

Advance CTE Board Meeting

AGENDA

October 17, 2017 - 9 a.m. - 12:10 p.m.

Meeting Room: Salon A, B, C

1 Welcome, Overview of Agenda
9 - 9:05 a.m.

Jo Anne Honeycutt
President
Page 1-4

2 Approval of June 23, 2016 Minutes
9:05 - 9:10 a.m.

Phil Cleveland
Secretary/Treasurer
Pages 5-6

3 Approval of Consent Agenda
9:10- 9:15 a.m.

Jo Anne Honeycutt
President
Pages 7-38

ACTE Liaison Report
ACTE Partnership Report
Advance CTE effect of government membership
Communications Update
Member Engagement Update
NASDCTEc HOSA Update
NSFY Update
Publications & Webinars Update
Putting Learner Success First Update
State Policy Update

4 Approval of FY16 Financial Reports
9:15 - 9:25 a.m.

Phil Cleveland
Secretary/Treasurer
Pages 39-51

5 Approval of FY17 Financial Reports
9:25 -9:35 a.m.

Phil Cleveland
Secretary/Treasurer
Pages 52-67

6 State Membership and Governance Discussion
9:35 - 11:15 a.m.

Kimberly Green
Executive Director

Kate Kreamer
Deputy Executive Director

BREAK

7 CTSO Liaison Discussion
11:25-11:40 a.m.

Kate Kreamer
Deputy Executive Director
Pages 68-69

8 Perkins Reauthorization
11:40 a.m. - 12:10 p.m.

Kimberly Green
Executive Director

Steve Voytek
Government Relations Manager
Pages 70-74

LUNCH

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

Advance CTE President

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Advance CTE Secretary / Treasurer

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Region I - Connecticut; Maine;
Massachusetts; New Hampshire; Rhode
Island; Vermont
Term: July 1, 2014 – June 30, 2017

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Region II - New York; New Jersey; Puerto
Rico; Virgin Islands
Term: July 1, 2015 – June 30, 2018

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Region III - Delaware; District of
Columbia; Maryland; Pennsylvania;
Virginia; West Virginia
Term: July 1, 2014 – June 30, 2017

Ms. Jean Massey
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Region IV - Alabama; Florida; Georgia;
Kentucky; Mississippi; North Carolina;
South Carolina; Tennessee
Term: July 1, 2016 – June 30, 2019

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

Dr. Charisse Childers
State CTE Director
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Phone: 501-682-1500
Fax: 501-682-1509 Email: Email:
charisse.childers@arkansas.gov
Region VI - Texas; Arkansas; Louisiana;
Oklahoma; New Mexico
Term: July 1, 2014 – June 30, 2017

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Nebraska
Term: July 1, 2015– June 30, 2018

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Region VIII - Colorado; Utah; North
Dakota; Montana; South Dakota; Wyoming
Term: July 1, 2016 – June 30, 2019

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

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

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Region XI - Hawaii; Commonwealth of
Northern Marianas; Federated States of
Micronesia; Republic of the Marshall
Islands; Republic of Palau; Guam;
American Samoa
Term: July 1, 2014 – June 30, 2017

Dr. Sheila K. Ruhland
President
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Associate Member Representative
Term: July 1, 2014 – June 30, 2017

Advance CTE Board of Directors'
MINUTES
CONFERENCE CALL
June 23, 2016
2:30 – 3:30 p.m. ET.

Attendees: Pradeep Kotamraju, Rod Duckworth, Jo Anne Honeycutt, Lee Burket, Eric Spencer, Sheila Ruhland, Vanessa Cooley

Staff: Kimberly Green, Kate Kreamer, Karen Hornberger

Absent: Marie Barry, Jean Massey, Bernadette Howard, Rich Katt, Mike Raponi, Kathy Cullen, Wayne Kutzer, Eleni Papadakis

Hornberger noted that the Board meeting was being recorded so that Board members not able to attend could listen to the call prior to casting their votes.

Welcome: Duckworth welcomed the Advance CTE Board of Directors' to the meeting. He noted that since there was not a quorum, an electronic ballot would be sent out.

Review of Minutes: Kotamraju presented the Advance CTE Board minutes from the 2016 Spring Meeting. No questions asked.

FY 17 Budget Overview: Kotamraju reported the organization is in a sound fiscal position. He reminded the Board that the Finance/Audit Committee reviewed the budget proposal in detail and unanimously approved the proposal. Kotamraju then turned over the report out of the proposed FY17 budgets to Hornberger and Green.

Advance CTE FY 17 Proposed Budget: Hornberger reported that based on the projected time staff will be spending on Center to Advance CTE initiatives, along with the two new staff positions supported by JPMC grant, it was necessary to update the organizational split that gets applied to all operational expenses (e.g. rent, telephone, insurance, etc.). For FY17, this split was 85% Association, 15% Foundation. The proposed split for FY17 is 58% Association and 42% Foundation, with 75% allocated to JPMC, 15% IDIQ (4 months of the year) and 7% general. Hornberger reviewed the income projections, noting that state memberships were based on 95% of invoiced dues, less Puerto Rico and Alaska. Alaska was removed out of the calculation due to the state budget situation and the State Director being laid off at the end of June. Associate and organizational memberships have increased by 25% to reflect the increased realized in FY16. Hornberger also noted that the conference sponsorships have been increased, reflecting the shift back to two regular meetings a year (FY16 included only one meeting – spring – and the fall summit, which had no sponsors).

Hornberger shared that on the expense side of the proposed budget, most expense lines represent a decrease as compared to FY16. This is mostly due to split of organizational expenses and reallocation of some staff time to the Foundation. Green shared that the printing cost increased covers the Board-approved printing of *Putting Learners First* and providing each state with up to 500 free copies. She also noted that the audio visual budget is increased to provide for internet at the Advance CTE meetings, a change being made due to member feedback. Green also wanted to note that the proposed budget includes additional legal expenses which represents ten hours of time should the governance taskforce's recommendation require a bylaws revision. Green asked if anyone had any further questions. No questions asked.

Initial findings on restricting “members only” assets: Staff conducted an extensive review of the question of whether resources created with membership dues, some of which may be paid for by state or federal funds, can have any restrictions on them. This research included reviewing information

produced by the Foundation Center, the Nonprofit Risk Management Center, the National Council of Nonprofits, and the Society for Nonprofits, as well as other similar education organizations that have state memberships, including the Southern Regional Education Board (SREB) and the Council of Chief State School Officers (CCSSO). In this research, we did not find any information requiring resources that are created as a membership resource, thus their creation is supported by membership dues, to be required to be made available publicly.

Organizations like CCSSO and SREB are also interesting to examine, as they also receive funding from state membership dues, though their members might pay their fees from different sources than Advance CTE members. Both CCSSO and SREB create materials for their members and the general public, including reports and presentations. There are also numerous consulting organizations that contract with states and the federal government to produce presentations and reports. Many of these products are made available only to paying members or customers, and not to the general public.

We did find some regulations around uses of state dollars, which vary significantly by state, and tend to focus more on financial transparency and reporting, rather than disclosing any materials actually created.

Cooley shared that in their state if Perkins money is used then the resource becomes open to the public. Duckworth agreed that it is the same for his state. After discussion, the Board requested staff to consult with the attorney to have an official legal opinion on this issue.

Other Items: Spencer shared that he was moving on from the State Director position in New Mexico and shared that it was a pleasure working with the staff and Board of Directors. Green and Duckworth thanked Spencer for his leadership and work with the Board. Honeycutt thanked Duckworth for his leadership as President and stated that she looks forward to moving into the position of President.

Hornberger share that the upcoming meetings are listed on the agenda and in the Board portal. She also reminded the Board that she would be sending out the electronic ballot to approve the FY17 budget and spring meeting minutes.

Meeting adjourned at 3:30 p.m. ET.



ACTE Board Report
Submitted September 13, 2016

ACTE continues to appreciate our partnership with Advance CTE. Following are highlights of recent activities and events. As always, please do not hesitate to ask questions or provide feedback on how we might continue to build on our partnership to serve the larger CTE community.

- In August, ACTE released a new Construction and Architecture Sector Sheet and a new Entertainment and Media Sector Sheet is being released this month. The full set of Sector Sheets can be found at <https://www.acteonline.org/sectorsheets>. These sector sheets describe CTE's role in growing the qualified workforce for vital industry sectors and we encourage you to download and share them with your field.
- ACTE is moving forward with the *Putting Learner Success First* campaign. We have set up a web page (<http://www.acteonline.org/ctesummit>) and will soon be adding a stakeholder letter encouraging CTE educators to participate in the effort.
- ACTE is continuing to work on the High Quality CTE project. We plan to pilot test in the spring with local practitioners and will have a new draft of the HQ CTE framework by the CareerTech VISION Conference in November. For more information visit <http://www.acteonline.org/high-qualityCTE>.
- ACTE is launching a new “Industry Connect” blog this fall. Blog entries are being solicited from the business and industry community for a CTE educator audience and will focus on skills gap issues as well as other employer/workforce-related topics. For more information contact Kevin Oshinskie koshinskie@acteonline.org.
- ACTE’s and the National Conference of Local Administrator’s Best Practices and Innovations Conference is being held in Tampa September 28-30 directly followed by ACTE’s Region II Annual Conference September 30 – October 1. Thanks to the five state CTE leaders who are serving on a panel during the Region II conference! More information can be found at <https://acteonline.org/bestpractices> and www.acteonline.org/regionii
- We are looking forward to CareerTech VISION and the Career Clusters Institute that will be held in Las Vegas November 30-December 3. If you have not already rsvp’d, please consider attending the CTE leaders breakfast for ACTE and Advance CTE state leaders. Also new this year is the CTE STEM Symposium. More information at www.careertechvision.com.
- ACTE will be launching CTE Learn later this fall, a portal that will house online professional development offerings including the new Global Competency Toolkit that ACTE, Advance CTE, the Asia Society and the Project Management Institute Educational Foundation are developing.

