

Advance CTE Board of Directors' Meeting

AGENDA

May 1, 2017

9 a.m. – 12:30 p.m.

Meeting Room: Hampton Ballroom

1. Welcome, Overview of Agenda
9 – 9:05 a.m. (5 minutes)
..... *Pages 1-5*
Jo Anne Honeycutt
President
2. Approval of March 29, 2017 Minutes
9:06 – 9:08 a.m. (2 minutes)
..... *Pages 6-9*
Pradeep Kotamraju
Vice President
3. Advance CTE Financial Reports
9:09 – 9:24 a.m. (15 minutes)
..... *Pages 10-25*
Pradeep Kotamraju
Vice President
 - Presentation of Financial Reports
 - Discussion about new budgeting approach
 - FY18 Finance/Audit Committee appointments
 - Office space lease renewal
4. Nominations Committee Update
9:25 – 9:32 a.m. (7 minutes)
..... *Pages 26-27*
Rod Duckworth
Past President
5. Personnel Policy Revisions
9:33 – 9:38 a.m. (5 minutes)
..... *Page 28*
Kimberly Green
Executive Director
6. Membership Survey Results
9:39 – 9:59 a.m. (20 minutes)
..... *Pages 29-35*
Andrea Zimmermann
Sr. Associate, Membership
Engagement & Leadership
Development
7. State Membership Participation
10 – 10:15 a.m. (15 minutes)
..... *Pages 36-38*
Andrea Zimmermann
Sr. Associate, Membership
Engagement & Leadership
Development
8. Leadership Program Input
10:16 – 10:36 a.m. (20 minutes)
..... *Pages 39-40*
Andrea Zimmermann
Sr. Associate, Membership
Engagement & Leadership
Development

BREAK

- | | | |
|-----|---|---|
| 9. | State Dues Policy Discussion
<i>10:50 – 11:05 a.m. (15 minutes)</i>
..... | Kimberly Green
Executive Director
<i>Pages 41-42</i> |
| 10. | Perkins Update and Planning
<i>11:06 -11:26 a.m. (20 minutes)</i>
..... | Kathryn Zekus
Sr. Associate for Federal Policy
<i>Pages 43-46</i> |
| 11. | Governance: Planning for Business Meeting
<i>11:27 - 11:42 a.m. (15 minutes)</i> | Kate Kreamer
Deputy Executive Director |
| 12. | Liaison Discussions
<i>11:42 a.m. – 12:27 p.m. (45 minutes)</i> | Jo Anne Honeycutt
President |
| 13. | Other items to be added/next meeting
<i>12:28 p.m. – 12:30 p.m. (2 minutes)</i> | Jo Anne Honeycutt
President |

LUNCH BEGINS IN ROBERTS' RESTAURANT AT 12:45 P.M.

PLEASE RETURN TO THE HAMPTON BALLROOM BY 1:45 P.M. FOR THE JOINT MEETING OF ADVANCE CTE/THE CENTER TO ADVANCE CTE BOARD MEETING

Upcoming Meetings

Advance CTE Board Conference Call

June 22, 2017

Topic: Approve FY18 Budget

1 - 2 p.m. ET

TENTATIVE: Advance CTE Board Conference Call

Thursday, August 17, 2017

Topic: Bylaws review re: governance

1 - 2 p.m. ET

2017 Fall Meeting

BWI Marriott Hotel

Meeting: October 16 – 18, 2017

Board Meeting: October 16, 2017

2018 Spring Meeting

Omni Shoreham Hotel

Meeting: April 4 – 6, 2018

Washington, DC

Meeting: April 3, 2018

**ADVANCE CTE
BOARD OF DIRECTORS
FY 16-17**

Advance CTE President

Ms. Jo Anne Honeycutt
Director, Career and Technical Education
North Carolina Department of Public
Instruction
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Advance CTE Vice President

Dr. Pradeep Kotamraju
Director, Career and Technical Education
Bureau Chief
Division of Community Colleges
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Advance CTE Secretary / Treasurer

Duties being fulfilled by Dr. Kotamraju

Advance CTE Past President

Mr. Rod Duckworth
Chancellor
Division of Career and Adult Education
Florida Department of Education
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Administrator
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Region I - Connecticut; Maine;
Massachusetts; New Hampshire; Rhode
Island; Vermont
Term: July 1, 2014 – June 30, 2017

Ms. Marie Barry
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Education
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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 11th Floor
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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
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Region IV - Alabama; Florida; Georgia;
Kentucky; Mississippi; North Carolina;
South Carolina; Tennessee
Term: July 1, 2016 – June 30, 2019

Ms. Kathleen Cullen
Provost and Vice President of Student
Success
Wisconsin Technical College System
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Fax: 608-266-1285
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Region V - Illinois; Indiana; Minnesota;
Michigan; Ohio; Wisconsin
Term: July 1, 2016 – June 30, 2019

Charisse Childers, Ph.D.
Director
Arkansas Department of Career Education
Three Capitol Mall
Little Rock, AR 72201
Phone: 501-682-1500
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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
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Lincoln, NE 68509
Phone: 402-471-4808
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Region VII - Iowa; Kansas; Missouri;
Nebraska
Term: July 1, 2015– June 30, 2018

Ms. Thalea Longhurst
State CTE Director
Utah State Office of Education
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Region VIII - Colorado; Utah; North
Dakota; Montana; South Dakota; Wyoming
Term: July 1, 2016 – June 30, 2019

VACANT
Region IX - Arizona; California; Nevada
Term: July 1, 2015 – June 30, 2018

Ms. Eleni Papadakis
Executive Director
Workforce Training & Education
Coordinating Board
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Region X – Alaska; Idaho; Oregon;
Washington
Term: July 1, 2015 – June 30, 2018

Ms. Bernadette Howard
State CTE Director
Career and Technical Education
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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
312 N. Stadium Way #402
Tacoma WA 98403
Phone: 920-896-3127
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Associate Member Representative
Term: July 1, 2014 – June 30, 2017

Advance CTE Board of Directors' Meeting

MINUTES

March 29, 2017

1 – 2 p.m. ET

Attendees:

Jo Anne Honeycutt, Pradeep Kotamraju, Vanessa Cooley, Marie Barry, Lee Burket, Charisse Childers, Rich Katt, Eleni Papadakis, Bernadette Howard, Rod Duckworth, Sheila Ruhland, Thalea Longhurst

Absent: Kathleen Cullen, Jean Massey

Staff: Kimberly Green, Kate Kreamer, Sherry Quinn

Welcome and Overview of Agenda: Honeycutt welcomed the Advance CTE Board and staff to the March 29, 2018 Advance CTE Board of Directors' meeting held by conference call.

Review and Approval of Advance CTE Board Minutes: Honeycutt presented the minutes from the January 26, 2017 Advance CTE Board of Directors' meeting. No corrections were made.

**MOTION: To approve the January 26, 2017 Advance CTE Board Minutes.
Cooley, Ruhland.
MOTION APPROVED.**

Review and Approval of Advance CTE/Center to Advance CTE Joint Board Minutes: Honeycutt presented the minutes from the January 26, 2017 Advance CTE/Center to Advance CTE Joint Board of Directors' meeting. No corrections were made.

**MOTION: To approve the January 26, 2017 Advance CTE Board Minutes.
Katt, Howard.
MOTION APPROVED.**

Advance CTE Executive Committee Transition: Honeycutt shared that Phillip Cleveland has left his position as the State CTE Director in Alabama. This departure leaves a vacancy in the Advance CTE Executive Committee, as Cleveland served as the organization's Secretary/Treasurer. The Nominating Committee will cultivate a candidate for the office of Vice President and present this individual, along with the Secretary/Treasurer candidates, to the membership for a vote at the May business meeting. Honeycutt expressed her sadness at losing Cleveland as a Board member as he was a great leader, innovator and professional friend; he will be greatly missed by the organization. With Cleveland's transition, we need someone to fulfill the Secretary/Treasurer duties until the end of the fiscal year. Honeycutt asked Kotamraju to serve in this dual role; he graciously agreed.

Advance CTE Governance Proposal: Green provided background on the governance proposal effort, reminding the Board that this effort, which began over a year ago, was to ensure the Board structure fully reflected the new brand (state CTE leaders), mission and vision, and address the challenge the current structure imposes on some regions with a small number of states. Green

also stated the regions were increasingly difficult to fill with eligible State Directors considering the high turnover (13 changes in this year alone). In October, the Board discussed handling the governance and state membership changes at the same time. However, as staff did the outreach and began the work around the new state membership structure, we realized we should address the membership structure first and give ourselves more time to bring the governance proposal forward. Our original plan was to ask the membership to vote on it this May. Green shared that, with support from the Executive Committee, staff now have two proposals for Board input, the proposal the Board discussed last October and a modified version.

Green presented two questions to be presented for the Board's consideration and vote:

1. Do you agree on the slower approach to consider the governance structure and not bring it to the membership until the fall?
2. Does the Board want to bring both the original proposal and an adapted proposal to the membership for consideration or only one and if only one, which of the two proposals?

Green then turned the presentation over to Kreamer.

Kreamer reiterated the challenge faced under the current regional structure, sharing that with such high turnover of State Directors (13 in 2017 already), some of the smaller regional positions are increasingly difficult to fill, including one which is currently vacant due to turnover among all three of the represented states. Some regions are so small, State Directors are perpetually on the Board while other regions see the opposite effect being large they have limited opportunity to participate.

Kreamer shared the proposed Board structure, which was unofficially 'approved' in October 2016. This proposal maintains the four officers for the Executive Committee, with five (5) regionally-selected Regional Representatives from State Directors, plus four (4) At-Large Representatives with one who must be a State Associate Member, one who must be a State Associate or a Non-State Associate Member; one postsecondary/non-secondary representative who can be a State Director, State Associate; or Non-State Associate Member; and one secondary representative who can be a State Director, State Associate or Non-State Associate Member.

Kreamer noted that as staff begin to plan a member engagement and implementation strategy based on this proposal (as the Board directed us), we found that it would actually be a fairly complicated transition given the flexibility with the at-large positions. We also heard the concerns from certain Board members about the dilution of State Directors on the Board. Kreamer shared that our updated proposal aims is a simplified version of the previous proposal. The updated proposal maintains the four officers for the Executive Committee, with five (5) regionally-selected Regional Representatives from State Directors, plus two (2) At-Large State Directors representatives; one (1) At-Large Associate, State Member Representative; and one (1) Associate Member Representative who must be a State Associate or Non-State Associate member (not an organizational member representative).

Kreamer asked if there are any questions.

Ruhland asked how the roles and responsibilities for the At-Large positions would be defined. Kreamer answered that anyone running for an At-Large Board position would be expected to put up a platform, more like what we now ask of those running for an officer position, and the At-Large positions would be on rotating schedules like the regions. Ruhland stated the term “At-Large” needs to be defined. Ruhland also raised the concern that if Advance CTE is having trouble finding 13 State Directors to serve on the Board, will we be able to find 11 under the new proposal? She urged the Board to not lose sight of recruitment challenges. Ruhland then stated those were her comments, and we could move on.

Barry addressed the difference in the two proposals around loosening the secondary and postsecondary requirements, which she noted could be handled by thinking about term limits of At-Large members. Barry also stated the nomination process needs revisiting to help ensure the Board represents all states and needs. Barry stated she supports the second, updated option but the details need to be flushed out.

Longhurst asked about term limits, and Kreamer stated we would continue to have three-year terms, but how many one person could serve has not yet been defined. This change will need to be updated in the bylaws. Longhurst stated the representatives need to be voted back in for second and Kreamer agreed there would be a revote, and that on the Center side we have two-term limits that could be replicated on the Advance CTE Board side. Papadakis shared that she likes having the State Directors required to create a position or platform to run as At-Large, which requires them to state their commitment and vision to organization.

Kreamer asked if there were any other questions; since there were none, Kreamer asked about the proposed timeline and if the Board was comfortable moving on the timeline with the full membership approving the new structure in October? If so, we will need a Board meeting in August to review the proposed bylaw changes, and time during the business meeting in May to get member feedback on the proposal, as well as additional outreach to members over the summer.

Pradeep asked if the proposal would be sent to members before the May meeting. Kreamer replied whatever the Board decides is the approach they want to pursue, the staff would send out the materials necessary to review in April before the spring meeting.

Ruhland recommended one proposal, not two, be presented; Howard and Katt agreed. Rich moved the updated proposal be taken forward. Pradeep agreed consider one proposal and to use the updated proposal.

Pradeep takes motion to the table for a vote:

MOTION: To take only one proposal to the membership, **Option 2** (Option 2 maintains the four officers for the Executive Committee, with five (5) regionally-selected Regional Representatives from State Directors, plus two (2) At-Large State Directors representatives; one (1) At-Large Associate, State Member Representative; and one (1) Associate Member Representative who must be a

State Associate or Non-State Associate member (not an organizational member representative).

Katt; Howard.

