirements](#)” and “[Building a Strong Relationship Between Competency-based Pathways and Career and Technical Education](#)”
    - In our most recent member survey, 89% of state directors and 79% of associate members found Advance CTE’s state policy reports and briefs “valuable” or “very valuable”
  - Updated [state snapshots](#) and [profile pages](#) on careertech.org
    - In our most recent member survey, 53% of state directors and 67% of associate members found the state profile pages “valuable” or “very valuable.” 63% of state directors and 70% of associate members found the state fact sheets “valuable” or “very valuable.”
  - An update on the May 2014 “Making Career Readiness Count” report, written in partnership with Achieve
2. Advance CTE has built, maintained and strengthened partnerships with most of the key state-facing organizations, including CCSSO, NGA, NASBE, NSCL and ACTE to draw stronger connections between CTE and other major education reform efforts.
3. Advance CTE has been working to expand of state policy resources and tools, mainly through:
  - Through the Career Cluster Leadership Pilot, staff engaged with leaders from six states around a range of issues. The most important deliverable to emerge from that work has been the Connecting the Classroom to Careers series on work-based learning.
  - Advance CTE commissioned Vivayic to complete a state-by-state analysis around the use and impact of the Common Career Technical Core and Career Clusters, which will impact activities under the 2016-18 strategic plan.

4. Advance CTE has efforts underway to streamline the dissemination of state policy resources and tools, mainly through:
  - The Learning that Works Resource Center (in development with launch date of late June 2016; part of the work with the *New Skills for Youth* initiative)
  - Coordinated release strategies for all major publications and resources

Looking ahead, staff will develop a new State Policy and Implementation strategy aligned to the new Board-approved strategic plan, the Shared Vision for CTE and our commitments in the *New Skills for Youth* initiative.

During the three-year period of the *New Skills for Youth* initiative, staff will support state progress by providing technical assistance and creating and maintaining the Learning that Works Resource Center, an online portal of best practices, tools and policies. Advance CTE will monitor progress of the states as they implement reforms, and will publish case studies that highlight promising practices, lessons learned, and outcomes of the policy and programmatic changes.

The initiative also includes affinity groups for smaller groups of states to focus in on specific problems of practice in various topic areas. Staff will make the lessons and resources from this grant accessible to all Advance CTE members through the Resource Center and potentially other reports.

After the release of the Shared Vision for CTE, staff will develop a research agenda and policy framework aligned with the Vision's core principles and actions. A focal point of the new State Policy and Implementation Strategy will be connecting all of these activities together to provide the maximum benefit to membership and the CTE field at large.

The Learning that Works Resource Center will be launched in June 2016. As staff continue to develop this scope of work, key questions are emerging that would benefit from Board feedback.

**Board action required:** Discussion is required.

#### **FOR DISCUSSION:**

##### Learning that Works Resource Center

1. **What elements, functions would make such a database most useful to you and your staff?**
2. Understanding that not all policy is created equal, staff are considering how best to curate these resources. **What criteria should staff use when considering how to identify policies?**
3. **Other considerations?**

## APPENDIX A

### Strategic State Policy Plan (2015-2016)

Approved April 2015

Across the country, state legislatures and boards of education are increasingly interested in Career Technical Education (CTE) in recognition of its role in the college- and career-ready (CCR) policy structure. However, many of these policies largely give only lip service to the idea of career readiness or overlook it entirely. While many states are taking action, there is no national voice on CTE reform within states, leading to missed opportunities, at best, and misinformed policies that undermine advances in both the academic and technical fields, at worst.

Advance CTE/The Center to Advance CTE is well positioned to provide guidance in this space given our extensive work with states, depth of knowledge on CTE policy and strong partnerships with key organizations at the state and national level. In 2014, Advance CTE/The Center to Advance CTE further grew its sphere of influence by establishing key state-focused partnerships, hiring of a new staff member dedicated to state policy and laying the critical groundwork for an expanded and respected role in the future.