Submitted September 13, 2016 by LeAnn Wilson,

ACTE Executive Director (703-683-3111; lwilson@acteonline.org)

ACTE Partnership Update
Report submitted by Kate Kreamer, Deputy Executive Director

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

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

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

<i>Collaboration</i>	<i>Status</i>
<i>Advocacy/policy</i>	
<ul style="list-style-type: none"> Policy/advocacy staff hold monthly calls to discuss collaboration on engagement of Congressional offices, including Hill visits and school visits; draft language for Perkins; aligned recommendations on other major federal legislation; coordination and support for CTE Caucuses; and other efforts and projects. Submitted jointly-developed Perkins language to key Congressional offices, worked with House and Senate offices on reauthorization and issued joint statement of support for House passage of Perkins. 	Ongoing
<ul style="list-style-type: none"> Co-develop and release the annual <i>Year in Review</i> on state CTE policy. 	Ongoing
<ul style="list-style-type: none"> While each organization may initiate separate projects, Advance CTE and ACTE will continue work to coordinate and work toward a common and public understanding of what “high-quality” CTE is to inform Perkins reauthorization, professional development activities and other initiatives. 	Ongoing
<ul style="list-style-type: none"> Update and pilot the utility of a revised CTE Monthly, a newsletter that previously was sent to Congressional offices in support of high-quality CTE. 	Planned 2016-17
<i>Communications</i>	
<ul style="list-style-type: none"> Communications staff hold monthly calls to discuss opportunities for collaboration as well as cross-organizational promotions. Share a regularly updated calendar of publications and webinars. 	Ongoing
<ul style="list-style-type: none"> Jointly develop a press engagement strategy for promoting federal policy work (e.g., joint press statements, budget requests, etc.) and at least one joint op-ed (still planned). A protocol has been developed and is being tested to support rapid responses and statements. 	Ongoing
<ul style="list-style-type: none"> Proactively plan strategy for Advance CTE to better support annual CTE month 	Ongoing

<i>Putting Learner Success First: A Shared Vision for the Future of CTE</i>	
<ul style="list-style-type: none"> • Served as co-conveners for the Future of CTE Summit. • Have both signed onto the <i>Putting Learner Success First: A Shared Vision for the Future of CTE</i> and have both committed to aligning their Strategic Direction and strategic plan, respectively, to supporting its implementation. • Coordinate on the development and release of materials targeted for local CTE leaders; participate in quarterly partner meetings; identify links between planned work and resources and the vision principles/actions. 	Ongoing
<i>Meetings & Conferences</i>	
<ul style="list-style-type: none"> • Formal MOU in place integrating the National Career Clusters[®] Institute into CareerTech VISION. • Planning is well underway for the 2016 VISION conference. Career Clusters will still maintain a strand, but efforts are being made to more fully integrate the content 	Ongoing
<ul style="list-style-type: none"> • MOU with Advance CTE, CORD & ACTE on Career Pathways Effect workshops, which is being updated and expanded to include CPE workshops at other ACTE events (i.e., Best Practices conference, etc.) 	Ongoing
<ul style="list-style-type: none"> • Engage states hosting regional ACTE conferences about ways we can jointly support them (e.g., range of themes, speaker bank, common resources, etc.). Explore possibility of each region focusing on specific issues. 	TBD
<i>Professional & Leadership Development</i>	
<ul style="list-style-type: none"> • Advance CTE surveyed State Directors and ACTE surveyed their state leadership to determine the relationship between each State CTE Director and their ACTE chapter, from both perspectives. • Co-host an invite-only breakfast for State Directors and State ACTE executives. • Based on survey of State Directors and ACTE leaders and feedback generated through breakfast, develop resources to support collaboration. 	In process
<i>Organizational Leadership – Coordination</i>	
<ul style="list-style-type: none"> • Serve as liaisons on each other Boards • Provide free registrations to organizations’ meetings • Board members each automatically receive membership to other Association • Quarterly meetings between Kim, Kate, LeAnn & Steve • Host annual Joint ACTE-Advance CTE Executive Committee meeting 	Ongoing
<ul style="list-style-type: none"> • Formally compare strategic plans to determine overlap, leverage points and gaps • Identify existing opportunities to build and deliver services that positively impact CTE and benefit the CTE community and the membership of both organizations. • Jointly pursue grant money/funding to support new initiatives through mutual discussion and agreement on strategic targets related to funding and projects. 	Plan

Board Action Required: None

September 12, 2016

Kimberly A. Green
Executive Director
Advance CTE
8484 Georgia Avenue, Suite 320
Silver Spring, MD 20910

Dear Kim:

You have requested an opinion whether Advance CTE is prohibited from restricting any of its offerings to members only because it derives almost all of its revenue from governmental sources. As discussed below, Advance CTE is not so prohibited.

Advance CTE is a Delaware nonstock corporation exempt from federal income taxation under Section 501(c)(4) of the US Tax Code. It is governed by a Board of Directors which, according to the Bylaws, has the general responsibility to “manage, supervise and control the business, property and affairs” of Advance CTE. Per Delaware law, individual Directors owe to Advance CTE the fiduciary obligations of care, loyalty and obedience. The membership of Advance CTE consists of U.S. States and Territories. State and Territorial government employees and agencies are also eligible to join. The membership dues and other amounts paid by these persons comprise most of Advance CTE’s revenue, and those dues and fees are paid with government funds.

To answer directly the question presented, the receipt of government funds in the form of membership dues, conference fees, and related amounts does not impose governmental policies or requirements on an independent, nonprofit corporation like Advance CTE. The US Supreme Court has held that the policies and practices of an independent nonprofit association with governmental members from multiple States are determined by the association itself as a private entity, and by not any State government. *National Collegiate Athletic Association v. Tarkanian*, 488 U.S. 179, 193 (1988) (holding that an association with State institution members is “independent of any particular State”). There can be circumstances under which a nonprofit organization is considered to be an agent of a particular State government and therefore possibly subject to policies of that State government, *e.g.*, *Brentwood Academy v. Tennessee Secondary School Athletic Association*, 531 U.S. 288, 296 (2001), but, again those do not apply to an organization like Advance CTE.

It is also relevant that the law considers dues and similar fees to be payments for services rendered, or to be rendered, not some kind of general public support. *E.g.*, *Kneeland v. National Collegiate Athletic Association*, 850 F.2d 224, 230 (5th Cir. 1988), cert. denied 488 U.S. 1042 (1989) (“The dues and ... assessments ... are not funds for the general support..., but, rather, are an exchange for known, specific, and measurable services.”). Payment of membership dues is essentially in the nature of a procurement or purchase of a needed item, as opposed to a grant or subsidy the use of which a State has a right to control. When a private nonprofit entity performs services procured by a government entity and is paid for them by a governmental entity, the government retains no proprietary interest in the funds after they are paid. Thus, for example, a governmental body may impose “restrictions on reimbursable costs” but not “restrictions on what can be done with money once it has changed hands” in a commercial or procurement transaction. *Healthcare Association of New York State, Inc. v. Pataki*, 471 F.3d 87, 104 (2006); 53A Am. Jur. 2d Money §21 (2009) (“Since possession of money vests title in the holder, the title to money passes with delivery to a person who acquires it in good faith and for valuable consideration.”). Once dues are paid to an association, the “economic and legal realit[y]” is that these monies “become the property of the association and any severable or individual interest therein ceases upon such payment. As such property, they are subject to disbursement and expenditure by the association in pursuit of the lawful object or objects” of the association. *Osborne v. Commissioner*, T.C. Memo 1995-71.

It is common place for nonprofit, Section 501(c)(4) membership organizations to restrict some products and services to members only, and I am not aware of any IRS ruling or court decision prohibiting an advocacy and education organization like Advance CTE from doing so. Further, this will in no manner prevent Advance CTE from being “primarily engaged in promoting ... common good and general welfare,” which is the basis for its Section 501(c)(4) tax exempt status. 26 CFR §1.501(c)(4)-1(a)(2)(i).

Please let me know if you have any questions or need anything further.

Sincerely,

Hugh K. Webster

Communications Update

Report submitted by Katie Fitzgerald, Communications Associate

The following report outlines the success of Advance CTE's communications efforts since the May Board of Directors meeting, and highlights the success of the communications plan throughout the year. Staff recently updated Advance CTE's communications strategy for 2016-17, building off the goals, activities, success and lessons learned from the 2015-16 communications strategy. (See more in Communications Strategy report).

Advance CTE's communications efforts are aligned with the following objectives:

1. Raise visibility of Advance CTE as leading voice on high-quality CTE and career readiness.
2. Raise visibility of high-quality CTE as most effective strategy for creating college and career ready learners with an emphasis on equitable and accessible CTE to all learners.
3. A broader array of stakeholders are engaged around the notion and goals of high-quality CTE (directly and indirectly through our members).
4. CTE: Learning that Works for America is a nationally-recognized campaign and all of Advance CTE's communications and case-making resources are aligned under this brand.
5. Support the adoption and implementation of Putting Learner Success First: A Shared Vision for the Future of CTE.
6. Support Advance CTE state and federal policy efforts through the reinforcement of effective partnerships, publications, messaging and engagement with policymakers and partners.
7. Support members through streamlined and targeted resources, information and communication through a variety of communication channels.

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

- Launching and rolling out *Putting Learner Success First: A Shared Vision for the Future of CTE*
- Launched the Learning that Works Resource Center
- Promoting a number of new Advance CTE resources including the *Connecting the Classroom to Careers* series
- Marketing the 2016 Fall Meeting

Below is a description of the strategies and tasks accomplished with related data. Note, these strategies are based on the 2015-2016 communications strategy, which was updated in September 2016 to reflect the new vision for CTE and the updated strategic plan (See Communications Strategy report).

