

**Advance CTE Board of Directors Meeting**

**AGENDA**

May 13, 2020

1:00 p.m. – 3:00 p.m. EDT

1. Welcome  
*1-1:05 p.m.*  
Sarah Heath  
President  
*Pages 1-4*
2. Approval of January 30, 2020  
Minutes  
*1:05-1:08 p.m.*  
Heather Justice  
Secretary/Treasurer  
*Pages 5-7*
3. Approval of Consent Agenda  
*1:08-1:13 p.m.*  
Sarah Heath  
President  
*Pages 8-55*
4. FY20 Financial Report  
*1:13-1:23 p.m.*  
Kimberly Green  
Executive Director  
Heather Justice  
Secretary/Treasurer  
*Pages 56-69*
5. Update on FY19-FY21 Strategic  
Plan  
*1:23-1:30 p.m.*  
Kate Kreamer  
Deputy Executive Director  
*Pages 70-74*
6. FY21 Membership Dues Renewal  
*1:30-1:35 p.m.*  
Katie Fitzgerald  
Director, Communications and  
Membership  
*Page 75*
7. Federal Policy Update  
*1:35-1:50 p.m.*  
Sam Dunietz  
Senior Associate  
Meredith Hills  
Policy Associate  
*Pages 76-79*
8. WIOA Recommendations Input  
*1:50-2:15 p.m.*  
Meredith Hills  
Policy Associate  
*Page 80*
9. FY21 Elections and Nominations  
Committee Update  
*2:15-2:23 p.m.*  
Bernadette Howard  
Past President  
*Page 81*
10. Virtual Learning Strategy  
Discussion *2:23-2:38 p.m.*  
Sara Gassman  
Senior Associate, Member  
Engagement and Professional  
Learning

11. Career Cluster Revision Update  
*2:38-2:48 p.m.*

Meghan Wills  
Director, Strategic Initiatives  
*Pages 82-83*

12. Update on Stocktake Actions  
*2:48-2:55 p.m.*

Austin Estes  
Data and Research Manager

13. Other Items to be Added/Next  
Steps  
*2:55-3 p.m.*

Sarah Heath  
President

**President**

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Term expires: June 30, 2020

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**Joint Advance CTE/The Center to Advance CTE Board of Directors' Meeting  
MINUTES**

January 30, 2020

Conference call

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**ATTENDEES:** Sarah Heath, Marcie Mack, Heather Justice, Jeralyn Jargo, Victoria Crownover, Laura Scheibe, Alex Harris, Nicole Smith, Sheila Ruhland

**STAFF:** Kimberly Green, Kate Kreamer

**GUESTS:** Carolyn Skinner, Jennifer Armingier, Mac Lilliard

**ABSENT:** Bernadette Howard, Thalea Longhurst, Katie Graham, Jay Ramsey, Barbara Wall

**Welcome:** Heath called the meeting to order at 3:03 P.M.

Heath asked for approval of Board meeting minutes from January 13 and 14, 2020.

**MOTION: To approve minutes from January 13 and 14, 2020, as presented.  
Justice; Mack.**

**MOTION APPROVED.**

**Review and Approval of 2019 Joint Audit for Advance CTE/ Center to Advance:**  
*Jennifer Armingier and Mac Liliard, GRF CPAs and Advisors*

Lilliard provided an overview of the AU-260 letter, noting that Advance CTE/ Advance CTE/The Center to Advance CTE's management implemented the new accounting standards and that there were no disagreements or difficulties encountered during the audit. The letter concludes with a summary of the three new standards that are coming up in the next few fiscal years, which Advance CTE/ Advance CTE/The Center to Advance CTE management is aware of and planning for implementation.

Armingier noted that the audit process was extremely smooth and efficient, evidenced in the results of audit; the audit was clean with no recommendations or findings. She further noted that the new accounting standards required a re-allocation of costs and changes in the presentation in the financial statements. The financial statements show a very positive financial position, with growth noted in most categories. The audit confirms that the financials are fairly represented and accurate. The presentation of financials reflect an increase in supporting services (including general and administrative costs), which is a result of the new accounting standard that required shifts in some expenses from program to administration. The last several pages of the financial statements break down by specific entity.

Lilliard noted the forthcoming five-step revenue recognition process has been properly addressed by Advance CTE/The Center to Advance CTE management.

**MOTION: To approve the 2019 Advance CTE/Center to Advance audit, as presented.  
Jargo; Justice.  
MOTION ADOPTED.**

**Review and approval of the draft 990s- Carolyn Skinner, Dembo Jones**

The role of Dembo Jones is to conduct the monthly reconciliations, preparation for the audit and 990s. Dembo Jones is not independent, as they assist Advance CTE/Center to Advance CTE with implementation of new accounting principles and decisions. There is a question on the tax forms that inquires if the Board approved the 990 returns before they are filed. The numbers in the 990s track back to the audit report. Finally, Skinner shared that the tax reform act initially imposed a tax on transportation benefits; that provision was repealed in the past few weeks, so the organization will get a refund.

**MOTION: To approve the 2018 Advance CTE 990s, as presented.  
Justice; Mack.  
MOTION ADOPTED.**

**MOTION: To approve the 2018 Center to Advance CTE 990s, as presented.  
Jargo; Justice.  
MOTION ADOPTED.**

**Review and Approval of FY21 State Dues:** Kreamer reminded the Board of the Board and member approved policy, which is for staff to look at the 12-month change in the consumer price index (December to December) and present to the Board that change as the proposed increase in state dues for the following year. The proposed increase for FY21 dues is 2.3%. Jargo inquired that if the 12-month change is the policy, does this need to come to the Board each year. Kreamer shared that the policy is to bring the proposed increase to the Board for approval; there have been times in the past when the Board chose not to impose the annual increase.

**MOTION: To approve the proposed FY21 state dues, as presented.  
Justice; Ruhland.  
MOTION ADOPTED.**

**Proposed Revision to the Personnel Policies:** The organization's leadership is presenting a proposal to add a telework policy to the personnel policies, replacing the existing flexible workplace clause. This proposal came about as a result of the equity review, as well as benchmarking of benefits against other DC-area non-profits. The goal is to be a more flexible and inclusive workplace, thus presenting this telework provision as a benefit to current and future staff. The policy is anchored in provisions related to both performance and tenure. Heath and Justice both spoke in support of the proposal. Heath noted the amount of time that is wasted commuting in densely populated areas, like DC. Justice noted that her agency is also implementing a similar type of policy, with initial, positive outcomes.

**MOTION: To approved the proposed personnel policy revision, as presented.  
Mack, Crownover.  
MOTION ADOPTED.**

Kreamer shared that she just received notification that the Siemens Foundation grant has been approved. The work begins March 1, with a no cost extension of the existing grant until that time, so there is full coverage of costs and staff.

**Reminders:** Kreamer walked through a few reminders with the Board. The spring meeting is May 13 -15, 2020 at the Renaissance Arlington Hotel (which is very close to Reagan National Airport). The Board meeting will begin at 8 a.m. on May 13. At that meeting, we'll have two hours of equity training for the Board, which is supported by our ABC grant. To help ensure the training is impactful, the equity consultant will be sending a confidential survey to Board members to help guide the agenda's development. And lastly, Kremer reminded Board members to submit their travel reimbursements from the meeting held earlier this month.

Heath wished everyone a Happy CTE Month and called the meeting to a close at 3:44 p.m. ET.

## **Overview of Major Activities**

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

Advance CTE will continue to monitor federal legislative policy developments and will develop and update recommendations for legislation that advocates for policies and programs that support all learners in accessing and fully participating in high-quality Career Technical Education (CTE). Our activities will mirror the priorities and needs of our members, with a special focus on addressing the effects of COVID-19 (Coronavirus). In particular, Advance CTE will focus on monitoring and responding to and advocating for CTE and workforce issues in any upcoming economic recovery legislation, including ensuring equitable access of broadband infrastructure for learners. Our advocacy work will include ensuring that there is robust funding for CTE and workforce programs through the appropriations process. Staff will also monitor state implementation of federal policies and regulations, with a focus on supporting successful implementation of the Strengthening Career and Technical Education for the 21st Century Act (Perkins V). We will continue our advocacy on our recommended priorities and strategy on the Higher Education Act (HEA), and on robust funding for CTE in the federal appropriations process. Additionally, we will continue to support development of recommendations that will guide discussions surrounding a reauthorization of the Workforce Innovation and Opportunity Act (WIOA). Advance CTE will assist and update our members on changes in federal policy guidance from the U.S. Department of Education, including using strong working relationships with the Office of Career Technical and Adult Education (OCTAE) to influence policy guidance and to provide up-to-date information to our staff.

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

Advance CTE will ensure that relevant federal laws, policies and legislative changes are shared with Advance CTE members through professional learning opportunities including [webinars](#), timely [legislative updates](#) and deep-dive [blogs](#) that can equip our members with the knowledge of current and proposed federal policy that supports high-quality CTE for all learners. Specifically, Advance CTE will empower its members to gain knowledge on rapidly changing issues through collaboration with Advance CTE staff and other State Directors during new grassroots meetings during the Coronavirus pandemic. Advance CTE staff will facilitate knowledge sharing and development of new recommendations through HEA and WIOA kitchen cabinet calls. We will use these meetings and quarterly federal policy advocacy calls to allow a space for information sharing and collaboration between states to guide development of our federal policy advocacy initiatives. We will also present distilled and topical information from complex regulatory or legislative language to help states make more informed decisions, such as the [webinar](#) that analyzed the implication of the Coronavirus Aid, Relief, and Economic Security Act (CARES) for our members.

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



Advance CTE will create and maintain meaningful strategic partnerships that strengthen Advance CTE's role as the "go-to" organization for CTE. The importance and role of CTE programs in supporting the immediate response to the Coronavirus pandemic and future economic recovery gives Advance CTE a unique opportunity to highlight best practices for high-quality CTE and the work of our members. To support this, we released an [op ed](#) highlighting the important role CTE has during this time. We will increase the visibility of many of our federal policy recommendations through deep-dive blogs that explain complex regulation to a broad audience on topics like the Higher Education Act (HEA) reauthorization and the Trade Adjustment Assistance Community College and Career Training program (TAACCCT). Advance CTE staff have developed and implemented a federal policy social media strategy, which is coordinated across the organization. This allows us to nimbly coordinate and communicate federal policy issues across a wide audience. This was first deployed during the President's FY21 budget release, and we have continued to use this expanded structure to disseminate information on our Coronavirus stimulus recommendations and guidance from the OCTAE on regulatory flexibilities in response to Coronavirus. In addition, we have expanded the regular use of Twitter to share impactful news and research. Specifically, staff have used this to disseminate Advance CTE priorities for Perkins V, HEA, appropriations and stimulus priorities.

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

Advance CTE will create and maintain meaningful strategic partnerships that strengthen Advance CTE's role and standing as the "go-to" organization for high-quality CTE, equity and other relevant topics. We will build and maintain relationships with organizations, coalitions and legislative staff that are focused on aligned priorities for Advance CTE, which can help maximize the presence of Advance CTE as an influential organization. Advance CTE will continue to create and maintain strategic partnerships with organizations that support the important role of equitable and high-quality CTE in any future economic recovery. We will maintain strong partnerships with groups that support greater federal funding for education, like the 110 member organizations and associations that comprise the Committee on Education Funding, which will help increase the influence of Advance CTE in the federal appropriations process. As we develop recommendations for the WIOA, creating strong partnerships with influential organizations that will promote the role of CTE in workforce development will strengthen our position of impacting change in any upcoming WIOA reauthorization. We will continue to partner with Congressional CTE caucuses to support the implementation and visibility of high-quality CTE programs, and to highlight events, such as CTE legislative briefings to promote best practices for high quality CTE and increase visibility for Advance CTE as topic experts. For instance, Advance CTE recently joined an informal coalition being led by the National Governors Association, and including groups such as the National Association of Workforce Boards, Association of Community College Trustees, American Association of Community Colleges, United States Conference of Mayors and the National Association of State Workforce Agencies, among others. After hearing from our members that access to broadband is a concern, we have also joined the Homework Coalition to advocate for greater investment in broadband infrastructure and availability.

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

Advance CTE is committed to creating and implementing data-driven, internal scalable processes and protocols that increase staff efficiency and productivity to support our members. Specifically, we will re-evaluate existing internal dashboard metrics and propose revisions to more holistically reflect the impact of Advance CTE activities on federal policy, including creating a guide of what legislative success looks like and expanding ways to better evaluate and track federal policy influence. Advance CTE staff will examine the internal processes of how we track, analyze and sign on to legislation.

### **Major Accomplishments (January – April 2020)**

- Advance CTE co-authored a [letter](#) in conjunction with ACTE to Congressional leadership to advocate for CTE priorities in forthcoming stimulus legislation.
- Advance CTE had outreach to Democratic presidential candidates to highlight the background and importance of CTE. Additionally, we created a [blog series](#) on highlighting the CTE and education platforms of Democratic presidential candidates.
- Advance CTE and ACTE engaged with the offices of twenty two members of Congress and submitted twenty three appropriations funding requests, and also co-authored and submitted testimony in support of CTE FY21 appropriations.
- Advance CTE co-authored two op eds, focused on CTE investment in the Presidential budget and on the importance of CTE during and after the Coronavirus pandemic.
- Advance CTE's centennial was recognized in resolutions in both the House of Representatives and the Senate, and a statement in recognition of Advance CTE was [read on the floor](#) of the House of Representatives.
- Advance CTE supported our members with targeted advocacy and guidance during the Coronavirus pandemic, including delivering timely updates and analysis for guidance from OCTAE and the U.S. Department of Education. Additionally, Advance CTE has advocated with these departments for additional regulatory flexibility in response to Coronavirus.
- Advance CTE staff led federal policy update webinars and presentations for a variety of audiences, including on Perkins V, WIOA and HEA.

### **Challenges**

- The impact of Coronavirus on the means and modes of federal lobbying and advocacy, which has now and for the foreseeable future been shifted to virtual. This presents challenges to being able to reach Congressional staff, build relationships, etc.
- The impact of Coronavirus and the related economic downturn on Congressional priorities and focus, including changes to outlook for WIOA, FY21 Appropriations, and HEA.
- Changing needs and priorities of our members due to the pandemic and future economic challenges that may change some of the focus of work of Advance CTE federal policy.
- Congressional gridlock on passage of a comprehensive Higher Education Act.
- Securing responses to the Advance CTE survey related to the area technical centers and the role they serve in supporting the needs of adult learners.

## **Update on Identified Priorities (December 2019 – April 2020)**

**Garner support among members of Congress for a strong federal investment in CTE for FY2021:** Advance CTE, in partnership with ACTE developed and carried out an advocacy strategy for support of increased funding for CTE and overall education funding. This strategy included mapping out and developing outreach that included targeted advocacy meetings with staff from twenty three Congressional offices. Advance CTE staff submitted twenty two formal appropriations requests to members of the House Appropriations Committee and the House Committee on Education and Labor. Our advocacy included close and frequent collaboration with the co-chairs of the House CTE Caucus.

In March, Advance CTE and ACTE also jointly submitted written testimony to the House Committee on Appropriations outlining the importance of CTE and the need for placing a greater investment in CTE. Specifically, the testimony highlighted the important role of CTE in training the healthcare workforce. This was submitted in the midst of COVID-19, and details the need for CTE funding before and during the pandemic. Advance CTE also requested to testify at the House Appropriations Committee's Subcommittee on Labor, Health and Human Services, Education and Related Agencies hearing on FY21 appropriations

### **Develop Advance CTE Workforce Innovation and Opportunity Act (WIOA)**

**reauthorization recommendations:** Advance CTE began to prepare for WIOA reauthorization by creating a WIOA Kitchen Cabinet in February, which includes 20 members across 18 states. Two calls with the Kitchen Cabinet have helped to guide the development of policy recommendations, and increase organizational knowledge of WIOA implementation. However, due to COVID-19, Advance CTE's timeline for recommendations has been pushed back. This will allow staff to understand the impact of COVID-19 and write WIOA policy recommendations that are responsive to the evolving policy environment. The WIOA Kitchen Cabinet will continue to convene every other month through the fall of 2020, when the recommendations will be finalized.

**Promote and highlight CTE through Advance CTE Centennial Celebration:** Since January, Advance CTE staff have worked with staffers of Members of Congress and staff from the Office of the President to highlight the role that Advance CTE has had since its founding one hundred years ago. In February, Rep. Thompson (R-PA), one of the House CTE Caucus co-chairs, [spoke on the House floor in recognition of Advance CTE](#). Advance CTE's centennial was also recognized in resolutions recognizing CTE Month in both the [Senate](#) and the [House of Representatives](#).

**Support passage of Higher Education Act reauthorization legislation that aligns with Advance CTE recommendations:** Since January, Advance CTE staff have continued advocacy for our [Advance CTE HEA recommendations](#) with Congressional staff and the postsecondary advocacy community. Advance CTE staff have expanded detailed talking points for our HEA recommendations for staff to use with legislators, media and staff. These recommendations have been adopted for use in Twitter posts in conjunction with newly created infographics.

**Support Advance CTE members respond and adapt to any proposed changes from OCTAE to Methods of Administration (MOA):** In February, OCTAE and the Office of Civil Rights (OCR) jointly released an updated set of guidance related to MOA. Advance CTE has been in frequent contact with OCTAE staff regarding the changes to MOA and the required state MOA plans. In February, State Directors participated in a town hall webinar with OCTAE staff to discuss proposed changes. Advance CTE staff have continued advocating for State Directors with OCTAE and OCR, including requesting: OCR begin to communicate directly with State Directors, including inviting all State Directors to the MOA conference and flexibility for the deadline for submission of the MOA state plans.

### **Priorities for Next Six Months (April 2020 – October 2020)**

- Promote and advocate for the importance of CTE in economic recovery.
- Advocate for dedicated funding for CTE in future stimulus bills.
- Build resources to help Advance CTE members to understand and take maximum advantage of federal stimulus and emergency spending.
- If CTE receives dedicated funding in a forthcoming stimulus package, create a research strategy that captures the reach and impact of those dollars.
- Continue to expand the reach and impact of the federal policy communications strategy.
- Support Advance CTE members to respond and adapt to new regulatory challenges, including proposed changes or needed regulatory guidance from OCTAE or the U.S. Department of Education.
- Develop and disseminate information and supports that advocate for our HEA priorities.
- Develop a series of supports to assist Advance CTE members in the implementation of the MOA state plans.
- Support the implementation of internal protocols and processes, and expanded knowledge management systems that support streamlined ways for staff to track and share legislative information among staff and members, which includes creating new dashboard metrics to evaluate success.
- Develop priorities and recommendations for the WIOA reauthorization.
- Carry out planned Lumina Foundation Grant on Area Technical Centers to help guide future federal policy recommendations.

### **Relevant Data**

- The average open rate for the Legislative Update email series between January and March remains high at 30 percent. This rate is much higher than the industry average of 15 – 20 percent
- Advance CTE had more than 130 engagements with 40 Congressional offices between January and March, nearly double the number of engagements and offices engaged in the previous quarter.
- 182 bipartisan signatures were received from U.S. House of Representatives members for a “Dear Colleague” letter in support of Perkins V funding.

### **Lumina Foundation Grant: Area Technical Centers**

In September, Advance CTE was awarded a \$250,000 grant from the Lumina Foundation to study the role of Area Technical Centers (ATCs) and their impact on statewide education attainment goals. Currently, Advance CTE staff are in the process of collecting survey data from State Directors and creating a detailed listing of the number and locations of these institutions from information gathered to better understand the reach and scope of these centers. Survey responses have been slow, in part because the survey was launched right as the Coronavirus stay-at-home orders were taking place. Staff is regrouping to think through next steps to ensure a high response rate, which is required by the grant.

## **Overview of Major Activities**

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

Advance CTE continues to produce and release a number of publications, tools and resources that support development and implementation of state policies that support improving the quality of and access to/success through CTE programs and experiences. From January through April 2020, Advance CTE staff published four resources on topics including a review of CTE and career readiness [state policy actions in 2019](#); embedding [global competency](#) in CTE curriculum and instruction; state approaches to the concepts of [high skill, high wage and in demand](#); and design principles for [middle grades CTE](#).