With this as a foundation, we present the following strategic plan to strengthen and guide our work in the state policy space. Embedded within this plan are links to the broader organizational strategic plan to ensure that our work in state policy is aligned to missions for Advance CTE and The Center to Advance CTE. Additionally, suggested success metrics have been provided for each strategy.

NOTE: With an eye toward the coming landmark events such as the Future of CTE Summit (Summit) and expected Perkins reauthorization, we must acknowledge these will likely create a shift in organizational priorities – as well as the potential capacity strain for staff. As such, we have categorized the following state policy activities as *planned* and *potential* to present a more realistic view of what we can accomplish through the first quarter of 2016. We also present these *potential* activities as a means to spur discussion of how and in what ways Advance CTE and The Center to Advance CTE may wish to pursue them in the future.

#### **Objectives:**

To help states advance high-quality CTE, Advance CTE/The Center to Advance CTE will:

1. Keep Advance CTE membership up to date of major state policy activity relating to CTE
2. Elevate Advance CTE/The Center to Advance CTE's profile across states and nationally as a state policy leader in CTE
3. Through partnerships, build consensus among the national education community and relevant governing organizations around the role of CTE/ "career" in the CCR agenda
4. Provide clear guidance to Advance CTE members and other state policymakers on effective and positive CTE/career readiness-focused policies



6. Support state implementation of Perkins and other relevant federal policy as well as other state-level policies, specifically programs of study and related areas, to help advance high-quality CTE across the country

### **Major Strategies:**

To meet these objectives, Advance CTE/The Center to Advance CTE will:

1. Develop and maintain resources to support state CTE policy development such as up-to-date state profiles, a members-only database of state CTE policies, a policy framework of CTE/career readiness policies, regular publications and blog posts on key legislative and regulatory policy
2. Forge strategic partnerships with key education and governing groups to advance and enhance Advance CTE/The Center to Advance CTE's state CTE policy efforts through collaborative deliverables
3. Provide cross-state solutions, resources and technical assistance related to state implementation of federal policy, the Common Career Technical Core, programs of study; and support state-led projects such as the Career Clusters<sup>®</sup> Leadership Pilot
4. Craft and execute a dissemination strategy aligned to the Advance CTE/The Center to Advance CTE communication strategy to ensure resources are reaching key audiences

### **Key audiences:**

- State CTE Directors
- State governing officials (governors, legislators, state board members, etc) and key staff
- Other relevant state policymakers and key staff
- CTE administrators and educators (secondary/postsecondary)
- State board of education members and/or relevant postsecondary governing bodies
- State-focused and national education communities and other relevant partners

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### **Major Strategies (in detail):**

- 1. Develop and maintain resources to support state CTE policy development such as up-to-date state profiles, a members-only database of state CTE policies, a policy framework of CTE/career readiness policies, regular publications and blog posts on key legislative and regulatory policy**

#### *Web-based Resources*

(Planned activities)

##### State Policy Database<sup>1</sup>

This database currently exists as a downloadable resource for Advance CTE members at [careertech.org](http://careertech.org), and contains the more than 150 state policies enacted in 2014, as featured in the Advance CTE/ACTE publication, “State Policies Impacting CTE: 2014 Year in Review.” Members may search among 16 unique categories to learn more about what other states are doing to better inform state-level policy development.

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<sup>1</sup> 2.2.5 - Develop a new section of the website focused on state CTE policy, that includes a state policy database. (Advance CTE/The Center to Advance CTE)

Options are being explored to build this work into an embedded database within the website, and could include 2013 state activity as well as proposed and approved policies within the current calendar year. The strategy for building out such a database will be developed and implemented starting in summer 2015.

#### Advance CTE Blog<sup>2</sup>

Staff regularly provide state CTE policy updates through the organization's blog, which has a wide-reaching audience and is one of Advance CTE's most effective ways of disseminating resources and materials to the CTE stakeholders.

#### State Profiles<sup>3</sup>

The state profiles are a powerful platform to highlight and promote each state's CTE system. Currently, these profiles are often used by educators, news media and other policy organizations to learn more about a specific state. Partner organizations such as the College & Career Readiness & Success Center draw heavily from these profiles for CTE-related information to inform their own websites' state profiles.