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

Tasks accomplished to date:

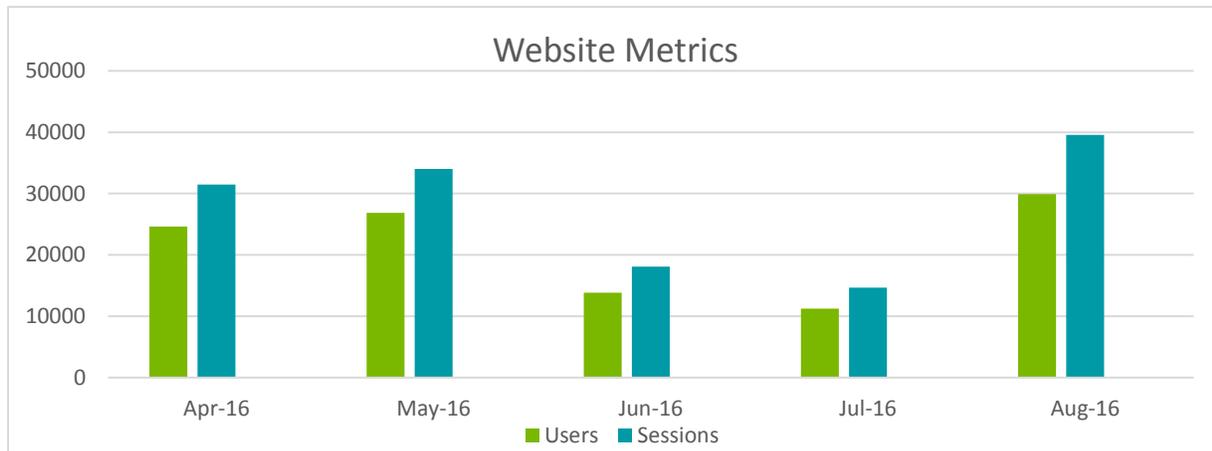
- Expanded e-blast series and blog series to include bi-monthly releases of the Learning that Works Resource Center Roundup (previously quarterly) for self-selected members of the research/publications email list, and an Election 2016 blog series,
- Worked with state policy team and web developers to create Learning that Works Resource Center featuring Advance CTE and external resources launched in June,
- Maintained regularly released blog series including This Week in CTE, State Policy Updates, Getting to Know..., Inside International CTE and Legislative Updates
- Integrated a CRM system into the Advance CTE website to streamline event registration and member data management
- Daily updates of Twitter and weekly updates of Facebook resulting in over 2,000 followers on each platform,
- Kept website up-to-date including changing homepage slides, updating the blog, updating the events and news section, the press room and more.

SUCCESS METRICS: WEBSITE

Between July 1, 2015 – June 30, 2016, we saw a 27 percent increase in sessions, 29 percent increase in users and 18 percent increase of pageviews compared to July 1, 2014 – June 30, 2015, demonstrating employment of an effective website strategy.

Staff has continued to update and manage all pages in a timely manner, keeping the home page fresh and inviting, and adding resources regularly. We revamped the CTE: Learning that Works for America campaign section and added the Learning that Works Resource Center.

Finally, staff integrated a CRM system to better streamline event registration and membership management. Event registration was utilized for the Spring and Fall Meetings, and the internal member database was launched in July. This allows staff to better track members, and aids in the development and management of a member engagement strategy.



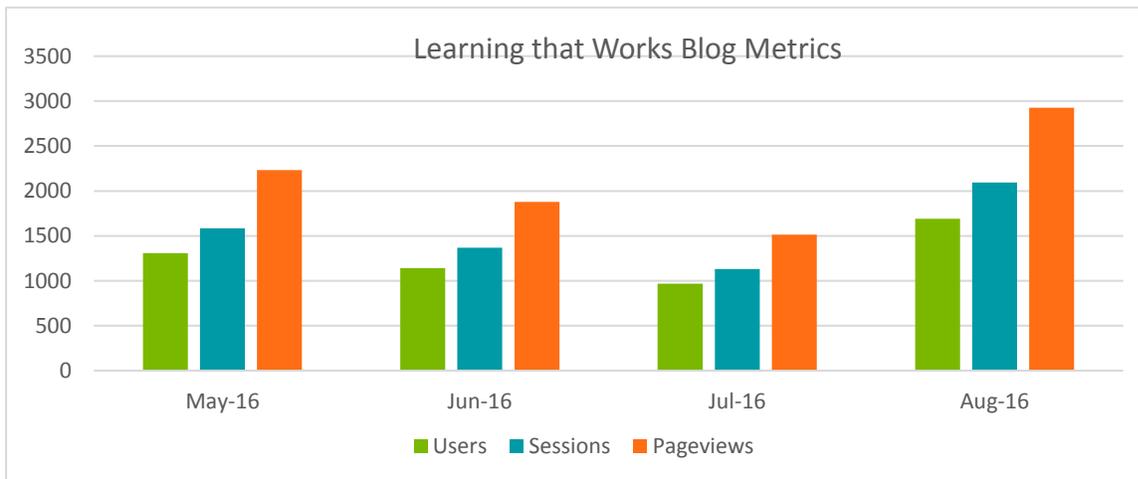
SUCCESS METRICS: LEARNING THAT WORKS BLOG

The Learning that Works Blog has featured 51 posts since May 2016 that have highlighted events, major accomplishments and announcements such as *Putting Learner Success First* and the Learning that Works Resource Center; timely state and federal policy updates; and new State CTE Directors. The blog also highlights regular series including:

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

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

The blog is consistently in the range of about 1,000 users and 2,000 page views per month. The blog traffic rose significantly July 1, 2015 – June 30, 2016 compared to the same timeframe the previous year. Overall, sessions increased by 34 percent, users by 36 percent and pageviews by 22 percent.

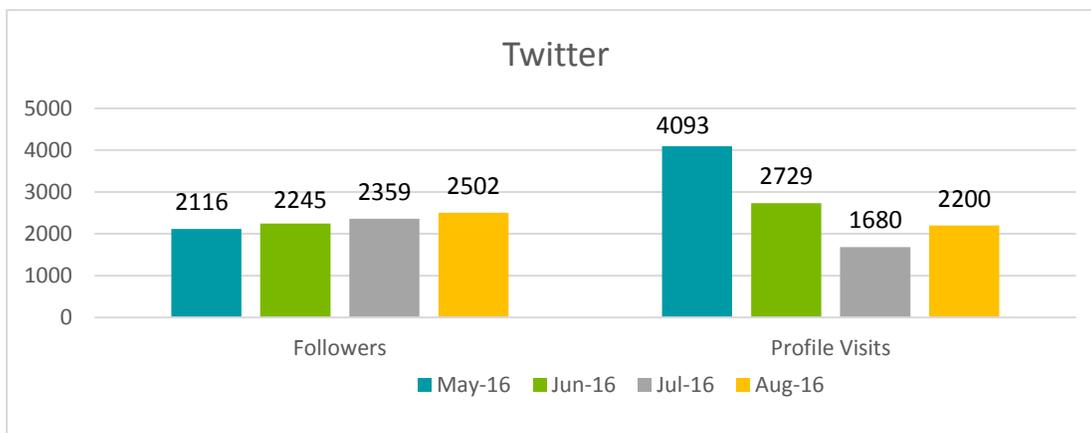


In an effort to drive traffic to the blog, staff releases the weekly blog roundup Mondays resulting in about 36 percent open-rate. (**Goal for 2016-17:** Maintain 35 percent open-rate.)

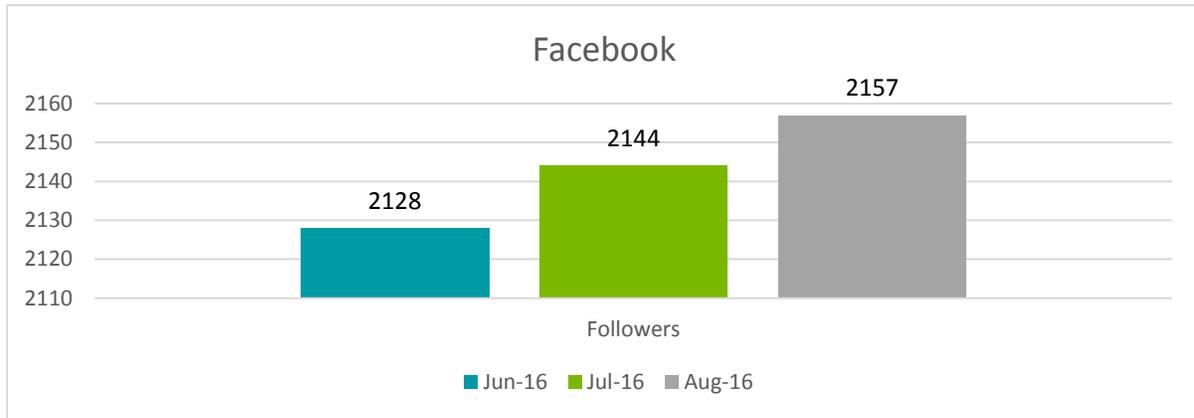
SUCCESS METRICS: SOCIAL MEDIA

Social media engagement has steadily increased over the past few months, with significantly more followers on both Facebook and Twitter. Staff has worked on cross promotion of Facebook posts and tweets with key partners, and participated in promoting the Putting Learner Success First, Learning that Works Resource Center and Perkins reauthorization.

@CTEWorks has gained nearly 500 followers since the May Board update, gaining an average of 129 followers per month and putting Advance CTE over 2,500 followers. (**Goal for 2016-17:** Add 1,250 Twitter followers by June 30, 2017.)



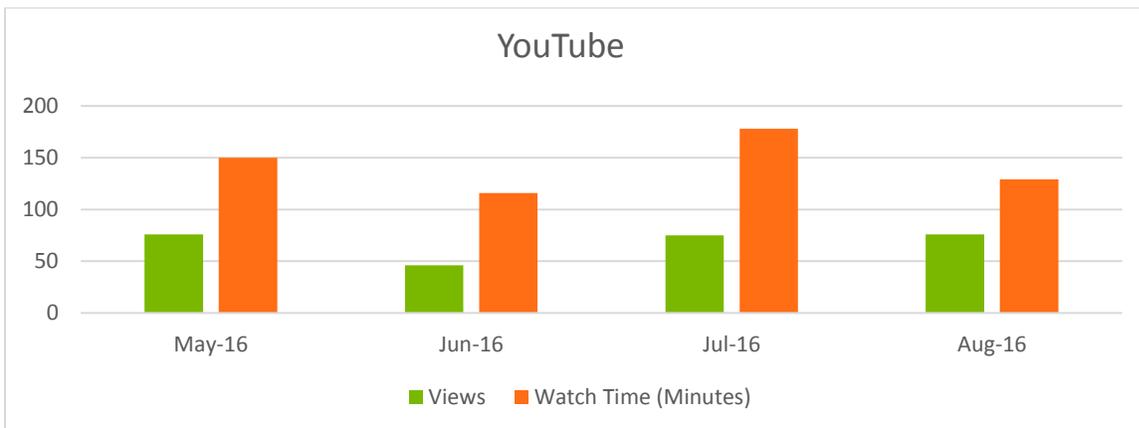
Advance CTE’s Facebook page gained 537 likes since the September Board update, averaging 67 likes per month and also reaching over 2,000 followers. (**Goal for 2016-17:** Add 750 Facebook followers by June 30, 2017.)



