

Joint Meeting of the Advance CTE and The Center to Advance CTE Boards of Directors

April 18, 2022

3:30 – 4:30 p.m. ET

<https://us02web.zoom.us/j/86502699703?pwd=Nk1waVNpUzMzZ0YzOWIYMXR2THBRUT09>

3:30 – 3:32 p.m.	Welcome	Sarah Heath <i>Pages 1-5</i>
3:33 – 3:34 p.m.	Vote: Review and Approval of February 25, 2022 Minutes	Katie Graham <i>Pages 6-11</i>
3:35– 3:38 p.m.	Vote: FY23 Financial report	Katie Graham <i>Pages 12-33</i>
3:39 – 3:43 p.m.	Development Update	Kate Kreamer <i>Pages 34-40</i>
3:42 – 3:52 p.m.	Overview of New Strategy Template and Strategic Plan Progress <ul style="list-style-type: none"> ● Introduce new strategy document reports and relationship to strategic plan ● Overview of the strategic plan progress report 	Kimberly Green Kate Kreamer <i>Pages 41-49</i>
3:52 – 4:14 p.m.	Breakouts Discussions on New Strategies <i>Round 1: 3:52 - 4:02 p.m.</i> <ul style="list-style-type: none"> ● Communications Strategy ● State Policy Strategy ● Federal Advocacy Strategy <i>Round 2: 4:04- 4:14 p.m.</i> <ul style="list-style-type: none"> ● Membership Engagement Strategy ● Operations Strategy ● Equity Strategy Discussion questions: <ul style="list-style-type: none"> ● What clarifying questions do you have about the strategy? ● Does the new format of the strategy documents give the Board the right information with which to guide the work of the organization? ● Will the strategy ensure Advance CTE meets the members’ needs? 	Various <i>Pages 50-61</i>

	<ul style="list-style-type: none"> • Does the strategy focus on the right organizational priorities? • Anything missing? • Anything you would de-prioritize? 	
4:15 – 4:28 p.m.	<p>Full Board Discussion:</p> <ul style="list-style-type: none"> • Whip around share back from each strategy • Will the strategies collectively focus Advance CTE’s work on what is most important to attend to? • Will the strategies result in marked progress toward the theory of action? • What observations do you have about the strategic plan progress report? 	Sarah Heath
4:28 – 4:30 p.m.	<p>Closing remarks</p> <p>Next Board Gathering:</p> <ul style="list-style-type: none"> • In-Person Board Meeting/Stocktake – May 11 from 2 – 4 p.m. ET • Working to reschedule Board Equity Training! 	Sarah Heath

**ADVANCE CTE
BOARD OF DIRECTORS
FY 22**

President

Laura Scheibe
State CTE Director
South Dakota Department of Education
Division of Career & Technical Education
800 Governors Drive
Pierre, SD 57501
laura.scheibe@state.sd.us

Vice President

Laura Scheibe
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Secretary-Treasurer

Katie Graham
State CTE Director
Nebraska Department of Education
PO Box 94987
Lincoln, NE 68509
katie.graham@nebraska.gov

Past President

Sarah Heath
State CTE Director
Colorado Community College System
9101 E. Lowry Blvd
Denver, CO 80230
sarah.heath@cccs.edu

Region A

Luke Rhine
State CTE Director
Delaware Department of Education
Delaware CTE and STEM Office
401 Federal Street
Dover, DE 19901
luke.rhine@doe.k12.de.us
Term expires: June 30, 2022

Region B

David Horseman
State CTE Director
Kentucky Office of Career & Technical
Education
300 Sower Blvd, 5th Floor SW
Frankfort, KY 40601
david.horseman@education.ky.gov
Term expires: June 30, 2023

Region C

Colleen McCabe
State CTE Director
Wisconsin Technical College System
4622 University Avenue
Madison, WI 53705
colleen.mccabe@wtcsystem.edu
Term expires: June 30, 2022

Region D

Thalea Longhurst
State CTE Director
Utah State Board of Education
250 East 500 South
P.O. Box 144200
Salt Lake City, UT 84114
thalea.longhurst@schools.utah.gov
Term expires: June 30, 2024

**ADVANCE CTE
BOARD OF DIRECTORS
FY 22**

Region E

Cathie Raymond
State CTE Director
Arizona Department of Education
1535 West Jefferson, Bin 42
Phoenix, AZ 85007
cathie.raymond@azed.gov
Term expires: June 30, 2023

At-Large State Director

Dr. Michelle Aldrich
State CTE Director
Wyoming Department of Education
122 West 25th Street, Suite 200
Cheyenne, WY 82002
michelle.aldrich@wyo.gov
Term expires: June 30, 2024

At-Large State Director

Vacant
Term expires: June 30, 2022

State Associate Representative

Victoria Crownover
Perkins Plan Manager
Colorado Community College System
9101 E. Lowry Blvd
Denver, CO 80230
victoria.crownover@cccs.edu
Term expires: June 30, 2022

Associate Member Representative

Donna Lewelling
Deputy Director, Office of Community Colleges
and Workforce Development
Oregon Higher Education Coordinating
Commission
3225 25th Street SE
Salem, Oregon 97302
Donna.j.lewelling@hecc.oregon.gov
Term expires: June 30, 2023

**THE CENTER to ADVANCE CTE
BOARD OF DIRECTORS
FY 22**

President

Ms. Laura Scheibe
State CTE Director
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800 Governors Drive
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laura.scheibe@state.sd.us

Vice President

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Secretary-Treasurer

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Past President

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State CTE Director
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The Center Public Board Members:

Dr. Nicole Smith
Research Professor and Chief Economist
McCourt School of Public Policy
Georgetown University Center
2115 Wisconsin Avenue, NW, Office G213
Washington, DC 20007
nicole.smith@georgetown.edu
Term: July 1, 2021 – June 30, 2024

Alex Harris
Vice President of Programs
Harold K.L. Castle Foundation
1197 Auloa Road
Kailua, HI 96734
aharris@castlefoundation.org
Term: July 1, 2020 – June 30, 2023

Wendi Safstrom
Executive Director
SHRM Foundation
1800 Duke Street
Alexandria, VA 22314
Wendi.Safstrom@shrm.org
Term: July 1, 2019 – June 30, 2022

Joint Advance CTE/The Center to Advance CTE Board of Directors' Meeting
MINUTES
February 25, 2022
Zoom call

BOARD ATTENDEES: Marcie Mack, Sarah Heath, Laura Scheibe, Thalea Longhurst, Victoria Crownover, Katie Graham, Tiara Booker-Dwyer, Luke Rhine, David Horseman, Colleen McCabe, Cathie Raymond, Michelle Aldrich, Nicole Smith, Alex Harris, Wendi Safstrom

NOT PRESENT: Donna Lewelling

STAFF: Kimberly Green, Kate Kreamer, Krissy Haynes, Tunisha Hobson, Steve McFarland, Candace Williams, Haley Wing, Steve Voytek, Tanya Powers

Welcome and Introductions of New Advance CTE Staff: Mack called the meeting to order at 2:03 p.m. ET, welcoming everyone to the meeting. New Advance CTE staff introduced themselves sharing the main projects they work on. Candace Williams, Senior Research Associate works on the Postsecondary Data Initiative, State CTE Funding, and a *New Skills ready network* shared solutions workgroup on Credit for Prior Learning. Haley Wing, Senior Policy Associate, works on the *New Skills ready network*, CTE Without Borders, and the Equity Index projects. Allie Pearce, Graduate Fellow, works on various projects focused on stimulus funding and equity. Steve Voytek, Policy Advisor, works on federal policy and advocacy. Steve McFarland, Director of Communications and Membership, will be leading our membership and communications strategies.

Graham asked for approval of minutes from January 26, 2022, as presented.

MOTION: To approve the Joint Advance CTE/The Center to Advance CTE minutes from January 26, 2022, as presented.
Heath; Raymond
MOTION APPROVED.

Board Vacancies: Mack announced her resignation. Based on the discussion from the Board Officers, a proposal was presented to the Board recommending that Scheibe serve out the term for the President position through June 30, 2022.

MOTION: To appoint Laura Scheibe to serve as the Vice President and President, filling the balance of the vacated term.
Heath; McCabe.
MOTION APPROVED.

Board Appointments (At-Large State Director): Mack noted Tiara Booker-Dwyer announced her resignation. Based on discussion and input from the Executive Committee, a proposal to the Board was presented to appoint Michelle Aldrich with the Wyoming Department of Education to serve out the term for the At-Large State Director position, which ends on June 30, 2024.

MOTION: To appoint Michelle Aldrich to serve as the At-Large State Director Board Representative until June 30, 2024, filling the balance of the vacated term. Graham; Scheibe.
MOTION APPROVED.

Review & Approval of Associate Member Board Policy: Kreamer shared that in 2017, The Board of Directors and Advance CTE membership voted to approve a new Board governance structure, which added a second associate member representative to the Board. The Advance CTE Board of Directors now includes a State Associate Member Representative and an Associate Member Representative to better reflect the variety of state leaders who comprise Advance CTE’s membership. As part of that change, Advance CTE updated the nominations and elections for the officers, regional representations, and At-Large State Director Representatives, as approved by the Board of Directors, but did not update the process for nominating and electing the two associate member representatives. Kreamer noted that during the last election of the Associate Member Representative, which is open to both associate state and associate non-state members, several nominations from several non-state associate members who are retired and/or serve in consulting roles, representing a conflict of interest were received. Advance CTE staff made individual outreach asking those individuals to remove themselves from the running based on concerns but believe a more formal approach going forward was needed. Kreamer proposed updating the “Process for Selecting Associate Board Members” policy to clarify that the “associate member representative” must be someone currently employed by a state agency or local educational institution.

Mack asked for approval of the proposed update and clarification of the Process for Selecting Associate Board Members, as presented.

MOTION: To approve the proposed updates to the Associate Member Board Policy, as presented. Raymond; Longhurst.
MOTION APPROVED.

Review & Approval of the ACTE Board Liaison Policy: Haynes shared that the ACTE Board Liaison Policy was created in September 1998 and currently states that the Immediate Past President of Advance CTE serve as the liaison to ACTE. On October 16, 2017, the Board approved moving the responsibility to the Vice President. This was updated in the Commitments & Responsibilities of Executive Committee Members Policy but was not updated in the ACTE Board Liaison Policy. The proposed change would update the ACTE liaison to be the Vice President, bringing it in line with the Board approved change from October 2017.

Mack asked for approval of the revision to the ACTE Board Liaison Policy, as presented.

**MOTION: To approve the revision to the ACTE Board Liaison Policy, as presented.
Heath; Aldrich.
MOTION APPROVED.**

Review & Approval of the updates to the Financial Policy: Haynes shared that the process for sending and collecting State Membership and Associate Member dues had changed over the past several years. The proposed changes update the Financial Policy to be in line with the current process. For State Membership dues, the State CTE Directors receive a dues intent form in March each year. The form asks them to indicate their intent to renew, the state by which they will pay dues and the source of payment. States are given the option to pay dues by July 1, September 15 or October 15. Previously all dues were required by July 1. Due to the expanded date range to receive dues, reminders no longer occur only on July 15 and August 15. They are now sent 15, 45 and 60 days past the due date. For Associate Membership Dues, Associate Members are not sent a dues intent form, but are instead sent a renewal invoice in May of each year. Associate Members that have not paid by July 15 receive an email request asking them the status of their payment as well as their intent to renew. Associate Members that have not paid and have not responded to email requests, now have their renewal canceled on August 1. It was also proposed to change the name of the policy to Membership Dues Renewal to clearly identify the policy.

Mack asked for approval of the revisions to the Financial Policy, as presented.

**MOTION: To approve the revisions to the Financial Policy, as presented.
Crownover; Raymond.
MOTION APPROVED.**

Review & Approve the Sunset Board Policies: Haynes stated that the organization was working on improving its internal operations processes. As part of the improvement, the Board Policy Manual will be reviewed annually to ensure that all the policies are maintained and up to date. The first review of the Board Policy Manual was completed in January 2022. During the review, there were several policies identified that were no longer applicable or in use. Haynes proposed sunsetting the following policies:

Advance CTE Board Policy Manual:

- Board Election Policy (1998) – this policy is included in the Nomination and Election Process (2017)
- Board member Vacancy Policy (1998) – this policy was changed and is now included in the bylaws that were approved in 2017
- Putting Learner Success First (2016) – this has been replaced with the new CTE Without Limits vision

The Center to Advance CTE Board Policy Manual: The below policies are all policies that were implemented with the Career Clusters® rollout. These programs and policies are no longer in use.