Advance CTE has continued to provide technical assistance to states in alignment with the stand-alone Technical Assistance Strategy, although the progress of planned work has slowed as a result of the COVID-19 pandemic. States are receiving technical assistance on a number of policy-related topics including implementation of Perkins V, strategic planning and systems alignment, development and effective use of high-quality data, equity in CTE and closing opportunity gaps, and youth apprenticeship and its alignment with CTE. Advance CTE staff are in regular contact with lead points of contact for each project and are working to identify what planned work can continue through virtual collaboration and extending timelines of projects. More information on recent technical assistance activities is provided in the Technical Assistance Strategy Update document.

Advance CTE has launched its planned work to revisit The National Career Clusters<sup>®</sup> Framework, which is being conducted with support from Vivayic. Work completed since January 2020 was largely behind-the-scenes work, such as developing work plans and timelines. An online innovation portal will be launched in mid-June 2020, which will provide an opportunity for the entire CTE community to share information about their current use of the Framework, and to submit ideas for revisions to the current Framework as well as innovative ideas for a fully reimagined or transformed Framework. More information will be shared with State Directors through a series of webinars starting in mid-June to coincide with the launch of the innovation portal.

In March and April 2020, Advance CTE staff rapidly developed and launched activities to provide information and support to states in response to the COVID-19 pandemic, in support of maintaining quality of and access to/success through CTE programs and experiences. To assist states in their response to COVID-19, staff are developing resources (and sharing existing resources) related to topics including distance learning, work-based learning, equity, and industry-recognized credentials. All resources related to COVID-19 are being posted on the [COVID-19 page](#) of Advance CTE's website.

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

Staff regularly present on a variety of topics at Advance CTE and partner conferences, to both share with and learn from members on state CTE policies. Since January 2020, staff delivered the following presentations to members and other partners:

- *State and Federal Policies Needed to Advance Career Development*; National Career Development Summit; hosted by the Coalition for Career Development; Washington, DC
- *Career and Technical Education: Policy to Practice*; National Center for Homeless Education (NCHE) Annual Meeting for State Coordinators; Arlington, Virginia
- *Working Group meeting*; Partnership to Advance Youth Apprenticeship (PAYA) Data Working Group; Washington DC (virtual)
- *2019 Year in Review: State Policies Impacting CTE* (webinar); Advance CTE (virtual)
- *CTE Data Reporting and Visualization Workgroup*; Advance CTE (virtual)

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

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

Since June 2016, Advance CTE has maintained a robust repository of reports, tools and policy profiles through the [Learning that Works Resource Center](#), which now includes more than 450 hand-curated resources. The average number of pageviews each month from January–March 2020 was more than 12,400. While traffic to the Resource Center remains robust overall, the average number of pageviews each month from January–March 2020 is six percentage points lower than the same period in 2019, which may indicate that interest in the Resource Center has plateaued. Staff have conducted regular maintenance of the Resource Center by auditing one topic page each month and modifying the Resource Center structure and navigation to improve usability. Additionally, staff regularly publish state policy research and updates on Advance CTE’s blog.

In early 2020, staff had planned to develop and launch a web-based portal for state Perkins V plans. Staff learned that the U.S. Department of Education’s Office of Career, Technical and Adult Education (OCTAE) will be developing a web-based portal with very similar functionality. In order to not undertake duplicative work, which would result in confusion for the field and inefficient use of resources, Advance CTE determined to not pursue its own development of a web-based Perkins V plan portal but will be updating our state-specific pages on our website to better present information on Perkins plans and more.



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

Advance CTE maintains partnerships with key leaders and influencers in the field, including the Association for Career and Technical Education, National Conference of State Legislatures, Data Quality Campaign and the American School Counselor Association, among others, in order to strengthen our own capacity and influence the national conversation around CTE. In addition, Advance CTE is focused on strengthening our newer partnerships that have been formed in support of our equity initiative, including National Urban League, Council of State Governments and National Center for Homeless Education.

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

Advance CTE is committed to developing and implementing internal processes and protocols to share knowledge, coordinate efforts, streamline work and create efficiencies, and continuously improve our work and support of our members. Staff continue to upload documents, research and presentations to our shared online folder to ensure that knowledge and materials are shared across the organization. In addition, staff members regularly present information to each other on state policy projects and work through “deep dive” presentations at weekly staff meetings. Moving forward, state policy team leadership will ensure that lessons learned from individual projects are incorporated into the organization’s overall work including communications, equity, technical assistance and federal policy work.

#### **Major Accomplishments (January – April 2020)**

- Released 4 new reports, briefs and other resources related to state policy:
  - [\*Preparing Tomorrow’s Workforce: The Global Learning Imperative for Career and Technical Education Programs at Community and Technical Colleges\*](#)
  - [\*State Policies Impacting CTE: 2019 Year in Review\*](#)
  - [\*Aligning to Opportunity: State Approaches to Setting High Skill, High Wage and In Demand\*](#)
  - [\*Broadening the Path: Design Principles for Middle Grades CTE\*](#)
- Launched the new Global Career Readiness Initiative in six communities across the country, with a focus on expanding high-quality career pathways; site leadership teams include cross-sector representation from both the local and state levels.
- Supported customized technical assistance to states in support of Perkins V plan development and implementation, with 10 states receiving state policy-focused technical assistance since January 2020.
- Launched an effort to revisit The National Career Clusters Framework and identify potential revisions to ensure the Framework is a modern construct, reflective of the future of work, and adaptable to the current and emerging needs of learners and the workplace.
- Maintained and strengthened the Learning that Works Resource Center, which received an average of 12,400 hits per month since January 2020.



## **Challenges**

The emerging COVID-19 pandemic has had a significant impact on much of Advance CTE's state policy work, largely because of reduced capacity in state agencies and their real need to address urgent priorities on the ground in communities. Progress on state technical assistance work has slowed to a near-halt in most states. The timeline for planned publication releases has been extended because state agencies have limited capacity to engage with Advance CTE staff and because Advance CTE has shifted its focus on developing and releasing resources that can help states more effectively respond to COVID-19. Staff are developing resources (and sharing existing resources) related to topics including distance learning, work-based learning, equity, and industry-recognized credentials. Advance CTE state policy staff are rapidly adjusting plans to ensure that our engagement with states remains relevant and timely even in this rapidly changing environment, and adjusting or extending timelines for longer-term projects to shift some work on technical assistance and publications to later in the summer and fall of 2020.

Building staff capacity to support state policy work remains an ongoing challenge, including both delays in hiring of highly qualified staff and challenges with providing support to new staff members. Advance CTE had planned to hire three new staff members between January-June 2020 to support state policy work. Since January 2020, Advance CTE hired and onboarded one policy associate, and a second job offer was extended that fell through. Advance CTE has since hired a second policy associate who will begin employment on June 1, 2020. The hiring of a policy coordinator has been delayed until staff begin travel and in-person meetings again.

Advance CTE recently launched a major new, five-year project: the Global Career Readiness Initiative in six U.S. sites, with support from JPMorgan Chase & Co. Advance CTE had already anticipated some challenges with launching a major new project, including building new relationships and establishing new routines, yet the COVID-19 pandemic has had an additional significant impact on launching this work. Within the first three weeks of the project's launch, sites needed to quickly shift their attention to address urgent matters related to COVID-19, including ensuring students were safe and had access to food and supporting teachers and students in the immediate shift to online learning. As a result, the beginning of intensive work with the sites has been delayed to mid-May and the timeline of the planning phase has been extended by about two months until late September.

## **Update on Identified Priorities for (January – April 2020)**

- Begin work in support of the JPMorgan Chase & Co.'s global career readiness initiative, including developing and conducting a needs assessment and action plan development process with the sites.
  - Advance CTE began engagement with the six selected U.S. sites in March 2020, yet within three weeks of the project's official kickoff sites were already experiencing a significant impact from the COVID-19 pandemic. In response to check-in calls with sites in mid-March, Advance CTE and Education Strategy Group (ESG) revised the timeline of the project's planning phase. Initial meetings with each site's cross-sector leadership team were held in mid-late April to revisit and reconfirm each site's vision

for the project and for a transformed career readiness system. Intensive engagement and provision of technical assistance to each site will begin in earnest in May 2020, with the timeline of the planning phase being extended by about two months.

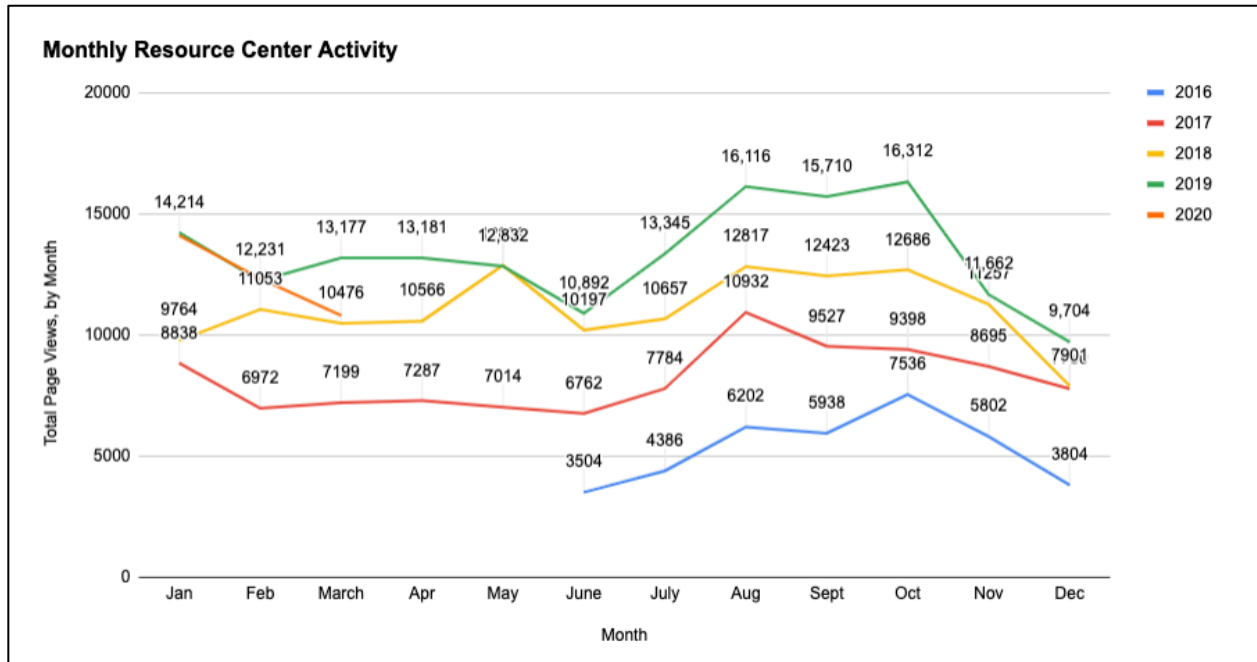
- Continue to support state implementation of Perkins V, including identifying innovative approaches in state plans and sharing those approaches with other states through professional learning and other strategies.
  - Advance CTE is providing policy-related support and technical assistance to 10 states through grants from the Gates and Joyce Foundations as well as state contracts. As a result of the COVID-19 pandemic, the progress of planned work has slowed; Advance CTE staff are in regular contact with lead points of contact for each project and are working to identify what planned work can continue through virtual collaboration and extending timelines of projects. In response to the slowed pace of individual state technical assistance, Advance CTE staff are fast-tracking the development and launch of a virtual cohort-based technical assistance effort that will work with small groups of states on specific topics of interest.
- Develop and launch a web-based portal for state Perkins V plans, which will serve as a one-stop location to search for and access specific content within and across state plans.
  - Staff learned that the U.S. Department of Education's Office of Career, Technical and Adult Education (OCTAE) will be developing a web-based portal with very similar functionality. In order to not undertake duplicative work, Advance CTE determined to not pursue its own development of a web-based Perkins V plan portal but will, instead, update its state-specific webpages and offer users the ability to compare information across states on our website.
- Initiate a comprehensive and inclusive revision of The National Career Clusters Framework.
  - Advance CTE has launched its planned work to revisit The National Career Clusters Framework, which will be conducted with support from Vivayic. An online innovation portal will be launched in mid-June 2020, which will provide an opportunity for the broad CTE community to share information about their current use of the Framework, and to submit ideas for revisions to the current Framework as well as innovative ideas for a fully reimagined or transformed Framework. More information will be shared with State Directors through a series of webinars in mid-June to coincide with the launch of the innovation portal.
- Build staff capacity to support Advance CTE's state policy work, including hiring, onboarding and supporting talented new staff members.
  - Since January 2020, Advance CTE hired and onboarded one policy associate who began employment in early February 2020. A second policy associate has been hired, who will begin employment on June 1, 2020. The hiring of a policy coordinator is on hold as a result of COVID-19; this position's primary responsibility would be coordinating meetings and travel, and there is limited need for this role until staff begin travel and in-person meetings again.
- Lead shared solutions workgroups on middle grades CTE, data visualization and use, CTE data quality, and closing equity gaps in CTE.
  - The shared solutions workgroup on middle grades CTE has concluded its work. The workgroup met in person in October 2019 and conducted four calls between October

- 2019 and February 2020. The workgroup shared valuable input that informed a set of [resources](#) for the field on CTE in the middle grades, including a [theory of action](#) and a design principles [self-assessment tool](#). The remaining deliverables – including a repository of middle grades CTE resources and materials and a blog series – will be released in spring.
- Advance CTE is currently leading three workgroups that are all related to data:
    - Data collection and use in youth apprenticeship programs: The first virtual meeting of this workgroup was held in February 2020.
    - Perkins V data reporting and visualization: The first virtual meeting of this shared solutions workgroup was held in late March 2020.
    - CTE Data quality: The first virtual meeting of this workgroup was held in mid-April 2020.
  - The shared solutions workgroup on closing equity gaps in CTE has been pushed back to launch later in 2020; the launch date has not yet been finalized as we plan our overall calendar for the remainder of 2020 in light of COVID-19.

### **Priorities for Next Six Months (May – October 2020)**

- Continue to support cities and states to expand high-quality career pathways through the Global Career Readiness Initiative supported by JPMorgan Chase & Co., including conducting a needs assessment and action plan development process with sites.
- Develop and release new reports and briefs and developing and releasing two resources/publications that will support sites' work and the CTE community as a whole.
- Continue to support state implementation of Perkins V, including identifying innovative approaches in state plans and sharing those approaches with other states through professional learning and other strategies.
- Support the first cohort of the virtual cohort-based technical assistance model, which will provide a robust and comprehensive way for multiple states to engage in peer sharing and learning on a specific topic through multiple points of engagement over a fixed period of time.
- Maintain and strengthen the Learning that Works Resource Center, including expanding the number of resources on relevant topic areas and conducting several rounds of modifications to the Resource Center's structure to ensure it is easy to access.
- Conduct the first two phases of an effort to revisit and modernize The National Career Clusters Framework, including soliciting feedback on how the CTE community currently uses the Framework, suggestions for revisions to the Framework and ideas for wholesale transformations of the Framework; and launching a facilitated process to identify and develop several potential prototypes for a transformed Framework.
- Build staff capacity to support Advance CTE's state policy work, including onboarding and supporting talented new staff members.
- Lead shared solutions workgroups on data visualization and use, CTE data quality, and data collection and use in youth apprenticeship programs, and launch a shared solutions workgroup on closing equity gaps in CTE.

## Relevant Data



## **Overview of Major Activities**

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

Advance CTE staff held individual calls with three new State CTE Directors whose Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act (Perkins V) plans had been reviewed as part of the “expert review” process to answer any questions or address any concerns outlined in the review process and brainstorm possible solutions.

Staff offered 30-minute check-in calls with each State CTE Director to provide guidance and support during COVID-19 (Coronavirus) and had calls with 39 State Directors. Based on feedback and questions gathered through individual check-in calls with nearly all State CTE Directors, Advance CTE and the Association for Career and Technical Education (ACTE) submitted a letter to Congress on April 1 that included suggestions for new investment priorities, as well as needed waivers or flexibilities in federal statute or policy. The same two parties sent an additional revised memo on April 8 that included recommendations for workforce and postsecondary investments.

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

Advance CTE engaged members in two webinars in 2020 on topics including the *State Policies Impacting CTE: 2019 Year in Review* report and the new CARES Act released in response to Coronavirus.

Due to the Coronavirus, Advance CTE cancelled its Spring Meeting, which was to be held in May. In response to the cancellation of the Spring Meeting and the growing needs surrounding the global pandemic, Advance CTE developed a robust communications and virtual learning plan to assist states in navigating CTE during Coronavirus. The professional learning offerings in this plan include regional calls, topic-based lunch and learns and a summer learning webinar series that will take the place of some planned Spring Meeting sessions. More updates are below on the structure and purpose of each event.

In early April, staff launched the professional learning series with five video calls for State CTE Directors organized by each region to discuss challenges and emerging solutions to the pandemic. In addition, the outline of an organization-wide, multi-year virtual learning strategy was developed that encompasses the Coronavirus professional learning series, as well as a robust webinar calendar with monthly topic-based events (year one), virtual meeting and learning spaces for members with like roles and responsibilities (year two) and a Virtual Institute for rising state leaders (year three).

Between January and April, staff held onboarding welcome calls with five new State Directors, orienting them to Advance CTE’s member benefits and resources and getting to know them.

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

Advance CTE continues to raise the visibility of states, state leaders and members via blogs and social media. Staff posted three blogs introducing new State Directors this year, which were also cross posted on Twitter. Additionally, staff published three blogs featuring past State Directors as part of the 100-year anniversary blog series and highlighting the advancements CTE has made over the decades.

Advance CTE Board of Directors President Sarah Heath was featured in the press statement about the President's proposed FY21 budget.

Advance CTE continues to engage member as experts to share promising practices on webinars, the online Moodle community and other virtual spaces. Advance CTE is conducting research and interviews to feature in the lunch and learns and summer learning professional learning highlight a number of best practices happening across states in the coming months.

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

Throughout Spring Meeting planning, interest and commitment from new and returning sponsors was high. Eleven organizations had already committed sponsorship dollars and at least four others were in communication about potential sponsorship at the time of meeting cancellation. Staff considered offering sponsorships for the Summer Learning Series but decided instead to reach out to would-be sponsors and other organizational members to collect resources that they would like to share with Advance CTE members to better support CTE delivery affected by Coronavirus.

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

To ensure we have strong feedback loops in place to help us be data-driven and responsive to our members' needs, we issue a Member Services Survey each year. The results of the 2019 Member Services Survey have been shared with all staff, including new staff as part of their onboarding process. The results are influencing work products and especially the development and implementation of the Virtual Learning Strategy, including types of resources that staff will develop and opportunities for member engagement. See some of the data from this survey at the end of this report.

Large portions of the member dues renewal process have been automated or otherwise streamlined with new online forms and DocuSign. This has increased efficiencies on both the user and administrative sides. Staff hosted a webinar to share updates about the dues renewal process and to elevate Advance CTE member benefits. Approximately 20 people joined this webinar and the recording and materials have been posted to the Advance CTE website.

Staff have hosted three welcome calls with new State CTE Directors on Zoom using video, adding a more meaningful personal element to the session (previously held via phone) and allowing for an engaging screen-share demonstration of key features of the Advance CTE website. Staff intend for these video welcome calls to better drive Moodle traffic and to give new State Directors a more immediate understanding of their state membership benefits.

Advance CTE made significant changes to the State Director member portal of the website and moved much of the physical packet new State Directors receive online for easier and more immediate access and use. This portal will now house all information needed by current and new State Directors. We expect this portal will facilitate more traffic on Moodle, the Learning that Works Resource Center and across the Advance CTE website, and will also allow State Directors to keep their state members up to date more easily.

### **Major Accomplishments (January – April 2020)**

- **Advance CTE 2020 Spring Meeting:** Advance CTE was on track for a well-attended and fully sponsored Spring Meeting. Eighty percent of the targeted sponsor amount had been achieved with several other ongoing conversations indicating that the targeted amount would be met if not significantly surpassed. By early March, 130 individuals had registered for the meeting. This number does not include expected speakers or people who would have attended with complimentary registration such as partners with reciprocity and sponsors.
- **Virtual Learning Strategy Development & Launch:** In rapid response to the cancellation of Advance CTE’s 2020 Spring Meeting and the shifting needs of members during the pandemic, Advance CTE prioritized the development and delivery of its Virtual Learning Strategy. Advance CTE purchased a Zoom subscription to allow for videoconferencing and webinar delivery and staff received an instructional guide from contractor Krissy Haynes, who is an expert with this technology. Staff researched best practices for virtual facilitation, attending webinars, instructional workshops and reading guides. Findings have been compiled into a set of guidelines for Advance CTE virtual meetings and shared with staff at a weekly staff meeting.