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

The top videos viewed during this time period are:

- [Career Pathways Effect: Overview of Career Pathways](#) (281 views),
- [Career Pathways Effect: Programs of Study](#) (69 views).



Goal for 2016-17: Update YouTube videos in a timely manner, increase views and watch times. Upload all relevant past webinars to the YouTube page.

SUCCESS METRICS: E-BLASTS

- The CTEWorks Communications e-blast has an average 31 percent open-rate and 22 percent click-through rate. While this did not meet the 35 percent benchmark, as subscribers become more familiar with the e-blasts, Advance CTE staff predicts open-rates and click-through rates will rise. (**Goal for 2016-17:** 35 percent open-rate and quarterly release schedule for e-blasts.)
 - Learning that Works Resource Center Roundup e-blasts were transitioned to a bi-monthly release schedule in June. The e-blast has an average 30 percent open rate and 26 percent open rate. While this did not meet the 35 percent benchmark, as subscribers become more familiar with the e-blasts, Advance CTE staff predicts open-rates and click-through rates will rise. (**Goal for 2016-17:** 35 percent open-rate and monthly release schedule for e-blasts.)
2. *Engage in and maintain strong partnerships with critical education reform and business organizations, with a particular focus on those that can help amplify our federal policy agenda, our interactions with state policymakers and/or our direct impact on CTE in practice.*

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

Tasks accomplished to date:

- Developed internal calendar of major events throughout the year (e.g., CTE Month, Teacher Appreciation Week, Manufacturing Month, etc.) to better align our own communications (e.g., social media and This Week in CTE blog posts) with those efforts.
- Partnered on a variety of publications and webinars with partners including the Appalachia Regional Comprehensive Center, ACTE, CCSSO, Achieve and Asia Society.
- Maintain/update our joint-work plan with ACTE to coordinate on policy, programs and communications.

SUCCESS METRICS

- Staff monitors partner engagement and participation quarterly and reports back on partner events and announcements on a weekly basis.
 - Staff is on track to complete the goal of partnering six times per year on publications and/or webinars.
3. *Support the utilization of the CTE: Learning that works for America campaign in all states through regular revisions of resources and direct technical assistance.*

Tasks accomplished to date:

- Currently 743 users have entered into the CTE: Learning that works for America[®] agreement.

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

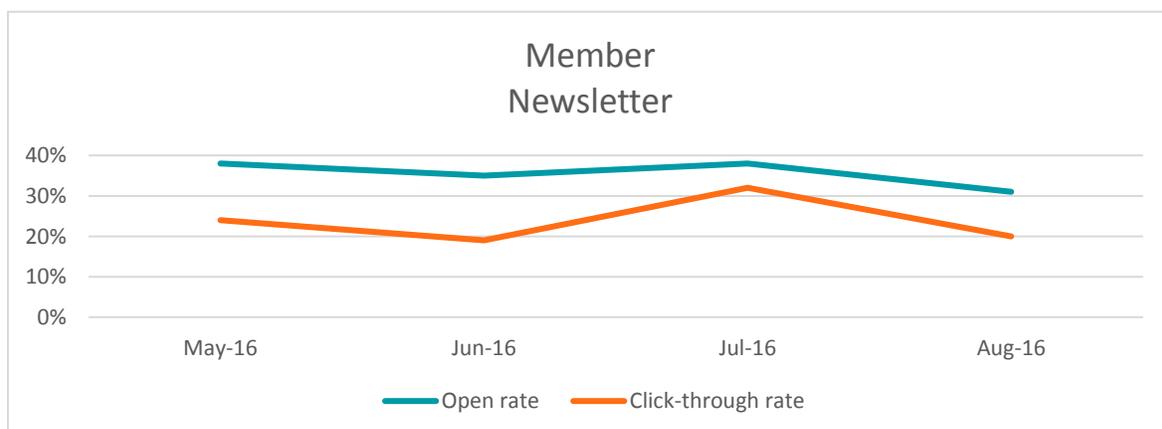
Advance CTE is currently working with the Siemens Foundation on a project that will result in a number of new CTE: Learning that works for America resources to be launched in winter/spring of 2017. (See Strategies for Attracting Students to High Quality CTE Report/Siemens Report for more information).

SUCCESS METRICS:

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

Tasks accomplished to date:

- Communications Committee: Advance CTE re-launched the Communications Committee in May 2015, and has held regular calls and e-mail communications around specific topics. The committee consists of 23 members from 13 states and a multitude of national organizations. This year, the committee worked with staff on rebrand efforts including providing input on the name, logo, style guide and roll out plans. The committee also provided guidance on the Career Clusters product update. As we look into next year, the committee will assist in the updating CTE: Learning that works for America campaign resources.
- Advance CTE Member Newsletter: The Member Newsletter provides members with an overview of what Advance CTE is working on and has accomplished, new resources released, state policy updates, member updates, federal policy updates and timely information on events. This summer, staff included a new section featuring content from the Learning that Works Resource Center.



SUCCESS METRICS

- Since the May Board update, the newsletters have an average of 36 percent open rate surpassing the 35 percent goal and we will continue to strive for a 35 percent open rate.
5. ***Conduct and leverage annual Excellence in Action Award to identify and embed high-quality CTE programs of study throughout communications, outreach and advocacy efforts.***

Advance CTE leveraged its third annual Excellence in Action award program, which recognized 11 winning programs from across the country, a number of which were featured in local and national publications, such as Education Week and an op-ed we published in Real Clear Education. Winners will continue to be promoted in blog posts and at events including the upcoming CareerTech VISION conference among other events as they arise. 2015 winners continue to be featured and recognized in articles published throughout the year, including in a recent profile of Omaha Bryan High School, a 2015 winner in the Transportation, Distribution & Logistics Career Cluster. A student from Upper Valley Career Center, a 2015 winner in Architecture & Construction, was featured in the New York Times.

This Award is central to our broader communications and advocacy efforts, with the winners featured on fact sheets, articles written for partner organizations, blogs, as well as in conversations with members of the media. As we look towards the 2017 Excellence in Action awards, we will focus on the following:

SUCCESS METRICS

- Advance CTE will increase the amount of applications to the award yearly, with the goal of awarding a program of study in 11 Career Clusters in 2017.
- Advance CTE will lead a successful and engaging awards ceremony at the 2017 Spring Meeting.
- At least ten articles feature award winners as a result our media and press outreach strategy.
- Advance CTE will successfully use the award-winning programs in communications and advocacy throughout the year.

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

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

Tasks accomplished to date:

- Since April, Advance CTE has had 16 media mentions, primarily around the promotion of the 2016 Excellence in Action award winners. Media picks ups tend to be focused on significant announcements or events including:
 - Excellence in Action Awards (9 and one profile of a 2015 student in the New York Times)
 - Putting Learner Success First (2 articles)
- Advance CTE has also spoken with reporters from Associated Press, New York Times, Ed Week, NPR, Chalkbeat New York and the Hechinger Report over the past 6 months.

SUCCESS METRICS

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

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

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

Tasks accomplished to date:

- Provided FAQs and related resources around Advance CTE’s major initiatives including the rebrand and launch of Putting Learner Success First to help members communicate about the rebrand.
- Worked with leadership to craft blogs supporting Putting Learner Success First resulting in three partner blogs with three more pending.
- Launched the Putting Learner Success First sign on campaign engaging members and non-members and pooling information on how users will use the vision.
- Updated style guide to reflect new brand and relation to sub-brands.

SUCCESS METRICS

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

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

Tasks accomplished/ongoing:

- Monthly Board updates providing a snapshot of metrics including website, blog and social media traffic and bi-yearly in-depth updates to the Board on communication efforts

Board action required: *None*

Member Engagement Update

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

This report provides a summary of the membership changes that have taken place since the May 2016 Advance CTE Board of Directors meeting.

Membership Snapshot:

Member Type	Total (as of 9/19/2016)	New since 7/1/2016
State Directors	54	3*
Associate-State	88	3
Associate-Non State	75	9
Organizational	32 organizations (representing 93 individuals)	1 organization (with 3 individuals)
<i>TOTAL MEMBERS</i>	249 <i>**310 if you count the individuals represented by organizational memberships</i>	

Member Management: In July, staff officially transitioned to a CiviCRM database system, which is built into the back-end of the careertech.org website. This system allows staff to better manage and analyze all of the ways in which we interact with members. In transitioning to this system, it has also helped us reduce duplication of effort and streamline record keeping on members. As a result, some of the numbers reported regarding membership may have fluctuated from past reports. Additionally, twenty-three Associate memberships (with a value of \$2,475), as well as one Organizational membership (\$1,500) were written off as uncollectible for FY17, further impacting the earlier reported numbers.

State CTE Director Transitions: Since the May Board Meeting, five State Directors left their posting and 3 have been appointed. The following chart notes the changes:

State	Previous State Director	Date Vacated	New State Director (or interim, if applicable)	Date Appointed (if applicable)
AK	Curtis Clough	6/30/16	Brad Billings	9/1/16
CA	Russell Weikle	5/31/16	Donna Wyatt	9/6/16
KS	Rita Johnson	7/31/16	Connie Beene	9/1/16
KY	Dale Winkler	9/10/15	Laura Arnold (interim)	TBD
MD	Karen Salmon	5/22/16	Lynne Gilli (interim)	TBD
NM	Eric Spencer	7/15/16	TBD	TBD

Board Action Required: None



HOSA's 40TH ANNIVERSARY CELEBRATION FEATURES U.S. SURGEON GENERAL AT THE INTERNATIONAL LEADERSHIP CONFERENCE



Over **9,200** HOSA members, advisors and guests participated in HOSA's first-ever International Leadership Conference in Nashville, TN, June 22-25, 2016. HOSA-Future Health Professionals from all over the country, Canada, American Samoa and Puerto Rico came together to compete, learn and share their HOSA experiences. Conference highlights included **57** health-related competitive events, **147** educational workshops, keynote addresses from **VADM Vivek Murthy, M.D.**, the U.S. Surgeon General, and **Brad Montague**, creator of Kid President, and a special celebration for HOSA's 40th Anniversary.