- CCTC Declaration of Support (2011)

- CCTC Planning Engagement (2010)
- Cluster Leader Conflict of Interest Policy (2008)
- Cluster Leader Policy Changes (2007)
- Cluster Leader Policy Statement (2008)
- Cluster Leader Policy Guiding the Revision Changes (2008)
- Knowledge & Skills - State Use Policy (2006)
- Liaisons to NCTEF Board of Directors (2008)
- NAC Guidelines for National Advisory Committee Membership (2009)
- Partnerships & Future Projects (2008)
- Registration of Knowledge & Skills Statements (2008)
- (Career Clusters) Task Force Committee Policy & Mission Statement (2009)

Mack asked for approval of the Sunset of Board Policies proposal, as presented.

**MOTION: To approve the proposed Sunset of Board Policies, as presented.
Scheibe; Raymond.
MOTION APPROVED.**

Center to Advance CTE FY22 Budget Modification: Kreamer shared that The Center to Advance CTE was requesting a budget modification of an additional \$474,570 to accommodate several new grants and contracts that have been secured since fall 2021. These included new grants from the Walton Family Foundation, Joyce Foundation and Annie E. Casey Foundation and subgrants from JFF (to support phase 1 of “Systems2Stimulus,” a multi-funder, multiparter initiative) and College in High School Alliance (CHSA) through the Bill & Melinda Gates Foundation. Kreamer noted that the Annie E. Casey grant was also in support of the Systems2Stimulus initiative, but for phase 2, which will launch in April 2022. The organization received that grant on behalf of the initiative’s partners.

Mack asked for approval of the proposed Center to Advance CTE FY22 Budget Modification, as presented.

**MOTION: To approve the proposed Center to Advance CTE FY22 Budget Modification, as presented.
McCabe; Aldrich.
MOTION APPROVED.**

Advance CTE State Leaders Retreat Update: Haynes provided an update to the Advance CTE State Leaders Retreat. She noted that registration would launch on Wednesday, March 2, 2022. Haynes shared that initial registration rates were determined by the estimated costs of the hotel contract and pricing. However, the redesign of the agenda for the Spring State Leaders Retreat included more meals than originally planned for, hotel pricing had increased for food and beverage and additional audio visual and meeting room rental fees will be incurred due to the additional space required to have a safe and socially distanced in-person meeting. Haynes shared that the actual cost per attendee for just the in-person event was \$1,105. In addition, there was an extra cost of the virtual event, which was \$125 per attendee. Therefore, the combined registration

for the two events would be \$1,230. These rates were determined based on the estimated direct costs of the meetings and do not include covering any indirect costs, salaries, or benefits. However, Advance CTE recommended to subsidize the State Director and one member registration for the combined events, holding the registration at \$650. This would be accomplished by redirecting funds previously approved for the Excellence in Action awards (which has been postponed due to staff capacity), which will be covered by the interest income and other income received. The total amount subsidized per member registration is \$580 for a total estimated cost of \$46,400. Haynes noted that Green approved the modification, but the organization wanted the Board to be aware that the modification was made, and it was an important member benefit.

WIOA Recommendations: Voytek explained that since 2020 the Workforce Innovation and Opportunity Act (WIOA) has been due for reauthorization. WIOA was last updated in 2014 to better support workforce development activities, fund job training programs for eligible individuals, and to align the nation's workforce development investments more closely. Voytek shared that Advance CTE was aware of and anticipated initial Congressional efforts to reauthorize this law in the early part of 2022 but does not believe this will culminate in a full reauthorization prior to the end of the 117th Congress. Reauthorization will be informed by the current realities facing our nation's workforce and the urgent need to attend to equity, specifically racial equity, as we upskill and reskill millions of Americans in the post-pandemic economy. To achieve these and other organizational federal policy objectives, Advance CTE has undertaken a revision of its existing WIOA recommendations in recent months to ensure the organization's key messages resonate with Congress. Voytek shared an overview of the major changes:

- One-stop Infrastructure Requirements: Clarifying the organization's position on the one-stop infrastructure funding requirement. This includes calling for the elimination of compulsory one-stop partner contributions to the costs of physical infrastructure, the creation of new dedicated funding for this purpose, and, in exchange, stronger coordination and alignment requirements for one-stop partner programs. Language has also been included to support, with the appropriate guardrails, allowing for the virtualization of one-stop centers in limited circumstances.
- Comprehensive Local Needs Assessment for Youth Funding: Recommending the use of a comprehensive local needs assessment, modeled off of Perkins V's language, to drive state and local decision-making for determining the split of youth funding for out-of-school and in school-youth.
- Dedicated Resources for Career Pathways: Calling for dedicated funding for state and local implementation of career pathways and related systems. Advance CTE further recommends language that would require these resources to complement CTE program of study implementation to avoid duplication of efforts and to increase alignment across systems.

Aldrich thanked Voytek for his work. She shared that she sits on the Workforce Development Council that oversees the WIOA funds for Wyoming. Aldrich said that the lack of guidelines can be difficult, and she thinks that any input and/or guidance provided is important and appreciated. Rhine agreed with the direction in the split of youth funding but recommended giving states

greater flexibility in determining the split between in-school and out-of-school funding versus CLNA. Rhine also suggested states having strong systems in place for combined state plans. Horseman agreed with Rhine regarding the flexibility with split funding. Raymond shared that ensuring locals have workforce boards on their CLNA committees will help. She said there was a disconnect between the two. She said she wasn't sure that she would go for a combined plan but would like to work together better. Aldrich would like to see flexibility in the ability to combine plans. Raymond, Mack, McCabe, and Longhurst agreed, the combined plan may not work for each state. Everyone agreed that there was a need for clearer guidance from the government on how combined state plans should work.

Green recommended to take the feedback received and revise the proposed WIOA recommendations. Then revisions would be sent to the Board for an electronic vote.

Organizational Updates: Mack asked the Board to go into Executive Session to discuss organization updates.

**MOTION: To go into Executive Session.
Heath; Raymond.
MOTION APPROVED.**

**MOTION: To end the Executive Session.
Horseman; Scheibe.
MOTION APPROVED.**

Mack adjourned the meeting at 3:15 p.m. ET.

An electronic vote is being recorded on March 18, 2022.

**MOTION 1: To approve the proposed FY23 proposed slate of candidates, including the modified succession of officers, as presented.
By a vote of 11 in favor, the motion was approved.**

**MOTION 2: To approve the proposed revisions to the WIOA Recommendations, as presented.
By a vote of 10 in favor and 1 opposed, the motion was approved.**

FY22 Advance CTE Financial Report
Report prepared by Krissy Haynes, Finance & Operations Manager

This report provides summary financial information for July 1, 2021 through February 28, 2022 or 66% of the fiscal year. The accountant has reconciled the financial statements through January 31, 2022, which means investments are reflected through this date.

INCOME: Advance CTE has received 91 percent of its budgeted income. 97 percent of state membership income has been received. State dues have been received from 53 states, with the remaining two state dues payments expected in the next month. Registration for the Spring State Leadership Retreat opened on March 4 and the June Meeting Series registration will open later this month, so income is expected to be received for these two events starting in March.

EXPENSES: Advance CTE has spent 44.7 percent of its budgeted expenses, which is below projections. The member services budget is below target as the organization was expected to complete a full rebuild of the website this fiscal year, but that work was delayed due to contract negotiations and will be starting this month and is expected to be completed in October. The member supports budget is below target as the New State Director in-person meeting has been cancelled due to staff turnover and new State Director participation. G&A expenses are slightly above target as investment fees are higher than anticipated. The expenses incurred thus far are operational expenses, publications and subscriptions, salaries and benefits and consulting costs. Expenses are expected to increase in the last quarter due to the in-person Spring State Leadership Retreat and Board Meeting.

Additional details regarding income and expenses can be found in the Explanatory Notes section of the accompanying budget.

ASSETS: Assets total \$5,754,322.15, with equity at \$5,265,406.87.

INVESTMENTS: The report from the Merrill Lynch advisor recommends reviewing the short-term needs for cash and add any excess to dividend oriented stocks. The portfolio has a -0.32% rate of return for FY22, with the equity portion at 1.45%, which is higher than the Dow Jones Index (-1.77%) and a little lower than the S & P 500 (1.78%).

Board action required: Approve FY22 financial reports.

FY22 Advance CTE Budget

	APPROVED FY22	Actuals as of 2/28/22	Actuals to Budget 66% of fiscal year	Explanatory Notes
INCOME				
State Memberships	\$561,749.00	\$544,582.00	96.9%	Received dues from 53 states. Dues still expected from Tennessee and California.
Associate & Organizational Memberships	\$81,175.00	\$78,650.00	96.9%	Associate memberships are below target due to increased number of job changes and retirements at the end of last fiscal year.
Spring meeting registration	\$70,750.00	\$0.00	0.0%	Registration opened in March 2022.
Fall meeting registration	\$50,000.00	\$61,256.00	122.5%	
Fall meeting sponsorships	\$32,160.00	\$35,000.00	108.8%	
UMass	\$8,500.00	\$3,000.00	35.3%	Second quarter payment was delayed and is expected in April 2022.
Interest/Dividend	\$50,000.00	\$46,997.95	94.0%	Interest through January 31, 2022.
Other income	\$26,000.00	\$30,500.39	117.3%	Small contract from Citizens and Scholars, Rand, and carried forward Wonder Strategies contract income to cover FY22 expenses.
TOTAL REVENUES	\$880,334.00	\$799,986.34	90.9%	
EXPENSES				
Allocated Expenses to Specific Projects				
Member Services	\$43,589.19	\$7,804.13	17.9%	Below budget due to the delay in the website rebuild. Expenses include consultants and operational expenses.
Member Supports	\$24,554.90	\$9,702.90	39.5%	Below budget due to the in-person New State Director Meeting being cancelled due to staff turnover and low new State Director participation. Expenses include finance and operations support as well as planning day meals for 1 staff member.
Government Relations	\$74,490.69	\$49,690.84	66.7%	On track. Expenses include Politico Pro subscription and federal policy consultant support.
Lobbying	\$2,345.00	\$570.00	24.3%	Below budget due to no local travel.
Fall Meeting	\$82,160.00	\$72,290.82	88.0%	Below budget due to creating the branding in house. Expenses for the Fall Meeting included production and event planning support.
Spring Meeting	\$91,115.00	\$4,070.00	4.5%	On track as planning kicked off in January. Expenses include salaries and benefits for the planning of the State Leadership Retreat.
Advance CTE Board	\$36,149.02	\$4,194.69	11.6%	On track. Majority of expenses will occur during the in-person Board Meeting in late FY22. Expenses include audit, insurance and President's gavel.
UMass	\$3,022.00	\$1,439.95	47.6%	On track. Expenses include staff time.
Subtotal - Specific Projects	\$357,425.80	\$149,763.33	42%	
Staffing & General & Administrative Expenses				
Non-contract Staff Time	\$436,575.00	\$181,748.93	41.6%	Below budget due to staff turnover. Expenses include staff time for Member Services, Member Supports, Government Relations, Lobbying, Communications, Fall Meeting, and Board. ¹³

Total G&A Expenses (excluding staff time)	\$72,503.20	\$55,778.32	76.9%	Above target as investment fees are higher than anticipated.
Total G&A Expenses	\$509,078.20	\$237,527.25	46.7%	
Total Project Expenses	\$357,425.80	\$149,763.33	41.9%	
TOTAL EXPENSES	\$866,504.00	\$387,290.58	44.7%	
INCOME LESS EXPENSES	\$13,830.00	\$412,695.76		