In addition to delivering tangible resources (e.g., fact sheets, blogs, research findings), staff are inviting members into four distinct virtual spaces to promote member-to-member connection and learning.

- **Moodle:** This online forum continues to serve as an on-demand way for State Directors to ask for specific, topic-based examples and resources.
- **Regional State Director Calls:** These monthly calls provide an open, conversational “safe space” for State Directors to discuss top-of-mind challenges and solutions in small groups based on geographic region. The first set of calls was held on April 15. These calls are meant to foster the same kinds of casual connections members may have made in less structured spaces at Spring Meeting.
- **Lunch & Learn Sessions:** Beginning in early May, these video chats will be offered as a benefit for State Directors and their State members. Each Lunch & Learn will focus on a topic that has emerged as a priority for Advance CTE members in response to Coronavirus, and will feature a member or partner presenter and robust question and answer.

- Summer Learning Series: Beginning in late May, Advance CTE will offer members and non-members a series of topic-based webinars with well-researched and in-depth presentations from staff and other experts. Some sessions planned for the Spring Meeting will be presented during this series.

### **Challenges**

- **Delivering member value in virtual spaces:** Advance CTE is considering ways to promote online member-to-member connections in a year when in-person connections are uncertain.
- **New State Director Program (NSD):** The 2019-2020 NSD cohort has faced an extremely unique set of demands on their time, from submitting their Perkins V plans to the complete disruption of everyday life by Coronavirus. Attendance at monthly calls hovered around 20 percent of the cohort (though those in attendance were meaningfully engaged). Additionally, this cohort was not able to meet in person, a critical component of the networking and delivery. We have adjusted the program delivery for the 2019-2020 cohort in response to the stresses Coronavirus presented to their jobs and to encourage all members to participate in our other professional learning activities. We are currently reimagining the design for the 2020-2021 cohort, this program's fourth year.
- **Continual Turnover of State Directors:** There is significant turnover at the State Director level, which means that extra support and resources are needed for the many new State Directors. There are two states with interim State Directors – Alabama and Indiana. Six new State Directors were onboarded between January and mid-April, and will be invited to the 2020-2021 New State Director cohort along with any additional State Directors who start between late April and Fall 2020. However, each new State Director was offered a mentor immediately to begin their onboarding as soon as possible.
- **Organizational Member Dues Renewal:** Given many of Advance CTE's organizational members are small businesses, staff is anticipating a decrease in renewals from current organizational members at this time.

### **Update on Identified Priorities for January – June 2020**

- **Ensuring members are aware of and engaged in 100-year anniversary of Advance CTE:** Interviews have been conducted with several key figures from Advance CTE's history and are featured in monthly blogs, among other 100-year activities detailed in the Communications strategy update. There were significant plans for the Spring Meeting around 100-year celebration, which will be transitioned to a 101-year celebration in Spring 2021.
- **Deliver a high-quality, well-attended and well-received 2020 Spring Meeting:** Expected Spring Meeting deliverables have been repackaged and repurposed into the Virtual Learning Strategy. The sponsorship agreement process was moved to DocuSign, relieving significant administrative burden for 2020 and future years.
- **Continue to lead the New State Directors Leadership Program, including an in-person workshop at the Spring Meeting, monthly virtual support and updates of the modules:** Four out of the five modules have been updated to reflect Perkins V and three modules have



been delivered to the New State Director cohort. This cohort has been placed on hold to encourage members to participate in other virtual communities and to be able to dedicate staff time to that alternative program delivery outlined above. This change has been communicated to all members of the cohort. Additionally, staff communicated the update to all State Directors who were serving as mentors and inquired about their capacity to continue to serve as a mentor. All mentors indicated willingness and ability to continue serving in this role and nearly all reported recent or scheduled upcoming communication with their mentees.

- **Onboarding and including new State Directors in New State Director Leadership Program or otherwise:** While new State Directors who started their positions after December 2019 will not be inducted into the program until Summer 2020, they have been oriented to Advance CTE member benefits and in some cases paired with a mentor. Advance CTE developed a new State Director section in the State Director member portal for easier access to relevant information. The majority of new State Directors – including those that are brand new – have been participating in our virtual events and offerings.
- **Streamlining administrative membership systems before launching next dues renewal process:** The FY21 Dues Intent Form process was moved to DocuSign, relieving significant administrative burden especially with regard to reminder messages; most states signed and returned their intent forms within one week of receiving the form. Organizational Membership renewals were also significantly streamlined, including creating a new form and dashboard so that current Organizational Members could easily update their membership FY 2021. Despite interruptions from Coronavirus, member dues renewal is on track.
- **Develop and launch new Virtual Learning Strategy:** The Advance CTE Virtual Learning Strategy (“VLS”) is an umbrella strategy to bring cohesion and intentionality to existing and new Advance CTE resources, knowledge and initiatives to maximize the organization’s reach and impact. The VLS promotes member professional development, member-to-member learning and sharing of promising practices in online spaces and fosters meaningful and productive connection between members and Advance CTE staff. The cancellation of the Spring Meeting has allowed staff to offer a variety of virtual learning and supports including:
  - One-on-one calls with State Directors
  - Regional Zoom calls with State Directors
  - Lunch and Learns on specific topics offered to State Directors and State Members
  - Summer Learning Series webinars on specific topics offered to all Members and the general public. The initial phase of the VLS is underway.

These offerings are being integrated into the larger VLS strategy, which will include a year-long professional learning series calendar, strategies to engage State Directors and state members virtually, and more.

- **Planning 2020 CTE Forward Summit, including member engagement at key times:** Advance CTE is in the planning process with a consulting firm, nine co-convening organizations and key Advance CTE members for the 2020 CTE Forward Summit. However,

staff is monitoring Coronavirus implications closely to determine if this Summit will need to be postponed.

### **Priorities for Next Six Months (April – October 2020)**

- **Virtual Learning Strategy:** Staff has developed a robust professional learning strategy regarding Coronavirus and will implement this through Summer 2020. We have embedded member evaluation in our new online programs to ensure that we are meeting member needs and to inform this early phase of virtual learning. As Advance CTE’s work moves on from pandemic response, staff will develop and implement an organization-wide Virtual Learning Strategy that encompasses all virtual platforms and learning.
- **Staying connected with partners and past sponsors through the pandemic:** To support member response to unexpected circumstances and determine the best way to deliver CTE in the time of social distancing, Advance CTE will collect and share resources offered by partners (including entities that would have sponsored Spring Meeting and otherwise interacted with members).
- **2020-2021 New State Director Program:** Staff is evaluating past challenges of this program and are considering alternatives starting in Summer 2020, moving to video calls and reimagining the content delivery methods, as well as the content agenda and themes.
- **FY21 Dues Renewal:** It’s dues renewal season! Fifty-three states and territories have submitted their dues renewal intent forms and in the coming months and have been invoiced accordingly. All Organizational Members have been invited to review with Advance CTE and select their three members FY 2021. Advance CTE will begin Associate Member dues renewal in late April.

### **Relevant Data**

#### **Select results from the 2019 Member Services Survey**

##### *Member Satisfaction*

- 100% of State Directors reporting they are “very satisfied” or “satisfied” with value of membership
- 97% of State Associate Members reporting they are “very satisfied” or “satisfied” with value of membership
- 97% of Non-State Associate & Organizational Members reporting they are “very satisfied” or “satisfied” with value of membership
- 100% of Board Members reported their experience as “quite” or “incredibly” positive

##### *Resources*

- On average, 92% of members report that Advance CTE is their first stop when they need a resource on CTE or career readiness
- On average, 93% of members report that Advance CTE resources address the issues they face in their work

- A majority of members report that they have shared Advance CTE resources with staff, colleagues and/or other networks.

*Professional Learning*

State Director response to the prompt, “Please indicate the quality of professional learning opportunities provided by Advance CTE.”



**Evaluation Summary for April 2020 Regional State Director Calls**

	<b>Region</b>	
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	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>Average across all regions</b>
<b>How likely are you to attend another regional State CTE Directors call in the future? (1 – Not likely; 5 – Extremely likely)</b>	4.57	4.25	5	4.6	4.86	4.63
<b>Based on the current needs in your state and office, how valuable was this regional State CTE Directors call? (1 – Not valuable; 5 – Extremely valuable)</b>	4.43	4.13	4.6	4.2	4.43	4.34
<b>States attending</b>	9	9	8	5	6	~70%

**Overview of Major Activities:**

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

Advance CTE has continued to disseminate and market resources developed by staff as well as partners that assist states in the adoption and implementation of high-quality state and federal policy. In light of Coronavirus, staff has adopted four topic areas to focus their research pertaining to CTE policy and practice: work-based learning, credentials, distance learning and equity. Staff has developed a robust communications plan to disseminate information and learning around these topics to members.

Staff has developed and began executing a digital media strategy to highlight key federal and state policy priorities, namely Higher Education Act (HEA) and appropriations. However, much of that work has been paused due to the prioritization of communicating about Perkins V considerations and stimulus packages affecting CTE in the age of Coronavirus. Staff will reengage the efforts pertaining to HEA and appropriations once the pandemic has concluded.

**2. Empower members through professional learning**

Advance CTE has developed a robust professional development and communications plan to assist states in navigating CTE during Coronavirus. The cancellation of the Spring Meeting offered staff the opportunity to develop and execute a three-pronged professional development strategy including regional calls, topic-based lunch and learns and a summer learning series. See the Membership Engagement and Professional Learning Strategy Update for more information related to that work.

Advance CTE published a number of resources to assist states in communicating about CTE in February, including three case studies and a number of ready-to-use templates. These materials were informed by the work completed by the Siemens Foundation grantees over the past three years.

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

Advance CTE promoted CTE through various platforms, with an increased focus on digital media as mentioned above. Additionally, Advance CTE has been celebrating its 100-year anniversary, demonstrating the organization's many successes while also raising awareness about CTE in general.

Specifically, Advance CTE:

- Celebrated CTE Month in February, with strong engagement on social media channels demonstrated below.
- Began to develop a strategy to explain, market and promote the National Career Clusters® Framework refresh effort.
- Continued the celebration of Advance CTE's 100-year anniversary, including:

- Monthly celebrations of Advance CTE embedded in all communications (e.g. member newsletter).
- Implementation of a digital strategy that highlights Advance CTE’s accomplishments and members.
- Implementation of a monthly blog series featuring interviews with past Board of Directors presidents, members, State CTE Directors, partners and key stakeholders.
- Featured testimonials and quotes from partners, members, former members, past presidents, etc.
- Released the 2019 Annual Report, highlighting major accomplishments from the past year.

Staff developed a Coronavirus communications plan to better communicate about resources, emerging best practices, solutions and opportunities in CTE during the pandemic. Specifically, Advance CTE:

- Launched a blog series to communicate about CTE during Coronavirus.
- Developed and published an op-ed to make the case as to why an investment in CTE is critical to the nation’s recovery.
- Collected and distributed quality resources to support states and locals in delivering CTE on a new page dedicated to Coronavirus on the Advance CTE [website](#).
- Is conducting research to identify emerging best practices and solutions and promote them through various communications channels.

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

Advance CTE continued to leverage partners to help promote resources, collaborate on projects and initiatives and broaden our reach and connections to key stakeholders. Staff has coordinated with partners related to major grant activities to ensure promotion of high-quality CTE and Advance CTE’s grant activities including through the JPMorgan Chase & Co.’s Global Career Readiness Initiative, Partnership to Advance Youth Apprenticeships and more.

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

Advance CTE staff developed a more detailed vendor and marketing plan that all staff has begun using. There are processes that need to be developed related to the website and evaluation of communications data.

Advance CTE hired a Digital Media Associate who is currently creating a comprehensive digital communications plan including implementing processes to ensure all communications are data driven and meeting member needs.

**Major Accomplishments (January – April 2020)**

- Developed and published three case studies and a number of ready-to-use materials to help states communicate effectively about CTE.

- Disseminated a number of new resources, including reports on middle grades CTE and defining high-skill, high-wage and in-demand careers.
- Began a new round of funding from the Siemens Foundation to assist states in communicating about CTE.
- Launched a communications and professional development plan in light of the Spring Meeting cancellation to best support states as they navigate Coronavirus.
- Hired and onboarded a Digital Media Associate.
- Developed a federal policy digital media strategy, and began the development of an organizational digital media strategy.
- Celebrated 100 years of Advance CTE.
- Posted two op-eds on Medium, in partnership with ACTE.

#### **Update on Identified Priorities (January – April 2020)**

- Staff did not develop or implement a media engagement strategy at this time.
- Advance CTE delayed hiring a second Communications Associate due to Coronavirus moving all employees virtual and a postponement of some of the work that would be delegated to the associate.
- Advance CTE launched the third Siemens Foundation grant, however much of the work has been delayed a few months due to the pandemic.
- Staff has not yet developed a website SOP.
- All other priorities were accomplished including:
  - Released the communication materials for states;
  - Launched the celebration of Advance CTE’s centennial;
  - Developed a digital media strategy;
  - Hired a Digital Media Associate; and
  - Received funding and began planning for the third phase of Siemens Foundation work.

#### **Priorities for Next Six Months (April – October 2020)**

- Continue to support all states and members throughout the Coronavirus crisis.
- Continue the celebration of Advance CTE’s centennial.
- Develop and implement a media engagement strategy.
- Finalize and launch a digital media strategy.
- Explore avenues to ensure all materials developed are accessible to those with disabilities.
- Implement a website SOP.
- Plan and launch the third Siemens Foundation grant including:
  - Conducting a national survey of students and parents;

- Develop and release assets related to the survey; and
- Update the workshop, *Empowering Students to Pursue their Career Goals* and begin delivery in Fall 2020.
- Plan for RFPs for grants to states to pilot recruitment activities
- Hire the second Communications Associate, once staff are back in the office the communications research described above can be launched.

**Data:**

- Twitter followers: +486
- Twitter profile views: 4,863
- Facebook followers: +105
- Website users: 93,871
- Website sessions: 131,082
- Website pageviews: 488,694

Website pageviews related to new and updated resources and promoted sections of the website:

Webpage	Page views from January-April 2020
Resource Center	4859
Fact Sheets	2951
Recruitment Strategies	2118
Spring Meeting	1968
Members-Only portal	1334
COVID-19	1203
Perkins	1145
Plan Your Campaign	1142
<i>Aligning to Opportunity: State Approaches to Setting High Skill, High Wage and In Demand</i>	1096
<i>State Policies Impacting CTE: 2019 Year in Review</i>	775
<i>Broadening the Path: Design Principles for Middle Grades CTE</i>	647
CTE Month	576
CTE 101 video	549
Webinars	481

Advance CTE was featured in a [number of articles](#) over the past four months including:

- *NYC Schools Struggle to Keep Vocational Programs Afloat*, New York Daily News
- *Report: States Enacted More Than 200 CTE Policies in 2019*, Education Dive
- *Trump Seeks Big Increase in Career-Technical Education Money*, The Associated Press



- *Breaking Down Barriers to Make Career and Technical Pathways Accessible to Everyone, MultiBriefs*

Lastly, Advance CTE published two op-eds on Medium

- [It's CTE Month, and Time to Commit to Doubling the Investment](#)
- [In the Age of Coronavirus, Career-Tech Ed is More Important than Ever](#)

## **Overview of Major Activities**

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

Advance CTE focuses on postsecondary CTE through federal and state policy work. The state policy work should always inform the federal policy work. At the federal level, Advance CTE continued to monitor reauthorization of the Higher Education Act (HEA) and prepare for legislative movement. Staff developed talking points for each of Advance CTE's recommendations for HEA reauthorization. These can be used for organizational and member advocacy when reauthorization moves forward. In addition, staff began to prepare for reauthorization of the Workforce Innovation and Opportunity Act (WIOA), including having conversations with Congressional staff to discuss initial planning for reauthorization. Going forward, staff will continue to monitor legislative movement for HEA, WIOA as well as standalone bills, and engage in related lobbying efforts.

Since COVID-19, the federal legislative outlook has significantly changed. Full focus has been on stimulus packages and securing needed flexibilities for states through U.S. Department of Education (ED) and federal government authority, and it is expected that that will continue to be the case for the time being. Staff is in frequent communication with members, ED and Congressional staffers to communicate the needed funding, statutory waivers and additional supports necessary. Advance CTE is advocating for the postsecondary CTE needs in the federal response to COVID-19. In April, Advance CTE in partnership with the Association for Career and Technical Education (ACTE) [sent a letter](#) to the leadership of the House Committee on Education and Labor and Senate Committee on Health, Education, Labor and Pensions detailing member-driven priorities to be included in a stimulus package. The letter includes new investment priorities, requests for statutory flexibility and waivers and policy priorities. This document covers many postsecondary priorities informed by State CTE Directors, including: reinstate a grant program similar to the Trade Adjustment and Assistance Community College and Career Training (TAACCCT); expand Pell Grant eligibility to high-quality short-term programs; reinstate Pell Grant eligibility in prisons and increase support for non-traditional postsecondary learners. Advance CTE and ACTE also sent a letter to ED voicing concerns about student eligibility for the Higher Education Emergency Relief grant funding within the Coronavirus Aid, Relief, and Economic Security (CARES Act).

In state policy, Advance CTE has prioritized sharing postsecondary stories and strategies in research and publications. Advance CTE published three new reports that included postsecondary examples, these were: *Supporting Districts and Schools in their Recruitment Efforts: Stronger Relationships, Better Engagement*; *Aligning to Opportunity: State Approaches to Setting High Skill, High Wage and In Demand*; and *Preparing Tomorrow's Workforce: The Global Learning Imperative for Career and Technical Education Programs at Community and Technical Colleges*.

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

Advance CTE continued to serve its postsecondary members, build the postsecondary knowledge of secondary members and provide technical assistance on federal policy. In February, Advance CTE formed a WIOA Kitchen Cabinet comprised of 20 members across 18 states. This group has convened twice, and will continue to do so through the fall in order to develop the organization's policy recommendations for WIOA reauthorization. Advance CTE also continues to work with the HEA Kitchen Cabinet as makes sense. Additionally, staff continues to support postsecondary members in implementation of the Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act (Perkins V). Staff will be doing a detailed analysis of each Perkins V state plans, including how the plan addresses postsecondary CTE.

In supporting our members during COVID-19, Advance CTE has also made sure to address the postsecondary challenges the community is facing right now. In April, Advance CTE hosted a webinar for State CTE Directors on the third stimulus package, the Coronavirus Aid, Relief and Economic Security Act (CARES Act). The webinar spoke to the full CARES Act, including the postsecondary implications- such as the Higher Education Emergency Relief Fund. Staff will continue to advocate for secondary, postsecondary and adult learners' needs during and after the pandemic, and keep all members apprised of federal updates.

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

Advance CTE will continue to raise the visibility of high-quality postsecondary CTE through regular blog posts and postsecondary-focused resources in the Learning that Works Resource Center. Staff will also continue to promote the three recent publications that include postsecondary examples (listed above). Advance CTE will elevate the promising practices found with support from the Joyce Foundation, Lumina Foundation and ECMC Foundation as the corresponding work progresses.

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

Advance CTE continued to grow existing partnerships in the postsecondary space through targeted outreach and regular participation in events, such as the Workforce Development Roundtable hosted by Third Way. Advance CTE engaged with existing partners in a new context as staff began to prepare for WIOA reauthorization, such as JFF, National Skills Coalition (NSC), New America, National Governor's Association and the National Association of State Workforce Agencies. Conversations with existing partners about a different topic than usual allowed staff to identify future opportunities for alignment. Staff continued participation in the Opportunity America Community College working group. Staff was also invited to participate in new work, including returning to serve on the selection panel of the Aspen Community College Prize, and a new project funded by the Lumina Foundation and led by Opportunity America to understand the national landscape of workforce education in community colleges.

Staff completed the Joyce Foundation grant regarding postsecondary program quality. Additionally, new work supported by the Lumina Foundation will allow for opportunities to engage with postsecondary partnerships.