While at the ILC, Dr. Murthy honored the ten delegates chosen to participate in the **Public Health Leadership Scholars** week. The week-long seminar is hosted by the U.S. Department of Health and Human Services' (HHS) Office of the Assistant Secretary for Preparedness and Response (ASPR) with support from the Office of the U.S. Surgeon General (OSG) and the United States Public Health Service Commissioned Corps (USPHS).



2016-2017 Newly-Elected National Executive Council. HOSA-Future Health Professionals elected their officers led by Elizabeth Carnesi, National President (AZ).

(Pictured: L-R: Elizabeth Carnesi, National President; Holly Hardin, Region II Vice President; Angeli Sharma, Secondary Board Representative; Khalil Tubbs, Postsecondary/Collegiate Vice President; Shawnee Chaudhury, Post-secondary/Collegiate Board Representative; Abraham Onifade, Region III Vice President; Priya Rathakrishnan, President-Elect; and Jada Holliday, Region I Vice President)



The PHLS leaders had the opportunity to meet with **Dr. Nicole Lurie, Assistant Secretary for Preparedness and Response, U.S. Public Health Service** and had the rare privilege of touring the Secretary's Operation Center to become better aware of how the Center operates its mission.



HOSA-100 National Advisory Council met while at HOSA's International Leadership Conference. Those in attendance:

Chairman

General Bruce Green, M.D., Former Air Force Surgeon General; Deloitte, Chief Federal Medical Officer

Members

Collene Bauer, Dean, Specialized Programs, University of Phoenix

Charnetia Young, Manager of Workforce Programs, CVS Health

Dr. Robert Popovian, Sr. Director, U.S. Government Relations, Pfizer Pharmaceuticals

Captain Robert Tosatto, Director, Medical Reserve Corps

Sean Callinicos, Government Relations, Cardinal Health

Doug Wolf, Director of Strategic Initiatives, Boys & Girls Clubs of Columbus

Health Leader of the Year Award

Congratulations to CAPT Rob Tossatto, USPHS, for receiving the Commissioned Officers Association of the USPHS Health Leader of the Year Award. Captain Tosatto is the Director of the Medical Reserve Corps, a member of the HOSA-100 National Advisory Council and longtime supporter of HOSA. The COA Health Leader of the Year Award was established in 1987 to recognize individuals who have made notable contributions to the health of the Nation. Contributions can be in research, administration, service delivery, or some other area of public health. Other recipients have been: RADM Boris Lushniak, Deputy Surgeon General; Thomas Frieden, Director CDC; Richard Carmona, U.S. Surgeon General, Secretary Tommy Thompson to name a few. HOSA honors Captain Tosatto as well.



HOSA's International Leadership Conference served 6,640 Competitors in 57 competitive events demonstrating competencies developed through health and biomedical science classroom instruction, technical training and HOSA activities. HOSA congratulates all middle school, secondary and postsecondary/collegiate winners.

2016-2017 Competitive Event Topics

Public Health

"Combating Zika and Future Threats. What is the best way to detect and respond to this emerging disease?"

Researched Persuasive Writing and Speaking

"Prescription Painkiller Abuse: Who's at Fault?"

"Smartphone Addiction: A problem or a Sign of the Times"

Biomedical Debate

"America has the best health care system in the world."

Public Service Announcement

"My Preparedness Story: Staying Healthy and Resilient!"

Behavioral Health

National Alliance on Mental Illness and CVS Prescription Drug Abuse

Medical Reading Books

Wonder — Raquel Palacio

Dr. Muttter's Marvel — Cristin O'Keefe Aptowicz

Extreme Medicine — Dr. Kevin Fong

The Man Who Touched His Own Heart — Rob Dunn

The Secret: What Great Leaders Know & Do — Blanchard & Miller

Medical Innovation — Two separate events in 2017: Original and Advanced.

Middle School Division — First year of competition was at 2016 ILC. At the 2017 ILC, HOSA will offer 16 events for middle school competitors.

Crosswalks have been developed to show alignment with the different partners and curriculum (hosa.org/CEresources)

- NAF Academy of Health Sciences
- National Health Science Standards
- Common Career and Technical Core
- Common Core State Standards
- Project Lead The Way Biomedical Science
- STEM



2016 HOSA Hall of Fame Inductees

HOSA-Future Health Professionals unveiled its new Hall of Fame during HOSA's 40th Anniversary Celebration at the 2016 International Leadership Conference Opening Session on June 22 in Nashville. The HOSA Hall of Fame was created to honor and recognize individuals, companies, associations and government agencies who have rendered outstanding service to HOSA, health and biomedical science education and the health industry.

The inaugural inductees of the HOSA Hall of Fame recognized three outstanding **corporate partners** – CVS Health, Deloitte and HCA-Hospital Corporation of America, for their significant contributions to HOSA over the last 40 years. Partners presented at the Opening Session included: Ernie DuPont, Senior Director of Workforce Initiatives, **CVS Health**, represented by Charnetia Young, Manager of Workforce Programs; Dr. Bruce Green, Chief Federal Medical Officer, **Deloitte**, and Chair of the HOSA-100 National Advisory Council; and Jennifer Berres, Vice President of Talent Management, and Scott Waldrop, Director of Operations, for **HCA-Hospital Corporation of America**.



Charnetia Young
CVS Health



Dr. Bruce Green
Deloitte



Jennifer Berres
HCA-Hospital Corporation
of America



Scott Waldrop
HCA-Hospital Corporation
of America

Four outstanding **associations** were honored for their continued support and contributions to HOSA-Future Health Professionals: **ACTE-Health Science Division** represented by Gina Riggs, President-Elect, Association for Career & Technical Education; **National Technical Honor Society** represented by Kate Allen, Chief Operating Officer; **Health Professions Network** represented by Lynn Brooks, Executive Director; and **National Consortium for Health Science Education** represented by Phyllis Johnson, Executive Committee Chair.



Gina Riggs
ACTE



Kate Allen
National Technical
Honor Society



Lynn Brooks
Health Professions Network



Phyllis Johnson
National Consortium for
Health Science Education

HOSA also recognized the **Medical Reserve Corps** represented by Captain Rob Tosatto, Director, Medical Reserve Corps; **Office of the Assistant Secretary for Preparedness and Response** represented by Don Boyce, Deputy Assistant Secretary, Office of Emergency Management, Health & Human Services and the **United States Public Health Service** represented by Commander Thomas Pryor, Nurse Officer USPHS.



Captain Rob Tosatto
Medical Reserve Corps



Don Boyce
U.S. Department of Health
and Human Services



CDR Thomas Pryor
U.S. Public Health Service

The inaugural HOSA Hall of Fame class also included Past HOSA, Inc. Board Chairmen, Past National Presidents; former Competitive Events Directors and Honorary Life Members. The full list can be found on HOSA's website at hosa.org. HOSA is indebted to these individuals, corporate partners, associations and government agencies for their continued support of HOSA-Future Health Professionals and for the value they bring annually to the over 202,000 *future health professionals*.

Health Professions Week

Explore. Learn. Pursue.

www.explorehealthcareers.org



HOSA-Future Health Professionals is proud to sponsor the first-ever Health Professions Week. Health Professions Week is an exciting week-long event for high school and college students interested in learning more about careers in health professions. HPW offers innovative ways for individuals to explore multiple health professions and interact directly with current practitioners and educators about admission requirements and career pathways. Each event will include an online treasure hunt, on-campus events and two virtual fairs.

Health Professions Week is a collaborative effort sponsored by the organizations that promote health profession education. The careers represented and their sponsoring organizations are:

Commission on Accreditation of Athletic Training Education	Association of Accredited Naturopathic Medical Colleges	American Association of Colleges of Pharmacy
American Speech-Language-Hearing Association	American Association of Colleges of Nursing	American Physical Therapy Association
Association of Chiropractic Colleges	American Occupational Therapy Association	American Academy of Physician Assistants
American Dental Education Association	Association of Schools and Colleges of Optometry	Physician Assistant Education Association
Association of University Programs in Health Administration	National Commission on Orthotic and Prosthetic Education	American Association of Colleges of Podiatric Medicine
Association of American Medical Colleges	American Association of Colleges of Osteopathic Medicine	Association of Schools & Programs of Public Health
Association of American Veterinary Medical Colleges	Council on Social Work Education	



Hawaii HOSA at ILC



Brad Montague at ILC With Kid President!

For more information about
HOSA-Future Health Professionals,
40th Anniversary International Leadership Conference,
 or to attend the 2017 International Leadership Conference in Orlando, contact:
Jim Koeninger, Ph.D., Executive Director
jim.koeninger@hosa.org
 548 Silicon Drive, Suite 101 • Southlake, TX 76092 • 972.874.0062



As the first phase of the New Skills for Youth (NSFY) grant comes to an end, staff have been working to capture the stories and lessons of this first phase in a way that will inform future work and benefit all states working on career readiness reforms. Staff have also been assisting with the design of the Phase 2 competition process, which is detailed below.

Going forward, Advance CTE and its NSFY partners, the Council of Chief State School Officers (CCSSO) and Education Strategy Group (ESG), must decide how Phase 2 will be structured and what supports will be offered to states, whether they participate in Phase 2 or not. This planning work will begin in November 2016 and will shape the NSFY work over the next three years, including state convenings, publications, and technical assistance.

Publications

Staff have released several publications so far through New Skills for Youth, which are detailed in the Publications update. Beginning in November 2016, staff will develop a calendar for 2017 publications, which will include not just briefs and reports, but policy and implementation tools as well. These tools will focus on specific policy questions and implementation challenges, and will be versatile enough to help any state address those challenges. Potential topics include program approval and rural challenges.

Learning that Works Resource Center

The Learning that Works Resource Center (LtWRC) was launched in June 2016 with dozens of reports, tools and policies focused on CTE and career readiness. Advance CTE staff will regularly add materials so that the LtWRC is seen as the premiere site for information on career readiness policies. By the end of 2016, the site will have a total of 120 reports and tools and 27 policies. Additionally, there will be a resource that pertains to every state by the end of 2016. In December 2016, staff will develop specific targets for visits to the LtWRC, and will also set new goals for the number of resources to add during 2017. So far, the site has been visited over 15,000 times.

Staff promote the LtWRC through targeted social media posts as well as a bimonthly newsletter. Staff also works with contacts at (CCSSO) to promote the site through CCSSO newsletters and in person at CCSSO meetings with the use of an informative one-pager.

Communications

Staff have begun conversations with CCSSO and ESG to provide communications support to NSFY states. In addition to content and implementation assistance, states have requested help in thinking and planning for communicating about these reforms to schools, parents and the general public.