**Advance CTE
Balance Sheet
As of February 28, 2022**

	Total
ASSETS	
Current Assets	
Bank Accounts	
1012 Cash-BOA Checking-Use This	358,066.39
1017 Merrill Lynch Cash - 749	274,834.64
1018 Merrill Lynch Cash - 7WD	67,353.77
Total Bank Accounts	\$ 700,254.80
Accounts Receivable	
1200 Accounts Receivable	45,072.91
Total Accounts Receivable	\$ 45,072.91
Other Current Assets	
1100 Investments	
1131 Government Bonds	932,147.83
1159 Equities	3,939,319.22
1299 Accrued Interest Receivable	2,357.39
Total 1100 Investments	\$ 4,873,824.44
1275 Security Deposit	9,000.00
1280 Due from Foundation	111,518.60
1300 Prepaid Expense	9,069.58
1499 Undeposited Funds	800.00
Total Other Current Assets	\$ 5,004,212.62
Total Current Assets	\$ 5,749,540.33
Other Assets	
1400 Furniture and Fixtures	33,200.78
1405 Accumulated Depreciation - Furniture and Fixtures	-29,112.43
1410 Equipment	10,697.65
1450 Accumulated Depreciation- Equipment	-10,004.18
Total Other Assets	\$ 4,781.82
TOTAL ASSETS	\$ 5,754,322.15
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 Accounts Payable {105}	-1,212.78
Total Accounts Payable	-\$ 1,212.78
Other Current Liabilities	
2070 Accrued Vacation	102,210.32
2099 Deferred Revenue	7,679.00
2152 Deferred Revenue FY22 State Dues	193,736.00
2153 Deferred Revenue FY22 Associate Dues	25,280.00
Total 2099 Deferred Revenue	\$ 226,695.00
2102 Payroll Liabilities	264.30

Total Other Current Liabilities	\$ 329,169.62
Total Current Liabilities	\$ 327,956.84
Long-Term Liabilities	
2880 Deferred Rent and lease incentive	160,958.44
Total Long-Term Liabilities	\$ 160,958.44
Total Liabilities	\$ 488,915.28
Equity	
3000 Net Assets Without Donor Restrictions	3,677,148.59
3005 Net Assets With Donor Restrictions	25,000.00
3900 Earnings	1,261,116.42
Net Revenue	302,141.86
Total Equity	\$ 5,265,406.87
TOTAL LIABILITIES AND EQUITY	\$ 5,754,322.15

Advance CTE/The Center to Advance CTE Executive Investment Recommendation Summary March 2022

It has been almost two years since the world was shaken by a deadly and unpredictable virus. The stock market at one point in 2020 was down more than 34%. By the end of the year the market was up double digits. Many investors without guidance sold on the fear factor and then went on to watch a significant recovery. This recovery was helped by the environment of very low interest rates.

What a big difference time and a few trillion dollars of stimulus makes in the markets. The combined returns for the Association and foundation for year-end 2021 were up about 16%. Over the last three years the Association and Foundation accounts are up a total of about 48%. Currently the markets are down due to international and domestic issues. Both the Association and foundation accounts are over-weighted in defensive sectors and have performed better than the general market, but are still down for this year. We have also seen interest rates rise with the anticipation that this trend will continue this year.

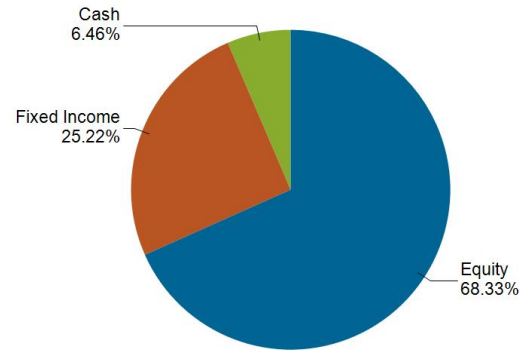
Due to this high return of stocks we recently recommended changing the investment policy statement to allow for a wider range of stocks. This was recently approved by the board. Currently the combined Association and Foundation stock holdings are about 60%. This is well within the revised range. Due to some recent deposits the cash levels for the Foundation and Association are particularly high. With money market rates very low (currently less than 0.3%) it is advisable to review the short-term needs for cash and perhaps add any excess to dividend oriented stocks. It is also important to note that interest rates are expected to rise in 2022 due to inflation concerns. Bonds move inversely with interest rates so adding to bonds later this year could also be a good option. As rates rise we would adjust back to more fixed income exposure.

Summary of recommended changes:

The above changes are intended to improve long-term performance and increase income from fixed income investments. Certain sectors of the market are recommended to be over-weighted also to improve long-term performance. These are sectors that tend to perform well during a difficult economic environment and tend to lead the market when things improve.

No direct costs are associated with making these changes.

Asset Allocation: February 28, 2022



Asset Class	Market Value (\$)	% of Total
Equity	3,491,566	68.33
Fixed Income	1,288,609	25.22
Cash	330,014	6.46
Subtotal	5,110,189	100.00
Total	5,110,189	

Advance CTE
Advisory Program Fees
July 1, 2021 - February, 2022

ASSOCIATION 7WD-04H50

Trade/Transaction Date	Description	Amount
7/6/2021	Advisory Program Fee INV. ADVISORY FEE JUL	\$ 874.94
8/3/2021	Advisory Program Fee INV. ADVISORY FEE AUG	\$ 883.18
9/2/2021	Advisory Program Fee INV. ADVISORY FEE SEP	\$ 879.95
10/4/2021	Advisory Program Fee INV. ADVISORY FEE OCT	\$ 873.26
11/2/2021	Advisory Program Fee INV. ADVISORY FEE NOV	\$ 872.60
12/2/2021	Advisory Program Fee INV. ADVISORY FEE DEC	\$ 875.83
1/4/2022	Advisory Program Fee INV. ADVISORY FEE JAN	\$ 871.77
2/2/2022	Advisory Program Fee INV. ADVISORY FEE FEB	\$ 857.90
Total		\$ 6,989.43

ASSOCIATION 749-04H01

7/6/2021	Advisory Program Fee INV. ADVISORY FEE JUL	\$ 3,129.59
8/3/2021	Advisory Program Fee INV. ADVISORY FEE AUG	\$ 3,195.49
9/2/2021	Advisory Program Fee INV. ADVISORY FEE SEP	\$ 3,265.14
10/4/2021	Advisory Program Fee INV. ADVISORY FEE OCT	\$ 3,403.66
11/2/2021	Advisory Program Fee INV. ADVISORY FEE NOV	\$ 3,594.84
12/2/2021	Advisory Program Fee INV. ADVISORY FEE DEC	\$ 3,554.27
1/4/2022	Advisory Program Fee INV. ADVISORY FEE JAN	\$ 3,698.04
2/2/2022	Advisory Program Fee INV. ADVISORY FEE FEB	\$ 3,511.79
Total		\$ 27,352.82

Total Fees All Accounts	\$	34,342.25
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Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2021 to 02/28/2022

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2022	5,456,689	0	5,750	(352,250)	5,110,189	(6.35)	(0.32)
2021	4,778,100	350,000	56,671	271,918	5,456,689	6.44	6.44
Total	4,778,100	350,000	62,421	(80,332)	5,110,189		(0.32)

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 services. Past performance does not guarantee future results.

Relative Performance - Equity: Yearly

Performance period: 07/01/2021 to 02/28/2022

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
2022	(7.97)	1.45	(6.73)	(1.77)	(6.43)	(0.54)	(4.83)	(13.67)	(5.90)	(3.58)	(8.23)	1.78	(8.01)	2.72
US Equity	(7.97)	1.45												
2021	10.24	10.24	5.32	5.32	6.29	6.29	(9.30)	(9.30)	2.46	2.46	10.91	10.91	11.67	11.67
US Equity	10.24	10.24												

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 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.

FY22 The Center to Advance CTE Financial Report
Report prepared by Krissy Haynes, Finance & Operations Manager

This report provides summary financial information for July 1 through February 28, 2022 or 66% of the fiscal year. The accountant has reconciled the financial statements through January 31, 2022, which means investments are reflected through this date.

INCOME: The Center to Advance CTE has received 90 percent of its budgeted income. All remaining funding is expected to be received. The ECMC Fellows payment is delayed as the organization must spend at least eighty percent of the initial payment before the second payment can be received. The project timeline shifted earlier this fiscal year, so the second payment is expected later this fiscal year. Due to recent world events, the stock market is on the decline so the interest and dividends for the year may also fall below target.

EXPENSES: The Center to Advance CTE has spent only 39 percent of its budgeted expenses. The organization has continued to endure some employee turnover this year, which has caused salaries and benefits to be below budget for many of the grants. While two employees have departed since January, we have hired five incredible employees since January. The new hires include a Director of Communications and Membership, two Senior Policy Associates and two Policy Associates. A majority of expenses incurred thus far are operational expenses, publications and subscriptions, salaries and benefits and consulting costs. We will see an increase in spending in the Spring as in-person meetings start to occur and staffing levels increase.

Additional details regarding income and expenses can be found in the Explanatory Notes section of the accompanying budget.

ASSETS: Assets total \$4,683,364.61, with equity at \$4,463,166.65.

INVESTMENTS: The report from the Merrill Lynch advisor recommends reviewing the short-term needs for cash and add any excess to dividend oriented stocks. The portfolio has an 1.86% rate of return for FY22, with the equity portion at 3.73%, which is higher than the Dow Jones Index (-1.77%) and the S & P 500 (1.78%).

Board action required: Approve FY22 financial reports.

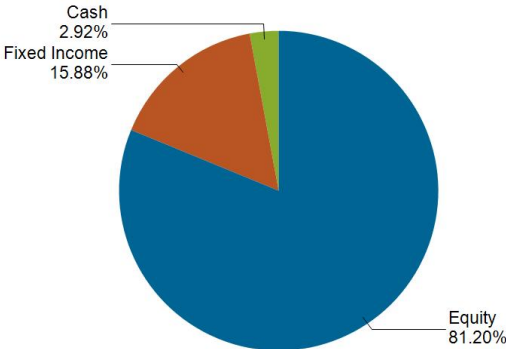
FY22 The Center to Advance CTE Budget				
	APPROVED FY22	Actuals as of 2/28/22	Actuals to Budget 66% of fiscal year	Explanatory Notes
Income				
Annie E. Casey	\$200,000.00	\$200,000.00	100.0%	
PAYA	\$113,566.49	\$113,566.49	100.0%	Grant ended on January 31, 2022. Another contract extension is expected.
Gates 3.0	\$374,050.00	\$374,050.00	100.0%	
Joyce 2.0	\$102,678.65	\$102,678.65	100.0%	Grant ends on March 31, 2022.
Joyce 3.0	\$71,850.00	\$71,850.00	100.0%	
NSFY Innovation	\$42,784.62	\$42,784.62	100.0%	Grant ends March 31, 2022.
New Skills (JPMC)	\$1,025,497.15	\$1,025,497.15	100.0%	
ECMC	\$264,700.01	\$264,700.01	100.0%	Carried over \$138,396.91 and received an additional \$310,000 in January. Recognizing a total of \$264,700.01 to cover FY22 expenses.
ECMC Fellows	\$456,720.00	\$375,836.80	82.3%	The second payment of \$429,000 is expected once 80 percent of the year one payment has been achieved.
Siemens 3.0	\$417,893.14	\$277,033.14	66.3%	Receiving final payment of \$140,860 in March 2022.
CHSA-ECMC	\$15,167.00	\$15,167.00	100.0%	
CHSA-Gates	\$4,651.46	\$4,651.46	100.0%	Grant ended on October 31, 2021.
CHSA-Gates 2	\$7,500.00	\$7,500.00	100.0%	
CHSA-Joyce	\$40,301.00	\$40,301.00	100.0%	
JFF Stimulus	\$65,000.00	\$65,000.00	100.0%	Grant ends on March 31, 2022.
Walton (WFF)	\$130,220.00	\$130,220.00	100.0%	
Other Income	\$0.00	\$426.75	n/a	Profit share from NOCTI.
Interest/Dividend	\$40,000.00	\$28,586.70	71.5%	Interest earned through January 2022.
Reserve Withdraw to balance budget	\$119,160.00	\$0.00	0.0%	No reserves have been withdrawn to date as interest is able to cover all Board and Development expenses and all Career Cluster-related expenses have been covered by the Gates grant.
Total	\$3,491,739.52	\$3,139,849.77	89.9%	
EXPENSES				
Allocated Expenses to Specific Projects				
Career Clusters	\$70,000.00	\$0.00	0.0%	No expenses to date as the Gates grant has covered the expenses.
Annie E. Casey	\$200,000.00	\$0.00	0.0%	No expenses to date. Work begins Spring 2022.
PAYA Expenses	\$113,566.49	\$15,594.64	13.7%	Below budget due to staff turnover resulting than lower than expected salaries and benefits spent on grant. Expenses for grant will increase in the Spring. Expect grant to be extended in order to spend down remaining funds. Expenses include staff salaries and benefits and overhead.
Gates 3.0 Expenses	\$374,050.00	\$167,673.16	44.8%	On track. Expenses include salary and benefits, Career Clusters, consulting, rent and overhead.
NSFY Innovation Expenses	\$42,784.62	\$42,600.52	99.6%	On track. Grant received no-cost extension through March to allow time to spend down remaining funds. Expenses include staff time and resource development.