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

In order to continue to expand our reach in the postsecondary space, Advance CTE staff must have a thorough understanding of the content and the ways in which K-12 and postsecondary CTE differ. As Advance CTE staff build content expertise through new partnerships, topical panels, working groups and new reports (internal and external), this information is shared back internally through knowledge management strategies. Additionally, Advance CTE staff created the WIOA Kitchen Cabinet plans to continue working with this group to prepare for WIOA reauthorization, as well as increase the organization's understanding of postsecondary priorities and advocacy goals.

### **Major Accomplishments (January – April 2020)**

- Released the survey for an initiative on adult learners and area career technical centers, funded by the Lumina Foundation.
- Continued partnership with the National Association of Student Financial Aid Administrators (NASFAA) on a grant from the Lumina Foundation for an initiative on short-term postsecondary programs and began grant work.
- Started Advance CTE's WIOA Kitchen Cabinet, comprised of 20 members across 18 states and convened the group in February and March.
- Added three new resources to the resource center from Advance CTE that include postsecondary content.

### **Challenges**

During this time frame, COVID-19 was realized to be a pandemic. As a result, organizational and federal priorities shifted to be responsive to COVID-19 and it is understood that these resources are top priority.

### **Update on Identified Priorities for (January – June 2020)**

- Develop Advance CTE's WIOA reauthorization priorities and continue to prepare for WIOA reauthorization, including participation in Hill visits and coalition efforts.
  - Advance CTE began to write reauthorization priorities based on input from the WIOA Kitchen Cabinet, partner organizations and research. These recommendations will continue to be developed in the coming months so that they can reflect newly recognized priorities as a result of COVID-19.
- Continue work on the Lumina Foundation grant with NASFAA and ACTE regarding short-term postsecondary programs.
  - Advance CTE completed interviews with nine states and wrote a detailed summary to be included in the final report. Advance CTE reviewed the full report and gave feedback. The timeline of this grant has shifted due to COVID-19.
- Continue work on the Lumina Foundation grant regarding area technical centers.
  - In March states were sent an online survey and asked to update a list of area technical centers in their state. Because of COVID-19, staff is exploring alternative options to the originally planned site visits. The slow response to the survey as well as the cancellation of site visits has caused a shift in the timeline of this work.
- Continue work on the ECMC Foundation grant that has a focus on postsecondary data, including releasing the RFP and selecting states to participate.

- As a result of the COVID-19 pandemic, Advance CTE has decided to delay the launch of the ECMC Foundation initiative until a time when state leaders have capacity to prepare a meaningful application. While this decision will have a cascading impact on the initiative timeline, the funder has been informed and is amenable to any changes that need to be made.
- Continue to track HEA reauthorization and actively engage in advocacy efforts, including Hill visits and coalition efforts.
  - HEA reauthorization has largely stalled as a result of COVID-19.
- Continue existing and build new postsecondary partnerships to support legislative priorities and grow our content knowledge.
  - In preparation for WIOA reauthorization, Advance CTE met with postsecondary partner organizations (listed above) to understand priorities and identify opportunities for alignment.
- Ensure that Advance CTE members are well served in Perkins V implementation process, and elevate promising practices in postsecondary CTE that come from submitted plans.
  - As final Perkins V plans continue to be submitted, Advance CTE will review all plans and continue to elevate promising postsecondary practices.
- Close out all activities for the Joyce Foundation postsecondary grant work in Colorado and Illinois.
  - The final grant report was submitted to the Joyce Foundation.

#### **Priorities for Next Six Months (April – October 2020)**

- Ensure that postsecondary CTE is represented in COVID-19 response efforts, including resources and support from Advance CTE, federal legislation and waivers and guidance from the U.S. Departments of Education and Labor. In addition, ensure that postsecondary examples are included in the distance learning series as much as applicable. Staff will also track the implications of COVID-19 for postsecondary systems and institutions.
- Develop Advance CTE's WIOA reauthorization priorities and continue to prepare for WIOA reauthorization, including participation in Hill visits and coalition efforts.
- Complete work on the Lumina Foundation grant with NASFAA and ACTE regarding short-term postsecondary programs.
- Continue work on the Lumina Foundation grant regarding area technical centers.
- Continue work on the ECMC Foundation grant with a focus on postsecondary data, including releasing the RFP and selecting states to participate.
- Continue to track HEA reauthorization and actively engage in advocacy efforts, including Hill visits and coalition efforts.
- Publish an HEA blog series that will be comprised of four blogs covering the following topics: reinstating Pell grant eligibility in prisons; fostering job-driven postsecondary partnerships; expanding the scope of data collection and increasing opportunities for experiential learning.
- Continue existing and build new postsecondary partnerships to support legislative priorities and grow our content knowledge.

- Ensure that Advance CTE members are well served in Perkins V implementation process, and elevate promising practices in postsecondary CTE that come from submitted plans. This includes analysis of postsecondary components of state plans, a resource on combined state plans and additional materials as makes sense.

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

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

So far, Advance CTE provided feedback on and disseminated a survey instrument that was deployed to a sample of Advance CTE membership and interviewed nine states about short-term program development and barriers in their state. Advance CTE wrote a section of the final publication based on these interviews. Moving forward, Advance CTE will provide substantial edits to the full report that NASFAA created.

Originally, Advance CTE was scheduled to present on the final report at Advance CTE's 2020 Spring Meeting and NASFAA's June 2020 convening. However, due to COVID-19 both of these events are cancelled. Additionally, the original publication date of May 2020 has shifted due to COVID-19. This will allow all organizations involved to produce relevant and time sensitive resources during the pandemic. The Joyce Foundation approved a no-cost extension of this grant. It is likely that the final report will be published in the fall of 2020.

## Equity Strategy Update – April 2020

### Overview of Major Activities

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

Advance CTE has leveraged the Board-approved [Statement on Equity in CTE](#) to promote policies that lead to high-quality and equitable Career Technical Education (CTE) programs. Staff, using the statement as a framework for research, are in the process of developing population specific equity resources with partner organizations. The resources define the state role in promoting CTE policies and programs that ensure historically marginalized populations are able to access and thrive in high-quality CTE opportunities. Additionally, Advance CTE is in the process of developing resources to support states' approaches to Methods of Administration (MOA) that align with the Statement on Equity in CTE and that will allow states to invest their resources where they are most needed. Advance CTE has leveraged the grant from the Association of Black Charities (ABC) to participate in trainings that have helped staff to understand how to identify federal and state CTE policies or practices that perpetuate inequities. Earlier this year, Advance CTE reviewed states' Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act (Perkins V) plans through an equity lens to help state leaders use the policy levers in the law to promote diversity, equity and inclusion in CTE. Advance CTE also continued to provide technical assistance to states to help them identify and address opportunity gaps.

Additionally, in response to the new and exacerbated equity challenges that have emerged during the COVID-19 (Coronavirus) pandemic, Advance CTE developed a Coronavirus equity strategy. The strategy aims to provide critical information and professional learning opportunities to members to help them address equity challenges that emerged due to the Coronavirus response and to maintain a fierce commitment to quality, equity and access during the pandemic. To operationalize the strategy, staff began developing content and planning professional learning opportunities, which will be rolled out beginning in April.

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

Advance CTE opened the Kitchen Cabinet on Equity in CTE to new members and convened a new Kitchen Cabinet that has representation from over 20 states. The new Kitchen Cabinet met to discuss the equity challenges states are facing as a result of Coronavirus and to engage in cross-state sharing to identify potential solutions to those challenges. The Kitchen Cabinet also identified ways that Advance CTE can support states during the Coronavirus pandemic. Additionally, Advance CTE hosted regional calls with states that allowed them to discuss challenges, including equity challenges, they are facing and engage in cross-state sharing. Advance CTE is also in the process of developing data-driven equity workshops and a suite of corresponding tools to equip state leaders to conduct their own opportunity gap analysis. In the early months of 2020, Advance CTE piloted the workshop with the New Jersey Council of County Vocational-Technical Schools and the Hennepin West and Southwest Metro consortia in Minnesota.

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

Staff worked strategically to promote the resources developed under the initiative through multiple methods of communication. Specifically, staff presented on Advance CTE's equity resources at partner organizations' events and webinars and promoted the resources through Advance CTE's social media channels and blog. Staff also represented Advance CTE at equity-focused presentations to raise the visibility of the organization in the broader equity field. Specifically, staff presented on topics related to equity and CTE during the National Center for Homeless Education Annual Meeting for State Coordinators for Homeless Education and during a webinar hosted by the Council for State Governments Justice Center and the Council of Juvenile Justice Administrators.

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

Advance CTE continued to engage the Committee on Equity in CTE, which is comprised of representatives from national civil rights, workforce and education organizations, to support the equity strategy. The Committee met in January 2020 to recommit to the Committee's charge, brainstorm opportunities for collaboration, and identify how to maximize the impact of the Committee. Since then, Advance CTE has partnered with members of the Committee, specifically the Council of State Governments Justice Center, National Center for Homeless Education and National Center for Learning Disabilities, to develop population specific equity resources which were mentioned above in the first section on policy.

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

Advance CTE has leveraged the ABC grant to help the organization operationalize the Statement on Equity in CTE. Advance CTE has worked with a diversity, equity and inclusion expert, who is funded by the ABC grant, to review Advance CTE's internal processes and protocols through an equity lens. The expert provides coaching to the leadership team on how to advance equity internally and facilitated an equity training session in February to deepen staff's organizational knowledge of diversity, equity and inclusion. Through this process, we updated our hiring practices and position descriptions to attract a more diverse pool of candidates and to mitigate implicit bias. Additionally, Advance CTE has implemented a new telework policy and we have changed our onboarding process to create a more inclusive and welcoming environment. We are also in the process of reviewing our evaluation system and standard operating procedures through an equity lens. Advance CTE continues to use the Statement on Equity in CTE to guide our work.



### **Major Accomplishments (January– April 2020)**

- Strengthened relationships with organizations, such as the Council of State Governments Justice Center, National Center for Learning Disabilities and National Center for Homeless Education.
- Provided an equity training session to staff that deepened our organizational knowledge of diversity, equity and inclusion.
- Updated our internal hiring processes to mitigate implicit bias after reviewing the processes through an equity lens.
- Implemented a new telework policy and onboarding process to foster a more inclusive and welcoming environment.
- Created a data-driven equity workshop to help state leaders identify and address opportunity gaps.
- Piloted the equity workshop with the New Jersey Council of County Vocational-Technical Schools and the Hennepin West and Southwest Metro consortia in Minnesota.

### **Challenges**

The Coronavirus pandemic has impacted our ability to carry out our internal equity work as originally planned. Advance CTE planned to have an internal equity training in March; however, due to Coronavirus, the in-person training was cancelled. To address this challenge, Advance CTE is working with the diversity, equity and inclusion expert to develop interim activities staff can participate in to continue to learn until we can have the in-person training.

Additionally, there are not clear promising or best practices that Advance CTE can uplift to help states address some of the equity challenges they are facing in light of the Coronavirus. To address this, Advance CTE plans to collaborate with partners to develop some recommendations for practices that states can utilize to address Coronavirus related equity challenges.

### **Update on Identified Priorities for (January– June 2020)**

- Develop resources and provide support to help states adopt an approach to MOA that maximizes their resources and promotes equity.
  - Advance CTE is in the process of developing MOA resources to support states.
- Complete two staff equity training sessions to deepen our organization knowledge of diversity, equity and inclusion and to help us understand how to identify CTE policies or practices that perpetuate inequities.
  - Advance completed a staff equity training in February. However, the in-person equity training scheduled for March had to be postponed due to the Coronavirus pandemic, as staff are teleworking. Advance CTE anticipates that the next equity training will occur in June.
- Provide one Board equity training session to deepen our Board’s knowledge of diversity, equity and inclusion.
  - Since Advance CTE’s Spring Meeting was cancelled due to the Coronavirus pandemic and it’s critical that equity trainings take place in-person, the Board

equity training session was cancelled. Because this training is best delivered in person, we hope to reschedule the training for a future date.

- Assess Advance CTE’s internal processes and protocols through an equity lens.
  - Advance CTE’s leadership team worked with the diversity, equity and inclusion expert to review Advance CTE’s internal processes and protocols through an equity lens during regular coaching calls. Through this process we have updated our hiring practices and position descriptions, implemented a new telework policy and changed our onboarding process to mitigate implicit bias and foster an inclusive, welcoming environment. We are also in the process of reviewing our evaluation system and standard operating procedures through an equity lens.
- Continue to engage the Committee on Equity in CTE, utilizing these relationships to build content expertise and expand Advance CTE’s presence in this space through strengthened relationships.
  - Advance CTE convened the Committee on Equity in CTE in January to brainstorm opportunities for collaboration and identify ways to maximize the impact of the Committee. Before convening the Committee, Advance CTE successfully invited new organizations to join the Committee and onboarded those members. Staff are partnering with members of the Committee to develop population specific equity resources. Additionally, staff have presented at Committee members’ events.
- Continue to engage the Equity Kitchen Cabinet, utilizing their input on research and leveraging them to assist in dissemination strategies.
  - Advance CTE convened the Equity Kitchen Cabinet in April to inform our Coronavirus equity strategy.
- Begin developing a resource, through the Gates Foundation grant, highlighting Advance CTE’s work on equity.
  - Advance CTE is in the process of developing population specific equity resources supported by the Gates Foundation grant. The resources are connected to Advance CTE’s [\*Making Good on the Promise\*](#) series and highlight Advance CTE’s Statement on Equity in CTE.
- Promote equity as a pillar in organization-wide work, particularly our work related to Perkins V.
  - Staff leverage the Statement on Equity in CTE to guide their work and respective strategies. Additionally, staff reviewed Perkins V plans through an equity lens to help our members leverage the plan to promote quality, equity and access.

### **Priorities for Next Six Months (April – October 2020)**

- Develop resources and provide support to help states adopt an approach to MOA that maximizes their resources and promotes equity.
- Complete a staff equity training session to deepen our organization knowledge of diversity, equity and inclusion and to help us understand how to identify CTE policies or practices that perpetuate inequities.

- Assess Advance CTE’s internal processes and protocols through an equity lens.
- Continue to engage the Committee on Equity in CTE, utilizing these relationships to build content expertise and expand Advance CTE’s presence in this space through strengthened relationships.
- Continue to engage the Equity Kitchen Cabinet, utilizing their input on research and leveraging them to assist in dissemination strategies.
- Develop a resource, through the Gates Foundation grant, highlighting Advance CTE’s work on equity.
- Promote equity as a pillar in organization-wide work, particularly our work related to Perkins V.
- Develop and implement a strategy to help states address the equity challenges that emerged as a result of the Coronavirus pandemic.
- Publish beta versions of the opportunity gap analysis tools online.
- Develop a virtual facilitation strategy for delivering the opportunity gap analysis workshop.

### **Relevant Data**

- 2019 Member Services Survey Results:
  - Percent of members that used Advance CTE’s equity related resources to inform their approach to advancing equity in CTE:
    - 80% other
    - 95% of State Associate
    - 83% of State Directors
    - AVG 87%
  - Percent of members that agree or strongly agree that advancing equity in CTE is a priority for them in their work:
    - 68% other
    - 89% of State Associate
    - 91% of State Directors
    - AVG 84%
- *Making Good on the Promise* series performance:
  - Collectively, the *Making Good on the Promise* briefs received a total of 572 hits between January 1, 2020 and April 22, 2020.

## **Overview of Major Activities**

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

From January-April 2020, the majority of Advance CTE's technical assistance delivered to states supported the implementation of Perkins V and other relevant federal laws and requirements. Advance CTE's technical assistance to states in support of Perkins V implementation is funded by the Bill and Melinda Gates Foundation and the Joyce Foundation, as well as by state-funded contracts with Advance CTE.

In January 2020, Advance CTE and ACTE completed the Perkins V state plan expert review that began in September 2019. In the fourth and final round of the state plan expert review that concluded in January, 14 states received feedback from content experts on their draft Perkins V state plans via a robust memo that identified strengths and potential areas of improvement. Across the entire four-phase expert review process, a total of 38 states received expert feedback on their draft state plans. Advance CTE partnered with 22 outside experts to conduct this draft state plan review; experts grounded their draft state plan review in deep content knowledge of topics including CTE, K-12 education, postsecondary education, workforce development and data.

In addition, seven states received intensive coaching and topic-specific technical assistance related to Perkins V implementation.

- **California, New York and Washington** are receiving intensive coaching support related to development and implementation of their Perkins V state plans, including secondary-postsecondary systems alignment, developing leadership capacity, and implementing high-quality work-based learning. The pace of work in all three states has slowed dramatically since March 2020 as a result of COVID-19, but Advance CTE plans to reconnect with the states in mid-May to reinitiate coaching support.
- **Illinois** is receiving technical assistance related to the program of study approval process and overall implementation of its Perkins V state plan. The pace of work in Illinois has slowed as a result of the COVID-19 pandemic; Advance CTE plans to reconnect with the state in mid-May to reinitiate work.
- **Iowa** is receiving technical assistance from Advance CTE and ACTE related to development of its Perkins V state plan, including facilitation of stakeholder engagement meetings, content expertise related to data and accountability and teacher preparation, synthesis of public comments received on the draft state plan, and in-depth reviews of the state's draft Perkins V state plan.
- **Ohio** received technical assistance related to stakeholder engagement in support of its Perkins V state plan. Advance CTE and ACTE provided facilitation support and content expertise to the state. The technical assistance work with Ohio is complete.

- **Oregon** received technical assistance related to developing a Perkins V state plan that supports equity and high-quality CTE, as well as ensuring alignment across state agencies and identification of shared goals and priorities. Advance CTE and ACTE staff provided facilitation support, content expertise, and in-depth reviews of the state’s draft Perkins V state plan. The technical assistance work with Oregon is complete.

In response to the slowed pace of individual state technical assistance, Advance CTE staff are fast-tracking the development and launch of a virtual cohort-based technical assistance effort that will work with small groups of states on specific topics of interest.

From January-April 2020, Advance CTE launched three workgroups related to effective collection and use of data. In the coming months, Advance CTE will engage these workgroups to identify promising and best practices on each topic and will develop tools and resources for the field that are informed by workgroup participants.

- **Data collection and use in youth apprenticeship programs:** The first virtual meeting of this workgroup was held in February 2020, with two states represented on the workgroup.
- **Perkins V data reporting and visualization:** The first virtual meeting of this shared solutions workgroup was held in late March 2020, with seven states represented on the workgroup.
- **CTE Data quality:** The first virtual meeting of this workgroup was held in mid-April 2020, with ten states represented on the workgroup.

Finally, Advance CTE is partnering with Education Strategy Group to provide technical assistance to six states and communities within those states to expand high-quality career pathways, through the Global Career Readiness Initiative funded by JPMorgan Chase & Co. Within the first three weeks of the project’s launch in early March, sites needed to quickly shift their attention to address urgent matters related to COVID-19, including ensuring students were safe and had access to food and supporting teachers and students in the immediate shift to online learning. As a result, the beginning of technical assistance to the sites has been delayed to mid-May and the timeline of the planning phase has been extended by about two months until late September.

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

While Advance CTE plans to continue and potentially expand the New State CTE Directors Leadership Program, short-term plans to do so are currently on hold as a result of the COVID-19 pandemic. Four out of the five modules have been updated to reflect Perkins V and three modules have been delivered to the New State Director cohort. We expect to deliver the final two modules in early summer for reference only. This cohort has been effectively ended to encourage members to participate in other virtual communities and to be able to dedicate staff time to that alternative program delivery.

As the needs of State CTE Directors began to change in March 2020, Advance CTE rapidly developed new ways to engage State Directors in professional learning and technical assistance activities. Advance CTE will be launching a series of Lunch & Learn sessions in May 2020,

which offer a venue for state CTE leaders to engage with their peers on a specific topic in a conversational setting. In addition, Advance CTE will be launching a Summer Learning Series in late May 2020, which will feature experts sharing information on a specific topic with state CTE leaders through a more traditional webinar-style format.

Advance CTE is delivering technical assistance to three states (**Florida, Minnesota and Tennessee**) on the topic of advancing equity in CTE and closing opportunity gaps, with funding support from the Joyce Foundation and the Bill and Melinda Gates Foundation. Advance CTE conducted an in-state workshop with two pilot districts in Minnesota in early March, but a statewide train-the-trainer workshop is currently on hold because of the COVID-19 pandemic. Data analysis for Florida and Tennessee is well underway, but planned focus groups and interviews in both states have been delayed to summer or fall 2020.