Convenings

- State Convenings:
 - May 2016: The NSFY project team held a convening in Chicago in May, which brought together the 25 Phase 1 winners, along with three other states participating in CCSSO's broader Career Readiness Initiative. States heard from content experts in various career readiness topics, including accountability, and also had dedicated time with their NSFY coaches to begin planning for their needs assessment and other Phase 1 activities.
 - October 2016: On October 25-26, 2016, the 25 Phase 1 states will meet in Washington, DC to compete for participation in Phase 2. During the convening, states will give presentations to the NSFY review committee on their Phase 1 activities, including their needs assessments and plans for Phase 2. Additionally, they will have the opportunity to meet and work with their coaches, and attend interactive workshops on work-based learning, federal policy, accountability, and talent pipeline management.
 - Future Convenings: The project team is currently in the process of planning the timing and structure for two convenings in 2017. It is possible that one convening will be held only for Phase 2 states, while the other includes all states involved in CCSSO's Career Readiness Initiative.
- Partners' Meeting: On September 26, 2016, the NSFY project team convened a group of stakeholders, including states, funders, and other non-profit organizations, in Washington, DC to discuss the lessons learned so far and priorities of the NSFY work. Staff presented on Advance CTE's role in the project, including highlighting the LtWRC.

Phase 2 Timeline

The NSFY project team has decided on the following timeline for Phase 2 selection:

- October 7, 2016: States will submit materials for review, including the results of their needs assessment and data analysis work, their three-year action plans, evidence of early wins and a budget narrative.
- October 14, 2016: States will submit a PowerPoint presentation that will be used during their presentations on the 25th and 26th.
- October 25-26, 2016: States will give 20 minutes presentations on their NSFY work, followed by 15 minutes of Q&A by the review committee.
- November 2016: The NSFY project team will conduct follow-up interviews as necessary, based on questions raised from the documents submitted by the state and the presentations given.
- Early December, 2016: The NSFY project team will meet to decide the ten Phase 2 states, based on input from the review committee, as well as the follow-up interviews, documents submitted by the states, and the state presentations. The team will ensure that Phase 2 states represent a range of states in terms of geography and context, including states that are newer to this work.
- Early January, 2016: The NSFY project team will notify winning states.

- Late January, 2016: The NSFY project team will make the names of Phase 2 winners public.

Partnerships

The NSFY work has allowed Advance CTE staff to engage our partners in new ways. Staff works closely with the Career Readiness team at CCSSO, which has led to new conversations with other teams at CCSSO, including Communications and Education Workforce. JPMorgan Chase is actively involved in the work as well, giving feedback on Advance CTE publications and the structure and content of NSFY convenings.

The October convening has created a unique opportunity for our partners to engage with this work, as staff will be unable to lead workshops while listening to state presentations. Therefore, workshops will be led, with coordination from staff, by National Governors Association, the US Chamber of Commerce Foundation and the National Skills Coalition.

Board Action Required: None

PUBLICATIONS

Since May 2016, Advance CTE has published a number of major policy briefs/reports on topics of interest from the field, as well as the new shared vision for CTE.

- *Putting Learner Success First: A Shared Vision for the Future of CTE* (with ACTE, CCSSO, NASBE, NCSDE, National Skills Coalition and US Chamber of Commerce Foundation) (May 2016)
 - Over 25,000 copies of this report have been distributed
 - There have been over 3,000 page views of www.careertech.org/vision
- *How States are Making Career Readiness Count: A 2016 Update* (May 2016) (with Achieve)
- *Connecting the Classroom to Careers: Leveraging Intermediaries to Expand Work-Based Learning* (July 2016): This brief provides guidance and examples from South Carolina and Georgia of how states can support and leverage intermediaries to expand work-based learning.
 - There have been over 500 page views between July 23-September 22, 2016
- *Connecting the Classroom to Careers: Measuring Work-based Learning for Continuous Improvement* (August 2016): This brief highlights examples from West Virginia, Tennessee and Massachusetts that demonstrate either a systems-level or student-level approach to measuring work-based learning activities.
 - There have been 300 page views between August 25-September 22, 2016
- *In Their Words: Why Employers Support CTE* (with support from Ford Next Generation Learning) (September/October 2016): This white paper features lessons learned from two employer roundtables held in Nashville, TN and Pinellas County, FL, focused on the why and how of employer engagement in CTE.
- *Connecting the Classroom to Careers: A Comprehensive Guide for State Leaders on Work-based Learning* (October 2016): This guide combines and condenses the four *Connecting the Classroom to Careers* briefs and adds a new section on scaling work-based learning to provide a comprehensive guide for designing and implementing work-based learning systems.
- *Credentials of Value: State Strategies for Identifying and Endorsing Industry-Recognized Credentials* (October 2016): This brief examines three states, Kansas, Florida and Louisiana, that have taken innovative approaches to identifying industry-recognized credentials and pulls out common themes for other states to learn from.

Looking ahead, Advance CTE has the following publications planned through May 2017.

- *State of CTE report* (December 2016): This report, based on a survey of our members, as well as almost 300 local CTE leaders, will examine how states and localities are addressing

the challenge of recruiting industry experts into secondary schools. The report will highlight innovations occurring in this area, and suggest next steps for various involved stakeholders.

- Snapshot case studies on the 25 New Skills for Youth Phase 1 states (January 2017): Staff will release 2-3 page case studies on each of the 25 Phase 1 New Skills for Youth states. The case studies will focus on the process each state went through to carry out their needs assessment and plan for career readiness reforms, and any lessons learned along the way.
- Other reports, briefs and resources as defined through New Skills for Youth: In 2017, staff will develop 3-4 tools for policy and implementation, along with 3-4 publications. The tools and publications will be informed by the needs of Phase 2 states, and will likely reference some of the following topics: rural challenges, program approval, systems alignment and data use, among others. Staff will develop a more thorough schedule of 2017 publications beginning in November 2016.

WEBINARS

Since May 2016, Advance CTE hosted three webinars:

Webinar Topic	Month	# Participants
Apprenticeship webinar with USDOL	July 2016	121
WIOA Infrastructure (State CTE Directors & Counterparts invited)	July 2016	30 states
Perkins Update (State CTE Directors & Counterparts invited)	July 2016	38 states
A co-hosted webinar with Appalachian Regional Comprehensive Center on work-based learning in Kentucky	August 2016	25

Looking ahead, Advance CTE will host a number of webinars through spring 2017. To date the following are planned:

- A webinar with past Excellence in Action award winners as part of our recruitment efforts for the 2017 awards (November 2016)
- Webinar on *Putting Learner Success First* (November/December 2016)
- Webinar to release State of CTE report (December 2016)
- Webinar on lessons learned in Phase 1 of New Skills for Youth (January-February 2017)
- Webinar to release findings from communications research through Siemens grant (February-March 2017)
- *NOTE: If Perkins is fully reauthorized, more webinars will be scheduled to support state planning and implementation efforts.*

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

- Advocacy 101: Making the Case for CTE
- Career Clusters 101
- Programs of Study
- Reflect, Transform & Lead: An Overview of the Vision for CTE
- The Common Career Technical Core: The Basics
- The Common Career Technical Core: The Development Process
- Sequestration
- The Federal Budget & Appropriations Process: What's the Difference?

Board Action Required: None

Putting Learner Success First: A Shared Vision for the Future of CTE Rollout

Report submitted by Kate Kreamer, Deputy Executive Director

Advance CTE with seven supporting organizations released *Putting Learner Success First: A Shared Vision for the Future of CTE* in May 2016. This shared vision provides recommendations for how the entire education system can better support learners in their endeavors, leveraging high-quality CTE as a central strategy. It includes five guiding principles:

- All CTE programs are held to the highest standards of excellence.
- All learners are empowered to choose a meaningful education and career.
- All learning is personalized and flexible.
- All learning is facilitated by knowledgeable experts.
- All systems work together to put learner success first.

To maintain a firm commitment to Putting Learner Success First, Advance CTE has embedded the new vision throughout our recently approved Strategic Plan, including dedicating an entire strategic priority to ensuring the success of the new vision.

Below is a description of that strategic priority and its four related goals and relevant activities currently underway or planned.

Strategic Priority 4: Lead a cross-organizational and cross-state effort to successfully build awareness, advocacy and accomplishment of the Putting Learner Success First: A Shared Vision for the Future of CTE.

1. *Goal: Serve as an ongoing convener of partnering organizations to ensure advocacy for and collaborative and coordinated advancement of the vision.*

Much of the strength of *Putting Learner Success First* came from the fact that it was developed jointly by partner organizations. This collective action raised the visibility of the document, and also provides a critical platform to focus and deepen our partnerships with these organizations.

Since the release of the vision document, Advance CTE has continued to engage the original supporters through regular one-on-one calls or through existing partnership mechanisms, such as New Skills for Youth or our joint workplan with ACTE. These discussions have deepened our partnerships and led to us identifying new ways to collaborate in support of key principles and actions.

To date, Advance CTE has:

- Presented on the vision at CCSSO and National Council of State Directors of Community Colleges meetings.
- Partnered with CCSSO, ACTE, NSC and the U.S. Chamber of Commerce Foundation to develop a [chart](#) highlighting existing and planned initiatives that are addressing and advancing the principles and actions of the vision. The chart demonstrates the areas of focus and where gaps still exist.

- Posted a guest blog from the U.S Chamber of Commerce Foundation the Learning that Works blog.
- Collaborated with ACTE on [The Shared Vision & CTE Educators](#), a short document that communicates how and why local CTE educators can engage around and support the vision.

In addition, through partner engagement, [four new organizations](#) have formally joined onto the vision, bringing the total of supporting organizations to 11. These organizations - including the Asia Society, Goodwill International, SkillsUSA and FCCLA – sent letters of support signaling their commitment to the five principles of *Putting Learner Success First*. We have or are in the process of posting blogs from these partners on our blog and identifying new ways to collaborate.