New Skills Expenses	\$1,025,497.15	\$384,163.31	37.5%	On track as expenses will increase in the spring with travel and the website update beginning. Expenses include staff costs, finance and operations support, rent and overhead.
Joyce 2.0 Expenses	\$102,678.65	\$98,084.97	95.5%	On track. Grant received no-cost extension through March to allow for states to complete work and all stipends to be issued. Expenses include staff time, stipends, equity SSWG support, and a proportion of rent. Grant ends on March 31.
Joyce 3.0 Expenses	\$71,850.00	\$1,300.46	1.8%	On track. Grant started January 1. Expenses include salaries and benefits.
ECMC Expenses	\$264,700.01	\$97,844.64	37.0%	On track as expenses increase in Spring with state grants and travel starting and release of final state subgrants. Expenses include staff time, state subgrants, contractors and overhead.
ECMC Fellows Expenses	\$456,720.00	\$161,107.68	35.3%	Below budget due to an intentional shift in the timeline for the project, delayed start of cohort one to give a longer runway for the development of robust marketing and curriculum. Remaining funds will rollover into next years budget. Expenses include staff time, strategic advising, application portal, finance and operations support and overhead.
Siemens 3.0 Expenses	\$417,893.14	\$272,055.75	65.1%	On track. Expenses include staff time, Constant Contact annual subscription and overhead.
CHSA-ECMC	\$15,167.00	\$3,293.92	21.7%	Below budget due to staff turnover resulting in lower than expected salaries and benefits spent on grant.
CHSA-Gates	\$4,651.46	\$4,651.46	100.0%	Grant ended on budget.
CHSA-Gates 2	\$7,500.00	\$47.56	0.6%	On track. Grant began in January 2022. Expenses include salaries and benefits.
CHSA-Joyce	\$40,301.00	\$20,879.29	51.8%	On track. Expenses include staff time and CHSA Steering Committee dues.
JFF Stimulus	\$65,000.00	\$43,073.63	66.3%	On track. Expenses include staff time and travel.
Walton (WFF)	\$130,220.00	\$26,808.89	20.6%	On track. Expenses include staff time and consultant support of roundtables and funding research.
Development	\$12,200.00	\$987.90	8.1%	While the majority of expenses occur in the Spring 2022, we will likely be underspent in this category due to limited travel.
Board expenses	\$28,960.00	\$10,327.98	35.7%	On track as majority of expenses occur in the Spring 2022.
Project-based internal staff time and benefits	\$46,800.00	\$11,990.24	25.6%	Internal staff time and benefits to support development and Board.
Subtotal for Specific Projects	\$3,490,539.52	\$1,362,486.00	39.0%	
General & Administrative Expenses				
Direct staff and benefits	\$1,200.00	\$908.29	75.7%	G&A staff time and benefits.
G&A Expenses	n/a	\$0.00	n/a	
Total G&A expenses	\$1,200.00	\$908.29	75.7%	
Total project expenses	\$3,490,539.52	\$1,362,486.00	39.0%	
TOTAL EXPENSES	\$3,491,739.52	\$1,363,394.29	39.0%	
INCOME LESS EXPENSES	\$0.00	\$1,776,455.48		

The Center to Advance CTE
Balance Sheet
As of February 28, 2022

	Total
ASSETS	
Current Assets	
Bank Accounts	
1010 Cash - Bank of America	1,543,074.71
1017 Cash - Merrill Lynch	50,711.22
1018 Cash - Merrill Lynch# 03248	31,959.70
Total Bank Accounts	\$ 1,625,745.63
Other Current Assets	
1050 Mutual Funds	3,045,973.20
1350 Prepaid expense	383.64
Total Other Current Assets	\$ 3,046,356.84
Total Current Assets	\$ 4,672,102.47
Fixed Assets	
1100 Furniture	19,885.35
1101 Accumulated Depreciation-Furniture	-14,563.19
1120 Equipment	56,673.31
1121 Accumulated Depreciation-Equipment	-50,733.33
Total Fixed Assets	\$ 11,262.14
TOTAL ASSETS	\$ 4,683,364.61
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 *Accounts Payable	220,197.96
Total Accounts Payable	\$ 220,197.96
Total Current Liabilities	\$ 220,197.96
Total Liabilities	\$ 220,197.96
Equity	
3900 Net Assets Without Donor Restriction	1,786,409.92
3902 Net Assets With Donor Restrictions	196,442.46
Net Income	2,480,314.27
Total Equity	\$ 4,463,166.65
TOTAL LIABILITIES AND EQUITY	\$ 4,683,364.61

Asset Allocation: February 28, 2022



Asset Class	Market Value (\$)	% of Total
Equity	2,483,208	81.20
Fixed Income	485,489	15.88
Cash	89,333	2.92
Subtotal	3,058,029	100.00
Total	3,058,029	

Center to Advance CTE
Advisory Program Fees
 July 1, 2021 - February 28, 2022

FOUNDATION 749-04G96

Trade/Transaction Date	Description	Amount
	Advisory Program Fee	
7/6/2021	INV. ADVISORY FEE JUL	\$ 2,475.24
	Advisory Program Fee	
8/3/2021	INV. ADVISORY FEE AUG	\$ 2,523.70
	Advisory Program Fee	
9/2/2021	INV. ADVISORY FEE SEP	\$ 2,573.25
	Advisory Program Fee	
10/4/2021	INV. ADVISORY FEE OCT	\$ 2,467.84
	Advisory Program Fee	
11/2/2021	INV. ADVISORY FEE NOV	\$ 2,591.07
	Advisory Program Fee	
12/2/2021	INV. ADVISORY FEE DEC	\$ 2,569.40
	Advisory Program Fee	
1/4/2022	INV. ADVISORY FEE JAN	\$ 2,682.40
	Advisory Program Fee	
	INV. ADVISORY FEE FEB	\$ 2,580.57
Total		\$ 20,463.47

FOUNDATION 7WD-03248

	Annual Service Fee	
7/8/2021	EMA ANNUAL FEE	\$ 4.00
	Annual Service Fee	
9/1/2021	EMA ANNUAL FEE	\$ 1.13
Total		\$ 5.13

Total Fees All Accounts \$ 20,468.60

Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2021 to 02/28/2022

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2022	3,250,835	0	1,447	(194,252)	3,058,029	(5.93)	1.86
2021	3,002,243	0	28,295	220,296	3,250,835	8.28	8.28
Total	3,002,243	0	29,742	26,044	3,058,029		1.86

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 services. Past performance does not guarantee future results.

Relative Performance - Equity: Yearly



Performance period: 07/01/2021 to 02/28/2022













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
2022	(6.57)	3.73	(6.73)	(1.77)	(6.43)	(0.54)	(4.83)	(13.67)	(5.90)	(3.58)	(8.23)	1.78	(8.01)	2.72
US Equity	(6.57)	3.73												
2021	11.03	11.03	5.32	5.32	6.29	6.29	(9.30)	(9.30)	2.46	2.46	10.91	10.91	11.67	11.67
US Equity	11.03	11.03												

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 services. Past performance does not guarantee future results.

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Sector Analysis - Summary

As of Close of Business: 03/15/2022

Sector	Total Holdings(%)		Current(%)	Model(%)	Gap-Model vs. Current(%)	All Equity compared to Custom Model		
	0%	50%				ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
Equity								
Health Care			13.91	13.30	(0.61)	813,506	1,061,808	248,302
Consumer Staples			11.64	6.10	(5.54)	680,846	486,995	(193,851)
Information Technology			24.58	27.80	3.22	1,437,611	2,219,418	781,807
Consumer Discretionary			9.90	12.90	3.00	579,024	1,029,874	450,850
Industrials			12.29	8.20	(4.09)	719,075	654,649	(64,427)
Materials			3.14	2.60	(0.54)	183,852	207,572	23,720
Financials			13.21	10.60	(2.61)	772,425	846,253	73,828
Communication Services			4.99	10.90	5.91	291,704	870,204	578,499
Utilities			3.47	2.70	(0.77)	202,842	215,555	12,713
Energy			1.75	2.50	0.75	102,508	199,588	97,080
Real Estate			1.11	2.40	1.29	65,188	191,604	126,417
Equities Blend			0.00	0.00	0.00	0.24	0	(0.24)
Total						5,848,581		

* 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: 03/15/2022

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	01/31/2022			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PAVE	GLOBAL X FUNDS SHS US	01/31/2022	IYH	ISHARES U.S. HEALTHCARE	01/31/2022
QQQ	INVESCO QQQ TR SER 1	01/31/2022	IYW	ISHARES U.S. TECHNOLOGY	01/31/2022
DGRO	ISH TR CORE DIVID GROWTH	01/31/2022	VOX	VANGUARD COMMUNICATION	01/31/2022
SHY	ISHARES 1-3 YEAR	No Date Reported	VCR	VANGUARD CONSUMER	01/31/2022
IEI	ISHARES 3-7 YEAR	No Date Reported	VIG	VANGUARD DIVIDEND	01/31/2022
IWR	ISHARES RUSSELL MIDCAP	01/31/2022	VYM	VANGUARD HIGH DVD YIELD	01/31/2022
DVY	ISHARES SELECT	01/31/2022	VIS	VANGUARD INDUSTRIAL ETF	01/31/2022
IGSB	ISHARES TR ISHARES 1-5	No Date Reported	VAW	VANGUARD MATERIALS ETF	01/31/2022
IGIB	ISHARES TR ISHARES 5-10	No Date Reported	BND	VANGUARD TOTAL BOND MKT	No Date Reported
IYK	ISHARES U.S. CONSUMER	01/31/2022	DGRW	WISDOMTREE U.S. QUALITY	01/31/2022
IYF	ISHARES U.S. FINANCIAL	01/31/2022	DTD	WISDOMTREE US TOTAL	01/31/2022

Size and Style Analysis - Summary

As of Close of Business: 03/15/2022

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(\$)
Equity								
Large Cap Growth			41.49	33.00	(8.49)	2,426,809	2,634,561	207,752
Large Cap Value			36.60	26.00	(10.60)	2,140,795	2,075,715	(65,080)
Small/Mid Cap Growth			5.71	8.00	2.29	334,000	638,682	304,681
Small/Mid Cap Value			14.67	8.00	(6.67)	858,254	638,682	(219,573)
International Equity			1.07	25.00	23.93	62,698	1,995,880	1,933,182
Equities Blend			0.44	0.00	(0.44)	26,024	0	(26,024)
Total Equity Assets						5,848,581		

* 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: 03/15/2022

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	01/31/2022			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PAVE	GLOBAL X FUNDS SHS US	01/31/2022	IYH	ISHARES U.S. HEALTHCARE	01/31/2022
QQQ	INVESCO QQQ TR SER 1	01/31/2022	IYW	ISHARES U.S. TECHNOLOGY	01/31/2022
DGRO	ISH TR CORE DIVID GROWTH	01/31/2022	VOX	VANGUARD COMMUNICATION	01/31/2022
SHY	ISHARES 1-3 YEAR	01/31/2022	VCR	VANGUARD CONSUMER	01/31/2022
IEI	ISHARES 3-7 YEAR	01/31/2022	VIG	VANGUARD DIVIDEND	01/31/2022
IWR	ISHARES RUSSELL MIDCAP	01/31/2022	VYM	VANGUARD HIGH DVD YIELD	01/31/2022
DVY	ISHARES SELECT	01/31/2022	VIS	VANGUARD INDUSTRIAL ETF	01/31/2022
IGSB	ISHARES TR ISHARES 1-5	01/31/2022	VAW	VANGUARD MATERIALS ETF	01/31/2022
IGIB	ISHARES TR ISHARES 5-10	01/31/2022	BND	VANGUARD TOTAL BOND MKT	01/31/2022
IYK	ISHARES U.S. CONSUMER	01/31/2022	DGRW	WISDOMTREE U.S. QUALITY	01/31/2022
IYF	ISHARES U.S. FINANCIAL	01/31/2022	DTD	WISDOMTREE US TOTAL	01/31/2022

Fundraising & Development Update

Report submitted by Kate Kreamer, Deputy Executive Director

Advance CTE/The Center to Advance CTE has continued to have strong relationships with our funders and has raised funds to support new and existing project work, staff time and member resources, while staying committed to only taking on projects aligned to our mission, vision, strategic plan and member priorities.