In addition, Advance CTE is developing materials and templates that any state can use to conduct an equity-based data analysis and root cause analysis process to close opportunity gaps. These resources build on equity gap analysis work in Florida, Minnesota, New Jersey and Tennessee. The COVID-19 pandemic has delayed work on this project, namely state-specific pilot projects, but Advance CTE staff are developing workshop materials in the interim with plans to release these resources to states in early fall 2020.

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

Advance CTE provides technical assistance to State CTE Directors and state CTE leaders related to communications, messaging and promotion of high-quality CTE. Advance CTE recently received its third grant from the Siemens Foundation to provide technical assistance to a small number of states to support the recruitment of students into high-quality CTE programs. Advance CTE planned to release RFPs to states in Fall 2020. However, the launch of the project has been delayed until 2021 due to COVID-19 and the competing priorities of states predicted this fall. In addition, Advance CTE is delivering technical assistance to **Texas** in support of a statewide communications strategy related to CTE. Advance CTE staff were planning to conduct a site visit to the state in spring 2020 to deliver technical assistance, but the timing of this site visit has been delayed as a result of the COVID-19 pandemic.

Advance CTE continues to build technical assistance activities into project proposals and budgets to ensure sufficient resources to support the provision of these services. Our technical assistance work is currently supported by grants from four different philanthropic foundations, as well as state-funded contracts. As the COVID-19 pandemic has delayed the pace and progress of our technical assistance work, the funders have offered significant flexibility, including shifting the scope of planned work to encompass COVID-19 activities and extending the timelines of planned work.

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

Advance CTE continues to engage and leverage partnerships that support our delivery of high-quality technical assistance to states and expand our capacity to do so. We work collaboratively

with partners on the delivery of technical assistance; current partners include the Association for Career and Technical Education (ACTE), Education Strategy Group (ESG), and two former State Directors who work for Advance CTE as consultants. We are collaborating with partners to develop and disseminate technical assistance tools and resources, with the potential to co-brand relevant resources.

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

Advance CTE as an organization is committed to developing and implementing internal processes and protocols to ensure that we provide high-quality technical assistance to states that need it and that information and lessons learned through state-specific technical assistance informs our broader work with all states. On a quarterly basis we track which states receive technical assistance and as a staff discuss ways we can provide support and technical assistance to states most in need of this support.

We are committed to supporting and increasing the capacity of Advance CTE to deliver high-quality technical assistance; we have engaged two former State Directors as consultants to expand our technical assistance capacity, we have hired staff members with previous experience delivering technical assistance, and we provide training to staff to build their technical assistance and facilitation skills. Currently we are focusing on developing staff members' skills with virtual engagement and facilitation, in response to the COVID-19 pandemic and the fact that technical assistance is being delivered virtually for the time being; we plan to deliver additional training to staff on in-person technical assistance and facilitation skills once such opportunities begin again.

We are strengthening our knowledge management system processes, including ensuring that tools and documents used or developed through technical assistance work with states are saved to the organization's shared Google drive, as well as collecting and storing in one central location documents that are typically needed for grant proposals.

Finally, we continue to implement data-driven processes to evaluate the quality and impact of Advance CTE's technical assistance work. We embed evaluation into all technical assistance work to collect evidence about the effectiveness of specific strategies, and we analyze and use this information to support continuous improvement of technical assistance work and products.

### **Major Accomplishments (January – April 2020)**

- Completed the Perkins V state plan expert review process that began in September 2019; across four rounds, a total of 38 states received feedback from content experts on their draft Perkins V state plans via a robust memo that identified strengths and potential areas of improvement in their draft state plan.
- Provided seven states with intensive coaching and topic-specific technical assistance related to Perkins V implementation.

- Launched three workgroups related to effective collection and use of data, with specific topics of data collection and use in youth apprenticeship programs; Perkins V data reporting and visualization; and development of a data quality benchmark tool.
- Launched the new Global Career Readiness Initiative, which will provide six communities/states with technical assistance to expand high-quality career pathways.
- Rapidly developed and launched new ways to engage State Directors in professional learning and technical assistance activities in lieu of the New State CTE Directors Leadership Program; new models include a series of Lunch & Learn sessions and a Summer Learning Series.
- Delivered technical assistance to three states on the topic of advancing equity in CTE and closing opportunity gaps.
- Received a grant to provide technical assistance to a small number of states to support recruitment of students into high-quality CTE programs; the launch of this technical assistance is currently on hold as a result of the COVID-19 pandemic.
- Received a grant to provide technical assistance to a small number of states to advance the collection and use of CTE data at the postsecondary level, with support from the ECMC Foundation; the launch of this technical assistance is currently on hold as a result of the COVID-19 pandemic.

### **Challenges**

The emerging COVID-19 pandemic has resulted in major delays in Advance CTE's technical assistance work, as a result of reduced capacity in state agencies and their real need to address urgent priorities on the ground in communities. Technical assistance to states related to Perkins V implementation, advancing equity in CTE and closing opportunity gaps, and communications has slowed to a near-halt. Many of Advance CTE's professional learning activities have been cancelled, including the Spring Meeting and the remaining modules in the current iteration of the New State CTE Directors Leadership program.

Advance CTE staff remain in close contact with lead points of contact in states on current technical assistance projects to identify alternate ways to deliver technical assistance if possible and to discuss extended timelines for states to receive technical assistance. Timelines for most technical assistance work has been extended through late 2020 and even into early 2021. As the COVID-19 pandemic has delayed the pace and progress of our technical assistance work, the funders of this work have offered significant flexibility, including shifting the scope of planned work to encompass COVID-19 activities and accommodating requests to delay launching new projects and extend the timelines of existing work.

Advance CTE is rapidly developing new ways to engage State Directors in technical assistance activities, yet we anticipate continued limitations in capacity of state agencies as our members are understandably focused on responding to the continuing and rapidly evolving COVID-19 crisis.



### **Priorities for Next Six Months (May – October 2020)**

- Continue to provide technical assistance to states in support of Perkins V implementation, including identifying innovative approaches in state plans and sharing those approaches with other states through a *State of CTE* report, professional learning and other strategies.
- Support the first cohort of the virtual cohort-based technical assistance model, which will provide a robust and comprehensive way for multiple states to engage in peer sharing and learning on a specific topic through multiple points of engagement over a fixed period of time.
- Develop and release tools and resources on data visualization and use, CTE data quality, and data collection and use in youth apprenticeship programs, informed by three different workgroups on these topics.
- Begin providing technical assistance to six states and communities within those states to expand high-quality career pathways, through the Global Career Readiness Initiative funded by JPMorgan Chase & Co.
- Continue delivering technical assistance to State CTE Directors and state CTE leaders through professional learning activities including Lunch & Learns and the Summer Learning Series, and determine appropriate timing and structure to relaunch the New State CTE Directors Leadership Program.
- Develop and release materials and templates states can use to conduct an equity-based data analysis and root cause analysis process to close opportunity gaps.
- Continue to build technical assistance activities into project proposals and budgets to ensure sufficient resources to support the provision of these services.
- Continue to build staff capacity to support Advance CTE's technical assistance work, including hiring staff with previous experience with delivering technical assistance, developing technical assistance and facilitation skills among staff, and partnering with other organizations and consultants to support delivery of high-quality technical assistance.

## **Overview of Major Activities**

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

Between February and April 2020, Advance CTE launched three data quality workgroups, each with its own scope and objectives. The flagship workgroup, on CTE data quality and use, is supported by the ECMC Foundation and JPMorgan Chase & Co., and will result in the development, piloting and publication of a comprehensive policy benchmark tool on CTE data quality and use.

Additionally, as a result of early planning work in 2020, Advance CTE is now poised to launch the ECMC-funded Advancing Postsecondary CTE Data Quality Initiative, a multi-state, multi-year initiative to build state capacity and improve postsecondary data quality. Due to COVID-19 and state-led social distancing policies, Advance CTE has decided to temporarily delay the launch of the initiative.

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

Advance CTE updated and delivered the data module of the New State CTE Director Leadership Program. The module covers topics such as developing research questions, responding to requests for information and improving data quality, which are all essential responsibilities of state CTE offices.

Although two sessions on CTE data were planned for the 2020 Advance CTE spring meeting, the meeting was cancelled due to the COVID-19 and social distancing restrictions in Virginia. Advance CTE is exploring other alternatives to deliver this content to members.

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

Data quality and use continues to be a priority of Advance CTE philanthropic partners. In addition to the Advancing Postsecondary CTE Data Quality Initiative, which is funded by the ECMC Foundation, Advance CTE is managing data quality projects to support the Partnership to Advance Youth Apprenticeship (PAYA; multiple funders), Perkins V implementation supports (funded by the Bill & Melinda Gates Foundation) and the Global Career Readiness Initiative (JPMorgan Chase & Co.).

Additionally, Advance CTE partnered with the Institute of Education Sciences to feature effective partnerships between researchers and state CTE leaders. Four blogs have been posted in the series already, featuring Q&A interviews with Michigan, South Dakota and Massachusetts. A final post is planned for spring 2020, which will promote IES's CTE research grant opportunities.

Other dissemination and promotion activities are planned for 2020 – including webinars, blogs and presentations at partner events – though much of the planned work has been delayed as a result of COVID-19.

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

Through the CTE Data Quality workgroup and the CTE Data Visualization and Reporting workgroup, Advance CTE is engaging more than 15 national partners with data expertise. This includes, but is not limited to, most of the partners involved in the initial *State of CTE* report: Education Strategy Group, Data Quality Campaign, and the National Skills Coalition (which recently absorbed the Workforce Data Quality Campaign).

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

Two practices have now become established on the Advance CTE team: the quarterly Impact and Reach Dashboard and the biannual stocktake. These processes encourage staff to monitor and reflect on priority indicators of success and empower them to make strategic decisions to improve the impact of Advance CTE's work. After a staff stocktake discussion was held in December 2019, Advance CTE conducted a separate stocktake discussion with the Board of Directors in Minneapolis, MN in January 2020. The next internal staff stocktake is scheduled for the spring.

#### **Major Accomplishments (Jan – April 2020)**

- **Launch of the CTE Data Quality Shared Solutions Workgroup:** The workgroup was officially launched in mid-April with 21 participants, representing secondary, postsecondary and workforce development sectors at the local, state and national level. This comes after Advance CTE conducted one-on-one interviews with 15 participants in February and March. At the end of April, the workgroup is scheduled to have an intensive working meeting to inform the Policy Benchmark Tool on CTE Data Quality and Use.
- **Launch of the CTE Data Visualization and Reporting Shared Solutions Workgroup:** With support from the Bill & Melinda Gates Foundation, this workgroup is designed to develop tools and resources to support effective CTE data reporting. The workgroup kicked off its first meeting in March and will have its second meeting in early May. In response to feedback from workgroup participants, Advance CTE is considering developing resources such as an audience mapping tool or a national database of CTE report cards.
- **Launch of the Partnership to Advance Youth Apprenticeship Data Workgroup:** Advance CTE held the first PAYA data workgroup meeting in February. This workgroup is fairly limited in scope and only includes members from the PAYA network. The goal of the workgroup is to identify challenges and opportunities related to youth apprenticeship data collection.

- **Opportunity Gap Analysis Workshop Pilots:** One exciting project Advance CTE is taking on is the design of a data-driven equity workshop. Advance CTE is developing a suite of tools – including a data analysis template, root cause analysis protocol, and facilitation guide – to equip state leaders to conduct their own opportunity gap analysis. In the early months of 2020, Advance CTE piloted the workshop with the New Jersey Council of County Vocational-Technical Schools and the Hennepin West and Southwest Metro consortia in Minnesota. Advance CTE plans to release beta versions of the workshop materials online this summer.
- **Hiring New Staff Member:** In February Advance CTE hired a new policy associate to support the ECMC Advancing Postsecondary CTE Data Quality Initiative as well as the Global Career Readiness Initiative.
- **CTE Research Partnership Blog Series:** In partnership with the Institute of Education Sciences, Advance CTE published a blog series highlighting effective CTE research partnerships. The series features Q&A interviews with researchers and state leaders in Michigan, South Dakota and Massachusetts.

### Challenges

- **Delay of ECMC Postsecondary CTE Data Quality Initiative:** As a result of the COVID-19 pandemic, Advance CTE has decided to delay the launch of the ECMC Foundation initiative until a time when state leaders have capacity to prepare a meaningful application. While this decision will have a cascading impact on the initiative timeline, the funder has been informed and is amenable to any changes that need to be made.
- **Travel Limitations:** Additionally, travel limitations have impacted several of Advance CTE’s planned dissemination and partnership activities for 2020, including a presentation at the Association of Institutional Researchers conference in May and a proposal for a session at the July STATS-DC conference.
- **Input into CTE Data Quality Policy Benchmark Tool:** Advance CTE had planned to get member input into the policy benchmark tool at this year’s Spring Meeting. Now that the meeting has been cancelled, Advance CTE is exploring alternative options for gaining member input.
- **Effective Guidance for States Amid COVID-19 Waiver Environment:** The COVID-19 pandemic has created an environment of uncertainty around Perkins V implementation, specifically data and accountability requirements.

### Update on Identified Priorities for (Jan – April 2020)

Not applicable. The data strategy was presented for the first time at the winter board meeting and no priorities were shared.

**Priorities for Next Six Months (May – October 2020)**

- Draft and pilot the CTE Data Quality Policy Benchmark Tool
- Launch the Advancing Postsecondary CTE Data Quality Initiative
- Develop CTE reporting and visualization tools through the CTE Data Reporting and Visualization Workgroup
- Publish beta versions of the opportunity gap analysis tools online
- Develop a virtual facilitation strategy for delivering the opportunity gap analysis workshop
- Sustain partnerships through regular workgroup meetings

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

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

The work falls into three major categories:

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

### **50-State Supports**

*Expert Peer Review:* Advance CTE offered an “Expert Peer Review,” through which national experts provided actionable feedback on draft state plans. In total, 37 states and Washington, DC participated, getting feedback from 22 expert peer reviewers, including seven former State Directors, two former OCTAE staff (including a former Assistant Secretary of OCTAE), two CEOs/Presidents of national non-profits, and representatives from K-12, postsecondary and workforce development. Feedback has been very positive from participating State CTE Directors as well as the expert reviewers, although the feedback is largely anecdotal at this time. We plan to gather more formal feedback data through the short survey, mentioned below, we are sending out as part of our final Perkins V state plan review.

*State of CTE on Perkins V:* Advance CTE is in the process of reviewing the final Perkins V state plans from the 50 states and Washington, DC, with the plan of releasing our next *State of CTE* report on our findings in fall 2020. The report will be augmented by a short survey to State Directors and will be released alongside updated state pages on our website, with a new cross-state search function, that will allow users to compare Perkins and other CTE-related facts and data across some or all states.

*Opportunity Gap Tools:* As part of our technical assistance work around Perkins V, Advance CTE is developing a set of tools and resources to help state leaders more effectively analyze and facilitate data-driven discussions around closing equity gaps. The process was piloted in Minnesota and there were plans for in-person pilots in Florida and Tennessee that are being reimaged due to COVID-19. However, Advance CTE plans to release beta versions of the tools this summer, which will be updated once they have been tested in the field.

*Other Supports/Tools:* Advance CTE has continued to add to our [Perkins V section](#) in our Learning that Works Resource Center. We have also engaged heavily with OCTAE around the major questions and concerns states had about Perkins planning and funding throughout the COVID-19 crisis.

## **Building Cross-State Solutions**

Early on, Advance CTE recognized that there was a clear need for the development of “shared solutions” to help states maximize the new law to its fullest and leverage the plan development so that more learners have access to and are successful in high-quality CTE programs. As such, Advance CTE designed a new model of state engagement and support, “Shared Solution Workgroups,” (SSWG) which are comprised of state and national leaders with the goal of developing and identifying the resources, tools and best practices needed to address key issues, from which all states could benefit.

The first SSWG, held in 2019, focused on the comprehensive local needs assessment. In September 2019, Advance CTE launched the second SSWG – focusing on middle grades CTE, involving 11 states, five national partners and one local practitioner. The major deliverable, which identified [design principles for quality middle grades CTE](#), was released in March 2020. A repository of states’ middle grades CTE resources will be released in late spring 2020, along with a blog series highlighting promising practices and state examples.

In March 2020, Advance CTE launched its third SSWG on data visualization with seven states and eight national partners. Advance CTE has another Perkins-focused SSWG’s planned (one on equity, specifically), but will be re-evaluating the topics and timing in light of COVID-19, shifting timelines and states’ needs.

## **State-Specific Technical Assistance**

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

## **Looking Ahead**

Over the next six months, Advance CTE will continue to provide targeted technical assistance; analyze all final Perkins V state plans; and release our State of CTE report, updated webpages and other relevant deliverables on major themes and findings from across our state plan review. We will lead our data visualization workgroup, release the second round of resources generated by the middle grades CTE workgroup and potentially launch a fourth workgroup, based on the needs of states.

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

**FY20 Advance CTE Financial Report**  
*Report prepared by Kimberly Green, Executive Director*

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This report provides summary financial information for July 1, 2019 through March 31, 2020 or 75% of the fiscal year. The accountant has reconciled the financial statements through March 2020.

**INCOME:** Advance CTE has received 79% of its budgeted income. Other than the Spring Meeting, all other budget categories are on or near the budgeted income target. If the projected Spring Meeting income is removed from the calculation, we are at 97% of budgeted income.

**EXPENSES:** Advance CTE has spent 39% of its budgeted expenses. If the 100-year celebration and Spring Meeting expenses are removed from the calculation, we are at 47% of projected expenses. Expenses are generally lagging budget projections, most notably in salaries and benefits (at 53%) as more of those expenses have been covered by grants. COVID-19 has caused a shift in a variety of our projected work and will have an impact on the following budgets, which will likely be significantly below budget at the end of the fiscal year:

- Board: Due to the Cancellation of the Spring Meeting, expenses will fall below budget projections.
- Member Supports: The structure of the New State CTE Director program has been shifted due to capacity by State CTE Directors to participate in the program. The approved budget included expenses for revising modules and an external facilitator, most of which will not be incurred.
- Government Relations and Lobbying: Many direct expenses are travel and meetings costs are not being incurred due to stay-at-home orders in the DC metro area.

**ASSETS:** Assets total \$4,267,704.57 (includes FY21 state dues invoicing) with equity at \$3,386,377.73.

**INVESTMENTS:** The report from the Merrill Lynch advisor does not call for any adjustments to the portfolio at this time. A more thorough analysis of the investments will be presented during the Board meeting.