Looking ahead, Advance CTE will:

- Update this [chart](#) on a quarterly basis, with input from the co-conveners.
 - Partner with NCSDE to develop a document focused on postsecondary CTE leaders that communicates how they can best support and advance the vision.
 - Continue to have regular engagement with all of the partners and recruit additional organizations to sign on in support of the vision.
2. *Goal: Develop and disseminate communications tools and resources to support Advance CTE members, partnering organizations and stakeholders in building awareness of and advocacy for the vision.*

Advance CTE is committed to supporting all members as they adopt, implement and advance the principles and actions of *Putting Learner Success First*. Advance CTE’s approach is two-fold: create the materials state leaders most need to help communicate and implement the vision and work directly with members to identify and lift up best practices from the field.

To date, Advance CTE has:

- Created a new section of our website dedicated to *Putting Learner Success First*.
- Distributed over 25,000 hard copies of the document.
- Developed a [suite of materials](#) for members and other interested leaders to use, including:
 - A PowerPoint presentation with talking points
 - A one-page, leave behind fact sheet
 - Tips for sharing *Putting Learner Success First*
 - Discussion questions to support the implementation of *Putting Learner success First*
 - A set of guiding questions state leaders can use to engage in and think through the vision’s principles and actions
- Launched a monthly blog series in August highlighting new resources and supporters of *Putting Learner Success First*.
- Presented on the new vision at two statewide CTE conferences and supported members as they presented on the vision themselves.

Looking ahead, Advance CTE will:

- Launch a member-driven committee to identify best practices and support the implementation of the vision (in October 2016).

- Create an animated video showing a world where this vision is a reality.
 - Highlight implementation examples from states and organizations through our blog and other publications.
 - Develop additional tools and resources for members, with input from the vision committee.
3. *Goal: Ensure alignment and prioritization of organizational assets, technical assistance, resources, federal and state policy priorities and strategies, communications, and professional learning opportunities with the advancement and accomplishment of the vision.*

Just as *Reflect, Transform and Lead* pushed Advance CTE to launch new initiatives, such as the CTE: Learning that works for America[®] campaign and Common Career Technical Core, and served as the foundation for our federal policy recommendations, *Putting Learner Success First* has become a major driver of Advance CTE's priorities and activities.

To date, Advance CTE has:

- Included a stand-alone strategic priority focused on *Putting Learner Success First* in our 2016-2018 strategic plan.
- Included activities in support of *Putting Learner Success First* in our communications, member engagement, state policy and federal advocacy strategies.
- Aligned all planned publications with principles and actions within *Putting Learner Success First* either implicitly (e.g., work-based learning briefs and guide) or explicitly (employer engagement white paper and upcoming State of CTE report on experts in the classroom).
- Shared *Putting Learner Success First* with a number of funders and potential philanthropic partners.
- Featured *Putting Learner Success First* at our Spring and Fall meetings.

Looking ahead, Advance CTE will:

- With input from the vision committee, identify new resources and technical assistance that can be provided for members to support *Putting Learner Success First*.
- Highlight the vision and major national and state accomplishments at our 2017 spring meeting.
- Ensure all future publications and resources continue to align with and help advance *Putting Learner Success First*.
- Leverage this [chart](#) to focus and target future fundraising and development activities.

4. *Goal: Document and disseminate progress of the states, partnering organizations and Advance CTE in the accomplishment of the vision.*

To support the wide array of activities listed above and that are ongoing throughout states and communities, Advance CTE has created an internal set of metrics to track progress and success. Metrics include:

- Webpage views
- Opens of *Putting Learner Success* focused e-blasts
- Number of individuals signing onto web-based campaign
- Number of hard copies requested and shared

- Number of in-state and national presentations on the vision delivered and/or supported by Advance CTE
- Member support and implementation of the vision (through annual member services survey)
- Number of new partners who sign on
- Number of resources, blogs or other materials created by or with partners
- Any new funds raised in support of specific principles or activities
- Press hits/mentions

To date, Advance CTE has:

- Created an internal calendar of communications and outreach efforts.
- Launched a [sign on](#) campaign, where leaders and supporters at all levels can show their support for the shared vision.
- Placed an op-ed in Real Clear Education.
- Worked with a reporter at Education Week to support a CTE-focused series.

Looking ahead, Advance CTE will:

- Update this [chart](#) on a quarterly basis, with input from the co-conveners.
- Co-host a webinar with a number of the partner organizations to share progress on the vision six months after its release in November/December 2016.
- Highlight the report in our 2016 Annual Report.
- Release a progress report on *Putting Learner Success* one year later in May 2017 at our spring meeting.
- Continue to mention and tie back to the vision in media engagement.

Board action required:

None

Over the past six months, much of the work in this area has occurred under the New Skills for Youth (NSFY) umbrella. However, with the development of a new strategy, the larger state policy work, including a distinct focus on implementation, will become distinct from the NSFY work in many ways.

The new state policy and implementation strategy continues the work of gathering and sharing policy information for Advance CTE members, but adds the creation of tools and support for effective implementation of state and federal policies. Some of the work planned in this new focus area over the next six months is detailed below.

Repository for Policy Resources

- **State CTE Policies and Emerging Trends:** In 2016, staff have identified, and are currently monitoring, more than 200 policies related to CTE. These policies will be included in a report, which will be released in January 2017.
- **Advance CTE’s Blog:** The blog includes the recurring “State CTE Policy Update” series, as well as the “CTE Research Review”. In the future, this series will include updates about ESSA implementation and opportunities to include CTE as a strategy in state plans. Since June, the “State CTE Policy Update” series has received more than 200 views – approximately 43 views per post. Separately, the “CTE Research Review” series provides regular updates on cutting edge research in the field. This series has also received more than 200 total views since June, at an average of 56 views per post.
- **State Fact Sheets:** Advance CTE’s state fact sheets, which serve as advocacy tools, were last updated in 2015, and will be revised during the summer of 2017. Staff will explore various delivery methods for these fact sheets in the next few months, including combining them with state profiles in order to make information easier to find for our members.

Develop policy frameworks and tools

- **Policy Framework:** Staff have developed a strawman document for the proposed structure and content of policy frameworks. These frameworks will focus on specific topic areas, such as program approval, and will provide tips in crafting and implementing legislation at the state level. These frameworks will not prescribe specific policy language, but rather describe elements that high-quality policies must contain and/or address. Once staff have received feedback from the Board on the strawman document, they will develop the tool in early 2017.
- **[Policies](#) in the Learning that Works Resource Center (LtWRC):** Staff have created 22 state policy profiles in the LtWRC, each highlighting innovative and promising state policies related to work-based learning, career advisement, graduation requirements and more. Policies included in the database must be aligned to Advance CTE’s vision, meet

one of the six objectives in the New Skills for Youth Initiative, be relevant in today's policy environment, provide utility to state leaders and either have evidence of success or be an innovative policy. Staff will add another 20 policies by April 2017.

- **ESSA Implementation:** Over the next six months, staff will provide regular updates on states' progress in implementing the Every Student Succeeds Act (ESSA), which includes opportunities to promote high-quality CTE. Currently staff are carrying out a scan of state updates on the ESSA planning process. This information will be used to design materials and supports for members.
- **Case Making Materials:** This fall, Advance CTE staff will review and update existing case making materials and fact sheets, removing those that are no longer relevant and creating new resources that members can use to promote CTE in their own communities.

Strategic Partnerships

Advance CTE has continued to strengthen relationships with other state-facing organizations. Since June, staff have communicated with the Education Commission of the States, supporting the organization's work in dual enrollment and CTE, and with the National Conference of State Legislatures, responding to ongoing requests for information. In the coming months, we plan to identify and connect with organizations supporting state work in ESSA implementation to ensure that CTE continues to play a role in implementing the law.

Board Action Required: None

FY16 Advance CTE Financial Report
Report prepared by Kimberly Green, Executive Director

This report provides summary financial information for the entirety of fiscal year 16 or July 1, 2015 through June 30, 2016.

INCOME: Advance CTE received 84% of its budgeted income. All main sources of income exceeded projections – dues, interest, meeting registrations and sponsorships. The only “under budget” income item was reserve withdrawals. The budget called for \$367,782.55 in reserve withdrawals, however, only \$89,729 was withdrawn. The reasons the reserve withdrawals were well below projections are (1) other income areas exceeded their targets; (2) a larger than projected portion of salaries and benefits were offset by a grant received by The Center to Advance CTE; (3) the decision to not pursue the CCTC alignment study and the postponement of some CTE campaign activities (which were to be reimbursements from Advance CTE to the Center) and (4) Summit expenses were lowered than projected.

EXPENSES: Overall, Advance CTE expended 84% of projected expenses. The expense items that exceeded budgeted targets are as follows:

Bank charges (credit card fees): over budget by \$489.59

Explanation: This is due to more states and individuals paying for memberships and meeting registrations with credit cards.

Full employee benefits: over budget by \$6,042.93.

Explanation: An employee had previously declined health insurance in favor of a salary increase. This employee wanted to get back on our employer-sponsored health care plan. Since new health care legislation came into effect, the prior agreement whereby the employee would need to pay for the full cost of health coverage was no longer legal. Therefore, the organization was required to absorb the additional costs, which accounts for the overage.

Bank charges: over budget by \$8.87

Explanation: A stop payment fee on a check to a consultant resulted in the over budget expense.

Merrill Lynch fees: over budget by \$6,423.84

Explanation: The investment portfolio/management fee is charged at 1% of investments. Therefore, the fees charged are linked to the value of the investments. During budget development, performance is estimated based on prior year performance and this influences both projected expenses and interest. This year, the market exceeded our projections. The fees charged were over budget by 26% but the interest earned exceeded our projections by 34%.

ASSETS: At the end FY16, Advance CTE’s fiscal position was strong with total equity at \$2,409,761.74 and total assets at \$2,734,546.33. Therefore, the overall fiscal position remains largely unchanged from the end of the prior fiscal year, when the organization’s total equity was \$2,417,466.39 and total assets at \$2,726,768.29.

INVESTMENTS: The report from the Merrill Lynch advisor does not call for any adjustments to the portfolio at this time. The portfolio has approximately a 5.57% rate of return, with the equity portion at 7.55%, which is higher than the both Dow Jones Index (1.76%) and the S & P 500 (1.73%).

Board action required: Approve FY16 year end financial reports.