Starting in July 2017, we began tracking our fundraising and development activities to capture within the organization's Shared Impact and Reach Dashboard. Between October 2021-March 2022, Advance CTE staff:

- Had 16 active grants/contracts;
- Secured and launched a renewal grant from the Joyce Foundation, received a new grant from the Walton Family Foundation;
- Joined a multi-funder, multi-partner effort around stimulus funding, which led to a phase 1 sub-grant through JFF and a new grant from Annie E. Casey Foundation for phase 2 work;
- Submitted a proposal for a federal grant around environmental literacy, in partnership with the Delaware Department of Education.

Grants Overview

Funder: Bill & Melinda Gates Foundation

Status: Ongoing

Description: In June 2021, we received a renewal grant from Gates, which totals \$500,000 over 18 months and support vision implementation and member supports, the Career Clusters modernization project, and continued support around high-quality CTE and Perkins V implementation.

Alignment to CTE Without Limits:

- ✓ Overall support for *CTE Without Limits*
- ✓ Principle 1: Each learner engages in a cohesive, flexible and responsive career preparation ecosystem
- ✓ Principle 2: Fully diagnose and understand scope of institutional barriers and systemic racism

Member Benefit: The Gates investment is funding core projects that are priorities to Advance CTE and its members (e.g., Perkins implementation supports, CTE Without Limits (including direct technical assistance and subgrants to three states and a broader community of practice), equity in CTE, etc.).

Funder/Project: JPMorgan Chase & Co.; New Skills ready network

Status: Ongoing

Description: In early 2020, Advance CTE received a five-year grant of \$5 million from the JPMorgan Chase Foundation (JPMC) to support JPMC's new career readiness initiative. Through *New Skills ready network*, JPMC is providing five-year grants to six sites across the country: Boston, Massachusetts, Columbus, Ohio, Dallas, Texas, Denver, Colorado, Indianapolis, Indiana and Nashville, Tennessee. These investments are for local-state partnerships to advance high-quality career pathways and real world-work experiences, with a focus on equity and access. We

are partnering with Education Strategy Group to provide supports to these sites, as well as leading on identifying promising practices and helping to share lessons learned with state and local leaders across the country.

Alignment to CTE Without Limits:

- ✓ Principle 1: Ensure all CTE programs of study are flexible and responsive
- ✓ Principle 2: Equity is a major driver of this project
- ✓ Principle 3: Offer integrated PreK-20W advisement systems
- ✓ Principle 4: Build and leverage trusted systems to translate competencies and credentials into portable credit.

Member Benefit: In addition to the members that are involved in the investments in their states, these resources fund much of Advance CTE’s state policy efforts including our state policy tracking, Year in Review publication, four-plus publications a year (aligned with key topics within *CTE Without Limits*) and the Learning that Works Resource Center. This summer, we will develop a policy benchmark tool around credit for prior learning.

Funder/Project: JPMorgan Chase & Co.; New Skills for Youth Innovation Sites

Status: Ends March 2022

Description: Over the past year, Advance CTE has leveraged the funding from this grant to support a Shared Solutions Workgroup around data quality aligned to the broader *New Skills ready network*, which has culminated in a new policy benchmark tool, a set of supplemental resources around career-ready data and a microsite released in February 2021 and a metrics framework in September 2021. This grant also supported early development work for the CTE equity index, which will be completed and released with support from the *New Skills ready network* grant.

Alignment to CTE Without Limits:

- ✓ Principle 1: Expand data and accountability models that value collaboration, equity and innovation

Member Benefit: The Shared Solutions Workgroup around data quality engaged many Advance CTE members and led to tools and resources that meet our members’ needs. Data quality has been cited as a critical priority among State Directors and this grant has enabled Advance CTE to develop [tools and supports](#) and build our organizational capacity in direct response to that need.

Funder/Project: Joyce Foundation

Status: Renewed

Description: Our grant from the Joyce Foundation that supported implementation supports for Perkins V, including direct technical assistance to priority states and a range of activities around equity, ended in March 2022, but we received a renewal grant that launched in January 2022. Under the initial grant, we launched our opportunity gap analysis workshop and learner voice shared solutions workgroup. Under the new grant, we are continuing with four additional cohorts of states participating in the opportunity gap analysis workshop and will, in late 2022, be launching a cohort-based TA opportunity around learner voice.

Alignment to CTE Without Limits:

- ✓ Principle 2: Each learner feels welcome in, is supported by and has the means to succeed in the career preparation ecosystem

Member Benefit: These two grants have supported a critical body of work, as Advance CTE helps states build capacity around the data and root cause analyses necessary to identify and close opportunity gaps. Advance CTE will be able to support five cohorts of states over 2.5 years, as well as launch more intensive supports to elevate the learner voice in CTE decision making.

Funder: Siemens Foundation

Status: Ongoing

Description: In early 2020, Advance CTE received a two-year grant from the Siemens Foundation to continue to support states in their communications and recruitment efforts at the state and local levels. This round of funding is technical assistance for states, subgrants to states to pilot recurrent activities, a national survey of students and families to re-test the messages developed in 2017 and oversample for subpopulations to ensure that messages resonate with families of varying backgrounds and a national survey of employers around their perception of CTE. Additionally, the grant is supporting 30 career advising workshops across the country.

Alignment to CTE Without Limits:

- ✓ Principle 1: Survey of employers to connect talent pipeline strategies with CTE
- ✓ Principle 2: Each learner feels welcome in and supported by their CTE programs
- ✓ Principle 3: Building capacity within career advisement systems

Member Benefit: The messaging research and tools have been shared widely with members and interest remains strong in CTE advocacy. Only State Directors in member states could apply for direct technical assistance being provided (to Alaska, Maryland, Minnesota, New Hampshire and Oklahoma) and over 20 states are getting free workshops around career advising. have access to the updated counseling workshops. More broadly, the grant supports much of Advance CTE's communications capacity and has enabled us to grow our internal communications team to advance our overall efforts to promote high-quality and equitable CTE.

Funder/Project: New America; Partnership to Advance Youth Apprenticeship (PAYA)

Status: Ongoing

Description: Advance CTE has joined New America and a number of other partners as a leading partner on a multi-year, multi-funder project to support the expansion of high-quality youth apprenticeship programs. We are now in year three of the four-year initiative and are continuing to support data quality efforts. In the final 18 months, we plan to redirect some of the PAYA resources to support our research efforts around CTE and WBL funding models.

Alignment to CTE Without Limits:

- ✓ Principle 1: Ensure all CTE programs of study are flexible and responsive; data capacity; equitable funding models

Member Benefit: This work fits neatly into Advance CTE's broader data strategy and expands our reach and scope. Any resources developed have direct value for state CTE leaders and our role in PAYA ensures that CTE is always a part of the initiative's youth apprenticeship strategy.

<p>Funder/Project: ECMC Foundation; Postsecondary Data Initiative Status: Ongoing</p>
<p>Description: Advance CTE has a three-year, \$750,000 grant from the ECMC Foundation to support a multi-state initiative to improve the quality and effective use of postsecondary CTE data. Through this grant, Advance CTE is working with a cohort of postsecondary state and system offices to conduct a comprehensive needs assessment, build an action plan for improving CTE data quality, receive technical assistance and participate in a community of practice. The states that applied but were not selected to be part of the cohort have joined the community of practice.</p> <p>Alignment to CTE Without Limits:</p> <ul style="list-style-type: none"> ✓ Principle 1: Expand data and accountability models that value collaboration, equity and innovation ✓ Principle 4: Build and leverage trusted systems to translate competencies and credentials into portable credit. <p>Member Benefit: This grant is supporting our broader data quality strategy, including staff. In addition, only members could apply for and receive technical assistance grants and/or participate in our community of practice. Participating states include Alabama, Delaware, District of Columbus, Florida and Oregon. All resources developed are being made available for all states, including a series of mini-briefs.</p>
<p>Funder/Project: ECMC Foundation; Postsecondary Fellows Status: Ongoing</p>
<p>Description: In February 2021, Advance CTE was awarded \$1.25 million to fund The Postsecondary State CTE Leaders Fellowship Program at Advance CTE – Sponsored by ECMC Foundation, a cohort-based program that will support and equip aspiring postsecondary CTE leaders with the knowledge, tools and network to craft, build support for, lead and evaluate postsecondary CTE programs and policies so that all CTE is high-quality and equitable. The program has engaged multiple partners in advisory and coaching roles and addresses Board concerns regarding a sufficient pipeline of future state CTE leaders and that CTE leadership better reflects the demographics of CTE learners.</p> <p>Alignment to CTE Without Limits:</p> <ul style="list-style-type: none"> ✓ Principle 2: Recruit, retain and support a diverse and culturally competent workforce <p>Member Benefit: With the focus on strengthening and diversifying the pipeline of state-level postsecondary CTE leaders, this grant advances a key priority within our Board-approved strategic plan. In addition, the workshops and resources being developed for this project will be shared with our broader membership.</p>
<p>Funder/Project: UMass Medical School Status: Ongoing</p>
<p>Description: Advance CTE has been built into a five-year grant, focused on supporting adult learners with disabilities, in partnership with the National Institute on Disability, Independent Living, and Rehabilitation Research. The total sub-contract runs from October 2019-September 2024 and is for \$42,000.</p>

Alignment to CTE Without Limits:

- ✓ Principle 2: Designing CTE programs and interventions on the margins

Member Benefit: This effort further strengthens Advance CTE’s equity strategies and will give us and our members access to useful research.

Funder/Project: Multiple; College in High School Alliance

Status: Ongoing

Description: Advance CTE joined the College in High School Alliance’s (CHSA) steering committee, along with JFF and NACEP, Bard College, Middle College National Consortium, KnowledgeWorks and Achieving the Dream. To date, we are built into grants across the three primary funders of CHSA: Joyce Foundation, ECMC Foundation and Gates Foundation.

Alignment to CTE Without Limits:

- ✓ Principle 4: Each learner’s skills are counted, valued and portable

Member Benefit: As a member of the steering committee, we are ensuring that CTE remains a priority of CHSA and is embedded in all of their efforts. We developed and released our 2021 State of CTE report on early postsecondary opportunities with support from CHSA funding. We also have input into their federal advocacy efforts and are supporting technical assistance in two states.

Funder: Bloomberg Philanthropies, Gates Foundation, Walton Family Foundation, Carnegie Corporation, Annie E. Casey Foundation and Beacon Group

Status: Ongoing (through March 2022)

Description: Advance CTE is partnering with JFF, Education Strategy Group, ExcelinEd and New America on a multi-funder, multi-year investment to help states and communities build scalable, sustainable and equitable career pathways. The group of funders approved a phase 1 planning grant, of which Advance CTE received \$65,000 for work through March 2022. Phase 2 would kick off in early 2022, with a focus on providing technical assistance and resources to a mix of states, regions and local districts, and extend for 24 months.

In addition, as the Annie E. Casey Foundation had resources, which they wanted to commit to Phase 2 of this initiative as part of their 2021 budget. Based on our commitment to equity, they asked Advance CTE to receive \$400,000 in funds on behalf of the partners. These resources will extend through September 30, 2022.

Alignment to CTE Without Limits:

- ✓ Principle 1: Establish shared, statewide goals for a cohesive career preparation ecosystem; ensure that all CTE programs of study are flexible and responsive.
- ✓ Principle 2: Fully diagnose and understand the scope of institutional barriers and systemic racism; Design CTE programs and interventions on the margin while maintaining a commitment to quality.
- ✓ Principle 3: Each learner skillfully navigates their own career journey.
- ✓ Principle 4: Build and leverage trusted systems to translate competencies and credentials into portable credit.