**Board action required:** Approve FY20 financial reports.



## Approved FY20 Advance CTE Budget

	Approved FY20 Budget	Actuals as of 3/31/20 (75% of fiscal year)	Variance - Actuals to Budget	Explanatory Notes
<b>INCOME</b>				
State Memberships	\$576,131.00	\$545,957.00	94.8%	On target. Outstanding state dues include is CA and American Samoa. Due to cancellation of Puerto Rico and several territories, the total estimated income for the year is lower than projected - \$563,481. This includes dues from CA but not American Samoa. This equates to \$12,650 or 2.2% less than estimated in the approved budget.
Associate & Organizational Memberships	\$63,000.00	\$82,050.00	130.2%	Associate dues are greater than projected. Many states added members to their state teams and Perkins V resulted in an increase in interest/membership.
Spring meeting registration	\$110,000.00	\$0.00	0.0%	Canceled
Spring meeting sponsorships	\$85,000.00	\$0.00	0.0%	Canceled
ABC Equity Grant	\$25,000.00	\$25,000.00	100.0%	Full payment received.
Iowa Contract	\$28,500.00	\$16,000.00	56.1%	Payments based on deliverables. Contract ends in June
Chamber TPM	\$40,000.00	\$40,000.00	100.0%	Full payment received.
NASFAA	\$75,000.00	\$65,000.00	86.7%	First and second payment invoiced. Payments based on deliverables.
UMass	\$9,000.00	\$5,500.00	61.1%	First invoice processed; work may be delayed due to
Interest/Dividend	\$60,000.00	\$66,183.53	110.3%	Included interest through March 2020.
Other Income	n/a	\$5,000.00	-	Honoraria received; not budgeted.
<b>TOTAL REVENUES</b>	<b>\$ 1,071,631.00</b>	<b>\$ 850,690.53</b>	<b>79.4%</b>	
<b>EXPENSES</b>				
<b>Allocated Expenses to</b>				
Member Services	\$56,192.45	\$23,696.40	42.2%	Lower than projected due to some costs shifted to grants, as well as some internal events postponed or delayed. Project to be under budget at the end of the fiscal year.
Member Supports	\$18,999.88	\$4,989.61	26.3%	New State Director program expenses. Will be lower than projected due to no in-person event at Spring meeting.
Government Relations	\$19,449.00	\$5,188.40	26.7%	Majority of expense to date have been able to be covered by grants/reimbursed.
Spring Meeting	\$113,720.00	\$3,816.82	3.4%	Expenses include meeting planner costs, credit card fees for processing payments and the purchase of the event license for the agenda app. Limited additional expenses projected; likely just meeting planner time to get the 2021 contract in place and manage the hotel 2020 contract cancellation.
Communications	\$7,848.00	\$453.08	5.8%	Will incur additional website related expenses in the third and fourth quarters of the fiscal year.
Advance CTE Board	\$38,042.40	\$19,809.23	52.1%	On target for strategic planning session in January; lower than projected for the year due to the cancellation of the spring meeting.
100 Year expenses	\$70,850.00	\$16.42	0.0%	Additional expenses have been incurred (communications firm) but have not been invoiced. Most expenses will postponed due the cancellation of the Spring meeting.
Lobbying	\$2,355.00	\$505.76	21.5%	Lobbying expenses minimal, other than staff time.
ABC Equity grant expenses	\$25,000.00	\$15,154.37	60.6%	Equity consultant has invoiced for two quarters of work. On target. Some work may need to be extended into the first quarter of the next fiscal year.
Iowa expense	\$28,500.00	\$9,669.96	33.9%	Staff time through March 2020. Work is on track.
Chamber expenses	\$40,000.00	\$2,368.26	5.9%	Staff time through March 2020. Work is on track.
NASFAA expenses	\$75,000.00	\$3,165.59	4.2%	Staff time through March 2020. Work is on track.
UMass expenses	\$9,000.00	\$0.00	0.0%	Project begins in 2020 but is delayed some due to
<b>Subtotal - Specific Projects</b>	<b>\$ 504,956.73</b>	<b>\$ 88,833.90</b>	<b>17.6%</b>	

<b>General &amp; Administrative</b>				
Salaries and benefits	\$383,719.89	\$204,967.06	53.4%	Includes non-grant funded salary and benefits through March 2020.
Telephone/Comm	\$100.00	\$55.66	55.7%	
Office Supplies	\$150.00	\$0.00	0.0%	
Printing/Copying	\$6.00	\$0.00	0.0%	
Rent	\$51,002.16	\$51,029.40	100.1%	Paid through April 2020. This rent requires adjustment as the accountant has not properly accounted for increased rental portion to be reimbursed by the Center. Once this has been adjusted, the rent will be within budget.
Merrill Lynch Charges	\$30,000.00	\$25,100.90	83.7%	Through March 2020.
Accounting	\$23,300.00	\$12,496.69	53.6%	Through March 2020.
<b>Total G&amp;A Expenses</b>	<b>\$ 488,278.05</b>	<b>\$ 293,649.71</b>	<b>60.1%</b>	
<b>Total Project Expenses</b>	<b>\$ 504,956.73</b>	<b>\$ 88,833.90</b>	<b>17.6%</b>	
<b>TOTAL EXPENSES</b>	<b>\$ 993,234.78</b>	<b>\$ 382,483.61</b>	<b>38.5%</b>	

**Advance CTE  
Balance Sheet  
As of March 31, 2020**

	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1011 Cash-Old BOA checking	28,314.15
1012 Cash-BOA Checking-Use This	690,744.18
1017 Merrill Lynch Cash - 749	107,244.69
1018 Merrill Lynch Cash - 7WD	15,167.37
<b>Total Bank Accounts</b>	<b>\$ 841,470.39</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	459,009.76
<b>Total Accounts Receivable</b>	<b>\$ 459,009.76</b>
<b>Other Current Assets</b>	
<b>1100 Investments</b>	
1131 Government Bonds	804,551.88
1159 Equities	2,038,780.12
<b>Total 1100 Investments</b>	<b>\$ 2,843,332.00</b>
1275 Security Deposit	9,000.00
1280 Due from Foundation	66,787.61
1299 Accrued Interest Receivable	3,113.18
1300 Prepaid Expense	390.61
1499 Undeposited Funds	34,350.50
<b>Total Other Current Assets</b>	<b>\$ 2,956,973.90</b>
<b>Total Current Assets</b>	<b>\$ 4,257,454.05</b>
<b>Other Assets</b>	
1400 Furniture and Fixtures	33,200.78
1405 Accumulated Depreciation - Furniture and Fixtures	-26,696.02
1410 Equipment	12,459.70
1450 Accumulated Depreciation- Equipment	-8,713.94
<b>Total Other Assets</b>	<b>\$ 10,250.52</b>
<b>TOTAL ASSETS</b>	<b>\$ 4,267,704.57</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 Accounts Payable {105}	-9,231.86
<b>Total Accounts Payable</b>	<b>-\$ 9,231.86</b>
<b>Other Current Liabilities</b>	
2070 Accrued Vacation	83,291.41
2099 Deferred Revenue	5,000.00
2148 Deferred Revenue FY 19-20 State Dues	132,122.81
2149 Deferred Revenue FY 19-20 Associate Dues	37,725.00
2150 Deferred Revenue FY21 State Dues	467,918.00
2151 Deferred Revenue FY21 Associate Dues	1,425.00
<b>Total 2099 Deferred Revenue</b>	<b>\$ 644,190.81</b>
<b>Total Other Current Liabilities</b>	<b>\$ 727,482.22</b>
<b>Total Current Liabilities</b>	<b>\$ 718,250.36</b>
<b>Long-Term Liabilities</b>	
2880 Deferred Rent and lease incentive	163,076.48
<b>Total Long-Term Liabilities</b>	<b>\$ 163,076.48</b>
<b>Total Liabilities</b>	<b>\$ 881,326.84</b>
<b>Equity</b>	
3000 Net Assets Without Donor Restrictions	2,981,479.51
3900 Earnings	441,746.81
Net Income	-36,848.59
<b>Total Equity</b>	<b>\$ 3,386,377.73</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 4,267,704.57</b>

# **Advance CTE/Center to Advance CTE Investment Recommendation Summary**

*Submitted by Mark Friese, Merrill Lynch*

Coronavirus, flattening of the curve and social isolation all are new words to many of us. This year was starting off to be the one of the best after following 2019, a record year for the U.S. stock markets. Interest rates were lowered by the Federal Reserve causing more money to flow into stocks and the economy and employment was at record levels.

The stock market rarely reacts positively when there is uncertainty. The health issues and virtual closing down of our country's businesses due to this pandemic without any certainty of an anticipated recovery period has caused significant volatility in the U.S. stock markets. What we have been taking about for years now is upon us, a recession.

As of April 17<sup>th</sup> the combined association and foundation accounts are down 9.4% or in dollar terms about \$ 638,000. Only a few weeks ago these accounts were down more, but have they have recovered on the anticipation of an economic and health recovery at some point in the future.

In the educational review I have sent you there is a chart titled Annual Returns and intra-year declines. This chart covers the period 1980-2019. The gray lines indicate where the market finished the year and the red dots represent the low point for that particular year. As you will note market declines of 10% or more are very common and the market often recovers during the same year as the decline.

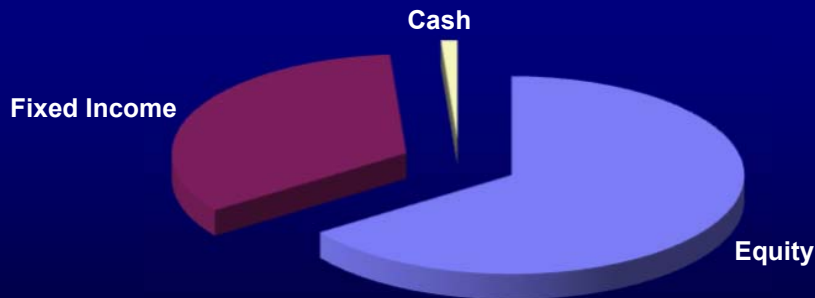
So what has been a good course of action with other market declines?

- First, evaluating your mix and goals that were established within your investment policy statement.
  - Both the Association and the Foundation are within the guidelines per the investment policy statement for both bonds and stocks.
- Next, making sure you are diversified and in areas that should recover quickly when the economy improves.
  - A large percentage of the stock portion of your equity holdings continues to be focused on conservative, dividend producing, equity based indexes. These indexes provide income which has historically risen over time and provided capital appreciation potential. This sector also tends to be the first areas to recover as the economy improves.
- Lastly, make sure you have adequate money market reserves, so you are not forced to liquidate stocks during a negative period of time.
  - Kim and I work together on this regularly and sufficient cash is available to meet intermediate cash flow needs.

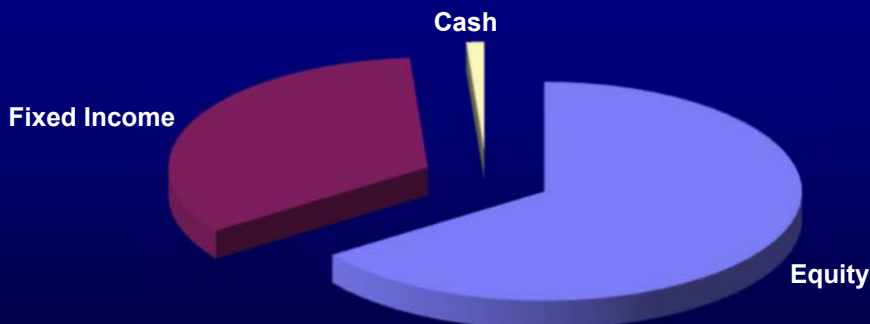
**Summary of recommended changes:** No changes at this time.

Advance CTE  
 Current Asset Allocation  
 Advance CTE Accounts 749-04H01 & 7WD-04H50  
 Period: July 1, 2019 - March 31, 2020

<b><i>Current Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	65%	\$ 1,869,701
	Fixed Income	34%	\$ 966,943
	Cash	1%	\$ 32,214
	Sub-Total	100%	\$ 2,868,858
	Cash Reserves		\$ 100,000
	Total Portfolio Value		\$ 2,968,858



<b><i>Proposed Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	65%	\$ 1,869,701
	Fixed Income	34%	\$ 966,943
	Cash	1%	\$ 32,214
	Sub-total	100%	\$ 2,868,858
	Cash Reserves		\$ 100,000
	Portfolio Value	100%	\$ 2,968,858



## Account Review Summary 07/01/2019 - 03/31/2020

## 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>Advance CTE-E.T.F.'s (749-04H01)</b>									
Ishares DJ US Consumer Goods (IYK)	340	\$ 24,558	07/10/12			\$ 36,788	\$ 12,230		n/a
Ishares DJ US Consumer Goods (IYK)	72	\$ 5,337	10/31/12			\$ 7,790	\$ 2,453		n/a
Ishares DJ US Consumer Goods (IYK)	5	\$ 471	01/22/14			\$ 541	\$ 70		n/a
Ishares DJ US Consumer Goods (IYK)	69	\$ 6,946	08/24/15			\$ 7,466	\$ 520		n/a
Ishares Russell Midcap (IWR)	4000	\$ 96,760	10/20/06			\$ 172,680	\$ 75,920		n/a
Ishares Russell Midcap (IWR)	1864	\$ 26,967	04/03/09			\$ 80,469	\$ 53,502		n/a
Ishares Russell Midcap (IWR)	1192	\$ 32,577	10/31/12			\$ 51,459	\$ 18,882		n/a
Ishares Tr Dow Jones US Tech (IYW)	352	\$ 24,756	07/10/12			\$ 71,945	\$ 47,189		n/a
Ishares Tr Dow Jones US Tech (IYW)	119	\$ 8,376	10/31/12			\$ 24,322	\$ 15,946		n/a
Ishares Tr Dow Jones US Tech (IYW)	28	\$ 2,118	05/10/13			\$ 5,723	\$ 3,605		n/a
Ishares Tr Dow Jones US Tech (IYW)	126	\$ 17,631	05/02/17			\$ 25,753	\$ 8,122		n/a
Ishares TR Dow Jones (DVY)	516	\$ 28,575	06/07/12			\$ 37,947	\$ 9,372		n/a
Ishares TR Dow Jones (DVY)	1733	\$ 97,546	07/10/12			\$ 127,445	\$ 29,899		n/a
Ishares TR Dow Jones (DVY)	541	\$ 31,251	10/31/12			\$ 39,785	\$ 8,534		n/a
Ishares TR Dow Jones (DVY)	32	\$ 2,100	05/10/13			\$ 2,353	\$ 253		n/a
Ishares TR Dow Jones (DVY)	851	\$ 59,965	12/10/13			\$ 62,583	\$ 2,618		n/a
Ishares TR Dow Jones (DVY)	277	\$ 19,729	01/22/14			\$ 20,371	\$ 642		n/a
Ishares TR Dow Jones (DVY)	109	\$ 7,711	02/14/14			\$ 8,016	\$ 305		n/a
Ishares TR Dow Jones (DVY)	57	\$ 4,605	12/30/14			\$ 4,192	\$ (414)		n/a
Ishares TR Dow Jones (DVY)	96	\$ 7,671	02/19/15			\$ 7,060	\$ (611)		n/a
Vanguard Consumer (VCR)	177	\$ 11,478	04/26/11			\$ 25,727	\$ 14,249		n/a
Vanguard Consumer (VCR)	62	\$ 4,589	10/31/12			\$ 9,012	\$ 4,422		n/a
Vanguard Consumer (VCR)	6	\$ 632	01/22/14			\$ 872	\$ 240		n/a
Vanguard Consumer (VCR)	81	\$ 5,253	04/26/11	03/13/20	\$ 11,747	\$ -	\$ -	\$ 6,494	n/a
Vanguard Dividend (VIG)	338	\$ 17,806	08/03/11			\$ 34,946	\$ 17,140		n/a
Vanguard Dividend (VIG)	429	\$ 24,144	06/07/12			\$ 44,354	\$ 20,210		n/a
Vanguard Dividend (VIG)	1734	\$ 98,102	07/10/12			\$ 179,278	\$ 81,176		n/a
Vanguard Dividend (VIG)	538	\$ 31,647	10/31/12			\$ 55,624	\$ 23,977		n/a
Vanguard Dividend (VIG)	812	\$ 59,982	12/10/13			\$ 83,953	\$ 23,970		n/a
Vanguard Dividend (VIG)	266	\$ 19,716	01/22/14			\$ 27,502	\$ 7,786		n/a
Vanguard Dividend (VIG)	107	\$ 7,855	02/14/14			\$ 11,063	\$ 3,208		n/a
Vanguard Dividend (VIG)	56	\$ 4,599	12/30/14			\$ 5,790	\$ 1,191		n/a
Vanguard Dividend (VIG)	94	\$ 7,748	02/19/15			\$ 9,719	\$ 1,970		n/a
Vanguard Industrial ETF (VIS)	24	\$ 965	05/13/09			\$ 2,647	\$ 1,682		n/a
Vanguard Industrial ETF (VIS)	374	\$ 19,968	07/15/10			\$ 41,256	\$ 21,288		n/a
Vanguard Industrial ETF (VIS)	210	\$ 14,507	10/31/12			\$ 23,165	\$ 8,659		n/a
Wisdomtree Total Divid ETF (DTD)	159	\$ 10,482	12/10/13			\$ 12,453	\$ 1,971		n/a
Wisdomtree Total Divid ETF (DTD)	195	\$ 13,026	01/22/14			\$ 15,272	\$ 2,246		n/a
Wisdomtree Total Divid ETF (DTD)	529	\$ 35,327	01/22/14			\$ 41,431	\$ 6,104		n/a
Wisdomtree Total Divid ETF (DTD)	27	\$ 1,789	02/14/14			\$ 2,115	\$ 326		n/a
Wisdomtree Total Divid ETF (DTD)	61	\$ 4,614	12/30/14			\$ 4,778	\$ 164		n/a
Wisdomtree Total Divid ETF (DTD)	25	\$ 1,896	02/19/15			\$ 1,958	\$ 62		n/a
Wisdomtree Total Divid ETF (DTD)	21	\$ 2,033	04/29/19			\$ 1,645	\$ (388)		n/a
Wisdomtree Total Divid ETF (DTD)	60	\$ 5,749	08/29/19			\$ 4,699	\$ (1,050)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	255	\$ 6,227	12/10/13			\$ 6,161	\$ (67)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	966	\$ 24,124	01/22/14			\$ 23,339	\$ (785)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	525	\$ 13,107	01/22/14			\$ 12,684	\$ (423)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	63	\$ 1,566	02/14/14			\$ 1,522	\$ (44)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	165	\$ 4,669	12/30/14			\$ 3,986	\$ (683)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	60	\$ 1,733	02/19/15			\$ 1,450	\$ (284)		n/a
Wisdomtree Tr Midcap Div Fc (DON)	110	\$ 4,022	04/25/19			\$ 2,658	\$ (1,364)		n/a

Wisdomtree Tr Midcap Div Fc (DON)	284	\$ 9,826	08/29/19		\$ 6,861	\$ (2,965)	n/a
Ishares US Financial Services ETF (IYF)	72	\$ 5,820	01/22/14		\$ 7,004	\$ 1,184	n/a
Ishares US Financial Services ETF (IYF)	221	\$ 18,382	10/21/14		\$ 21,499	\$ 3,117	n/a
Ishares US Financial Services ETF (IYF)	378	\$ 39,399	05/02/17		\$ 36,772	\$ (2,628)	n/a
Prudential Jennison Health (PHSZX)	961.013	\$ 47,368	10/01/14		\$ 40,853	\$ (6,516)	n/a
Vanguard High Div Yield ETF (VYM)	954	\$ 62,386	08/21/15		\$ 67,496	\$ 5,110	n/a
Vanguard High Div Yield ETF (VYM)	164	\$ 11,134	08/13/15		\$ 11,603	\$ 469	n/a
Vanguard High Div Yield ETF (VYM)	87	\$ 7,429	12/04/18		\$ 6,155	\$ (1,273)	n/a
Vanguard High Div Yield ETF (VYM)	56	\$ 3,927	03/13/20		\$ 3,962	\$ 35	
Vanguard Total Bond (BND)	308	\$ 24,947	02/17/17		\$ 26,288	\$ 1,341	n/a
Vanguard Total Bond (BND)	742	\$ 59,954	01/31/17		\$ 63,330	\$ 3,376	n/a
Ishares 1-3 Year Treasury (SHY)	177	\$ 14,958	01/31/17		\$ 15,341	\$ 382	n/a
Ishares 1-3 Year Treasury (SHY)	164	\$ 13,697	02/01/18		\$ 14,214	\$ 517	n/a
Ishares 1-3 Year Treasury (SHY)	509	\$ 42,298	12/04/18		\$ 44,115	\$ 1,817	n/a
Ishares Tr Core Dividend (DGRO)	884	\$ 32,125	02/01/18		\$ 28,810	\$ (3,315)	n/a
Ishares Tr Core Dividend (DGRO)	479	\$ 18,081	04/25/19		\$ 15,611	\$ (2,470)	n/a
Ishares Tr Core Dividend (DGRO)	947	\$ 36,154	08/29/19		\$ 30,863	\$ (5,291)	n/a
Wisdomtree US Quality Dividend (DGRW)	475	\$ 20,986	04/25/19		\$ 18,482	\$ (2,504)	n/a
Wisdomtree US Quality Dividend (DGRW)	947	\$ 41,513	08/29/19		\$ 36,848	\$ (4,665)	n/a
Ishares US Healthcare (IYH)	200	\$ 36,988	04/25/19		\$ 37,560	\$ 572	n/a
Ishares US Healthcare (IYH)	50	\$ 9,530	08/29/19		\$ 9,390	\$ (140)	n/a
Ishares US Healthcare (IYH)	21	\$ 3,820	03/13/20		\$ 3,944	\$ 124	
Vanguard Materials ETF (VAW)	8	\$ 1,008	04/25/19		\$ 770	\$ (238)	n/a
Vanguard Materials ETF (VAW)	17	\$ 2,076	08/29/19		\$ 1,636	\$ (440)	n/a
Vanguard Real Estate ETF (VNQ)	52	\$ 3,907	03/13/20		\$ 3,632		
<b>Total</b>		\$ 1,527,465			\$ 2,038,780	\$ 511,589	
<b>Advance CTE-Money Market (749-04H01)</b>					\$ 100,446		
<b>749-04H01 Account Total</b>					\$ 2,139,226	\$ 511,589	

Fees for period: \$19,296.05  
Fees based on assets: \$19,296.05

**National Association of State Directors of Vocational  
Account Review Summary 07/01/2019 through 03/20/2020**

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

Cost Basis	Buy/Sell	3/31/2020	Gain/Loss
\$759,492	Various	\$804,552	\$42,718

**Managed Fixed Income Portfolio**

Estimated Accrued Interest \$3,113  
Money Market \$21,494  
Account Total \$829,159

# Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2019 to 03/31/2020

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2020	3,493,289	0	19,209	(543,641)	2,968,857	(15.01)	(9.68)
2019	3,085,625	200,000	41,643	166,021	3,493,289	6.27	6.27
<b>Total</b>	<b>3,085,625</b>	<b>200,000</b>	<b>60,852</b>	<b>(377,620)</b>	<b>2,968,857</b>		<b>(9.68)</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.