MOTION APPROVED.

Green summarized the plan is to have intentional outreach of State Directors over the spring and Summer, schedule a Board meeting for August, finalize it in the late summer to take to the attorney, and present to the full membership in October for a vote.

Perkins Update: Green welcomed our new Senior Associate for Federal Policy, Kathryn Zekus. Zekus comes to her role with extensive experience in advocacy and implementation, having worked at Achieve most recently.

Green shared that reauthorization activity has begun again. The expectation is that the House will re-introduce a slightly updated version of the bill it passed last session H.R. 5587. Staff discussions are happening in both the House and between the House and Senate, as there is an expectation that the Senate is not planning to develop its own bill but instead to just introduce and pass the House bill. This means that all changes to the legislation must be made during the House's consideration of the bill.

Our top priority is getting the CTE concentrator definition fixed. There are other minor improvements we are seeking but none are as critical.

Right now, Hill staff are working through challenges being raised by a subset of the civil rights organizations related to secretarial authority. This concern is being raised not because of Perkins but because of how ESSA implementation has been handled.

Meeting adjourned at 1:50 p.m.

Upcoming meetings:

Quinn reviewed the upcoming meeting schedule:

May 1, 2017 at the Spring Meeting at the Omni Shoreham, Washington D.C., 9 a.m. – 2 ET

June 22, 2017 Conference call, 2-3 p.m. ET, **Topic:** FY18 budget approval

FY17 Advance CTE Financial Report
Report prepared by Kimberly Green, Executive Director

This report provides summary financial information for July 1, 2016 through April 15, 2017 or 87% of the fiscal year. The accountant has reconciled the financial statements through March 31, 2017. Therefore, salary and benefit numbers, as well as accounts related to investments will only reflect activity through March 31, 2017.

INCOME: As of April 15, Advance CTE has received 102.3% of its budgeted income. Exceptional spring meeting registrations and sponsorships, a strong investment portfolio and new organizational memberships all contribute to the strong income position. All states renewed their memberships, however the second half of California's dues will not be paid until the end of the fiscal year.

EXPENSES: Advance CTE has expended 70.6% of projected expenses. Salaries and benefits were reimbursed by The Center to Advance CTE for July – December 2016. Full salaries and benefits are reflected in the budget between January and March 2017; this quarter's reimbursement for Center-related work will occur in April 2017. The majority of expenses are on or below targeted expenditures.

A few items are over budget:

Credit card fees: Due to a shift to an integrated credit card payment portal for meeting registrations and memberships, more payments are being made in this manner. This shift has made it more efficient for the end-user, as well as reduced Advance CTE staff time for processing. Expenses are currently over budget by \$724 or 18%. We anticipate this number will go up before the fiscal year end.

Legal fees: Per the Board's direction, staff consulted legal counsel related to the state membership proposal. This totaled \$2,700. Project-based legal fees are over budget by \$996.50 or 29.5%. No additional project-based legal fees are anticipated in this fiscal year.

Accounting: As for March 31, 2017 we have expended our full allotment of funds for accounting. Due to the Office Manager's departure, we have relied upon the external accountant for more support. We project the year-end accounting total will likely be over budget by approximately \$4,000.

ASSETS: Assets total \$3,436,618.54, with equity at \$2,610,850.51. Compared to the same timeframe last fiscal year, assets are up 11% and equity is up 12%.

INVESTMENTS: The report from the Merrill Lynch advisor does not call for any adjustments to the portfolio at this time. The portfolio has approximately a 5.99% rate of return, with the equity portion at 5.11%, which is higher than the Dow Jones Index (4.56%) but lower than the S & P 500 (5.53%).

Board action required: Approve FY17 financial reports.

Approved Advance CTE FY17 Budget

	Approved FY17	Actuals as of 4/15/17	Actuals to Budget	Explanatory Notes
INCOME		87% of fiscal year		
State Memberships	\$499,395.05	\$542,372.00	109%	Reflects actual state dues as of April 15, 2017. All dues received as expected. CA second payment of dues will be received at the end of the fiscal year.
Associate & Org. Memberships	\$51,917.50	\$61,875.00	119%	Reflects actual associate and organizational dues as of April 15, 2017. Given the membership reconciliation, wrote off nearly \$4,000 in unpaid associate dues. This has been offset by a number of new organizational memberships.
Conference Registrations	\$135,000.00	\$166,528.81	123.4%	Fall meeting registrations trailed expectations but spring has very much exceeded expectations.
Conference Sponsorships	\$73,000.00	\$80,500.00	110.3%	Fall meeting sponsorships trailed expectations but spring has very much exceeded expectations.
Interest/Dividend	\$75,000.00	\$64,455.18	85.9%	Through March 2017. Includes realized gains of \$23,103.46
Other income	\$10,462.00	\$3,921.50	37.5%	Income from honorarium for serving on equity technical working group, middle grades grant and the Aspen Prize for Community Colleges.
Reserve withdrawal	\$20,484.01	\$0.00	0.0%	None at this time.
Reserve withdrawal - Reimburse The Center to Advance CTE	\$33,835.00	\$0.00	0.0%	None at this time.
TOTAL REVENUES	\$899,093.56	\$919,652.49	102.3%	
EXPENSES				
Allocated Expenses to Specific Projects				
Speakers	\$1,000.00	\$0.00	0.0%	No expenses incurred for fall meeting. Will have expenses for spring meeting.
Meals (Hotels/Catering)	\$95,300.00	\$26,264.42	27.6%	Fall meeting on target. Canceled in person Executive Committee meeting with ACTE, which had been budgeted. Spring meeting on target with proportional increase due to registration counts.
Travel/Lodging	\$26,000.00	\$1,734.12	6.7%	
Awards/Gifts	\$1,605.00	\$439.50	27.4%	Gavel and Past President recognition. Additional award (Congressional Rising Star) will be reflected after the spring meeting. Decided to postpone membership star of education recognition to the fall (had been budgeted for spring 2017).
Audio Visual	\$14,000.00	\$3,560.38	25.4%	On target based on budgeted distribution of fees across the spring and fall meetings.
Printing/Copying	\$28,600.00	\$16,129.83	56.4%	Fee covers printing of vision documents, CTE month postcards.
Telecommunications (telephone/communications)	\$11,128.08	\$4,510.99	40.5%	Pre payment for website work and membership management platform. Funds not yet expended for PR Newswire releases.
Postage/Overnight	\$3,685.00	\$2,347.42	63.7%	Shipment of vision documents to all members and Summit participants and CTE month postcards, as well as new State CTE Director packets.
Supplies	\$4,250.00	\$769.44	18.1%	General member services, as well as fall meeting expenses.

Approved Advance CTE FY17 Budget

	Approved FY17	Actuals as of 4/15/17	Actuals to Budget	Explanatory Notes
Education/Training	\$3,500.00	\$1,125.50	32.2%	Selected professional development was less than projected and will likely fall below budget at fiscal year end.
Dues/Subscriptions	\$8,052.61	\$5,179.89	64.3%	Annual subscriptions are paid upon receipt.
Bank Charges - Credit Card Fees	\$4,011.00	\$4,735.21	118.1%	Increased usage of credit cards for processing meeting registrations and memberships.
Reimbursement to The Center to Advance CTE for project-specific work	\$33,835.00	\$0.00	0.0%	This reimbursement will happen at fiscal year end. Will be lower than projected due to # of Excellence in Action award winners.
Legal fees	\$3,380.00	\$4,376.50	129.5%	\$2,700 in legal fees for review of state membership proposal for federal compliance (this expense had not been budgeted).
Contractors (consultants)	\$14,574.20	\$11,961.44	82.1%	Work on membership clearinghouse has not yet begun.
Subtotal - Specific Projects	\$252,920.89	\$83,134.64	32.9%	
General & Administrative Expenses				
Salaries	\$411,262.71	\$342,138.23	83.2%	The Center to Advance CTE has reimbursed Advance CTE for salaries/benefits through December 2016. Listed expenses include full salaries for January through March 2017. First quarter salaries and benefits will be reimbursed in April 2017.
Full employee benefits	\$81,591.90	\$82,859.41	101.6%	The Center to Advance CTE has reimbursed Advance CTE for salaries/benefits through December 2016. Listed expenses include full benefits for January through March 2017. First quarter salaries and benefits will be reimbursed in April 2017.
Rent	\$80,889.46	\$67,268.76	83.2%	July 2016 - April 2017.
Licenses/Fees	\$2,709.00	\$1,653.00	61.0%	Annual corporation registration, fee to Oklahoma to process dues, 401(k) annual plan fee
Office Supplies	\$700.00	\$142.54	20.4%	
Communications	\$130.00	\$39.01	30.0%	
Postage/Overnight	\$216.88	\$127.99	59.0%	Postage meter fee through April 2017.
Printing/Copying	\$10.00	\$0.00	0.0%	
Equipment & Furniture	\$3,812.07	\$1,338.51	35.1%	Copier lease through April 2017.
Bank Charges	\$60.00	-\$15.00	-25.0%	Reimbursed for wire transfer fee. No offset charged incurred to date.
Merrill Lynch Charges	\$31,500.00	\$24,514.92	77.8%	Through March 2017.
Accounting	\$27,381.00	\$27,397.60	100.1%	Over budget due to additional accounting responsibilities shifted externally (Office Manager transition). Covers costs through end of March 2017.
Legal	\$1,690.00	\$0.00	0.0%	Personnel policies reviewed but no bill received to date.
Insurance - Directors	\$3,679.65	\$3,758.01	102.1%	Annual insurance policies (business umbrella, equity bond, directors and officers liability, etc.). Premium increases due to staff size/salaries increased more than projected.
Liaison & Meetings	\$540.00	\$336.76	62.4%	
Total G&A Expenses	\$646,172.67	\$551,559.74	85.4%	
Total Project Expenses	\$252,920.89	\$83,134.64	32.9%	
TOTAL EXPENSES	\$899,093.56	\$634,694.38	70.6%	
INCOME LESS EXPENSES	\$0.00	\$284,958.11		

**Advance CTE
Balance Sheet
As of April 15, 2017**

	Total
ASSETS	
Current Assets	
Bank Accounts	
1010 Cash- Bank of America	119,259.94
1017 Merrill Lynch Cash - 749	162,588.34
1018 Merrill Lynch Cash - 7WD	31,001.82
Total Bank Accounts	\$ 312,850.10
Accounts Receivable	
1200 Accounts Receivable	633,244.64
Total Accounts Receivable	\$ 633,244.64
Other Current Assets	
1100 Investments	
1131 Government Bonds	581,850.20
1159 Equities	1,881,731.08
Total 1100 Investments	\$ 2,463,581.28
1275 Security Deposit	9,000.00
1299 Accrued Interest Receivable	2,394.73
1300 Prepaid Expense	315.16
1499 Undeposited Funds	13,100.00
Total Other Current Assets	\$ 2,488,391.17
Total Current Assets	\$ 3,434,485.91
Other Assets	
1400 Furniture and Fixtures	25,107.21
1405 Accumulated Depreciation - Furniture and Fixtures	-24,530.15
1410 Equipment	17,255.43
1450 Accumulated Depreciation- Equipment	-15,699.86
Total Other Assets	\$ 2,132.63
TOTAL ASSETS	\$ 3,436,618.54
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2070 Accrued Vacation	80,020.42
2099 Deferred Revenue	
2142 Deferred State Dues FY 16-17	167,825.75
2143 Deferred Associate Dues FY 16-17	22,661.86
2144 Deferred Revenue FY 17-18 State Dues	553,760.00
2145 Deferred Revenue FY 17-18 Associate Dues	1,500.00
Total 2099 Deferred Revenue	\$ 745,747.61
Total Other Current Liabilities	\$ 825,768.03
Total Current Liabilities	\$ 825,768.03
Total Liabilities	\$ 825,768.03
Equity	
3000 Net Assets	1,954,431.63
3900 Earnings	455,330.11
Net Income	201,088.77
Total Equity	\$ 2,610,850.51
TOTAL LIABILITIES AND EQUITY	\$ 3,436,618.54

**Advance CTE/Center to Advance CTE
Executive Investment Recommendation Summary
Submitted by Mark Friese, Merrill Lynch**

Last year was full of volatility and surprises. This was particularly true for the financial markets. Issues with China, Europe and then an unexpected outcome for the U.S. presidential election caused quite a roller coaster ride. In the end, the U.S. stock market finished higher.

We also saw the beginning of a slow increase in interest rates from the Federal Reserve. We expect this trend to continue, barring any major slowdown in the U.S. economy. Even with these increases, interest rates remain near all-time historic lows. Bonds move inversely with interest rates, so we are expecting a decline in bond prices looking forward. For this reason both the Advance CTE account and The Center to Advance CTE accounts are above the ranges for equities and under-weighted in bonds. When interest rates start to increase and bonds decline in price we will reallocate from equities to bonds.