<p>Member Benefit: While the overall project plan and Advance CTE’s role are still being finalized, participating in this initiative has great benefit to Advance CTE’s members and the broader CTE field. With the focus on sustainability – through levers such as funding, data and equity - and how few state and local stimulus plans address CTE and career pathways explicitly, we believe this initiative can lead to scalable and sharable proof points for building systems of high-quality and equitable career pathways across the country.</p>
<p>Funder: Walton Family Foundation Status: Ongoing</p>
<p>Description: Advance CTE received a two-year grant in support of two major projects: a research project to understand and document how CTE programs and other related career preparation activities are funded and what impact different approaches have on improving equity and access to high-quality CTE programs at the K-12 level (leading to a 50-state State of CTE report) and series of virtual roundtables of national, state and local leaders to identify barriers and policy solutions to supporting open access within states (particularly for rural learners) and across multiple states (leading to a “CTE without borders” playbook). The grant will run September 2021-June 2023 and is for \$300,000.</p> <p>Alignment to CTE Without Limits:</p> <ul style="list-style-type: none"> ✓ Principle 1: Design equitable funding models that direct funding to where it is most needed ✓ Principle 5: Each learner can access CTE without borders <p>Member Benefit: This work directly relates to two key actions within <i>CTE Without Limits</i>, both of which are of great interest to our members and the broader CTE field. Members will be invited to participate in the roundtables, and we will design professional learning opportunities to turn the insights and recommendations from both research projects into tangible actions members can take to improve and better leverage funding to support CTE and remove geographic barriers.</p>
<p>Funder: National Oceanic and Atmospheric Administration Status: Proposal Submitted</p>
<p>Description: Advance CTE partnered with the Delaware Department of Education and submitted a two-year proposal to NOAA to help Delaware develop environmental literacy standards to embed across the 16 Career Clusters. If granted, the project would launch on July 1, 2022.</p> <p>Alignment to CTE Without Limits:</p> <ul style="list-style-type: none"> ✓ Principle 5: Leverage a national framework for connecting education and the workforce. <p>Member Benefit: As part of our scope, Advance CTE will develop a case study on Delaware’s efforts and identify any lessons learned or resources that have 50-state application. This work also aligns nicely with ongoing discussions around the future of work and how to ensure CTE remains aligned with emerging economic trends.</p>

Looking Ahead:

Throughout 2022, our third Siemens grant, second Gates grant and initial ECMC grant will all come to a close. We are already in discussions with Siemens and ECMC about renewals, which will ramp up in summer 2022 and will begin to lay the groundwork for a Gates renewal later in the year, likely with a continued focus on *CTE Without Limits* and early work to support states as they update their Perkins V state plans, due in 2024. We have also remained in contact with the

Lumina Foundation to restart that relationship and expect the new Stimulus Collaborative project to bring new resources to our work. Finally, we are continuing to explore federal contracts, in partnership with the American Association of Community Colleges, and state contracts to deliver technical assistance to continue to diversify our funding sources.

Board action: None

Grant	Grant Amount	Grant Start Date	Grant End Date	Apr- Jun 2021	Jul- Sept 2021	Oct- Dec 2021	Jan- Mar 2022	Apr- Jun 2022	Jul- Sept 2022	Oct- Dec 2022	Jan- Mar 2023	Apr- Jun 2023	Jul- Sept 2023	Oct- Dec 2023
PAYA	\$400,000	Sept. 2018	Oct 2022											
Gates 3.0	\$500,000	Jun. 2021	Nov. 2022											
ECMC: Fellows	\$1,250,000	Feb. 2021	Jan. 2024											
JPMorgan Chase: Innovation Sites, Data Quality	\$475,000	Oct. 2018	Mar. 2022											
JOYCE: Perkins Support, Equity	\$300,000	Apr. 2019	Mar. 2022											
Joyce 3.0	\$325,000	Jan. 2022	Dec. 2023											
ECMC: Postsecondary Data Quality	\$750,000	Jan. 2020	Dec. 2022											
JPMC: New Skills ready network	\$5,000,000	Mar. 2020	Jun. 2025											
Siemens 3.0	\$838,500	Mar. 2020	Sep. 2022											
CHSA-Joyce	\$57,000	Sept. 2020	Aug. 2022											
CHSA-Gates2	\$15,000	Oct. 2021	Apr. 2023											
CHSA-ECMC	\$37,000	Feb. 2021	Jan 2023											
Stimulus Collaborative (Phase 1)	\$65,000	Oct. 2021	Mar. 2022											
Walton	\$300,000	Sept. 2021	Jun 2023											
Annie E Casey (Stimulus)	\$400,000	Nov. 2021	Sept. 2022											

Overview of New Strategy Plans and Mapping to Strategic Plan

Based on input from the Advance CTE/Center to Advance CTE Boards of Directors, organizational leadership extended the work with Delivery Associates to overhaul our internal reporting calendars, systems and templates. These all feed into the reporting to the Board and the organizational dashboard. The work represents a significant departure from prior reporting. The approach was driven by a strong commitment to concisely focus the communications on information the Boards need to successfully govern the organizations and to engage in oversight of progress and resources dedicated to the priorities established in the strategic plan and in line with the theory of action and CTE Without Limits vision.

Over the course of March 2022, the Advance CTE/The Center to Advance CTE staff worked to develop strategy updates for the Board of Directors in the following six workstreams:

1. Communications
2. Equity
3. Federal Advocacy
4. Member Engagement
5. Operations
6. State Policy

In the development of our internal strategies, we mapped the 15 strategic priorities identified in our strategic plan to identify where there was the greatest responsibility and capacity being deployed. Every strategic priority is addressed or supported in one or more internal strategy documents.

CAPACITY & RESPONSIBILITY BY TEAM	Communi- cations	Equity	Federal Advocacy	Member Engagement	Opera- -tions	State Policy
1. EQUIP Advance CTE to lead with a focus on quality and equity						
1a. Maintain a positive and inclusive work culture that is collaborative and values employees' strengths, contributions, leadership, and growth					x	
1b. Enhance the development and utilization of an equity lens by employees and the Advance CTE/The Center to Advance CTE Board of Directors		x			x	
1c. Ensure all aspects of the management of Advance CTE/The Center to Advance CTE are equitable, effective, efficient and legally compliant					x	

CAPACITY & RESPONSIBILITY BY TEAM	Communi-cations	Equity	Federal Advocacy	Member Engagement	Opera-tions	State Policy
1d. Deliver high-quality professional development events and resources to grow and strengthen the leadership skills, equity lens and content knowledge of all members				X		
1e. Support the growth and diversity of CTE's leadership pipeline		X		X		
2. EMPOWER members to realize the CTE Without Limits vision						
2a. Support members to build and maintain diverse cross-sectoral state teams with representation from K-12, postsecondary and workforce development				X		
2b. Shape agendas with national impact to align and attract funding for initiatives that have the highest potential to advance the CTE Without Limits vision		X	X			X
2c. Lead networks and cohorts to foster cross-state learning and shared solutions for members	X					X
2d. Provide intensive technical assistance to enable members to become sharable and scalable proof points for specific aspects of CTE Without Limits		X				X
2e. Develop policy frameworks, publications and tools that support members to increase learner access to and success in equitable, high-quality CTE						X
3. ELEVATE high-quality and equitable CTE						
3a. Advance federal priorities that support, promote and increase equitable access to and success in high-quality CTE	X		X			
3b. Lead members in the implementation of federal and state legislation and policies through personalized, structured and just-in-time technical assistance		X	X	X		X

CAPACITY & RESPONSIBILITY BY TEAM	Communica-tions	Equity	Federal Advocacy	Member Engagement	Opera-tions	State Policy
3c. Contribute to and support an expanded practice and research base around high-quality and equitable CTE, with an emphasis on all dimensions of equity including race						X
3d. Build the capacity of members and stakeholders to be effective advocates for high-quality and equitable CTE	X					
3e. Position Advance CTE as the go-to organization for members, policymakers, media and stakeholders seeking expertise and information on CTE	X		X	X		

Strategic Plan Update - April 2022

Strategic Priority/ Strategy	Progress	Capacity
1. EQUIP Advance CTE to lead with a focus on quality and equity	Y	Y
Maintain a positive and inclusive work culture that is collaborative and values employees' strengths, contributions, leadership, and growth	Y	Y
Enhance the development and utilization of an equity lens by employees and the Advance CTE/The Center to Advance CTE Board of Directors	Y	Y
Ensure all aspects of the management of Advance CTE/The Center to Advance CTE are equitable, effective, efficient and legally compliant	Y	O
Deliver high-quality professional development events and resources to grow and strengthen the leadership skills, equity lens and content knowledge of all members	G	G
Support the growth and diversity of CTE's leadership pipeline	Y	Y
2. EMPOWER members to realize the CTE Without Limits vision	Y	G
Support members to build and maintain diverse cross-sectoral state teams with representation from K-12, postsecondary and workforce development	R	R
Shape agendas with national impact to align and attract funding for initiatives that have the highest potential to advance the CTE Without Limits vision	G	G
Lead networks and cohorts to foster cross-state learning and shared solutions for members	G	G
Provide intensive technical assistance to enable members to become sharable and scalable proof points for specific aspects of CTE Without Limits	Y	Y
Develop policy frameworks, publications and tools that support members to increase learner access to and success in equitable, high-quality CTE	G	G
3. ELEVATE high-quality and equitable CTE	Y	O
Advance federal priorities that support, promote and increase equitable access to and success in high-quality CTE	G	G
Lead members in the implementation of federal and state legislation and policies through personalized, structured and just-in-time technical assistance	G	G
Contribute to and support an expanded practice and research base around high-quality and equitable CTE, with an emphasis on all dimensions of equity including race	Y	O

Build the capacity of members and stakeholders to be effective advocates for high-quality and equitable CTE	O	O
Position Advance CTE as the go-to organization for members, policymakers, media and stakeholders seeking expertise and information on CTE	Y	Y

Summary of overall trends:

- Since March 2020, our organization has gone through some fairly major changes. Our team has grown from 11 staff members to 13 (not including two positions that are currently unfilled), with an additional three full-time equivalent team members via contractors and fellows supporting our operations and federal advocacy work.
- The opportunity has enabled Advance CTE to adopt and implement an equitable hiring process that has been incredibly successful. Not only have we attracted talent from across the country, our team has also been greatly diversified, with our staff of color increasing from 27 percent in March 2020 to 42 percent of our staff in March 2022, including half of our Leadership Team.
- Despite the capacity challenges brought on by turnover and the need to dedicate critical time to onboarding new team members - and the fact that many of our members have their own capacity challenges - Advance CTE's work has continued to expand and have great impact at the federal and state levels. In particular, we have continued to prioritize meaningful professional learning opportunities for our members, centering equity in all that we do, and developing the resources and supports that help states advance the principles of *CTE Without Limits*.

Strategic Priority 1: EQUIP Advance CTE to lead with a focus on quality and equity

Key accomplishments this quarter:

- Implementation of intentional equitable hiring practices that has positively impacted the change in the diversity and make-up of the current Advance CTE staff. In just the last quarter, Advance CTE has hired/onboarded five new staff members. In addition, all new staff participate in a three-part equity onboarding process, in addition to ongoing equity trainings and supports from our equity coach.
- Conducted calls with 41 State Directors regarding their challenges and opportunities. Information was synthesized and key themes distilled, which will inform our upcoming events and member engagement.
- Conducted initial outreach to ten equity-focused organizations and completed introductory calls with four of the organizations that responded to outreach.
- Launched the application for the second cohort of ECMCF Fellows program, while continuing to support the first cohort of 15 Fellows.
- Collected baseline data for the new dashboard, which is aligned to our strategic plan and theory of action, in preparation for upcoming internal and Board of Director stocktakes. We also began work to develop measures of staff satisfaction and engagement and state implementation of *CTE Without Limits* vision.
- Hosted three webinars and an ask-an-expert session; the three webinars had an average registration rate 30% higher than the 2021 events, and reached 716 individuals via live participation and YouTube views.

Biggest challenges:

- Continuing to build the right systems and supports as we grow our team.
- Ensuring strong participation at in-person events.
- The national political climate around “equity” has been challenging. Many states do not have a “supportive” environment and therefore are unable to engage in open discussions about equity.

Priorities to address next quarter:

- Develop Board-approved FY23 Advance CTE/The Center to Advance budgets that expand operations capacity and continue to invest in internal equity training and professional development to ensure our organization is equipped to lead on quality and equity.
- Provide equity training to Advance CTE/The Center to Advance CTE Board of Directors.
- Host highly-engaging State Directors leadership retreat and June meeting series.
- Begin preliminary research to explore a “secondary” leaders Fellowship to create a pipeline to state CTE leadership for aspiring leaders of color that will address the decreasing number of diverse state CTE leaders.
- Be prepared to successfully shift to a hybrid work environment, per staff-led committee recommendations, fostering an inclusive workplace.
- Be ready to execute new project management processes and systems that further empower staff, per staff-led committee recommendations.
- Monitor state participation in Advance CTE activities to ensure we are creating a welcoming environment for every state and that we are featuring a diverse array of perspectives in Advance CTE events and resources.