Staff update the information in these profiles bi-annually as new data become available. State winners of Advance CTE's Excellence in Action award are also added to the "Success Stories" section.

#### State Fact Sheets

Advance CTE's state fact sheets were last updated in 2011, and are in the process of being redesigned and updated. By crafting fact sheets with more compelling narratives and information, these advocacy tools will provide greater value to the CTE community and interested stakeholders. Once the redesign is finished, staff will keep the fact sheets updated through a regular schedule.

#### Webinars<sup>4</sup>

On-demand and live webinars may be used to promote new Advance CTE resources as well as provide important foundational information to the CTE community and interested stakeholders. In concert with Advance CTE's growing state policy platform, webinars will be leveraged as another tool to increase awareness and understanding of state CTE policy.

#### Success Metrics:

The effectiveness of the web-based resources will be measured through:

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<sup>2</sup> 3.1.4 - Deliver timely information/resources to Advance CTE's members and relevant stakeholders (including the blog, social media resources, etc.). (Advance CTE/The Center to Advance CTE)

<sup>3</sup> 2.3.3 - Develop and maintain state profiles/fact sheets that explain and promote CTE in each state. (Advance CTE/The Center to Advance CTE)

<sup>4</sup> 3.1.1 - Conduct periodic webinars on relevant topics for Advance CTE members. (Advance CTE)

- Google Analytics to track web traffic on the blog as well as other relevant state policy-related pages on careertech.org. Advance CTE will use Google Analytics to track and report this data in the monthly Board of Directors' report.
- Cisco and Adobe Connect webinar tracking reports (includes surveys, registration and attendance numbers)

### Publications<sup>5</sup>

(Planned activities)

#### State Policy Framework for CTE and Career Readiness Policies

Staff have begun to amass state-focused policies for CTE and career readiness categorized across 16 distinct areas, and are now poised to take the next step and apply the next level of analysis through a policy framework. Using those 16 categories as the basis of the framework, we would consider the elements that help make a policy successful as well as the barriers. The categories include graduation requirements, standards and accreditation, industry-recognized credentials, and work-based learning. Through this tool, we will seek to evaluate new and existing policies to identify potential issues states should consider during implementation and monitoring.

This work would take place as part of the developing scope of work for the revamped The Center to Advance CTE. As the The Center to Advance CTE vision and mission is approved, this framework would serve as a guide to provide thoughtful guidance to states, media and other CTE stakeholders seeking high-quality examples and best practices.

#### Issue Briefs, White Papers and Case Studies

By further expanding into the state policy arena, many areas of Advance CTE's work have benefited, including our regular publications. Having ready access to a wealth of knowledge on state policy, examples and best practices has been foundational to elevating Advance CTE's status as the premier national organization for CTE.

In recognition of this coming Summit, a majority of our issue briefs in 2015 will focus on updates to the five principles laid out in the 2010 "Reflect, Transform, Lead: A New Vision for Career Technical Education." Other planned briefs include upcoming co-authored papers with Achieve on competency-based education and state CTE pathways to graduation as well as white papers and case studies related to issues tackled by the Career Clusters Leadership Pilot, including course sequences and work-based learning.

#### Annual Year in Review brief ("State Policies Impacting CTE: Year in Review")

Co-authored with ACTE, this brief provides a comprehensive scan of legislative and regulatory activities affecting CTE. This scan, presented without judgment, provides the

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<sup>5</sup> 2.1.5 - Develop a state policy work plan, that may include the creation of sample state legislation and policies in support of increasing access to high-quality CTE and adoption/implementation of CCTC and Career Clusters. (Advance CTE/The Center to Advance CTE)

community with an informed list of all activity taking place across the 50 states and D.C., and in turn, helps contribute to future CTE-positive legislation. The 2015 edition will be released in February 2016.