A large portion of the equity portion of your portfolio is focused on conservative, dividend producing, equity based indexes. These indexes provide income which has historically risen over time and provided capital appreciation potential. We are currently over-weighted in this area which recently has performed well beyond the general market. We believe that this trend will continue for many years as the Baby Boomer retire and seek to replace their employment income with income generated by their savings.

Together the Foundation's and Association's equity performance far exceeded the general market (S&P) in 2016. Dividend oriented investments, and a focus on defensive sectors accounted for much of this. For the period of your last report (July 1- March 31, 2017) there was a slight under-performance. This was mainly due to a slight under-performance of conservative utility focused indexes. We do not expect this to last for any extended period of time.

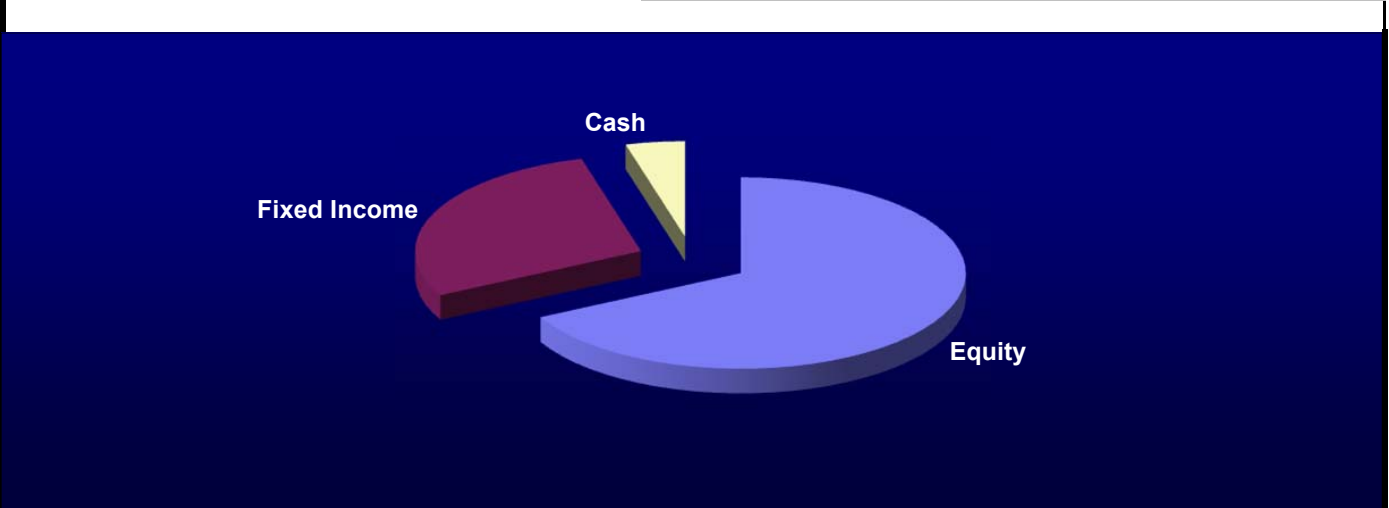
Kim and I had a meeting recently where we reviewed future cash flow needs and upcoming transfers. Based on this meeting sufficient cash is available to meet intermediate cash flow needs.

No changes are currently recommended.

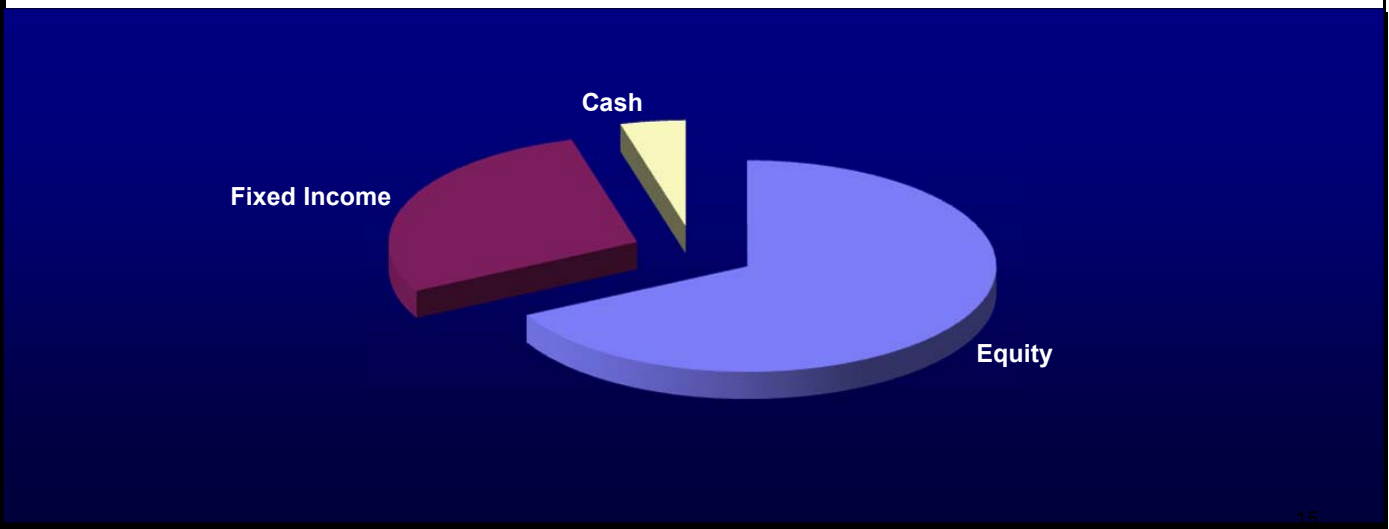
Summary of recommended changes:

Advance CTE
 Current Asset Allocation
 Association Accounts 749-04H01 & 7WD-04H50
 Period: July 1, 2016 - March 31, 2017

<i>Current Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement	
	Equity	67%
	Fixed Income	28%
	Cash	4%
	Sub-Total	100%
	Cash Reserves	
	Total Portfolio Value	



<i>Proposed Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement	
	Equity	67%
	Fixed Income	28%
	Cash	4%
	Sub-total	100%
	Cash Reserves	
	Portfolio Value	100%



Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2016 to 03/31/2017

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2017	2,574,051	0	11,958	73,560	2,659,570	3.32	5.99
2016	2,387,251	125,000	35,495	26,305	2,574,051	2.58	2.58
Total	2,387,251	125,000	47,454	99,865	2,659,570		5.99

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.

Relative Performance - Equity: Yearly



Performance period: 07/01/2016 to 03/31/2017

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
2017	5.11	11.53	4.56	15.24	5.85	12.13	5.53	12.57
US Equity	5.11	11.53						
2016	6.11	6.11	10.22	10.22	5.93	5.93	6.67	6.67
US Equity	6.11	6.11						

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.

Account Review Summary 07/01/2016 - 03/31/2017

Account 749-04H01

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
Association-E.T.F.'s (749-04H01)									
<i>Ishares DJ US Consumer Goods (IYK)</i>	340	\$ 24,558	07/10/12			\$ 40,375	\$ 15,817		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	72	\$ 5,337	10/31/12			\$ 8,550	\$ 3,213		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	5	\$ 471	01/22/14			\$ 594	\$ 123		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	69	\$ 6,946	08/24/15			\$ 8,194	\$ 1,248		n/a
<i>Ishares Russell Midcap (IWR)</i>	1000	\$ 96,760	10/20/06			\$ 187,180	\$ 90,420		n/a
<i>Ishares Russell Midcap (IWR)</i>	466	\$ 26,967	04/03/09			\$ 87,226	\$ 60,259		n/a
<i>Ishares Russell Midcap (IWR)</i>	298	\$ 32,577	10/31/12			\$ 55,780	\$ 23,203		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	352	\$ 24,756	07/10/12			\$ 47,580	\$ 22,824		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	150	\$ 10,549	07/10/12	02/17/17	\$ 19,778			\$ 9,228	n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	119	\$ 8,376	10/31/12			\$ 16,085	\$ 7,709		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	28	\$ 2,118	05/10/13			\$ 3,785	\$ 1,667		n/a
<i>Ishares TR Dow Jones (DVY)</i>	46	\$ 2,212	08/12/11	01/31/17	\$ 4,098			\$ 1,887	n/a
<i>Ishares TR Dow Jones (DVY)</i>	737	\$ 40,813	06/07/12			\$ 67,141	\$ 26,328		n/a
<i>Ishares TR Dow Jones (DVY)</i>	89	\$ 4,929	06/07/12	01/31/17	\$ 7,929			\$ 3,000	n/a
<i>Ishares TR Dow Jones (DVY)</i>	1733	\$ 97,546	07/10/12			\$ 157,876	\$ 60,330		n/a
<i>Ishares TR Dow Jones (DVY)</i>	541	\$ 31,251	10/31/12			\$ 49,285	\$ 18,034		n/a
<i>Ishares TR Dow Jones (DVY)</i>	32	\$ 2,100	05/10/13			\$ 2,915	\$ 815		n/a
<i>Ishares TR Dow Jones (DVY)</i>	851	\$ 59,965	12/10/13			\$ 77,526	\$ 17,561		n/a
<i>Ishares TR Dow Jones (DVY)</i>	277	\$ 19,729	01/22/14			\$ 25,235	\$ 5,506		n/a
<i>Ishares TR Dow Jones (DVY)</i>	109	\$ 7,711	02/14/14			\$ 9,930	\$ 2,219		n/a
<i>Ishares TR Dow Jones (DVY)</i>	57	\$ 4,605	12/30/14			\$ 5,193	\$ 587		n/a
<i>Ishares TR Dow Jones (DVY)</i>	96	\$ 7,671	02/19/15			\$ 8,746	\$ 1,074		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	91	\$ 3,446	02/23/10			\$ 3,522	\$ 76		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	471	\$ 17,977	07/15/10			\$ 18,228	\$ 251		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	322	\$ 12,593	07/10/12			\$ 12,461	\$ (132)		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	292	\$ 11,689	10/31/12			\$ 11,300	\$ (388)		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	254	\$ 10,400	05/10/13			\$ 9,830	\$ (570)		n/a
<i>Vanguard Consumer (VCR)</i>	258	\$ 16,731	04/26/11			\$ 35,725	\$ 18,994		n/a
<i>Vanguard Consumer (VCR)</i>	62	\$ 4,589	10/31/12			\$ 8,585	\$ 3,996		n/a

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
Vanguard Consumer (VCR)	6	\$ 632	01/22/14			\$ 831	\$ 198		n/a
Vanguard Dividend (VIG)	338	\$ 17,806	08/03/11			\$ 30,400	\$ 12,594		n/a
Vanguard Dividend (VIG)	75	\$ 3,951	08/03/11	01/31/17	\$ 6,490			\$ 2,539	n/a
Vanguard Dividend (VIG)	429	\$ 24,144	06/07/12			\$ 38,584	\$ 14,440		n/a
Vanguard Dividend (VIG)	1734	\$ 98,102	07/10/12			\$ 155,956	\$ 57,854		n/a
Vanguard Dividend (VIG)	538	\$ 31,647	10/31/12			\$ 48,388	\$ 16,741		n/a
Vanguard Dividend (VIG)	812	\$ 59,982	12/10/13			\$ 73,031	\$ 13,049		n/a
Vanguard Dividend (VIG)	266	\$ 19,716	01/22/14			\$ 23,924	\$ 4,208		n/a
Vanguard Dividend (VIG)	107	\$ 7,855	02/14/14			\$ 9,624	\$ 1,769		n/a
Vanguard Dividend (VIG)	56	\$ 4,599	12/30/14			\$ 5,037	\$ 438		n/a
Vanguard Dividend (VIG)	94	\$ 7,748	02/19/15			\$ 8,454	\$ 706		
Vanguard Industrial ETF (VIS)	24	\$ 965	05/13/09			\$ 2,970	\$ 2,005		n/a
Vanguard Industrial ETF (VIS)	374	\$ 19,968	07/15/10			\$ 46,275	\$ 26,307		n/a
Vanguard Industrial ETF (VIS)	210	\$ 14,507	10/31/12			\$ 25,983	\$ 11,477		n/a
Vanguard REIT ETF (VNQ)	349	\$ 25,632	05/10/13	01/31/17	\$ 28,548			\$ 2,915	n/a
Ishares S&P Developed (WPS)	194	\$ 7,837	05/10/13	02/17/17	\$ 6,813			\$ (1,025)	n/a
CBRE Clarion Global (IGR)	1965	\$ 15,114	12/10/13	01/31/17	\$ 14,462			\$ (652)	n/a
Wisdomtree Total Divid ETF (DTD)	159	\$ 10,482	12/10/13			\$ 13,354	\$ 2,872		n/a
Wisdomtree Total Divid ETF (DTD)	75	\$ 4,944	12/10/13	1/31/2017	\$ 6,101			\$ 1,156	n/a
Wisdomtree Total Divid ETF (DTD)	195	\$ 13,026	01/22/14			\$ 16,378	\$ 3,352		n/a
Wisdomtree Total Divid ETF (DTD)	529	\$ 35,327	01/22/14			\$ 44,431	\$ 9,104		n/a
Wisdomtree Total Divid ETF (DTD)	27	\$ 1,789	02/14/14			\$ 2,268	\$ 479		n/a
Wisdomtree Total Divid ETF (DTD)	61	\$ 4,614	12/30/14			\$ 5,123	\$ 509		n/a
Wisdomtree Total Divid ETF (DTD)	25	\$ 1,896	02/19/15			\$ 2,100	\$ 203		n/a
Wisdomtree Tr Midcap Div Fc (DON)	85	\$ 6,227	12/10/13			\$ 8,290	\$ 2,063		n/a
Wisdomtree Tr Midcap Div Fc (DON)	145	\$ 10,623	12/10/13	01/31/17	\$ 13,805			\$ 13,660	n/a
Wisdomtree Tr Midcap Div Fc (DON)	322	\$ 24,124	01/22/14			\$ 31,405	\$ 7,281		n/a
Wisdomtree Tr Midcap Div Fc (DON)	175	\$ 13,107	01/22/14			\$ 17,068	\$ 3,960		n/a
Wisdomtree Tr Midcap Div Fc (DON)	21	\$ 1,566	02/14/14			\$ 2,048	\$ 482		n/a
Wisdomtree Tr Midcap Div Fc (DON)	55	\$ 4,669	12/30/14			\$ 5,364	\$ 695		n/a
Wisdomtree Tr Midcap Div Fc (DON)	20	\$ 1,733	02/19/15			\$ 1,951	\$ 217		n/a
Ishares US Financial Services ETF (IYF)	72	\$ 5,820	01/22/14			\$ 7,492	\$ 1,672		n/a
Ishares US Financial Services ETF (IYF)	221	\$ 18,382	10/21/14			\$ 22,995	\$ 4,613		n/a