Strategic Priority 2: EMPOWER members to realize the CTE Without Limits vision

Key accomplishments this quarter:

- Initiated the state dues renewal process with 47 states/territories submitting their intent forms as of the first week of April 2022.
- Launched *Advancing CTE Without Limits* technical assistance projects with three states and a community of practice across 16 states, including 80 State Directors and cross-sector state leaders from workforce, postsecondary and other state-level agencies.
- Expanded our internal team and increased capacity to provide high-quality technical assistance to 23 states through Opportunity Gap Analysis workshops, the Postsecondary Data Initiative and the College in High School Alliance.
- Published four high-quality publications related to career pathways systems and state policy, including Year in Review, braided funding, a 50-state report on early postsecondary opportunities, and a youth apprenticeship data toolkit.
- Analyzed state team composition to determine a baseline number, which is that 24% of state teams are meeting the Board-established threshold of diverse state teams with representation from K-12, postsecondary and workforce development.
- Have 16 grants/sub-contracts from across eight distinct national funders, supporting CTE Without Limits-aligned projects.

Biggest challenges:

- Members have limited capacity due to turnover and capacity within state agencies, local institutions and industry, which has limited the number of states applying for Advance CTE-provided technical assistance opportunities.
- Measuring effort vs. impact to determine progress across initiatives due to limited longitudinal view of state policy impact.

Priorities to address next quarter:

- Secure membership renewal by all states/District of Columbia/territories and ensure all eligible agency members are supported in fully understanding their membership benefits and taking full advantage of their state team. This will include a new strategy to encourage and support more diversity within states teams, including representation from K-12, postsecondary and workforce development.
- Launch the second cohort of the Opportunity Gap Analysis workshop.
- Release our third policy benchmark tool, on the topic of credit for prior learning.
- Develop and begin implementation of customized training to state teams around Brave Dialogues, and develop a shorter module of the Brave Dialogues “participant” training that will be coupled with the Opportunity Gap Analysis workshops to help level-set members’ understanding of equity to maximize their participation in the Opportunity Gap Analysis workshop cohorts.
- Host 4-6 roundtables on expanding CTE without borders, in partnership with Southern Regional Education Board and Western Interstate Commission on Higher Education, engaging a wide breadth of national, state and local stakeholders.
- Release the year two *New Skills ready network* snapshots and annual report, elevating the work of the six state-local partnerships nationally.

Strategic Priority 3: ELEVATE high-quality and equitable CTE

Key accomplishments this quarter:

- Increased Perkins basic state grant funding by 3.4% / \$45 million; since 2017 Advance CTE has secured \$262.3 million in additional funding for this program.
- Secured the support of more than two-thirds of the Senate (68 total) for the 2022 CTE Month Resolution, helping elevate CTE within Congress, link to other pressing matters under consideration, and putting lawmakers on record in support of CTE.
- Successfully hosted a CTE Month briefing, providing perspectives from learners and featuring remarks directly from lawmakers. The event was widely attended by Congressional staff and the general public.
- Supported career advising workshops in nearly 20 states, with the remaining workshops scheduled through summer 2022.
- Leveraged new releases, CTE month, the one-year anniversary of *CTE Without Limits* and application windows for ECMC Fellowship and opportunity gap analysis workshop to increase website traffic by 30 percent over the previous quarter.

Biggest challenges:

- Stagnation of policy advancement due to hyper partisanship, upcoming midterm elections, and inflation. In particular, With core inflation increasing, pressures on current funding levels for Perkins V will continue to advance.

Priorities to address next quarter:

- Begin a complete website redesign, including ensuring ADA accessibility, improved user experience and increased traffic.
- Relaunch state policy and research roundup blog series to bring actionable information to members.
- Leverage state policy tracking to identify states that have “best practices” that need to be elevated and promoted across 50 states.
- Deliver technical assistance to states (through Siemens 3.0) grantees and development of a fourth proposal to the Siemens Foundation for a continuation of communications-related state supports.
- Build on the initial outreach and introductory calls held with equity-focused organizations and identify ways to collaborate on existing cross-cutting efforts, including federal advocacy and state supports.
- Support the execution of a special point of order on the House floor to strengthen awareness and positioning of CTE as part of American economic competitiveness.
- Increase Perkins FY23 funding to begin to close the inflation gap.
- Remain active in coalitions (CEF, CIAW, Homework Gap, Title IV-A, etc.) to leverage Advance CTE’s voice and federal advocacy impact.

Topical Appendices

- Advance CTE's 2021 Annual Report can be found on this [page](#).

Key for color ratings

Green	Solid: Progress is on track, or ahead of schedule, and is expected to be achieved
Yellow	Progressing: Progress has been made, but there are identified action steps and deliverable timelines which require attention in order to stay on track
Orange	Concerning: Progress has been halted and attention needs to be given to address/resolve the disruptions in order to get back on track
Red	Problematic: Little or no progress has been made and immediate attention is required to identify solutions-oriented next steps to begin getting traction

Commitment: The **Communications** team will collectively contribute to the theory of action over the next year by positioning Advance CTE to equip, empower and elevate state CTE leaders through the strategic sharing of information and resources.

How will we measure progress and success a year from now (Spring 2023)?

- Create a website that is accessible and elicits a positive user experience by all Advance CTE members
- Consistently feature diverse states, individuals and programs in our outreach and professional and virtual learning events
- Provide resources that increase knowledge and align with member needs, as measured by downloads of resources
- Increase number of states participating in virtual learning opportunities, with geographic diversity
- Activate a fully-staffed and high-functioning communications staff

Key accomplishments this quarter:

- Refined our communications strategy to achieve equitable representation in our outreach.
- Achieved a 30% increase in average learning event registrations above last year.
- Leveraged effective content and communications that drove website pageviews to increase 30% above the previous quarter.
- Produced a consistently-branded experience for upcoming virtual meeting.
- Led the celebration of CTE month and communications surrounding ECMCF Fellowship.

Biggest challenges:

- Maximizing staffing capacity, including hiring a new Director of Communications and Membership, recruiting a replacement communications associate, and leveraging the services of a former Advance CTE communications employee as a temporary part-time consultant.
- Overcoming staffing gaps at the state level

Priorities to address next quarter:

- Begin a complete website redesign, including ensuring ADA accessibility, improved user experience and increased traffic.
- Market June Meeting Series to ensure we reach our participation goals
- Deliver technical assistance to states (through Siemens 3.0) grantees and development of a fourth proposal to the Siemens Foundation for a continuation of communications-related state supports.
- Hiring new communications associate
- Evaluate overall communications strategy in the light of new staff hires and capacity
- Implement the new, more succinct Board reporting structures (e.g. monthly Board updates).

Commitment: The **Equity team** will collectively contribute to the theory of action over the next year by educating and supporting members to apply an “equity lens” using the *CTE Without Limits* framework.

How will we measure progress and success a year from now (Spring 2023)?

- Increase the data literacy and knowledge of states participating in the Opportunity Gap Analysis Workshops to identify and address equity gaps in the CTE system in their state.
- Build and grow the pipeline for leaders of color in postsecondary CTE through the selection of highly qualified applicants into the Postsecondary State CTE Leadership Fellowship program.
- Increase the competency and comfortability of states in leading discussions to address equity (specifically racial equity) through the implementation of Advance CTE’s Brave Dialogues curriculum and training for state teams.
- Establish new partnerships with equity-focused organizations and actively seek joint grant opportunities that will increase Advance CTE’s footprint within the diversity, equity and inclusion (DEI) landscape nationally.
- Ensure satisfactory completion of equity training by internal Advance CTE staff and Board of Directors.
- Begin a review, applying an equity lens, of Advance CTE’s bylaws, Board election processes and Board composition.

Internal - metrics/targets used to measure our success and impact

- Increase in the number of states that participate in the Opportunity Gap Analysis Workshop cohorts and strive towards more saturation in the field.
- Gather qualitative feedback from states regarding “tangible changes” that were implemented as a result of technical assistance from Advance CTE.
- Track the successful completion of fellows in the Postsecondary State CTE Leadership Fellowship and establish a baseline.
- Track the number of fellows that had a change in their employment and acquired a promotion after completing the fellowship (six months to one year after completion).
- Identify additional data and metrics that would be beneficial to track and the frequency of data collection to demonstrate progress or movement.

Key accomplishments and progress this quarter:

- Ten states have actively participated in the first cohort of the Opportunity Gap Analysis workshops to become more equipped to evaluate their state’s data under an equity lens and identify gaps and areas for improvement.
- The internal capacity of Advance CTE to conduct and lead equity-focused work has been expanded significantly through:
 - Implementation of intentional equitable hiring practices (i.e. including candidates of color in each interview round) that has positively impacted the change in the

diversity and make-up of the current Advance CTE staff. In addition, all new staff participate in a three-part equity onboarding process.

- Increased diversity on the Advance CTE full-time staff (i.e. five out of the last nine hires have been persons of color).
- Increased diversity of Advance CTE Leadership Team by adding three new members to the leadership team who are persons of color.
- All full-time staff have received and actively participated in DEI training with Advance CTE's equity coach.
- Conducted initial outreach to ten equity-focused organizations and completed introductory calls with four of the organizations that responded to outreach.

Biggest challenges:

- The national political climate around “equity” focused discussions has been challenging. Many states do not have a “supportive” environment and therefore are unable to engage in open discussions about equity.
- Limited capacity of states is an ongoing challenge.

Priorities to address next quarter:

- Refine the format and curriculum of the Postsecondary State CTE Leadership Fellowship to meet the needs of aspiring leaders in preparation for cohort two.
- Begin preliminary research to explore a “secondary” leaders fellowship to create a pipeline to state CTE leadership for aspiring leaders of color that will address the decreasing number of diverse state CTE leaders.
- Develop and begin implementation of customized training to state teams around Brave Dialogues.
- Develop a shorter module of the Brave Dialogues “participant” training that will be coupled with the Opportunity Gap Analysis workshops to help level-set members’ understanding of equity to maximize their participation in the Opportunity Gap Analysis workshop cohorts.
- Build on the initial outreach and introductory calls held with equity-focused organizations and identify ways to collaborate on existing cross-cutting efforts.
- Invite equity-focused organizations to participate in upcoming virtual Spring meetings to learn more about Advance CTE’s work as well as network with our members.
- Provide equity training to Advance CTE/The Center to Advance CTE Board of Directors.

Strategy Name: Federal Advocacy

April 2022

Commitment: The **Federal Advocacy team** will collectively contribute to the theory of action over the next year by securing an increase in the federal appropriation and building a supportive federal policy environment in aligned pieces of legislation so we can increase access to and equitable outcomes in high-quality Career Technical Education.

How will we measure progress and success a year from now (Spring 2023)?

- Increase Perkins funding
- Ensure a majority of Advance CTE's Workforce Innovation and Opportunity Act (WIOA) Board approved priorities are included in introduced and/or reauthorized legislation.
- Develop an apprenticeship strategy and policy recommendations.
- Conduct research to begin to build an Individuals with Disabilities Education Act federal policy recommendations
- Create and begin the implementation of an intentional federal advocacy communications strategy is in place to increase the reach, visibility, and impact of Advance CTE's voice and federal policy priorities.
- Maintain a current understanding of how states are effectively using stimulus funds to advance high-quality and equitable CTE.
- Begin an open "office hour" for Advance CTE members to ask questions re: federal policy and/or technical assistance on how to be a better stakeholder in other pieces of legislation
- Begin planning for new Perkins four-year state plans (and how we support the states), with a goal of supports and resources available Spring 2023.
- Utilize the federal policy checklists to ensure alignment to *CTE Without Limits* and Advance CTE's equity priorities (and create scorecards when laws are enacted)
- Improve the federal policy portion of the website to have it better serve as a go-to spot for policymakers and partners (as part of the federal advocacy communications strategy).

Key accomplishments this quarter:

- Increased Perkins basic state grant funding by 3.4% / \$45 million; since 2017 Advance CTE has secured \$262.3 million in additional funding for this program.
- Secured the support of more than two-thirds of the Senate (68 total) for the 2022 CTE Month Resolution, helping elevate CTE within Congress, link to other pressing matters under consideration, and putting lawmakers on record in support of CTE.