#### Annual State of CTE series

Started in 2013, the annual series, “The State of Career Technical Education,” presents an opportunity for Advance CTE/The Center to Advance CTE to fulfill their role as thought leaders within the CTE community by providing much-needed 50-state research or analysis to important issues facing the field. Since the series’ launch, installments have covered topics such as CTE standards and employer engagement.

In 2015, the “State of Career Technical Education” series provide a critical look-back over the past five years since the inaugural CTE Vision was released. This report will serve as a touchstone for states and key partners participating in the Summit, which will put forth a bold vision and collaborative strategy for the future of CTE.

#### Success Metrics:

The success of Advance CTE/The Center to Advance CTE’s state policy-focused publications will be measured by:

- Timely publication of high-quality reports and briefs;
- Feedback from State CTE Directors on quality and utility of publications
- Monitoring Google Analytics (views of reports/publications on Advance CTE website); and
- Tracking media engagement (e.g. mentions of reports in articles and interviews).

## **2. Forge strategic partnerships with key education groups to advance and enhance Advance CTE/The Center to Advance CTE’s state CTE policy efforts through collaborative deliverables<sup>6</sup>**

(Both planned and potential activities)

#### Council of Chief State School Officers (CCSSO)

With the Chiefs’ public commitment to career readiness, Advance CTE will continue to play an active role in the organization’s ongoing efforts to promote high-quality CTE and career readiness for all students. Specifically, following the publication of CCSSO’s “Opportunities and Options: Making Career Preparation Work for Students,” Advance CTE Executive Director Kimberly Green has been invited to make formal presentations at national convenings and Congressional briefings. Advance CTE continues to be involved in informal conversations with CCSSO to help provide guidance on how to translate the recommendations into state technical assistance. Additionally, CCSSO has signed on to be a Summit co-convenor, which will provide

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<sup>6</sup> 1.2.2 - Partner with key organizations on state policy initiatives (e.g. competency-based education, CCSS, CCTC, postsecondary alignment). Utilize the partnership matrix to target, manage and monitor partnership effectiveness. (Advance CTE/The Center to Advance CTE)

an excellent opportunity to further position CTE and Advance CTE/The Center to Advance CTE to be embedded in future work with the Chiefs.

#### National Conference of State Legislators (NCSL)

As a bipartisan national organization representing state lawmakers and their staff, the National Conference of State Legislators (NCSL) is well positioned to provide a neutral platform for promoting high-quality CTE. Currently, NCSL has co-hosted a webinar on state CTE financing models with Advance CTE and invited our staff to speak at its national conference. It also actively promotes Advance CTE publications and webinars through its various networks.

#### ACTE<sup>7</sup>

As part of Advance CTE/The Center to Advance CTE and ACTE's joint commitment to collaborate on key initiatives and advocacy efforts, Advance CTE will continue to work with ACTE to produce the annual Year in Review brief and look for additional ways to leverage new and existing efforts related to state policy.

#### Other<sup>8,9</sup>

Consistent with its strategic plan, Advance CTE/The Center to Advance CTE will continue to seek strategic partnerships with additional key groups such as national organizations (i.e. National Governors Association, National Association of State Boards of Education) and education reform groups (i.e. Achieve, College & Career Readiness & Success Center, Education Commission of the States, Jobs for the Future, etc.). Some of these organizations, including the NGA and the Council of State Governments, have signed on to be co-conveners for this year's Summit and many others will be invited.

#### Success Metrics:

We will measure success by:

- Monitoring and rating partner participation on a quarterly basis through the Partnership Matrix;
- Actively working with partners to increase cross-promotion via social media and organization websites;
- Publishing at least one Friends of CTE Blog post per year from a state-policy focused partner organization; and
- Partnering at least six times a year on publications and/or webinars with national, high-visibility partners, at least half of which must be state policy-focused.