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
<i>Prudential Jennison Health (PHSZX)</i>	961.013	\$ 47,368	10/01/14			\$ 43,121	\$ (4,248)		n/a
<i>Powershares Exch Traded Fund (PEY)</i>	84	\$ 1,074	08/24/15			\$ 1,434	\$ 360		n/a
<i>Powershares Exch Traded Fund (PEY)</i>	2443	\$ 30,854	08/24/15			\$ 41,702	\$ 10,848		n/a
<i>Vanguard High Div Yield ETF (VYM)</i>	954	\$ 62,386	08/21/15			\$ 74,078	\$ 11,692		n/a
<i>Vanguard High Div Yield ETF (VYM)</i>	164	\$ 11,134	08/13/15			\$ 12,735	\$ 1,601		n/a
<i>Vanguard Total Bond (BND)</i>	308	\$ 24,947	02/17/17			\$ 24,973	\$ 26		n/a
<i>Vanguard Total Bond (BND)</i>	742	\$ 59,954	01/31/17			\$ 60,161	\$ 208		n/a
<i>Ishares 1-3 Year Treasury (SHY)</i>	177	\$ 14,958	01/31/17			\$ 14,960	\$ 2		n/a
<i>Total</i>		\$ 1,280,792				\$ 1,881,731	\$ 600,940		
Association-Money Market (749-04H01)						\$ 162,588			
749-04H01 Account Total						\$ 2,044,319	\$ 600,940		

Fees for period: \$19,681.36

Fees based on assets: \$19,681.36

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.

Advance CTE

Account Review Summary 07/01/2016 through 03/31/2017

Account 7WD-04H50 (Association)

Cost Basis	Buy/Sell	3/31/2017	Gain/Loss
\$588,188	Various	\$581,850	-\$6,337

Managed Fixed Income Portfolio

Estimated Accrued Interest

\$2,395

Money Market













\$33,041

Account Total

\$617,286

Sector Analysis - Summary

As of Close of Business: 04/04/2017

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(\$)
Equity								
Health Care			9.05	13.70	4.65	183,560	450,013	266,453
Consumer Staples			12.55	9.30	(3.25)	254,685	305,484	50,799
Information Technology			12.16	21.30	9.14	246,650	699,656	453,006
Consumer Discretionary			12.87	12.30	(0.57)	261,072	404,027	142,955
Industrials			15.86	10.20	(5.66)	321,825	335,046	13,221
Materials			4.95	2.90	(2.05)	100,359	95,258	(5,101)
Financials			11.67	14.60	2.93	236,702	479,576	242,874
Telecommunication Services			1.65	2.50	0.85	33,553	82,119	48,566
Utilities			10.32	3.20	(7.12)	209,301	105,113	(104,189)
Energy			5.14	7.20	2.06	104,330	236,503	132,174
Real Estate			3.67	2.80	(0.87)	74,467	91,974	17,507
Equities Blend			0.12	0.00	(0.12)	2,442	0	(2,442)
Total						2,028,945		

* 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: 04/04/2017

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	02/28/2017			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
SHY	ISHARES 1-3 YEAR	No Date Reported	IYW	ISHARES U.S. TECHNOLOGY	02/28/2017
CSJ	ISHARES 1-3 YEAR	No Date Reported	PEY	POWERSHARES EXCH TRADED	02/28/2017
IEI	ISHARES 3-7 YEAR	No Date Reported	VCR	VANGUARD CONSUMER	02/28/2017
CIU	ISHARES INTERMEDIATE	No Date Reported	VIG	VANGUARD DIVIDEND	02/28/2017
IWR	ISHARES RUSSELL MIDCAP	02/28/2017	VYM	VANGUARD HIGH DVD YIELD	02/28/2017
DVY	ISHARES SELECT	02/28/2017	VIS	VANGUARD INDUSTRIAL ETF	02/28/2017
IYK	ISHARES U.S. CONSUMER	02/28/2017	VNQ	VANGUARD REIT ETF	02/28/2017
IYE	ISHARES U.S. ENERGY ETF	02/28/2017	VOX	VANGUARD TELECOMM SRVCS	02/28/2017
IYF	ISHARES U.S. FINANCIAL	02/28/2017	BND	VANGUARD TOTAL BOND MKT	No Date Reported
IYH	ISHARES U.S. HEALTHCARE	02/28/2017	DTD	WISDOMTREE TOTAL DIVID	02/28/2017
PFF	ISHARES U.S. PREFERRED	02/28/2017	DON	WISDOMTREE TR MIDCAP DIV	02/28/2017

Size and Style Analysis - Summary

As of Close of Business: 04/04/2017

Size And Style	Total Holdings(%)		Current(%)	Model(%)	Gap-Model vs. Current(%)	All Equity compared to Custom Model		
	0%	50%				ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
Equity								
Large Cap Growth			25.76	33.00	7.24	522,634	1,083,974	561,340
Large Cap Value			33.44	26.00	(7.44)	678,491	854,040	175,549
Small/Mid Cap Growth			18.22	8.00	(10.22)	369,710	262,782	(106,929)
Small/Mid Cap Value			21.73	8.00	(13.73)	440,818	262,782	(178,036)
International Equity			0.34	25.00	24.66	6,916	821,192	814,276
Equities Blend			0.51	0.00	(0.51)	10,375	0	(10,375)
Total Equity Assets						2,028,945		

* 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: 04/04/2017

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	11/30/2016			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
SHY	ISHARES 1-3 YEAR	11/30/2016	IYW	ISHARES U.S. TECHNOLOGY	11/30/2016
CSJ	ISHARES 1-3 YEAR	11/30/2016	PEY	POWERSHARES EXCH TRADED	11/30/2016
IEI	ISHARES 3-7 YEAR	11/30/2016	VCR	VANGUARD CONSUMER	11/30/2016
CIU	ISHARES INTERMEDIATE	11/30/2016	VIG	VANGUARD DIVIDEND	11/30/2016
IWR	ISHARES RUSSELL MIDCAP	11/30/2016	VYM	VANGUARD HIGH DVD YIELD	11/30/2016
DVY	ISHARES SELECT	11/30/2016	VIS	VANGUARD INDUSTRIAL ETF	11/30/2016
IYK	ISHARES U.S. CONSUMER	11/30/2016	VNQ	VANGUARD REIT ETF	11/30/2016
IYE	ISHARES U.S. ENERGY ETF	11/30/2016	VOX	VANGUARD TELECOMM SRVCS	11/30/2016
IYF	ISHARES U.S. FINANCIAL	11/30/2016	BND	VANGUARD TOTAL BOND MKT	11/30/2016
IYH	ISHARES U.S. HEALTHCARE	11/30/2016	DTD	WISDOMTREE TOTAL DIVID	11/30/2016
PFF	ISHARES U.S. PREFERRED	11/30/2016	DON	WISDOMTREE TR MIDCAP DIV	11/30/2016

**Advance CTE/ Center to Advance CTE
Finance/Audit Committee Roster
FY 16-17**

Advance CTE Vice President

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/ Center to Advance CTE
Past President**

Mr. Rod Duckworth
Chancellor
Division of Career and Adult Education
Florida Department of Education
325 West Gaines Street, Suite 734
Tallahassee, FL 32399-0400
Phone: 850-245-0446
Fax: 850-245-9052
Email: rod.duckworth@fldoe.org/
CareerandAdultEd@fldoe.org

Dr. Sheila K. Ruhland
312 N. Stadium Way #402
Tacoma, WA 98403
Phone: 920-896-3127
Email: ruhland11@gmail.com
Board Member, Advance CTE
Term: July 1, 2015 – June 30, 2017

Dr. Lee Burket
Director, Bureau of Career and Technical
Education
Pennsylvania Department of Education
333 Market Street 11th Floor
Harrisburg, PA 17126
Phone: 717-787-5530
Fax: 717-783-6672
Email: lburket@pa.gov
Board Member, Advance CTE
Term: July 1, 2016 – June 30, 2018

Dr. Timothy D. Hodges
Research Director
Gallup
1001 Gallup Dr.
Omaha, NE 68102
Phone: 402-938-6729
Fax: 1-888-500-8282
Email: Tim_Hodges@gallup.com
Board Member, Center to Advance CTE
Term: July 1, 2016 – June 30, 2018

Mr. Mike Mulvihill
Bureau Director of Career and Technical
Education
Mississippi Department of Education
359 North West Street
PO Box 771
Jackson, MS 39201
Phone: 601-359-3090
Fax: 601-359-6619
Email: mmulvihill@mdek12.org
Associate Member Representative
Term: July 1, 2015 – June 30, 2017

FY18 Elections: Regional Board Representatives and Officers
Report prepared by Kimberly Green, Executive Director

Regional Board Representative Election Results:

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 2017, electronic ballots distributed on February 10, 2017, with ballots due on March 24, 2017.

The following are the election results, to be announced at the Advance CTE Business Meeting on May 2, 2017. Until then, results are confidential. These Board terms will begin July 1, 2017 and end on June 30, 2020.

Region I: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Margaret Harvey, Maine (newly elected)

Region III: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virgin

Lee Burket, Pennsylvania (re-elected)

Region VI: Arkansas, Louisiana, New Mexico, Oklahoma, Texas

Charisse Childers, Arkansas (re-elected)

Region XI: Hawaii, Palau, Guam

Bernadette Howard, Hawaii (re-elected)

Associate Member Representative: Sheila Ruhland

FY18 Advance CTE/Center to Advance CTE Officers:

The Nominations Committee, made up of Advance CTE/The Center to Advance CTE Past Presidents, including current Past President Rod Duckworth along with Rich Katt, Phil Berkenbile, Marie Barry and Pat Ainsworth, were tasked with developing a slate of candidates to serve as FY18 officers for Advance CTE and The Center to Advance CTE.

As is the tradition, the Committee recommends that the Executive Committee move “up” one position, Pradeep Kotamraju to President and Jo Anne Honeycutt to Past President. Due to a change in his position, Philip Cleveland will not be eligible to serve as an officer in FY18, therefore the Committee recommends that Bernadette Howard, State Director in Hawaii, to serve as Vice President. Bernadette has been a long-serving Board member and active on the Finance/Audit Committee, thus is well positioned to seamlessly move into this leadership position.

The Committee was also charged with developing the slate of candidates for the Secretary/Treasurer position.

A call for nominations was sent out to all State CTE Directors in early 2017, which included the nominations criteria and form. One nomination was received. In addition, the Committee discussed another candidate who is being forwarded for consideration:

1. Connie Beene - Kansas
2. Sarah Heath - Colorado

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

Personnel Policy Review

Report prepared by Kimberly Green, Executive Director

Annually, staff sends the personnel policies to the attorney for review to ensure compliance with appropriate laws and regulations. The attorney returned no substantive changes to the personnel policies. Hugh Webster, counsel, provided the following statement:

“I have no suggested changes to the Personnel Policies. They remain valid and up-to-date. There have no legislative, regulatory, or judicial developments in the past year that would require or recommend changes.”