- Successfully hosted a CTE Month briefing, providing perspectives from learners and featuring remarks directly from lawmakers. The event was widely attended by Congressional staff and the general public.
- Advocacy efforts ensured that organizational priorities were retained in highly complex and politically charged legislation including:
 - After every iteration, additional supplementary investments for the Perkins basic state grant program were retained in recent Democratic reconciliation proposals;
 - Improvements to postsecondary data infrastructure, which would be made through the College Transparency Act, were included in the House’s proposal for forthcoming economic competitiveness legislation currently being negotiated between the chambers.
 - Similarly, Advance CTE has been successful to date in keeping proposals related to short-term Pell, made via the JOBS Act, as part of these ongoing negotiations.
 - Advance CTE was successful in getting 86 percent of its WIOA [recommendations](#) somewhat or fully aligned to the House’s WIOA reauthorization proposal. Fifty seven percent of the organization’s recommendations were “fully aligned” with this legislation.
- Advance CTE had 113 Congressional engagements this quarter.
- Established strong relationships with the Biden Administration including invitations to serve on small working group to inform an Administration-wide effort around pathways, an invitation to guide newly proposed Career Connected learning grants, invitations to present at OCTAE equity summit, outreach to attend monthly Department of Labor workforce meetings
- Maintained quarterly meetings with OCTAE leadership

Biggest challenges:

- Stagnation of policy advancement due to hyper partisanship, upcoming midterm elections, and inflation.
- Increasing challenge of being able to influence policies (e.g. stimulus, etc.) due to opaqueness and centralization of federal policy work (power centralized among Congressional leadership).
- With core inflation increasing, pressures on current funding levels for Perkins will continue to advance.
- Lack of Congressional CTE champions on the appropriations committees

Priorities to address next quarter:

- Impact the WIOA reauthorization, ensuring alignment of the proposal to Advance CTE’s priorities.
- Continue advocacy for Advance CTE’s Higher Education Act priorities aligned with short-term Pell and the College Transparency Act.

- Increase House and Senate CTE caucus membership.
- Influence House CTE caucus co-chair selection, in light of Congressman Langevin's retirement.
- Support the execution of a special point of order on House floor to strengthen awareness and positioning of CTE as part of American economic competitiveness.
- Establish a more intentional and proactive federal policy communications strategy (including social media)
- Increase Perkins FY23 funding to begin to close the inflation gap.
- Remain active in coalitions (CEF, CIAW, Homework Gap, Title IV-A, etc.) to leverage Advance CTE's voice and federal advocacy impact.
- Prepare materials to proactively communicate the GAO report and state CTE concentrator data to members of Congress, media and other relevant stakeholders.
- Engage with new equity partner organizations around shared federal policy priorities, namely State Directors of Vocational Rehabilitation (WIOA) and State Directors of Special Education (IDEA).

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Commitment: The **Membership Engagement** team will collectively contribute to the theory of action over the next year by providing members with information, tools, resources and supports that enable them to advance CTE Without Limits.

How will we measure progress and success a year from now (Spring 2023)?

- Increase member participation (with analysis by race, gender, age, geography, learner level, etc.) in professional learning events.
- Ensure members regularly see value in Advance CTE’s professional learning events, measured by the relevance and usefulness of the content shared.
- Support all new members in their onboarding to Advance CTE.
- Continue to build community within and among Advance CTE members.
- Implement organization-wide changes to respond to member services survey and other (professional and virtual learning, shared solution workgroup, etc.) evaluation results.
- Implement a more intentional strategy to support members’ increased use of Advance CTE communications, toolkits and resources.
- Support states in an effort to fully utilize all seats on their state teams and to diversify state teams, with representation from K-12, postsecondary and workforce development agencies.

Key accomplishments this quarter:

- Launched Successful Virtual Learning Series, with a 30% increase in average registrations above last year
 - Hosted three webinars and an ask-an-expert session; the three webinars had an average registration rate 30% higher than the 2021 events, and reached 716 individuals via live participation and YouTube views.
- Analyzed member services survey data (responses from 34 State CTE Directors), which demonstrate high levels of member satisfaction.
 - 100 percent of you agree or strongly agree that you are a valued member of Advance CTE;
 - 100 percent of you agree or strongly agree that you are satisfied with the value of their membership; and
 - 97 percent of you agree or strongly agree that Advance CTE is your first stop when you need a resource on a CTE topic.
- Initiated preliminary planning for the Spring State Leadership Retreat and the June Virtual Meeting series.
- Initiated the state dues renewal process with 47 states/territories submitting their intent forms thus far.
- Conducted calls with 41 State Directors regarding their challenges and opportunities. Information synthesized and key themes distilled, which will inform our upcoming events and member communications strategies. Key themes include general agreement between state political parties regarding CTE, staffing gaps/limitations, and, in many cases, more funding than they can put to active use.

- Analyzed state team composition to determine a baseline number, which is that 24% of state teams are meeting the Board-established threshold of diverse state teams.

Biggest challenges:

- Transitions:
 - Within Advance CTE, we have a new Director of Communications and Membership, a vacant membership position and a forthcoming vacant digital media position.
 - States are reporting being short-staffed, with a lot of transitions on state teams.
 - State Directors transitions has been high, which has had the cascading impact of unusually high transition among Advance CTE Board officers and members.
- Determining the right blend of in-person and virtual events given the changing nature of the coronavirus pandemic.
- Creating a safe in-person convening experience for members at the Spring State Leadership Retreat in light of ever-changing public health concerns and guidance related to the pandemic.

Priorities to address next quarter:

- Fill vacant positions (one membership, one communications) and fully onboard new staff to ensure a seamless delivery and supports for members.
- Meet the identified success criteria for the in-person Spring State Leadership, which includes dimensions of participation, building of community, strengthening leadership skills, etc.
- Host a successful June Meeting Series, which:
 - Provides attendees with a best-in-class virtual learning experience;
 - Builds community among attendees;
 - Positions the organization as a leader;
 - Is well-attended by members and national partners;
 - Features diverse perspectives and speakers; and
 - Receives high marks from attendees for quality content (aligned with CTE Without Limits); and replicable/implementable practices.
- Secure membership renewal by all states/District of Columbia/territories, as well as ensure all eligible agency members are supported in fully understanding their membership benefits and taking full advantage of their state team.
- Support all new members in their onboarding to Advance CTE, including hosting a new member orientation, publishing new State Director blogs, etc.
- Kick off the next cohort of the New State Director Institute, drawing on lessons learned from past years to maximize the experience for members.
- Host Board elections and onboard of new Board members and officers.
- Conduct early planning for resurrecting regional calls and/or starting new affinity groups.
- Monitor state participation in Advance CTE activities - organization-wide - to ensure we are creating a welcoming environment for every state and that we are featuring a diverse array of perspectives in Advance CTE events and resources.

April 2022

Commitment: The **Operations** team will collectively contribute to the theory of action over the next year by equipping our organization with the supports and systems they need to be successful and creating a supportive environment that is reflective of our core values.

How will we measure progress and success a year from now (Spring 2023)?

- Build sufficient capacity among our operations team to support our growing, diverse and hybrid organization.
- The Board of Directors and staff report feeling *increasingly* equipped to lead on racial equity.
- Systems are in place that ensure consistency and sustainability over staff transitions (e.g., succession planning through knowledge capture and transfer, redundancies in key functions, etc.)
- Maintain a robust and diverse fundraising strategy aligned to our theory of action.
- Continue to build and sustain equitable and inclusive personnel policies, both Board-approved and informal.
- Successful implementation of dashboard and identification of how best to leverage and augment data for continuous improvement.

Key accomplishments this quarter/Progress on Priorities:

- Hired and/or onboarded five staff members through an equitable hiring practice
- Had a clean audit
- Updated and streamlined the Board of Directors policy manual
- Launched staff-led committees to provide recommendations around project management and a productive and inclusive hybrid work environment
- Secured a contractor to support the hiring of a Director of Operations
- Collected baseline data for new dashboard in preparation for upcoming internal and Board of Director stocktakes
- Began work to develop measures of staff satisfaction and engagement, which is part of our dashboard.

Biggest challenges:

- 2021 staff turnover has led to gap in institutional knowledge, inconsistent membership on DEI Advisory Group and redirected capacity of our operations team and Advance CTE leadership. In particular, the HR requirements of hiring individuals from multiple, new states has been more time consuming than predicted, and has led to some operations priorities being put on the back burner.
- Continuing to build the right systems and supports as we grow our team (i.e., managing through growth)
- Building and maintaining a positive and inclusive workplace culture

Priorities to address next quarter:

- Conduct first internal and Board of Directors stocktakes to ensure greater focus on impact and outcomes, in alignment with our strategic plan and theory of action
- Make significant progress on hiring of a Director of Operations, who will be the steward of our operations, finance and internal culture
- Develop Board-approved FY23 Advance CTE/The Center to Advance budgets that expand operations capacity and continue to invest in internal equity training and professional development to ensure our organization is equipped to lead on quality and equity
- Be prepared to successfully shift to hybrid work environment, per staff-led committee recommendations, fostering an inclusive workplace
- Have and be ready to execute new project management processes and systems that further empower staff, per staff-led committee recommendations
- Begin the roll out of internal knowledge management system to ensure staff have the information they need, when they need it

Commitment: The **State Policy** team will collectively contribute to the theory of action over the next year by empowering state leaders to enact and elevate promising policy and practices in their states through systems-level change efforts.

How will we measure progress and success a year from now (Spring 2023)?

- Increase in the number of states that receive specific, targeted and strategic technical assistance activities from Advance CTE.
- Ensure successful implementation of the new dashboard metric that measures states' implementation of the *CTE Without Limits* vision and its principles.
- Increase the sharing of best practices among states and peer-to-peer collaboration among states.
- Increase in visibility of states that are leading the field in state CTE outcomes by defining and tracking high-quality CTE state policies.
- Enhance the knowledge of the field through publications and research in new and unexplored topic areas within the CTE ecosystem.

Key accomplishments this quarter:

- Advance CTE expanded its internal team and increased capacity to provide high-quality technical assistance to 23 states through Opportunity Gap Analysis workshops, the Postsecondary Data Initiative and the College in High School Alliance.
- Advance CTE built and expanded networks for CTE leaders to convene, address common challenges and share promising practices across states through developing communities of practice for the Opportunity Gap Analysis workshop participants and *CTE Without Limits* implementation. State leaders were able to address the challenges of assessing the equitable policies and practices associated with CTE programming.
- Published four high-quality publications related to career pathways systems and state policy, including Year in Review, braided funding, a 50-state report on early postsecondary opportunities in a youth apprenticeship data toolkit.
- Launched *Advancing CTE Without Limits* technical assistance projects with three states and a community of practice across 16 states, including 80 State Directors and cross-sector state leaders from workforce, postsecondary and other state-level agencies.
- Conducted six *New Skills ready network* site visits, resulting in drafts of six site visit memos, six snapshot drafts, and an annual report draft.
- Developed and started early implementation of the state policy data dashboards.

Biggest challenges:

- Measuring effort vs. impact to determine progress across initiatives due to limited longitudinal view of state policy impact.
- Members have limited capacity due to turnover and capacity within state agencies, local institutions and industry.
- Engaging states within the current political landscape.
- Better connect disparate grant obligations into a collective and aligned strategy.

Priorities to address next quarter:

- Leverage the State Policy strategy to drive cohesion between individual members of the State Policy team that are currently working on diverse and distinct projects.
- Manage the ongoing community of practice support that is provided to states through the *Advancing CTE Without Limits* technical assistance efforts.
- Begin to develop a tailored strategy and approach for technical assistance provided to states to ensure consistency in the delivery of technical assistance across projects.
- Dissemination of existing research and publications to states through June meetings series to maximize reach and impact.
- Successful onboarding of new staff joining the Advance CTE team to continue to provide meaningful supports and resources to our members and the broader CTE community.
- Develop a clear line of sight into state policy changes through better tracking of observed changes in state CTE outcomes.
- Leverage state policy tracking to identify states that have “best practices” that need to be elevated and promoted across 50 states.
- Explore research and publication(s) concepts that will help to address and fill a missing need currently untapped in the field. This will be done through conducting interviews with stakeholders that can expand the team’s body of knowledge.