# Relative Performance - Equity: Yearly

Performance period: 07/01/2019 to 03/31/2020



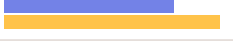

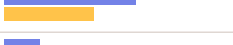







Period	Actual ROR(%)		Dow Jones Industrial Average PR(%)		Dow Jones Industrial Avg TR(%)		MSCI Emerging Markets TR Net(%)		MSCI World ex USA TR Net(%)		S&P 500 PR(%)		S&P 500 TR(%)	
	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum
<b>2020</b>	<b>(23.24)</b>	<b>(16.28)</b>	<b>(23.20)</b>	<b>(17.60)</b>	<b>(22.73)</b>	<b>(16.08)</b>	<b>(23.60)</b>	<b>(18.18)</b>	<b>(23.26)</b>	<b>(18.00)</b>	<b>(20.00)</b>	<b>(12.14)</b>	<b>(19.60)</b>	<b>(10.82)</b>
US Equity	(23.24)	(16.28)												
<b>2019</b>	<b>9.07</b>	<b>9.07</b>	<b>7.29</b>	<b>7.29</b>	<b>8.62</b>	<b>8.62</b>	<b>7.09</b>	<b>7.09</b>	<b>6.85</b>	<b>6.85</b>	<b>9.82</b>	<b>9.82</b>	<b>10.92</b>	<b>10.92</b>
US Equity	9.07	9.07												

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.

# Sector Analysis - Summary

As of Close of Business: 04/17/2020

Sector	Total Holdings(%)		Current(%)	Model(%)	Gap-Model vs. Current(%)	All Equity compared to Custom Model		
	0%	25%				ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
<b>Equity</b>								
Health Care			13.12	14.00	0.88	461,432	799,337	337,905
Consumer Staples			10.36	7.20	(3.16)	364,418	411,088	46,669
Information Technology			17.72	22.60	4.88	623,263	1,290,358	667,095
Consumer Discretionary			10.63	9.80	(0.83)	373,774	559,536	185,762
Industrials			13.77	9.40	(4.37)	484,163	536,698	52,535
Materials			3.77	2.70	(1.07)	132,576	154,158	21,582
Financials			11.81	13.20	1.39	415,310	753,661	338,351
Communication Services			5.33	10.50	5.17	187,457	599,503	412,046
Utilities			7.71	3.30	(4.41)	271,091	188,415	(82,676)
Energy			2.79	4.30	1.51	98,022	245,511	147,488
Real Estate			2.99	3.00	0.01	105,174	171,286	66,113
Equities Blend			0.01	0.00	(0.01)	187	0	(187)
<b>Total</b>						<b>3,516,865</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: 04/17/2020

## Date of Composition Information Obtained for Pooled Investments

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, 529 portfolios, 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	PGIM JENNISON	02/28/2020			

### Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
DGRO	ISH TR CORE DIVID GROWTH	02/28/2020	VOX	VANGUARD COMMUNICATION	02/28/2020
SHY	ISHARES 1-3 YEAR	No Date Reported	VCR	VANGUARD CONSUMER	02/28/2020
IEI	ISHARES 3-7 YEAR	No Date Reported	VIG	VANGUARD DIVIDEND	02/28/2020
IGIB	ISHARES INTERMEDIATE	No Date Reported	VYM	VANGUARD HIGH DVD YIELD	02/28/2020
IWR	ISHARES RUSSELL MIDCAP	02/28/2020	VIS	VANGUARD INDUSTRIAL ETF	02/28/2020
DVY	ISHARES SELECT	02/28/2020	VAW	VANGUARD MATERIALS ETF	01/31/2020
IGSB	ISHARES SHORT-TERM	No Date Reported	VNQ	VANGUARD REAL ESTATE ETF	02/28/2019
IYK	ISHARES U.S. CONSUMER	02/28/2020	BND	VANGUARD TOTAL BOND MKT	No Date Reported
IYF	ISHARES U.S. FINANCIAL	02/28/2020	DGRW	WISDOMTREE U.S. QUALITY	02/28/2020
IYH	ISHARES U.S. HEALTHCARE	02/28/2020	DON	WISDOMTREE US MIDCAP DIV	02/28/2020
IYW	ISHARES U.S. TECHNOLOGY	02/28/2020	DTD	WISDOMTREE US TOTAL	02/28/2020

# Size and Style Analysis - Summary

As of Close of Business: 04/17/2020

Size And Style	Total Holdings(%)		Gap-Model vs. Current(%)			All Equity compared to Custom Model		
	0%	50%	Current(%)	Model(%)	Gap-Model vs. Current(%)	ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
<b>Equity</b>								
Large Cap Growth			38.04	33.00	(5.04)	1,337,916	1,884,151	546,236
Large Cap Value			30.99	26.00	(4.99)	1,089,747	1,484,483	394,736
Small/Mid Cap Growth			14.96	8.00	(6.96)	526,183	456,764	(69,419)
Small/Mid Cap Value			15.24	8.00	(7.24)	536,005	456,764	(79,241)
International Equity			0.40	25.00	24.60	14,014	1,427,387	1,413,373
Equities Blend			0.37	0.00	(0.37)	13,001	0	(13,001)
<b>Total Equity Assets</b>						<b>3,516,865</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: 04/17/2020

## Date of Composition Information Obtained for Pooled Investments

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, 529 portfolios, 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	PGIM JENNISON	02/28/2020			

### Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
DGRO	ISH TR CORE DIVID GROWTH	02/28/2020	VOX	VANGUARD COMMUNICATION	02/28/2020
SHY	ISHARES 1-3 YEAR	02/28/2020	VCR	VANGUARD CONSUMER	02/28/2020
IEI	ISHARES 3-7 YEAR	02/28/2020	VIG	VANGUARD DIVIDEND	02/28/2020
IGIB	ISHARES INTERMEDIATE	02/28/2020	VYM	VANGUARD HIGH DVD YIELD	02/28/2020
IWR	ISHARES RUSSELL MIDCAP	02/28/2020	VIS	VANGUARD INDUSTRIAL ETF	02/28/2020
DVY	ISHARES SELECT	02/28/2020	VAW	VANGUARD MATERIALS ETF	01/31/2020
IGSB	ISHARES SHORT-TERM	02/28/2020	VNQ	VANGUARD REAL ESTATE ETF	02/28/2019
IYK	ISHARES U.S. CONSUMER	02/28/2020	BND	VANGUARD TOTAL BOND MKT	02/28/2020
IYF	ISHARES U.S. FINANCIAL	02/28/2020	DGRW	WISDOMTREE U.S. QUALITY	02/28/2020
IYH	ISHARES U.S. HEALTHCARE	02/28/2020	DON	WISDOMTREE US MIDCAP DIV	02/28/2020
IYW	ISHARES U.S. TECHNOLOGY	02/28/2020	DTD	WISDOMTREE US TOTAL	02/28/2020

Strategic Priority	Strategy	Activity	Status				
<b>Strategic Priority 1: Ensure the Adoption and Implementation of High-Quality State and Federal CTE POLICY</b>							
	1a. Develop, refine and advance federal legislative and budgetary priorities that support, promote and increase equitable access to and success in high-quality CTE.						
		1a1 Continue to refine and advance advocacy strategies in support of Perkins reauthorization	Complete				
		1a2 Review and update policy priorities and recommendations to ensure full alignment with Putting Learner Success First and with member input	Complete				
		1a3 Review and update policy priorities and recommendations to ensure full alignment with the equity statement.					
		1a4 Track, analyze and advocate for the Higher Education Act (HEA) based on Board-approved recommendations.					
		1a5 Track, analyze and advocate for Workforce Innovation and Opportunity Act (WIOA) based on Board-approved recommendations.					
		1a6 Track, analyze and advocate for apprenticeships/youth apprenticeships based on Board-approved recommendations and equity statements.					
		1a7 Track, analyze and advocate for increased appropriations for Perkins and related federal pieces of legislation based on Board-approved recommendations.					
		1a8 Launch a "double the investment" campaign for federal investment in CTE	Complete				
		1a9 Plan and execute transition strategies after 2018 midterm.	Complete				
		1a10 Plan and execute transition strategies running up to and after 2020 elections.					
	1b. Develop and promote policy frameworks, publications and tools that support, promote and increase learner access to and success in high-quality CTE.						
		1b1 Plan and execute a forward-looking research agenda and create high-quality publications (in alignment with Advance CTE member priorities, Putting Learner Success First, any established Board policy, including the Advance CTE equity statement) that have measurable impact in states.					
		1b2 Develop state policy frameworks and other tools to support policy implementation, with technical assistance opportunities embedded in the development and release.					
		1b3 Develop and disseminate tools and supports related to Perkins.					
		1b4 Develop and disseminate information and supports related to HEA.	N/A				
		1b5 Develop and disseminate information and supports related to WIOA.	N/A				
		1b6 Develop and disseminate tools and supports related to apprenticeships/ youth apprenticeships.					
		1b7 Develop and disseminate tools and supports related to ESSA.				Lower priority area; limited external movement	
		1b8 Develop customized, state-specific resources, such as fact sheets and personalized results of surveys.					
		1b9 Maintain and continue to refine Learning that Works Resource Center					
		1b10 Lead the equity in CTE initiative to build out the tools, resources, supports and partnerships necessary for states to expand equity in CTE.					
		1b11 Execute a data initiative focused on quality and effectiveness.					
		1b12 Develop and maintain a Perkins V portal to share state plans, promising practices and other resources.					
	1c. Support Advance CTE members in the implementation of federal and state legislation and policies through structured and just-in-time technical assistance.						
		1c1 Develop and execute a TA strategy focused on supporting states' strategic planning and implementation of state and federal policies.					
		1c2 Host three Perkins V implementation meetings.	Complete				
		1c3 Provide direct TA to states to support the development of ambitious Perkins V state plans.					
		1c4 Lead Shared Solutions Workgroups to develop resources and tools to benefit all states in the development and implementation of their Perkins V plans.					
		1c5 Lead a peer review process that provides actionable feedback to states on their Perkins V state plans.	Complete				

Strategic Priority	Strategy	Activity	Status				
	1c6	Build member capacity for federal advocacy through regular calls, training and resources.					
	1d. Plan and execute a strategy for the revision of the National Career Clusters® Framework.						
	1d1	Execute a comprehensive and inclusive strategy for revising the National Career Clusters Framework.					
	1d2	Release the revised National Career Clusters Framework and related resources, supported by a comprehensive communications plan.	Not yet started				
	1d3	Develop/offer technical assistance to support implementation of revised Framework and improved systems alignment.	Not yet started				
	1d4	Build internal staff knowledge/capacity around the Career Clusters.					
<b>Strategic Priority 2: Empower Advance CTE Members through Topical and Impactful PROFESSIONAL LEARNING</b>							
	2a. Maintain strong and effective two-way communications channels with Advance CTE members to ensure they are aware of and inform Advance CTE's priorities, activities, resources and events.						
	2a1	Gather regular information on members' satisfaction and priorities (e.g., member services survey, new member skills/interest inventory).					
	2a2	Use the state engagement matrix and review process to ensure depth and breadth of member engagement, including targeted follow up to lower engagement states.					
	2a3	Leverage member task forces, committees, kitchen cabinets around specific challenges or topics to advance our organization's strategic priorities including quality, equity, systems alignment, data-driven decisions and middle grades/career advisement.					
	2b. Provide high-quality in-person and virtual professional development events and resources to build, grow and strengthen the leadership skills and content knowledge of Advance CTE members, which they then implement in their own states and communities.						
	2b1	Plan and execute the annual Fall and Spring convenings.					
	2b2	Develop and execute an annual professional development calendar that appropriately leverages technology to maximally reach members and partners (including webinars, conference calls, etc.).					
	2b3	Plan and execute the Virtual Institute to support members' professional learning.	On hold				
	2b4	Develop and execute workshops and virtual learning for school counseling professionals.					
	2c. Provide personalized and targeted supports to Advance CTE members to support CTE's leadership pipeline.						
	2c1	Deliver annual new State CTE Director leadership program.					
	2c2	Design an expanded "leadership program" that supports new State Directors as well as future/rising leaders and experienced leaders	On hold				
	2c3	Lead the annual Star of CTE membership awards to recognize and leverage leaders within the organization	On hold				
	2c4	Provide annual advocacy training for Advance CTE officers' on messaging and major organizational initiatives.	On hold				
	2d. Build and strengthen communities within Advance CTE's membership to foster cross-state sharing and learning.						
	2d1	Develop intentional in-person and virtual opportunities for regions to engage and share.					
	2d2	Develop and execute a strategy for supporting content and/or role-specific virtual and/or in-person communities of practice for State Directors (Moodle).					

Strategic Priority	Strategy	Activity	Status				
		2d3 Develop and execute a strategy for supporting content and/or role-specific virtual and/or in-person communities of practice for state members (Moodle)					
<b>Strategic Priority 3: Raise the Visibility and PROMOTION of High-Quality CTE</b>							
	3a. Develop, disseminate, and support Advance CTE members and key stakeholders in the use of communications resources, tools, messages and technical assistance to build the visibility of and support for high-quality CTE.						
		3a1 Develop and maintain a comprehensive, organization-wide communications strategy inclusive of case-making, messaging, social media and other communications tools and resources to promote equitable access and success in high-quality CTE.					
		3a2 Provide technical assistance to states to support CTE communications, outreach and recruitment.					
		3a3 Lead the Excellence in Action award program, including year-long utilization of best practices in quality and equity from current and previous award winners	On hold				
	3b. Position Advance CTE as the go-to organization for members, policymakers, the media and other key stakeholders seeking expertise, accurate information and timely resources related to CTE.						
		3b1 Refresh careertech.org to reflect mission/vision, messaging, strategic priorities and accessibility	Complete				
		3b2 Maintain careertech.org to ensure it is up to date and accurate					
		3b3 Develop and execute intentional promotion strategies for all of Advance CTE's resources, initiatives, priorities and accomplishments.					
		3b4 Maintain and expand relationship with CTE caucuses and key Congressional staff					
		3b5 Create and execute media engagement strategy.					
		3b6 Execute a social media strategy that builds awareness around Advance CTE's resources, strategic priorities and messaging.					
		3b7 Send timely and engaging newsletters targeted at key audiences (e.g., member newsletter, Learning that Works, etc.)					
		3b8 Develop and disseminate annual report of Advance CTE's reach and impact.					
	3c. Plan and execute a strategy to celebrate Advance CTE's 100-year anniversary that documents and honors our history and success while continuing to move the organization and CTE field forward.						
		3c1 Develop a 100-year "retrospective" on Advance CTE's accomplishments and changes to the economy and CTE system					
		3c2 Develop year-long communications strategy					
		3c3 Embed the 100-year anniversary celebration in 2020 Spring convening	N/A				
		3c4 Host a Future of CTE Summit in lieu of the annual 2020 Fall convening.					
	3d. Plan and execute a fundraising and development strategy that aligns with and advances the organizations' mission and vision.						
		3d1 Develop and execute a fundraising strategy that both recognizes and honors existing funders and cultivates potential funders.					
<b>Strategic Priority 4: Build and Maintain Strong and Effective PARTNERSHIPS that Advance our Vision and Mission</b>							
	4a. Develop, maintain and grow strategic partnerships with policymakers, federal agencies, advocacy groups and other key organizations to advance the federal legislative and budgetary priorities.						
		4a1 Build and sustain effective partnerships with key Congressional offices and committees to effectively impact authorizing legislation and federal funding.					
		4a2 Sustain ongoing successful partnerships with key federal agencies (USDE, USDOL, etc.)					



Strategic Priority	Strategy	Activity	Status				
		Engage in cross-organizational coalitions to amplify our impact of organizational federal advocacy, authorizing, appropriations and regulatory priorities. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.					
	4a3						
	4b. Develop, maintain and grow strategic partnerships with policymakers, advocacy groups and other key stakeholders to support states' adoption and implementation of legislation and policies.						
		Actively cultivate and sustain expanded partnerships with other state-facing and TA-providing organizations to foster awareness of and support for high-quality CTE. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.					
	4b1						
		Lead and engage individual organizations within the CTE in Equity committee to build stronger connections that help advance the field on ensuring equitable access to and success in CTE					
	4b2						
	4c. Develop, maintain and grow strategic partnerships with K-12 and postsecondary education organizations to ensure CTE is considered an essential partner in the full P-20 education continuum.						
		Build, strengthen and expand partnerships with K-12 educational organizations to expand our reach and impact. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.					
	4c1						
		Build, strengthen and expand partnerships with postsecondary organizations and coalitions to expand our reach and impact. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.					
	4c2						
		Engage key education organizations and stakeholders in National Career Clusters Framework revision.	Not yet started				
	4c3						
	4d. Develop, maintain and grow strategic partnerships, particularly with employers and industry and workforce development organizations, to ensure CTE is considered an essential partner to workforce and economic development.						
		Build, strengthen and expand partnerships with industry and workforce development organizations/associations to expand our reach and scope. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.					
	4d1						
		Engage key employer and industry organizations and stakeholders in the National Career Clusters Framework revision.	Not yet started				
	4d2						
		Manage the Double the investment campaign.	On hold				
	4d3						
<b>Strategic Priority 5: Develop and Maintain Internal PROCESSES and PROTOCOLS to Ensure a Strong, Healthy and Sustainable Organization</b>							
	5a. Ensure all aspects of the management of Advance CTE/The Center to Advance CTE are effective, efficient and in legal compliance.						
		Undergo review against Maryland's Non-Profit Standards of Excellence and meet all standards.	On hold				
	5a1						
		Actively maintain and support Board of Directors, including maintaining updated Board policy manual.					
	5a2						
		Maintain up-to-date and legally compliant personnel policies. Conduct an annual review of the policies with all staff, including an annual signing of personnel policies, whistleblower policy, conflict of interest policy and position description.					
	5a3						
		Ensure compliance with all Board-approved finance policies, including conducting an annual audit					
	5a4						
		Execute full life cycle of dues renewal process including invoicing, membership database maintenance and audit of all systems					
	5a5						
	5b. Revise and update the organizational standard operations procedures manual to comprehensively articulate key organizational policies, processes and practices.						