Staff intend to bring to the May 2017 Advance CTE Board meeting recommended revisions to the personnel policies that will bring the current language that describes the “levels” to be used in the performance evaluation process in line with language on the performance evaluation forms. Further, additional language is being vetted with the attorney related to clarifying the benefits transition periods and annual leave pay out provisions. None of these changes are intended or anticipated to change to the benefits provided to staff.

As soon as the revised policy language is returned from the attorney, the language will be shared electronically with the Board. In addition, hard copies will be brought to the May 2017 Board meeting.

Board Action: Review proposed personnel policies revisions.

Vote to accept the proposed revisions.

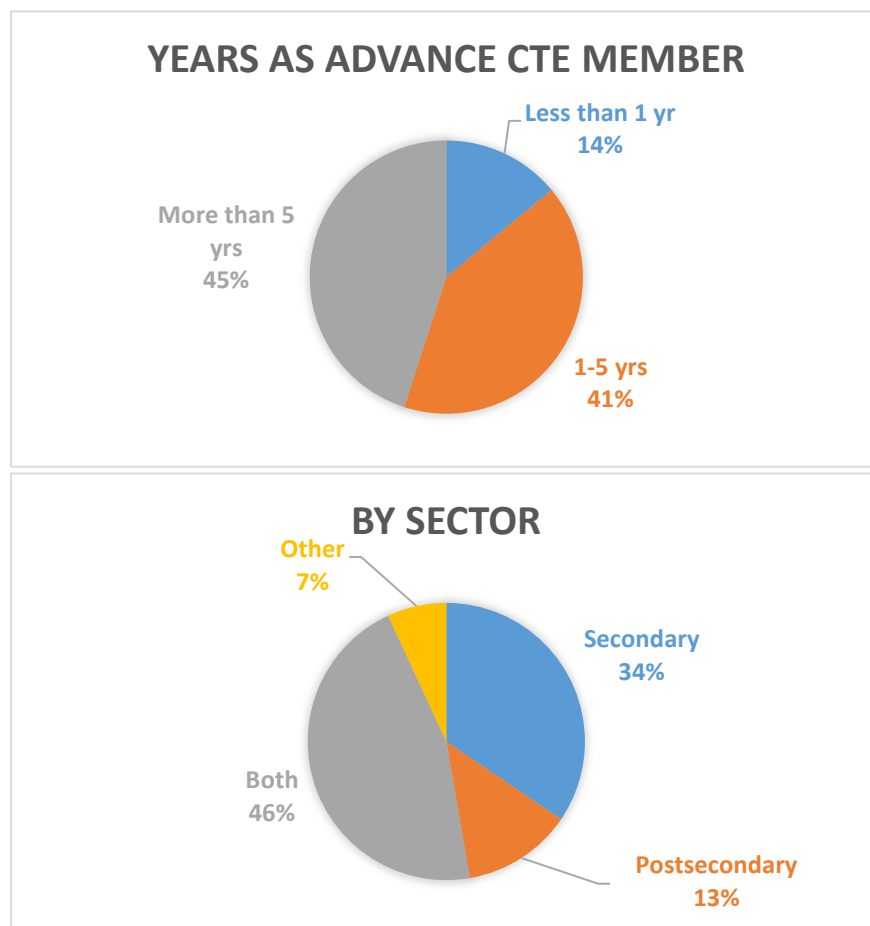
2017 Member Services Survey

Submitted by Andrea Zimmermann, Senior Associate for Member Engagement and Leadership Development

In March 2017, Advance CTE staff conducted the bi-annual Member Services Survey. In an effort to better understand the ways that the four types of members (State Director, Associate-State, Associate Non-state, and Organizational) interact with and find value in Advance CTE, the survey was split into four versions and sent separately. This will allow staff to consider what, if any, approaches should be tweaked to ensure all members find high value in their membership.

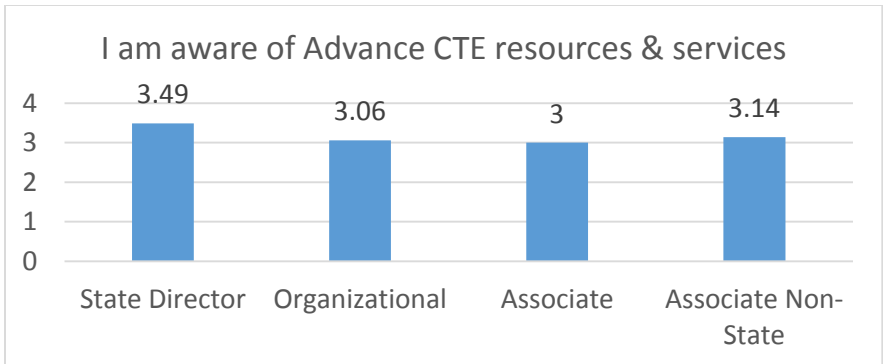
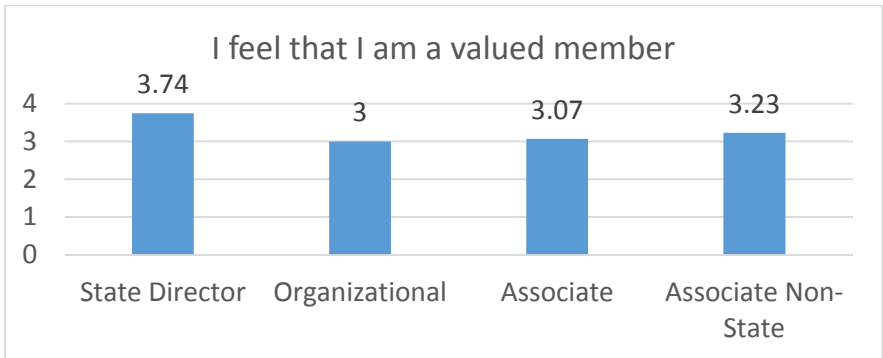
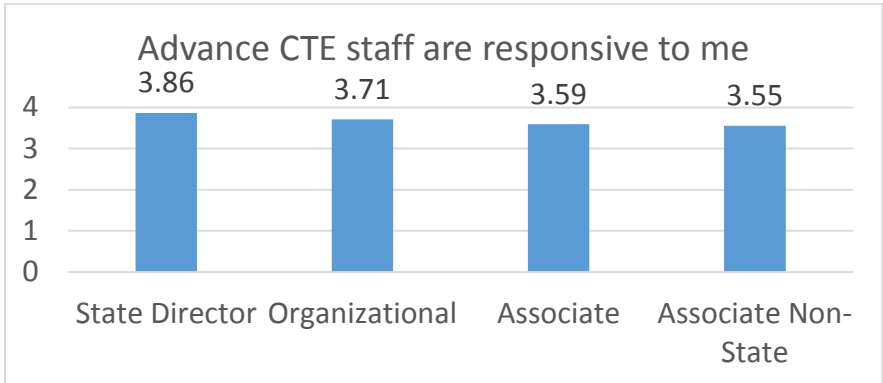
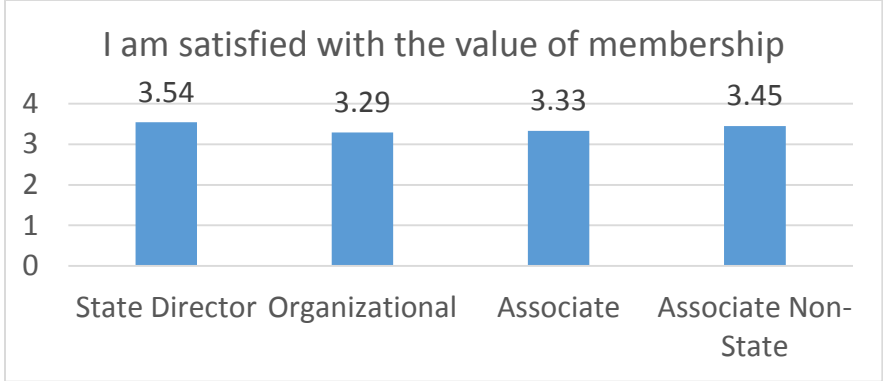
Overall, 121 members responded (34 percent of the total membership). This is slightly lower than in previous years.

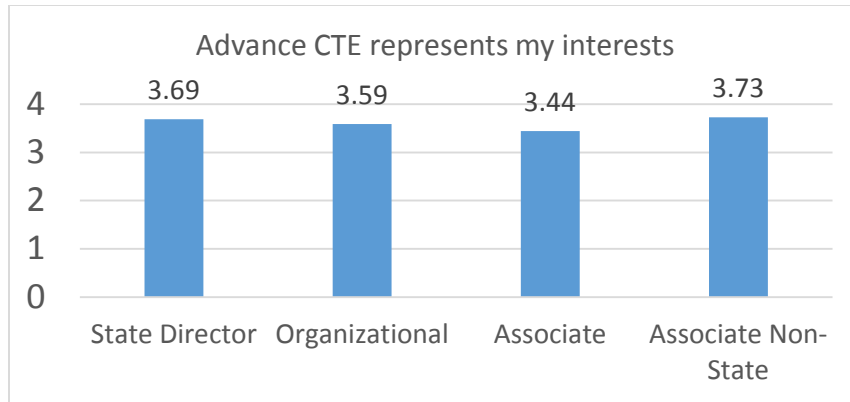
A quick snapshot of the overall respondents' years as members and the sector they represent:



Value of Membership

During each Member Services Survey, Advance CTE asks a series of service- and value-related statements. For each of the statements below, respondents were asked to choose between four options: Strongly Agree, Agree, Somewhat Agree, Strongly Disagree. The disaggregated results below show extremely high value across the board, but also some differences between the membership types.



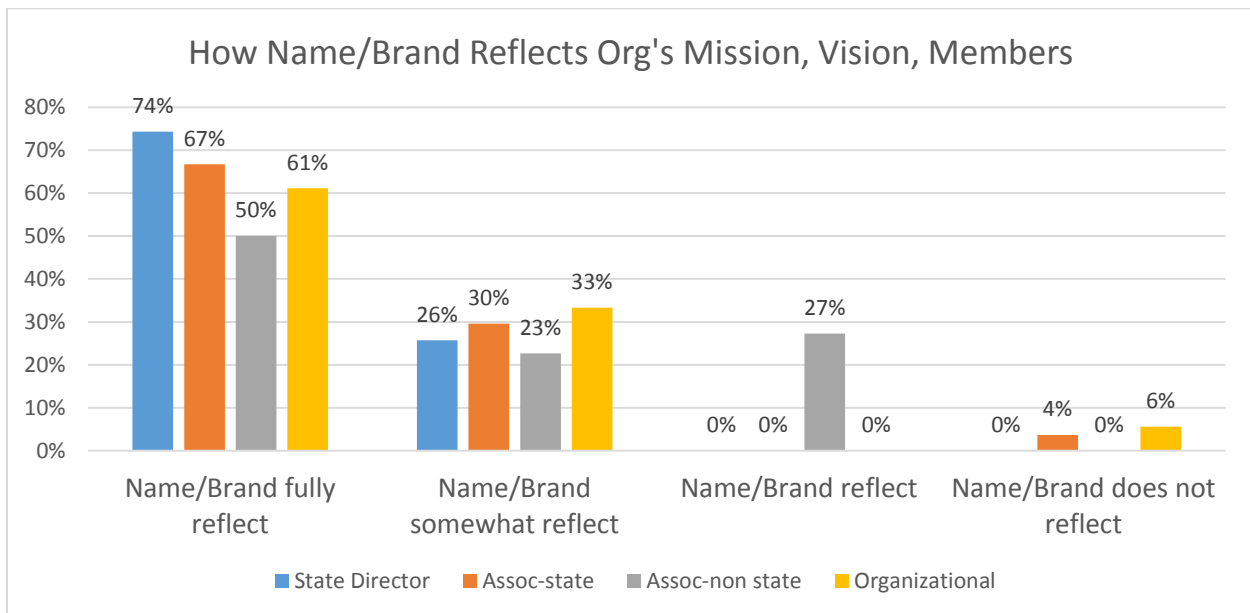


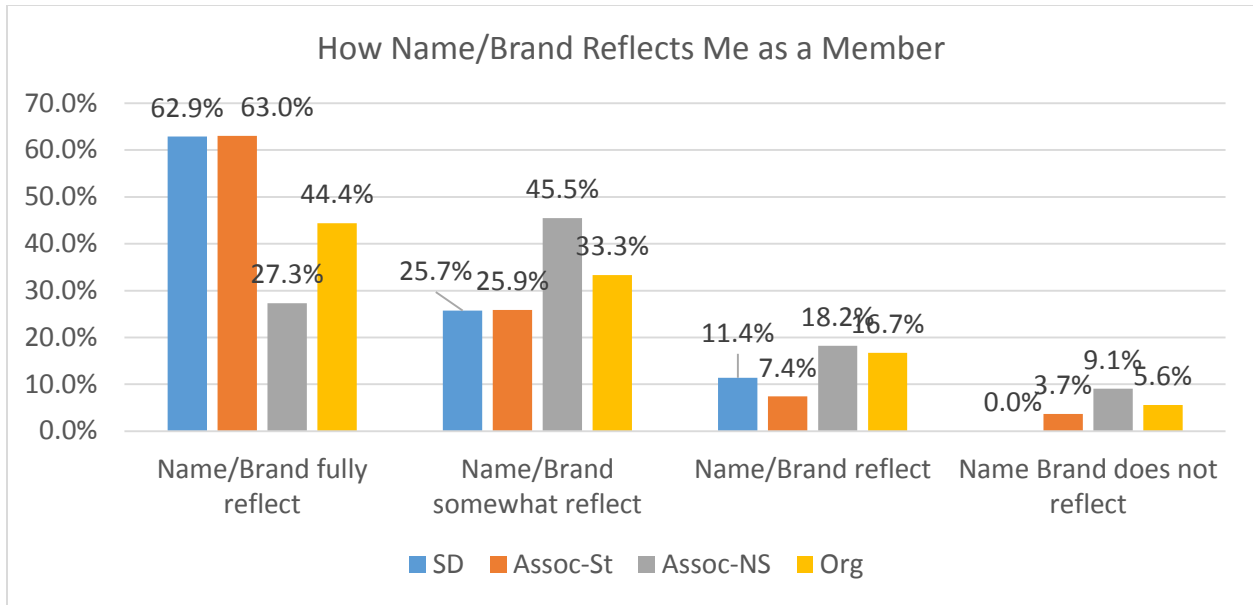
Major Initiatives

In 2016, Advance CTE launched two major initiatives – an organizational rebrand and *Putting Learner Success First*.