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<sup>7</sup> 1.6 - Collaborate and coordinate with ACTE on key initiatives and advocacy efforts in support expanded access to and quality of CTE. (Advance CTE/The Center to Advance CTE)

<sup>8</sup> 1.2.3 - Engage and support the National Governors Association "America Works" campaign, ensuring positive positioning for CTE. (The Center to Advance CTE)

<sup>9</sup> 1.5.2 - Strengthen and expand partnerships with key education/workforce development organizations, institutions, etc. to support effective PD opportunities. Utilize the partnership matrix to target, manage and monitor partnership effectiveness. (The Center to Advance CTE)

**3. Provide technical assistance and other resources related to state implementation of federal policy, the Common Career Technical Core, programs of study; and support state-led projects such as the Career Clusters® Leadership Pilot**

(Potential activities)

Common Career Technical Core<sup>10,11</sup>

Thanks to the work done for the 2013 “State of Career Technical Education: An Analysis of State CTE Standards,” The Center to Advance CTE has the ability to draw upon this 50-state research base to develop resources or in-person technical assistance to related to state implementation of the CCTC. With the Board-approved CCTC Continuum of Adoption, The Center to Advance CTE will be able to better target resources to help states implement the content standards and/or the Career Ready Practices. Future work in this area will be influenced by the Board’s discussion in April 2015.

Career Clusters Leadership Pilot<sup>12</sup>

The deliverables being developed by the ongoing Career Clusters Leadership Pilot offer a natural opportunity for The Center to Advance CTE as it seeks to define the scope of its work. The two Pilots in Manufacturing and Agriculture, Food & Natural Resources have started work on critical CTE areas of need including work-based learning, industry-recognized credentials and course sequences.

It has become clear that there is a need and desire to continue building on and scaling this initial work to the other Career Clusters. However, without a change in existing strategy, this tremendous opportunity may need to be tabled for future consideration, due to current capacity restraints within the states and Advance CTE/The Center to Advance CTE.

State implementation of federal policy<sup>13,14</sup>

With the coming reauthorization of Perkins, Advance CTE expects to provide technical assistance to the states to assist them in implementing the new law to maximize the opportunity and potential for their CTE systems. This will likely be a mix of in-person and virtual meetings.

Other<sup>15</sup>

With growing new and existing partnerships with state-policy focused organizations, there is the potential for The Center to Advance CTE to play a role in connecting states to broader education

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<sup>10</sup> 2.2.6 - Create resources to support state adoption and implementation of the CCTC/Career Clusters. (The Center to Advance CTE)

<sup>11</sup> 2.2.7 - Conduct an initiative to put in place appropriate measurements of the CCTC. (The Center to Advance CTE)

<sup>12</sup> 1.3.4 - Conduct Career Clusters governance pilot (The Center to Advance CTE)

<sup>13</sup> 1.1.3 - Convene CCSSO, NGA and NASBE to develop a common policy platform to for the state role in Perkins. (Advance CTE)

<sup>14</sup> 2.2.2 - Develop and host resources and workshops related to Perkins implementation following reauthorization. (Advance CTE)

<sup>15</sup> 2.2.8 - Create resources and supports for states to connect CTE with broader reform efforts (CCSS, NGSS, STEM, competency-based). (The Center to Advance CTE)

reform efforts such as the Common Core State Standards and Next Generation Science Standards, as well as STEM-related and competency-based education work. The Center to Advance CTE is still contracted with Achieve to support the NGSS career readiness work and, eventually, the development of NGSS pathways in 3-4 Career Clusters, although this work is currently on hold.

Success Metrics:

Success metrics will be determined as Advance CTE/The Center to Advance CTE plans to undertake specific activities.

**4. Craft and execute a dissemination strategy aligned to the Advance CTE/The Center to Advance CTE communication strategy to ensure resources are reaching key audiences**

Any dissemination plan will be aligned to the organizations' Communications Strategy, including social media to promote regular state policy updates, engagement of traditional media outlets to elevate major publications and projects from Advance CTE/The Center to Advance CTE and ongoing communications with our members through the newsletter, e-blasts and other relevant channels.

More broadly, as noted in the Communications Strategy, for any state policy publication or resource, we will develop a release and dissemination strategy at least a month before the set release date and, as needed, develop materials around publications – e.g. talking points, one-pagers, etc. – to highlight how they can be best utilized.