Strategic Priority	Strategy	Activity	Status				
		5b1 Execute an inclusive process for creating an SOP manual that includes processes, templates and models for key aspects of the organization.					
		5b2 Develop and implement an effective employee onboarding protocol.					
		5b3 Conduct regular internal staff training so everyone understands what is included in SOP and their role in maintaining it.					
		5b4 Ensure the SOP manual articulates sufficient checks and balances for fiscal accountability and stewardship.					
	5c. Develop, maintain and use an internal knowledge management system.						
		5c1 Internal knowledge management system is updated at least quarterly.					
		5c2 Offer regular internal staff training so everyone understands what is included in the knowledge management system and their role in maintaining it.					
		5c3 Develop and maintain an internal process for coordinated dissemination of resources, releases and communications for maximal uptake by our members and networks.					
	5d. Support and maintain a positive work culture that is collaborative and values employees' contributions, leadership and growth.						
		5d1 Undertake review of annual performance evaluation system.	On hold				
		5d2 Clarify and elevate personalized professional development opportunities for staff.					
		5d3 Provide regular internal staff trainings and opportunities for staff to build their presentation, facilitation and technical assistance skills.					
		5d4 Offer staff-wide and individual opportunities for professional development related to equity to support our internal and external work.					
		5d5 Conduct internal staff training around grants/contractor management.					
		5d6 Build out and begin to execute an implementation plan with key milestones based on results from organizational equity audit.					
		5d7 Offer regular "sunshine committee" activities.					
	5e. Maintain an organizational commitment to being data-driven and focused on continuous improvement.						
		5e1 Update Impact & Reach Dashboard quarterly.					
		5e2 Engage in bi-annual stocktakes with the Board of Directors.					
		5e3 Institute post-project/initiative debrief meetings.					
		5e4 Embed feedback loops and evaluations in all meetings and technical assistance offerings.					

## FY21 Dues Renewal

*Report submitted by Katie Fitzgerald, Director of Communications and Membership and Sara Gasman, Senior Associate, Member Engagement and Professional Learning*

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Advance CTE began member dues renewal in January 2020. Staff updated a number of process related to dues renewal including:

- Moving the state dues Intent form from paper to DocuSign. This resulted in a dramatic uptick in forms signed by the due date. To date, 53 of 56 dues intent forms for both states and territories have been submitted and five states have already paid their dues. All 53 that submitted intend to continue their membership with Advance CTE. We are following up with those who have not yet submitted; these are mostly in states where there is an interim State CTE Director.
- Organizational memberships have been revamped in the member database to better streamline administrative processes related to membership and dues renewal.
- A digital dashboard and renewal form was created and sent to all organizational members in mid-April.
  - This dashboard allows states to view their current members, and update their FY21 membership, a process that was manual in previous years.
  - While staff has received a number of dues intent forms from organizational members, staff is anticipating a decrease in this membership category in FY21 because many are small businesses that have been impacted by the COVID-19 pandemic.
- QuickBooks and CiviCRM, the Advance CTE membership database, were connected to cut down on the administrative burden for both the finance and administrative staff.

Associate Member dues will be sent in late April. Advance CTE is not anticipating a change in number of members at this fee level.

**Board Action Required:**           None

## Federal Policy Update

*Report submitted by Samuel Dunietz, Senior Associate for Federal Policy  
Meredith Hills, Policy Associate*

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**Fiscal Year (FY) 2021 Budget and Appropriations Update:** Since the last Board meeting, advocating for a robust investment in Career Technical Education (CTE) in the FY21 appropriations process has been a top priority. In February, President Donald Trump released the Administration's FY21 budget request, which included a \$900 million increase to The Strengthening Career and Technical Education for the 21st Century Act (Perkins V). If enacted, this increase, representing an almost doubling of CTE funding, would be the largest single increase in CTE funding since the Smith-Hughes National Vocational Act of 1917. Advance CTE in partnership with the Association for Career and Technical Education (ACTE) put out a [press release](#) in support of this proposed increase, while also acknowledging that sufficient funding is necessary across the education and workforce continuum.

In addition to CTE specific funding, the FY21 proposal also recommended the U.S. Department of Education budget at 7.8 percent lower than the amount enacted in FY20, and included:

- Level funding for adult education programs;
- An increase of \$137 million for the Minority Science and Engineering Improvement Program;
- An increase of \$100 million for the Individuals with Disabilities Act (IDEA);
- Expansion of Pell Grant eligibility to short-term programs and incarcerated individuals;
- A cut of over \$600 million to Federal Work-Study;
- Elimination of 11 programs, such as the State Longitudinal Data System and GEAR UP;
- Elimination of Public Service Loan Forgiveness; and
- A consolidation of 29 programs under the Every Student Succeeds Act (ESSA) into one block grant, and a decrease of Title I funding by \$4.8 billion.

The U.S. Department of Labor budget was proposed at 10.7 percent lower than the amount enacted in FY20, and included:

- Level funding for the Workforce Innovation and Opportunity Act (WIOA) Adult Employment and Training Activities;
- Level funding for WIOA Youth Activities;
- An increase of \$25 million to registered and industry-recognized apprenticeship programs;
- A cut of \$110 million to WIOA Dislocated Workers Employers and Training Activities;
- A cut of \$10 million to YouthBuild programs; and
- A cut of \$5 million to Reentry Employment Opportunities program.

Although the President's budget requested a significant and necessary increase for CTE programs, it included concerning cuts for funding to many other education and labor programs

that are valuable, and proposed significantly changing how K-12 funding is structured. Prior to the budget release, there was concern that national organizations would not be supportive of the increase for CTE given other cuts. We were pleased to find that this was largely not the case. Advance CTE has continued to partner with other organizations to advocate for programs that support CTE in addition to supporting other programs throughout the education and workforce spectrum, including serving on the Board of Directors of the Committee for Education Funding (CEF). Advance CTE also continues to be an active participant in the Campaign to Invest in America's Workforce and the Title IV-A Coalition.

In March, the House CTE Caucus released a "Dear Colleague" [letter](#) that advocated for the need for greater investment in CTE. Over 180 members of Congress have signed onto this letter, which surpasses the number of sign-ons for the previous year.

Due to the COVID-19 (Coronavirus) pandemic, all planned FY21 appropriations hearings have been canceled, and the discussions regarding the normal appropriations process have largely stalled. Advocacy for funding has largely shifted to have a CTE role included in future stimulus legislation.

**Coronavirus Pandemic Response:** Starting in March, Advance CTE shifted much of our federal policy work toward responding to the impact of Coronavirus. Since mid-March, three emergency stimulus packages have been passed by Congress and signed by the President. The first two stimulus packages primarily addressed the immediate response to Coronavirus in supporting funding for health agencies, increased access to testing, more funds for government support programs like Medicaid and additionally included paid sick and family leave and additional unemployment insurance benefits. The third package, entitled The Coronavirus Aid, Relief, and Economic Security Act (CARES) was signed into law on March 27, and at \$2.2 trillion is the largest ever economic stimulus package in U.S. history. There are several substantial portions that affect education, labor, and CTE specifically:

- \$30.75 billion in funding for education. This amount is split between:
  - \$2.9 billion Governor's Emergency Education Relief Fund;
  - \$13.5 billion Elementary and Secondary Emergency Relief Fund;
  - \$13.953 billion Higher Education Emergency Relief Fund
- \$345 million for the Dislocated Worker Assistance National Reserve

Additionally, this legislation included some flexibility for State Education Agencies (SEA) to request broad waivers on some statutory and regulatory provisions of the Every Student Succeeds Act (ESSA), and a waiver of section 421(b) of the General Education Provisions Act (GEPA), also known as the "Tydings Amendment" that would allow flexibility of the period of availability of funds, including Perkins V. Advance CTE is continuing to work with Congress and the Administration to ensure that waivers can apply to all Perkins eligible agencies, including those that are not SEAs. Advance CTE staff have had repeated outreach and discussions with Congressional staff from both parties on the House Education and Workforce Committee, and the Senate Health, Education, Labor and Pensions Committee.

In collaboration with ACTE, Advance CTE staff drafted a [letter of priorities](#) for Congress in any future economic stimulus legislation. These priorities included:

- Providing at least \$1 billion in additional dedicated resource to CTE programs
  - Including expanding options for equitable and accessible CTE distance learning and ensuring that there is adequate support for the digital and physical infrastructure needed for a program. In addition, the letter argued for the need for equipping teachers with the professional development necessary to make the shift to online instruction.
  - Scaling work-based learning
  - Preparing to serve displaced workers by ensuring resources can help institutions accommodate the increased demand for re-skilling and integrated adult basic education CTE programs.
- Foster job-driven postsecondary partnerships by reinstating partnership grants to community and technical colleges
  - Create a grant program, similar to the Trade Adjusted and Assistance Community College and Career Training (TAACCCT) program that would help ensure successful partnerships between postsecondary institutions and employers.

The letter also included recommendations for needed flexibilities and waivers, as well as fixes to waiver language included in CARES. Advance CTE is currently working with Congressional Staff and OCTAE to address these challenges. In late April, Advance CTE and ACTE released a [joint op-ed](#) calling on the importance of CTE during the Coronavirus pandemic and the need of CTE for future upskilling during an economic recovery. Going forward, Advance CTE plans to continue to create resources and provide technical assistance to support our members in the immediate pandemic and in any future recovery. We will continue to push timely and updated news and analysis to our members as it becomes available.

In April, Advance CTE staff analyzed the CARES legislative language and impact and distilled the relevant content through a [webinar](#), blog posts, and Moodle posts. Advance CTE staff stayed in frequent communication with congressional staff and officials from the U.S. Department of Education (USDE), including the Office of Career, Technical, and Adult Education (OCTAE) to ensure we advocated for our members' needs. Advance CTE staff have communicated frequently with OCTAE leadership and congressional staff to ensure support of our members and high-quality CTE in Coronavirus legislation and Perkins implementation. For instance, Advance CTE staff and State Directors participated in town hall calls with officials from OCTAE to discuss the impact of Coronavirus on our members' state CTE program.

OCTAE has released a few official notices of guidance in response to Coronavirus. These are [posted on the Perkins Collaborative Resource Network](#) and include among other topics guidance on:

- Strengthening Career and Technical Education for the 21st Century Act (Perkins V) state submissions and funding timelines - including guidance on requesting "Tydings waivers." This also extended Perkins V state plan submission requirements to June 15, 2020;
- Comprehensive local needs assessment (CLNA) issues and timeline; and

- Donating personal protective equipment (PPE) or other medical supplies that were purchased with Department grant funds.

OCTAE and USDE have been regularly updating this information and Advance CTE has passed this on to our membership through regular posts.

**Apprenticeship:** In March, the House Committee on Education and Labor shared a discussion draft for the reauthorization of the National Apprenticeship Act. Advance CTE provided feedback on this discussion draft to the Committee, and shared areas of support and dissent with Congressional offices, partner organizations and the Apprentice Forward Collaborative (AFC). Movement on this bill has halted due to Coronavirus. Advance CTE will also continue to monitor the new Industry Recognized Apprenticeship Program to ensure high-quality implementation and provide concerns as needed.

**Higher Education Act (HEA):** At the beginning of the year, it appeared as though there was gridlock in the Senate on a comprehensive HEA reauthorization bill, as an impasse was reached on the scope and content of a HEA reauthorization. The primary challenges that prevented further development included disagreements on changes to Title IX of HEA. However, by March negotiations between parties were ongoing and there was some hope that a comprehensive HEA reauthorization bill from the Senate might be introduced. The shifting priorities in response to Coronavirus has meant that a Senate-led reauthorization has little chance of being introduced in this session of Congress. Since January, in absence of significant Congressional movement, we have continued our outreach to national organizations that share our priorities for HEA.

**Elementary and Secondary Education Act (ESEA) / Every Student Succeeds Act (ESSA):** In March, Advance CTE joined the Title IV-A coalition in signing on to a letter calling for full funding of the Student Support and Academic Enrichment (SSAE) flexible block grant at a level of \$1.6 billion. This funding, the letter argues, would enable states and local school districts to support additional support services and programs, including CTE programs.

**Workforce Innovation and Opportunity Act (WIOA):** Initial conversations about WIOA reauthorization were expected to begin this summer. However, due to Coronavirus, legislative priorities have greatly shifted. It is anticipated that the economic downturn due to Coronavirus will shape WIOA reauthorization. Advance CTE will continue to monitor these implications, and advocate for the existing and newfound needs of the CTE community. See the WIOA Board update for more details.

**Board Action Required:** Discussion

**Discussion Questions:**

- Should Advance CTE develop a formal set of apprenticeship policy recommendations?
- As Advance CTE approaches its equity work, should we extend our federal policy reach to influence and inform broader wrap around supports, like TANF, SNAP, etc.?

**Workforce Innovation and Opportunity Act:  
Update on Advance CTE Policy Recommendations**  
*Report submitted by Meredith Hills, Policy Associate*

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Beginning in January, Advance CTE staff had conversations with partner organizations, such as JFF, National Skills Coalition, New America, National Governor’s Association and the National Association for State Workforce Agencies, to learn about implementation of the Workforce Innovation and Opportunity Act (WIOA) and discuss reauthorization. These meetings allowed staff to increase knowledge of WIOA, as well as share some of the implications for our membership with other organizations. In February, Advance CTE formed the WIOA Kitchen Cabinet, comprised of 20 members across 18 states. The Kitchen Cabinet convened by phone in February and March. These calls were opportunities for Advance CTE to learn more about successes, challenges and federal barriers in WIOA, and will inform the organization’s policy recommendations for reauthorization. The Kitchen Cabinet will convene every other month, guiding the content and scope of the recommendations. Thus far, the Kitchen Cabinet has identified four major priorities areas, which form the initial categories that the recommendations might fall under:

- **Systems Alignment:** State and local CTE leaders are an integral part of the workforce system, and often have direct contribution and interaction with the implementation of WIOA. Therefore, Perkins should be a more intentional partner throughout WIOA.
- **Youth Activities:** Feedback from the CTE community has consistently expressed that the split of funds between in-school and out-of-school youth is not effective. The split, as well as the additional programmatic supports necessary for high-quality implementation of WIOA must be re-examined.
- **Performance Indicators:** The existing data and accountability measures in WIOA do not appear to be as impactful as intended. The indicators of performance must be re-visited to reflect what “high-quality” should mean. From a systems alignment perspective, considerations should be given to alignment of indicators across WIOA and Perkins.
- **Definitions and Standards:** There are inconsistencies across states in WIOA implementation. Definitions, and program standards that are set through definitions, need to be relevant to the current workforce and education environment, as well as create a common standard across all states.

As a result of COVID-19, the originally planned timeline for the recommendations and WIOA Kitchen Cabinet has shifted. Instead of completing the recommendations in May with the cabinet concluding in June, recommendations will be completed in the fall of 2020. This will allow Advance CTE staff to understand what new needs this legislation must address as a result of the pandemic. The WIOA recommendations for reauthorization will therefore be a relevant document that is responsive to needs before and after COVID-19. Advance CTE is developing these recommendations in partnership with the Association for Career and Technical Education (ACTE), and ACTE is gathering input from their membership as well. A co-branded document will demonstrate that these policy priorities are representative of the CTE community.

**Board action required:** Discussion



**FY21 Elections and Nominations Committee Report**  
*Report prepared on behalf of Bernadette Howard, Nominations Committee Chair*

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The Nominations Committee was tasked with developing a slate of candidates for Secretary/Treasurer and two Regional Representatives (Regions B and E) positions.

The Nominations Committee is chaired by current Past President, Bernadette Howard, and included one Past President (Pradeep Kotamraju), the current Advance CTE/The Center to Advance CTE Vice President (Marcie Mack), former Advance CTE Board members (Eleni Papadakis and Lee Burket), and one Associate member (Sheila Ruhland).

As is the tradition, the Committee recommends that the Executive Committee move “up” one position, Marcie Mack to President, Heather Justice to Vice President and Sarah Heath to Past President.

A call for nominations was sent out to all State CTE Directors in early 2020, which included the nominations criteria and form. The following represent the nominations gathered and recommendations from the Nominations Committee:

**Secretary/Treasurer:**

1. Colleen McCabe, Wisconsin
2. Laura Scheibe, South Dakota
3. Barbara Wall, Georgia

Region B (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Puerto Rico, South Carolina, Tennessee, Virginia, West Virginia)

1. Steve Playl, Tennessee

Region E (Alaska, American Samoa, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Washington, Guam)

1. Cathie Raymond, Arizona

The Committee met and approved all candidates as being qualified to serve. All nominees were contacted and confirmed their interest in the Board positions. The vote for FY21 Board officers and representatives will take place virtually following the Business Meeting on May 21, 2020.

**Board action:**

Vote to approve the proposed FY21 slate of candidates, including succession of officers

**The National Career Clusters® Framework Revision**  
*Report Submitted by Meghan Wills, Director of Strategic Initiatives*

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Advance CTE is launching an effort to revisit The National Career Clusters Framework and consider potential updates to the Framework. Our upcoming effort to revisit and update the Framework builds on the work of Advance CTE's *Career Clusters Task Force*, which met in 2017 and provided recommendations and action steps for Advance CTE's revalidation of the Framework. The Framework has not been updated since the early 2000s, despite the evolution of our workforce and major changes to our occupational landscape, and Advance CTE recognizes the importance of ensuring that the Framework remains a relevant structure for Career Technical Education (CTE) programs. The objective of this effort is to ensure the Framework is a modern construct, reflective of the future of work, and adaptable to the current and emerging needs of learners and the workplace. Advance CTE is undertaking this project with assistance from Vivayic.

Advance CTE will develop a communications plan to engage state CTE leaders and other key stakeholders in providing input for the revision of the Framework. The communications plan will outline objectives, key messages and important considerations and will share a schedule of communications activities through December 2020. Advance CTE will share the draft communications plan with the Board to secure input and feedback.

To help us better understand members' needs related to the Framework, Advance CTE is convening a Career Clusters Kitchen Cabinet of up to six individuals representing state CTE systems who are fluent in CTE and the Framework as a whole. The Career Clusters Kitchen Cabinet will engage in monthly calls from May–November 2020. Members of the Kitchen Cabinet will be asked to share information on how their states currently use The National Career Clusters Framework; share input and informal guidance on potential updates to the Framework, as well as ideas they or their colleagues have regarding potential updates; and respond to occasional requests for interviews and information from Advance CTE staff. Advance CTE will use information gathered from the Career Clusters Kitchen Cabinet to inform its work to revisit and identify potential revisions to The National Career Clusters Framework.

The first phase of the project consists of research and information gathering. Advance CTE will conduct a research and literature review effort to learn more about how states, school districts, postsecondary institutions and other stakeholders currently use the Framework and how potential changes to the Framework may impact data collection and reporting to the U.S. Department of Education. In addition, Advance CTE will launch a web portal that will be used to gather input and feedback from the broad CTE community about the Framework. The web portal will gather feedback from a wide variety of Framework users about what they perceive the purpose of the Framework to be, how they use the Framework, and their thoughts about strengths and weaknesses of the current Framework. Information gathered through the web portal will supplement the research and literature review. Advance CTE will also engage State Directors in dialogue about their uses of the Framework during regional calls with State Directors in May or June 2020.

Once the research and information gathering phase is complete, Advance CTE will review all information, input and feedback and will determine next steps. Advance CTE's Board will be engaged in the decision about the purpose of the revised Framework and on how to move forward on a potential revision to or transformation of the Framework.

One option is to make small tweaks to the current structure of the Framework, if feedback from the field indicates that a full transformation of the Framework is untenable. If that emerges as the consensus path forward, Advance CTE would engage members in a consensus building process to identify the small revisions that would be needed to ensure the Framework is a modern construct, reflective of the future of work, and adaptable to the current and emerging needs of learners and the workplace.

Another option is to begin working toward a fully reimagined or transformed Framework. If this emerges as a viable path forward, Advance CTE would revise the web portal to serve as an online innovation portal that would engage users in a guided process to develop and submit innovative ideas for a fully reimagined or transformed Framework. Advance CTE would regularly review information submitted to the portal and seek clarity from submitters when needed if responses are vague or unclear. The online innovation portal would remain open until Advance CTE determines that a sufficient number of individuals representing a broad diversity of perspectives have provided feedback and submitted innovative proposals for a revised Framework.

The next step in development of a transformed Framework would include development of three - five prototypes of a transformed Framework. This work would start by identifying up to 24 promising submissions for innovative transformations of the Framework from the online innovation portal, conducting "pitch sessions" to a group of reviewers, and ultimately developing three to five prototypes of a revised Framework in response to feedback from State CTE Directors and state CTE leaders. Advance CTE would then engage in a robust consensus building process with State CTE Directors, state CTE leaders and other stakeholders to identify the best option among a small number of prototypes before moving forward.

It is likely that Advance CTE would begin sharing information with the field about a transformed Framework in mid-2021, with full implementation of a transformed Framework not taking place for several years to give the field ample time to make adjustments to CTE programs of study and data reporting systems.

**Board Action Required:** Discussion.