The first questions asked about the organizational re-brand – first asking for the member’s view of how the name and brand reflects the *organization* and second how it reflects them as an individual member.

Most notably is the high level of acceptance of the Advance CTE name and brand among State Directors and Associate-state members. Similarly, when the question asked how the name reflects “me as a member,” the Associate State responses that the name/brand fully reflects them equaled that of the State Directors.



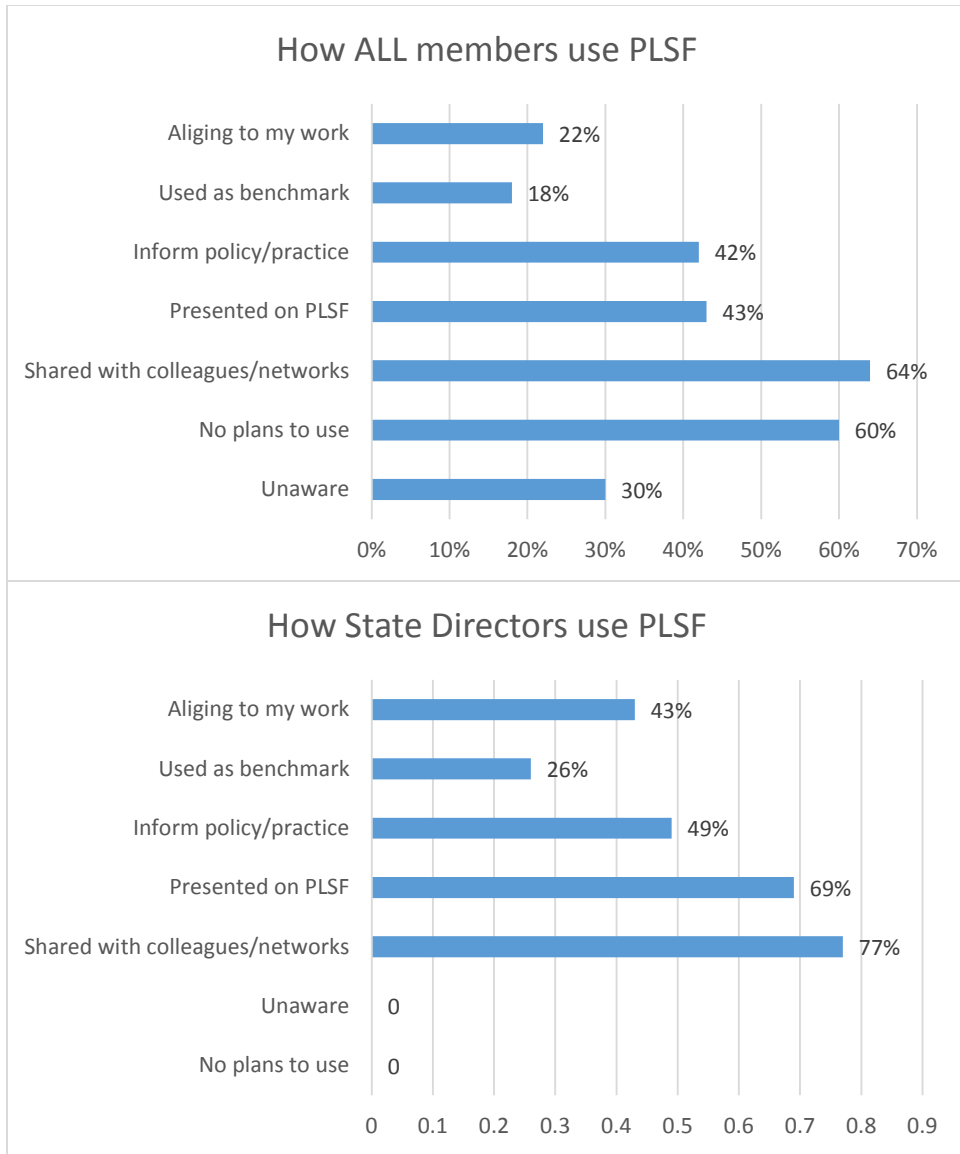


The second major initiative was *Putting Learner Success First* (PLSF). Respondents were asked which ways they had used PLSF, and could select as many that applied.

The options were:

- I am actively aligning or planning to align the work of my state to the principles in the shared vision
- I have used the shared vision to benchmark strategy for my state
- I am using the vision to inform policy or practice in my state
- I have presented on the shared vision to others in my state to explain and advocate for CTE's role in our education system
- I have shared the vision with my colleagues and networks to support their understanding of where the field is going
- I have no plans to use the shared vision
- I am unaware of the shared vision/Does not apply to me

There was a dramatic difference between the answers of State Directors and all other member types. While some of this is natural given that leaders are most well-positioned to make decisions, benchmark, give presentations on PLSF, it is worth considering how to increase the other categories, particularly Associate, Non-state, whose ranks often include district-level leaders.

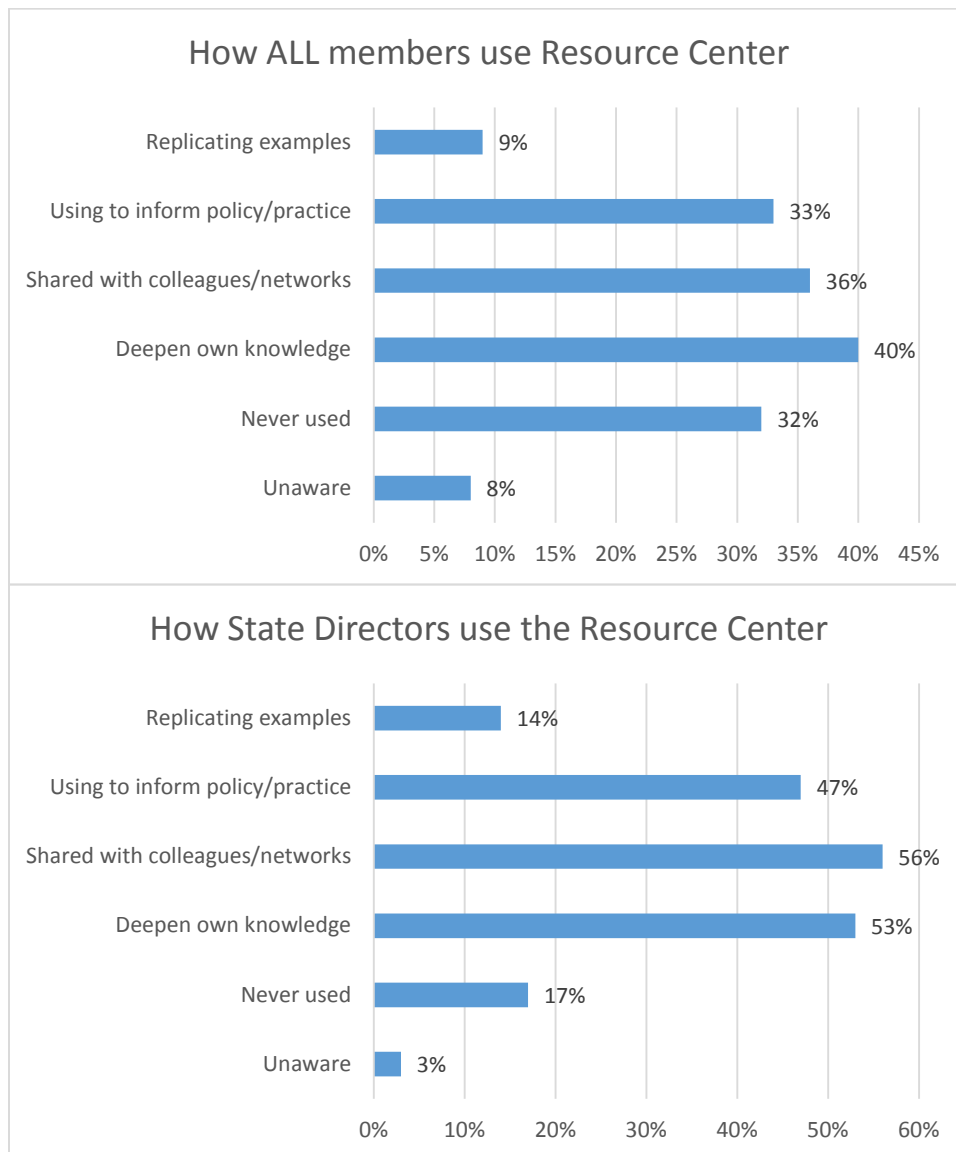


Major Publications

The survey also asked members about the ways in which they use and engage with the resources Advance CTE produced in the past year. Additionally, they were asked about the way in which they use the new Learning that Works Resource Center. Respondents could choose all that applied. The range of engagement was as follows:

- I am working to replicate state examples found in the Resource Center
- I have used the Resource Center to inform policy and/or practice in my state
- I have directed my colleagues and networks to use the Resource Center to deepen their understanding of CTE
- I have used the Resource Center to deepen my understanding of CTE
- I have never used the Resource Center
- I am unaware of the Resource Center

Across the membership, State Directors showed the most usage of the Resource Center from working to replicate examples to sharing with their networks. The other members showed very low levels of usage, which is prompting staff to consider how to target items of interest in the Resource Center. As one Associate, State member said, “Just clicked on the link. This looks like a gold mine of information!”



Finally, members were asked to choose all that apply regarding Advance CTE’s major publications released in 2016. The choices were similar to those in the Resource Center question. Across the membership types, the list below articulates the “most replicated”, “most shared”, “lowest awareness”.

State Directors (top two for each category)

- Most Replicated: (tie) Work-Based Learning Guide; Making Career Readiness Count 2.0

- Most Shared: State of CTE: Industry Experts; (tie) State Policy Review and Work-Based Learning Guide
- Lowest Awareness: Business Leaders: In Their Own Words

Associate, State

- Most Replicated: Numbers are too low
- Most Shared: Work-based Learning Guide
- Lowest Awareness: Business Leaders; Credentials of Value

Associate, Non-State

- Most Replicated: Work-Based Learning Guide
- Most Shared: Work-Based Learning Guide; State Policy Review
- Lowest Awareness: Equal levels of low awareness across all publications

Organizational

- Most Replicated: Business Leaders
- Most Shared: Business Leaders
- Lowest Awareness: Credentials of Value

Board action: **None**

Early Implications of the FY 18 State Membership

Submitted by Andrea Zimmermann, Senior Associate for Member Engagement and Leadership Development

Since the launch of the expanded state membership on March 1, State CTE Directors have been submitting their state members to Advance CTE. As of April 12, 26 states had taken advantage of the expanded membership.

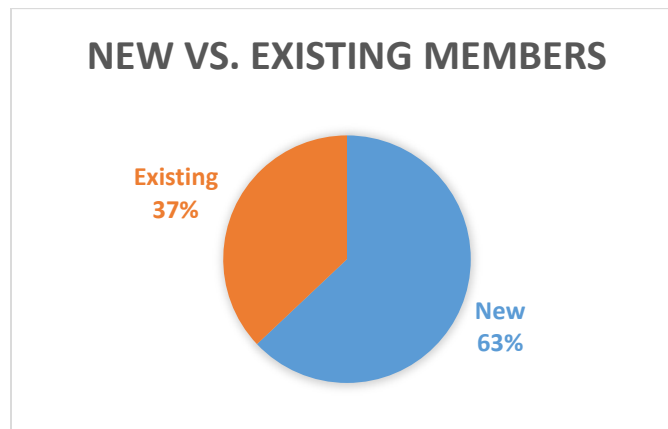
As a reminder, the policy provides a lot of flexibility and allows State Directors to:

- Fill up to four slots on their state membership for no additional cost;
- Fill as many or as few of those slots at their discretion;
- Fill or change the individuals in these slots at any time at their discretion.

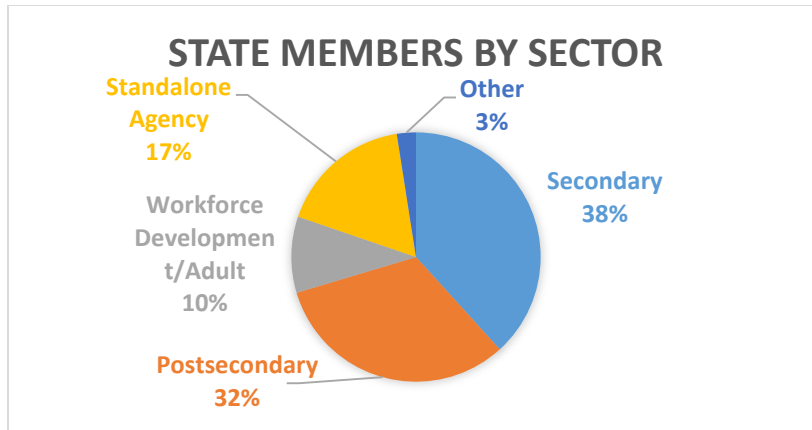
Given that context, having roughly half of states use the expanded membership is a measure of success. Further, more than 27 percent of those states filled the full complement of their membership, and 42 percent filled all but one of their membership slots.

Additionally, the breadth and depth of the selected individuals is worth noting. Specifically:

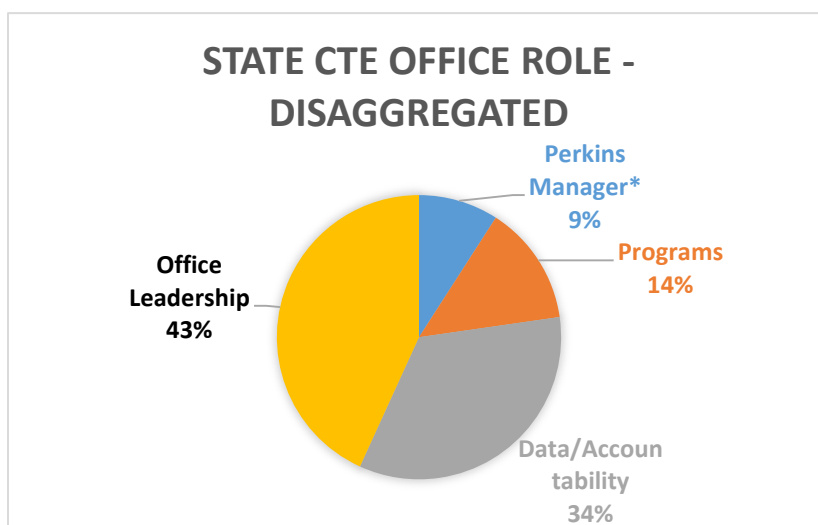
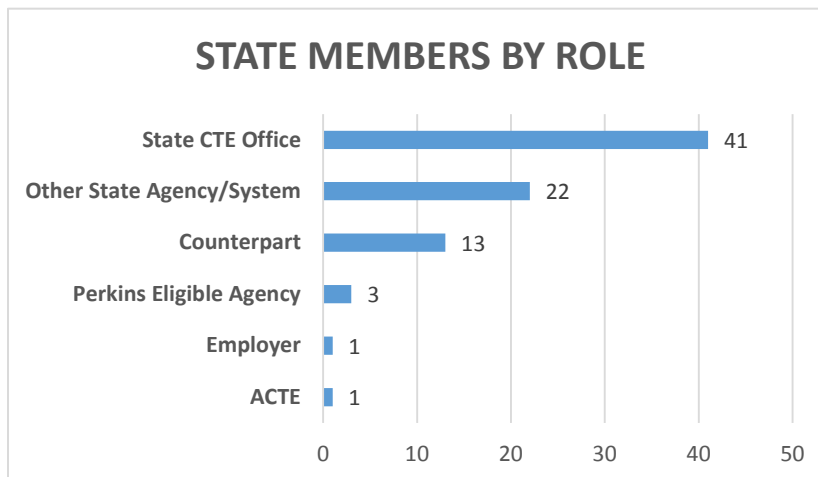
- Nearly two-thirds (63 percent) of the individuals added to state memberships are new to Advance CTE.



- The state members represent the breadth of the CTE landscape.



- Along with the range of sectors, their roles vary, with a majority residing in the state CTE office. However, even within the state CTE office, those positions vary widely. (Note: The disaggregated analysis was conducted based on job title, and thus open to interpretation).



Implications for Future Consideration

This rudimentary analysis provides a glimpse into the array of structures, roles and sectors covered by the expanded state membership. Staff are considering the possibility of conducting two surveys over the summer months. The first would be a brief survey of State Directors to ask for the motivation behind their chosen members and what they hope will be the intended outcome after having been an Advance CTE member for a year. This will help staff consider how best to support the State Directors and their state members.

The second survey would be to the state members, regardless of whether they are new or existing, to learn more about them, their relation to and understanding of CTE as well as their experience and background. Staff see the new state members – with their varied background and experiences – as an opportunity to further enrich the work of Advance CTE and create a depth of expertise in areas that were previously lacking such as workforce development and adult education.

Understanding that the “tent” for CTE is now much larger, staff have also begun early thinking into how communications can be packaged to be more accessible and actionable to all members without diluting the strong focus on high-qualify CTE.

Board Action: Discussion and input on the following questions:

1. Looking at these charts, do any of these surprise you? Why or why not?
2. Reflecting on the members you chose for your state membership, please share your thinking and your desired outcomes for these individuals after a year of membership to Advance CTE.
 - a. Do you plan to work with your members in a team-like fashion? If so, how do you would you like Advance CTE to support that?
3. Given the natural “role-alike” groupings of these members, staff have considered whether professional learning communities such as online forums or monthly calls would be an effective way to encourage greater sharing around states. Reflecting on your own state members, do you think this would be useful and used by them?
4. Member-focused awards: Advance CTE has an annual awards program, where it honors State Directors. It mirrors the Congressional Star of Education Awards and currently allows State Directors to nominate one another for either the “Rising Star” or “Emeritus” award.
 - a. Typically, staff receive few nominations for these awards, but believe member recognition is important. Should staff consider changing who may nominate a State Director for these awards? (i.e. state CTE staff)
 - b. Are these two categories the right ones to be recognizing State Directors? (Rising=1 year or less of service and Emeritus=5 years or more of service)
 - c. With the name rebrand to “state leaders,” should the board consider expanding this awards program to recognize members beyond the State Director? (i.e. Associate, State level award with nominations submitted by State Directors)

New State CTE Director Program

Submitted by Andrea Zimmermann, Senior Associate for Member Engagement and Leadership Development

Over the past two years, staff created a series of supports for new State CTE Directors to serve as a light-touch on-boarding program. This program was designed to foster a faster, stronger connection between Advance CTE and the new leaders. Staff have also seen anecdotal evidence that this early and sustained connection has led to greater engagement with Advance CTE among the recent cohorts.

Due to expanded capacity, Advance CTE is now in a place where it can create and support a program that offers combines the principles of good management with the skills to influence, ensure, or create the necessary dynamics to create a high-quality CTE system in their state. The intent is for the program to be personalized to meet the new leaders where they are and help position them for success. As such, staff are planning to pilot a professional development offering to new State Directors that would braid leadership skills and content knowledge.

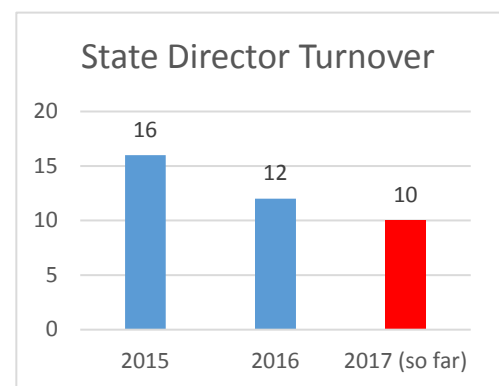
The current components of the program are:

- Introductory call with Advance CTE staff to understand new leader's background, state context, unique needs
- Pair with experienced State Director (Advance CTE staff now facilitate to the first call to ensure fruitful connections)*
- Two in-person gatherings at Advance CTE bi-annual conferences

*Staff now coordinate the first mentor calls to reinforce the objectives of the pairing and help the relationships get off to a fast start.

As seen in the chart, 2017 is on pace to eclipse 2016's turnover rate. This creates both an opportunity and an urgency to ensure that the new leaders feel supported and understand how they can use Advance CTE and its resources to help serve them and their state.

Having evolved these supports over the past two years, it's become clear that each State Director comes into his or her role from a different place. Some have years of experience in CTE at the local level and often having been a leader but lack state administrative experience; others have spent much of their time in the state CTE office and have a wealth of state administration experience but not necessarily in a leadership capacity. And still some are placed into these roles with little CTE background or leadership experience.

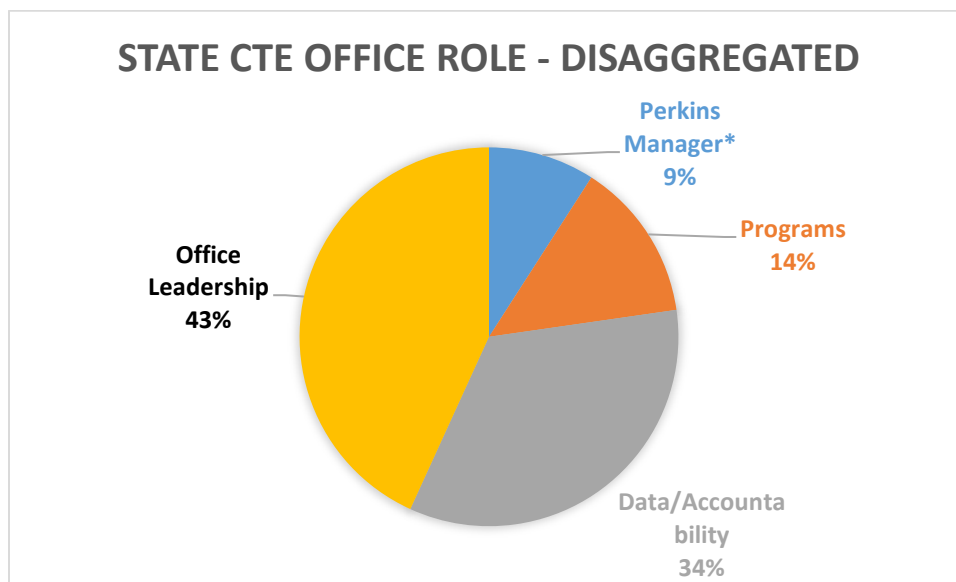


Since working with these new leaders, staff have heard consistent challenges across the cohorts – particularly around delegating as well as empowering and developing their staff. Advance CTE has purchased two training modules from [The Management Center](#), which we will use as part of the braided curriculum. Examples of content knowledge could include the flexible portions of

Perkins, reconsidering your state plan, state policy levers, etc. Staff would seek to fold these modules into a broader program to develop a tailored, year-round offering for a cohort of State Directors to be delivered virtually, with in-person touches built into the bi-annual meetings.

Additional ideas include creating strategic planning and visioning supports for the new leaders to use in their states or even Advance CTE conducting (or helping to conduct) a needs assessment at a state's request.

Another opportunity has also presented itself through the new expanded state membership. The largest group of state members come from state CTE offices. Further, when disaggregated 43 percent of these individuals hold deputy- or director-level positions. Whether a State Director plans to use this membership as an opportunity for succession planning or professional development, this is also an opportunity for Advance CTE to help shape the next generation of CTE leaders and champions whether their professional career leads them to being the next State Director or an influential leader elsewhere.



Board Action: **Discussion and feedback using the following guiding questions:**

1. Advance CTE is actively planning the pilot year. Would any Board members be willing and interested to serve in a “kitchen cabinet” capacity to advise staff as plans take shape?
2. If staff were to pursue the “strategic planning” elements of leadership, what skills would be most useful, based on your experience?
3. What, if any, should Advance CTE consider offering to the broader membership in terms of leadership development?

During the January 2017 Board call, a request was made for the Board to revisit the standing state dues policy. The Board and full membership adopted this policy in 1994. The policy was approved in the following context:

- There was no policy to guide when or how state dues increases would be determined. At the time this policy was adopted, there had not been a dues increase in many years.
- The policy established a timeline and process for determining proposed increases – annual consideration by the Board using the CPI change.
 - It should be noted the Board must affirm the increase through a vote; the increase is not automatic.
 - There have been years when the Board chose not to impose the increase despite there being an increase in the CPI.
 - There have also been years, in the year subsequent to the 1994 policy, where the Board increased dues more than the CPI to help build the organizational capacity.
- The policy established a baseline of dues for the states based the percentage of federal funds the state received via Perkins in 1994 and applying that same percentage to the association budget.
 - The goal of this decision – to establish a baseline - was to ensure some stability in the dues structure, not allowing the majority of the association’s budget to be reliant on a just a handful of states that received a large federal allocation. Instead, the decision was made for the fiscal burden was to be shared among the states.

With this background, the Board developed and the membership approved the following policy:

In 1994, the Board and membership approved a policy to annually consider an increase in the state dues based upon by the consumer price index (CPI).

The staff analyzes the annual percentage gain of the CPI from December to December. This percentage gain is the amount that is brought to the Board for confirmation as the percentage the dues should increase the following fiscal year.

In addition, the following language is found in the bylaws with regard to the membership dues:

Section 5. Membership Dues.

The amount of the annual dues of the members shall be determined by the Board of Directors and shall be paid annually by such date as may be determined by the Board from time to time. The Board of Directors may establish different dues amounts for members of different classes.

Additional information that might be useful in guiding this discussion:

	1994	2017	Difference
Total Advance CTE Budget	\$354,000	\$886,164	+ 150%
Total Advance CTE and Center to Advance CTE Budget	\$354,000	\$1,949,527	+ 450%
Budgeted State Dues	\$220,000	\$499,305	+126%
% State Dues Compromise Advance CTE Budget	62%	56%	- 6%
% State Dues Compromise Advance CTE and Center to Advance CTE Budget	62%	26%	- 36%
CPI - https://www.bls.gov/data/inflation_calculator.htm	\$1.00	\$1.66	+66% The value of \$1.00 in 1994 would cost \$1.66 in 2017.
Perkins funding	\$955,566,000	\$1.117 billion	+14%
Number of Advance CTE Staff	3	8	+166%

Board Action: Discuss the current state dues policy and vote to:

- (1) affirm the current policy; or
- (2) direct staff to gather additional information to present at the October Board meeting; or
- (3) direct staff to develop a revised state dues policy proposal to be presented at the October Board meeting. If this option is selected, the Board should provide the parameters by which the proposed revision should be developed.

Carl D. Perkins Career and Technical Education Act

In September 2016, the U.S. House of Representatives overwhelmingly supported the passage of H.R. 5587, the bill that would reauthorize Perkins, by a 405 – 5 margin. Ahead of the vote Advance CTE sent a [letter of support](#) to lawmakers in the House urging passage of the legislation, but still noting concern with the secondary CTE concentrator definition. Following the vote, Advance CTE issued a [press statement](#) reiterating the premise of this letter. Now, there are a different set of conditions impacting reauthorization: frustration with ESSA, a highly partisan political environment, and a Senate that will not be drafting its own bill.

At this time, we are actively engaging with House staff on improving upon the House bill’s secondary CTE concentrator definition (the one found in H.R. 5587, which they are using as a starting point for a new bill to be introduced in May). They intend to use a definition that would combine “concentrators” and “explorers” for accountability purposes, which would mean that some states would need to change how they collect data for CTE students, and that once they do, this data would not provide meaningful information about either group of students (e.g., the achievement of one group could be masked by the other). It is important that this definition get fixed in the House bill because the Senate will likely take up a House-passed bill as-is. We will continue to be in close contact with House staff to ensure that the bill they plan to introduce does not include any problematic language given that no changes will be possible once it is introduced.

It is possible that bill introduction will continue to be stalled by concerns from some groups that are unhappy with ESSA implementation. Most of these concerns have come from some of the women’s groups associated with the umbrella organization, the [Leadership Conference on Civil and Human Rights](#). We have been talking to these groups to build understanding of the bill and state implementation of Perkins, especially as it relates to the authority of the Secretary of Education. The House bill removed the language that gives the Secretary the authority to negotiate performance targets in state plans and sanction states for failure to set appropriate targets. While Advance CTE did not advocate for the removal of this language in the bill, it was not seen as a significant change because states had never had funds withheld for this purpose, nor have the negotiations with ED been uniformly stringent across states – key pieces of information that we have shared with these groups. Secretarial authority has been a sticking point because these groups see it as a key lever (regardless of which political party is in power) to ensuring that the federal government is able to intervene in cases in which students have been marginalized. We have pointed out the existence of non-regulatory guidance that clarifies that the Secretary maintains authority to disapprove plans if their performance targets are not significantly ambitious (there is just not a negotiation process leading up to plan submission) and explained how the change in the current draft could result in more states’ maintaining a positive relationship with ED focused on improvement versus the threat of sanctions. Our hope is that through these discussions, we can come to a compromise with these groups and that the bill can continue to enjoy bipartisan support.

Higher Education Act (HEA)

Reauthorization of HEA does not appear as imminent as Perkins, but there is a lot of energy around its potential reauthorization. As such, we are engaged with a number of partner organizations and coalitions to discuss our priorities and generate ideas. These include [Opportunity America](#), the [Postsecondary Data Working Group](#), the [College in High School Alliance](#), and the [Committee for Education Funding](#).

We have also signed on in support of the following letters and legislation that promote our postsecondary policy priorities:

- Letter to Secretary DeVos urging her to continue to provide information about postsecondary institutions through the College Scorecard and improve data quality to ensure taxpayers can make informed decisions (see appendix)
- [Statement of Support](#) for *The Making Education Affordable and Accessible Act*, which “would improve access to higher education by providing grants to eligible institutions of higher learning to create dual and concurrent enrollment and early/middle college programs that allow high school students to earn college credits before their high school graduation.”
- Letter to Members of the Commission on Evidence-Based Policymaking that advocates for lifting the ban on a postsecondary student level data network, which could provide a more complete picture of program outcomes and fill in information gaps (see appendix)

Elementary and Secondary Education Act (ESEA)

After Congress exercised its rarely-used Congressional Review Act authority earlier this year to revoke ESSA’s accountability regulations, Education Secretary Betsy DeVos urged states to stay the course and continue their implementation efforts as planned. Earlier in March, Secretary DeVos released an [updated template](#) reorganizing the structure of the state plan and eliminating a few requirements from the Obama administration’s version. Eighteen states have signaled they will submit ESSA plans during the current initial review window, which opened on April 3 and closes May 3. In addition, the U.S. Department of Education (ED) released ESSA State Plan Peer Review Criteria. The [criteria](#) notes that ED “will conduct a peer review only of the portions of a State plan related to Title I, Part A (ESEA sections 1111(a)(4) and 8451(d)); Title III, Part A (ESEA section 3113(c)); and Subtitle B of Title VII of the McKinney-Vento Act; (section 724(a) of the McKinney-Vento Act).” Department staff will review all other sections of state plans.

Workforce Innovation and Opportunity Act

Much of the recent discussions around WIOA are centered on ensuring that any reauthorization of Perkins and/or HEA align with it to the extent possible (i.e., leverage common definitions and accountability provisions where appropriate). WIOA also garnered attention in a hearing, “Examining Federal Support for Job Training Programs” held by the House Appropriation Committee’s Subcommittee on Labor, Health and Human Services, Education and Related Agencies on April 4. The Committee heard the following positive CTE [testimony](#), “Invest in career and technical education. Strengthen the direct funding for community colleges and career and technical education programs that play a crucial role in training the nation’s middle-skill workforce” from Zoe Baird, CEO of the Markle Foundation. The subcommittee also heard

[testimony](#) from Douglas J. Besharov, Professor, University of Maryland School of Public Policy; Senior Fellow, Atlantic Council who focused his remarks on the “skills mismatch” facing the US and discussed ideas for how to “improve and invigorate WIOA”. Dr. Demetra Smith Nightingale Institute Fellow, Urban Institute [testified](#) as well, highlighting promising practices in job training and notes that WIOA “includes provisions and changes that should improve the workforce development system and continue to build evidence about ‘what works.’” These hearings are increasingly important as Congress gears up to make appropriations decisions for both the 2017 and 2018 Fiscal Years.

We have also signed on to the following letter:

- Letter to the President urging him to appoint a Bureau of Labor Statistics Commissioner with strong credentials (e.g., management experience, economic and statistical skills, etc.) (see appendix)

FY 2017 and 2018 Budget and Appropriations Update

The ongoing Continuing Resolution (CR) that Congress passed late last year is scheduled to expire on April 28. At that time, Congress will need to pass an omnibus budget bill or another CR to continue funding for the remainder of FY17. On March 23, the Administration outlined [\\$3 billion in possible cuts](#) to education funding for FY17, most of which come to programs that were eliminated by ESSA or had been zeroed out in the FY18 “skinny budget.” Both of these budget proposals stay silent on Perkins funding levels. The president is expected to release a full budget proposal for FY18 in May.

We are heartened by the recent [Perkins Funding Letter](#) sent on April 6 to the chair and ranking member of the House Labor, Health and Human Services and Education Appropriations Subcommittee to request a strong investment in Perkins. The letter received support from both sides of the aisle with [140 signatures](#) across 38 states. We asked our members to contact their representatives to ask them to sign onto this letter and their efforts paid off! We have encouraged members to thank their Representative for signing on and Advance CTE is sending a personalized thank you letter to each Member who signed.

We have signed on to the following letters that promote our budget priorities:

- Letter to Director of the Office of Management and Budget (OMB) Recommending Adequate Funding for critical programs under WIOA, Perkins, HEA, and others in FY18 Budget (see appendix)
- Letter to Chairs and Ranking Members of the House and Senate Appropriations Committees Recommending Adequate Funding for critical programs under WIOA, Perkins, HEA, and others in FY18 Budget (see appendix)
- [Letter](#) to Congressional appropriators urging them to increase the spending allocation for the Labor, Health and Human Services, Education, and Related Agencies appropriations bill for FY18

Board action required: None.

EXPERIENCE

Achieve - Washington, DC

June 2014 - Present

Program Associate

- Built relationships with coalition leads in Achieve's Coalition Support Network (a group of 11 state-based advocacy coalitions committed to advancing college and career readiness) by assisting in management of the network, developing sessions for the Network's convenings, and handling contracts and billing requests.
- Partnered with third-party organizations to advance their Next Generation Science Standards (NGSS) adoption and implementation strategies through business engagement events, advocacy trainings, and communications support.
- Collaborated with colleagues to develop NGSS communications materials (e.g., email newsletter for 14,000+ subscribers, key message cards, fact sheets) to support adoption, implementation, and advocacy efforts across states.
- Contributed to planning and executing the Annual NGSS Network Leadership Conference by conceptualizing the agenda and facilitating state teams to improve NGSS implementation plans.

Vanderbilt University Department of Leadership, Policy, and Organizations - Nashville, TN

July 2013 - May 2014

Project Coordinator, Bill & Melinda Gates Foundation Grant on Principal Use of Teacher Effectiveness Data led by Ellen B. Goldring

- Managed online distribution of a survey of over 1,200 principals in eight school systems nationwide to determine how they use teacher effectiveness data to make human capital decisions.
- Coordinated the creation and dissemination of project-related reports to the research team and district partners.

State Collaborative on Reforming Education (SCORE) - Nashville, TN

June - August 2013

Graduate Fellow

- Researched and summarized a variety of current issues in education policy, including an in-depth examination of Tennessee's Learning-Centered Leadership Policy.
- Analyzed data collected through focus groups, surveys, and interviews for use in education policy reports.

Vanderbilt University Department of Special Education - Nashville, TN

August 2012 - May 2013

Research Assistant, Institute of Education Sciences Grant on Reading Interventions led by Douglas Fuchs

- Tutored five first grade students three times per week for 45 minutes using a research-based reading intervention strategy.
- Learned to score and administer 20+ assessments for first graders.

The National Board for Professional Teaching Standards (NBPTS) - Arlington, VA

June - August 2011

Government Relations Intern

- Arranged major components of Hill Day advocacy event for 200+ National Board Certified Teachers.
- Tracked federal and state education legislation and prepared executive summaries of education issues and events.

EDUCATION

Vanderbilt University - Nashville, TN

Master of Public Policy, May 2014

Washington University in St. Louis - St. Louis, MO

Bachelor of Arts in Psychology and Political Science, May 2012

LEADERSHIP & COMMUNITY INVOLVEMENT

Reading Partners - Washington, DC

October 2014 - Present

Seaton Elementary School Volunteer

- Volunteer once per week for one hour as a reading tutor in a local elementary school.

Vanderbilt University Kennedy Center Reading Clinic - Nashville, TN

January - May 2014

Reading Tutor

- Tutored one student once per week for 80 minutes using research-based methods to improve reading skills.