Advance CTE FY16 Year-End Budget Report

	Approved FY16	Actuals: July 1, 2015 - June 30, 2016	Actuals to Budget 100% of the fiscal year completed	Explanatory Notes
INCOME				
State Memberships	\$499,774.10	\$526,773.00	105%	All dues received except for Puerto Rico.
Associate & Org. Membe	\$41,433.75	\$49,475.00	119%	Exceeded target due to increased numbers of organizational members.
Conference Registrations	\$147,500.00	\$165,279.00	112%	Greater than budgeted participation in the Fall Summit. Below target participation at the Spring Meeting with 145 participants. Additional non-member attendees at both events brought us to our target revenue.
Conference Sponsorships	\$50,000.00	\$52,500.00	105%	No sponsors for the Fall Summit. Year-round sponsorship of \$10,000 included. Spring Meeting was at received \$42,500.
Interest/Dividend	\$59,400.00	\$79,406.09	134%	Market improvement and retained more funds in investments throughout the year (thus increased interest potential). Expenses are over budget by 26%; income exceeded budget by 34%.
Contract approved increases/bonus	n/a	\$0.00	0%	Contract bonus was awarded but paid for entirely by the Center to Advance CTE.
Other income	\$2,000.00	\$12,996.47	650%	Includes unanticipated smaller grant income, speaking and TWG honoraria, incentive from FL for hosting fall meeting. Received \$6,600 from Asia Society for a global competency project; \$3,300 of this was advanced to FY17 (when the work will be carried out).
Reserve withdrawal	\$100,507.55	\$0.00	0%	None needed to balance budget due to conservative expenditures.
Reserve withdrawal for Future of CTE Summit	\$204,170.00	\$76,713.26	38%	Summit expenses tracked with the approved budget (see attached spreadsheet). Only withdrew funds needed to cover expenses. Remaining costs were covered by income received in the fiscal year.
Reserve fund withdrawal - payment to The Center to Advance CTE	\$63,105.00	\$13,015.74	21%	See explanation under related expenses.
TOTAL REVENUES	\$1,167,890.40	\$976,158.56	84%	
EXPENSES				
Allocated Expenses to Specific Projects				
Speakers	\$1,000.00	\$0.00	0%	No expenses incurred.

Advance CTE FY16 Year-End Budget Report

	Approved FY16	Actuals: July 1, 2015 - June 30, 2016	Actuals to Budget 100% of the fiscal year completed	Explanatory Notes
Meals (Hotels/Catering)	\$152,550.00	\$102,057.85	67%	Meal costs for the Board retreat (\$3,835.35); Future of CTE Summit (\$49,528.20) and Spring meeting (47,542.12) were below budgeted expectations. Also due to lower than projected spring meeting participants, meal costs were below budgeted projections.
Travel/Lodging	\$34,785.00	\$20,518.35	59%	Lower than projected because the joint Executive Committee meeting cancellation due to snowstorm. Under budgeted projections in all categories of travel.
Awards/Gifts	\$1,787.85	\$464.45	26%	Budget projections include maximum potential number of award winners. Only recognized one awardee this year, plus president's gavel.
Audio Visual	\$10,000.00	\$8,188.35	82%	Negotiated to secure improved rates for AV at spring meeting thus reducing costs and being below budgeted expectations.
Printing/Copying	\$8,250.00	\$7,571.16	92%	Reflects increased printing of materials for meetings, reports, on boarding packets for new State Directors, Hill meetings/packets and Vision-related documents (internal printing), spring meeting printing and rebrand printing.
Telecommunications (telephone/communications)	\$10,462.99	\$9,380.42	90%	On target. Telephone/internet, cell phones, warranty on office phones, and conference calls including web hosting fees.
Postage/Overnight	\$3,650.00	\$322.11	9%	Approved amount increased by \$2,200 for rebrand budget modification to send packets to new members with branding information. Branding information sent electronically and funds were not be spent, thus being so far below budgeted expenses.
Supplies	\$3,750.00	\$3,263.85	87%	Budget is based largely on projected number of registrations at spring and fall meeting. Because spring registration was below target, fewer supplies needed.
Education/Training	\$3,500.00	\$165.00	5%	Staff were offered professional development opportunities but most did not avail themselves of the opportunity.
Dues/Subscriptions	\$8,821.77	\$7,267.75	82%	On target.
Bank Charges - Credit Card Fees	\$3,450.00	\$3,939.59	114%	Credit card are being used more frequently by states to pay registration fees and dues, thus overage.

Advance CTE FY16 Year-End Budget Report

	Approved FY16	Actuals: July 1, 2015 - June 30, 2016	Actuals to Budget 100% of the fiscal year completed	Explanatory Notes
Reimbursement to The Center to Advance CTE for project-specific work	\$63,105.00	\$13,015.74	21%	The CCTC-CCSS alignment study was canceled per the Board. The Excellence in Action Awards expenses were \$12,939.29. Communications campaign expenses were \$76.45. Most campaign activities were put on hold due to the Vision roll out. No charges for state policy work. All expenses were direct expenses. The Foundation covered the staff time and benefits associated with these projects.
Legal fees	\$2,000.00	\$1,039.65	52%	Includes regular annual review of policies and related rebrand legal work.
Contractors (consultants)	\$165,570.00	\$160,614.51	97%	Includes PWC/Summit, Fratelli Group (rebranding), website updates, Board retreat facilitation.
total - Specific Projects	\$472,682.61	\$337,808.78	71%	
General & Administrative Expenses				
Salaries	\$421,831.36	\$361,951.12	86%	Final salaries based upon timesheets.
Bonuses	\$0.00	\$0.00	0%	No regular bonus pool created for FY16. Instead, qualified staff received performance-based salary increases. Executive Director and Deputy ED bonus paid for by the Foundation (related to grant income).
Full employee benefits	\$86,093.26	\$92,136.19	107%	Final benefits based on timesheets. More time reimbursed by the Foundation than anticipated when the budget was developed. This is largely due to grants received by the Foundation, which offset salaries and benefits. Benefits slightly higher than anticipated due to federal health care legislation and one employee choosing to return to employer-based plan, as well as the association maintaining year end leave accrual. This accounts for the overage.
Rent	\$116,336.95	\$113,862.22	98%	On target.
Licenses/Fees	\$3,183.25	\$2,720.00	85%	On target. Annual plan fee for 401K and Corporation Service representation fee paid annually.
Office Supplies	\$750.00	\$586.60	78%	On target. Based on actual usage.
Communications	\$250.00	\$111.95	45%	Under budget based on actual usage.
Postage/Overnight	\$216.88	\$216.55	100%	On target. Monthly fee for stamps.com.
Printing/Copying	\$10.00	\$5.33	53%	Minimal non-project printing. Most printing charged to projects.

Advance CTE FY16 Year-End Budget Report

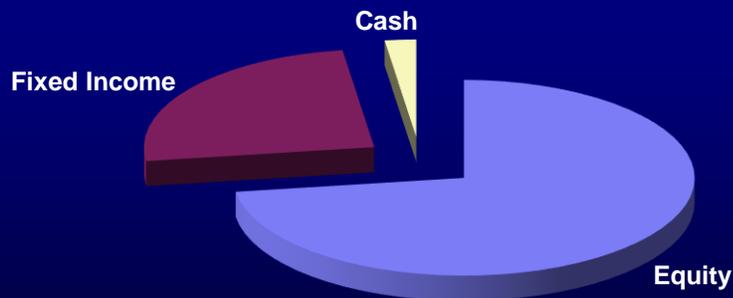
	Approved FY16	Actuals: July 1, 2015 - June 30, 2016	Actuals to Budget 100% of the fiscal year completed	Explanatory Notes
Equipment & Furniture	\$4,222.47	\$2,822.08	67%	Includes copier lease. Did not replace laptops as projected.
Bank Charges	\$35.00	\$43.87	125%	Stop payment fee incurred, which was unanticipated and unbudgeted.
Merrill Lynch Charges	\$25,000.00	\$31,423.84	126%	Investment portfolio fee charged at 1% of investments. Expenses are over budget by 26%; income exceeded budget by 34%.
Accounting	\$28,200.00	\$26,432.74	94%	On target.
Legal	\$3,190.00	\$346.00	11%	Budget estimated included time for MOA-related follow up, which was not used. Balance of fees include personnel policy review and rebrand research/filing.
Insurance - Directors	\$5,138.62	\$5,127.13	100%	On target.
Liaison & Meetings	\$750.00	\$564.16	75%	Lower than projected due to lack of time for staff to hold spring event.
Total G&A Expenses	\$695,207.79	\$638,349.78	92%	
Total Project Expenses	\$472,682.61	\$337,808.78	71%	
TOTAL EXPENSES	\$1,167,890.40	\$976,158.56	84%	
OME LESS EXPENSES	\$0.00	\$0.00		

Advance CTE/NASDCTEc
Balance Sheet
As of June 30, 2016

	Total
ASSETS	
Current Assets	
Bank Accounts	
1010 Cash- Bank of America	120,468.01
1017 Merrill Lynch Cash - 749	14,496.04
1018 Merrill Lynch Cash - 7WD	38,121.01
Total Bank Accounts	\$ 173,085.06
Accounts Receivable	
1200 Accounts Receivable	23,671.62
Total Accounts Receivable	\$ 23,671.62
Other current assets	
1100 Investments	
1131 Government Bonds	598,026.89
1159 Equities	1,734,415.65
Total 1100 Investments	\$ 2,332,442.54
1275 Security Deposit	9,000.00
1280 Due from Foundation	169,707.15
1299 Accrued Interest Receivable	2,228.22
1300 Prepaid Expense	21,840.31
Total Other current assets	\$ 2,535,218.22
Total Current Assets	\$ 2,731,974.90
Other Assets	
1400 Furniture and Fixtures	25,107.21
1405 Accumulated Depreciation - Furniture and Fixtures	-24,375.62
1410 Equipment	17,255.43
1450 Accumulated Depreciation- Equipment	-14,340.59
Total Other Assets	\$ 3,646.43
TOTAL ASSETS	\$ 2,735,621.33
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 Accounts Payable {105}	7,218.17
Total Accounts Payable	\$ 7,218.17
Other Current Liabilities	
2070 Accrued Vacation	80,020.42
2099 Deferred Revenue	
2142 Deferred State Dues FY 16-17	206,996.00
2143 Deferred Associate Dues FY 16-17	31,625.00
Total 2099 Deferred Revenue	\$ 238,621.00
Total Other Current Liabilities	\$ 318,641.42
Total Current Liabilities	\$ 325,859.59
Total Liabilities	\$ 325,859.59
Equity	
3000 Net Assets	1,954,431.63
3900 Earnings	463,034.76
Net Income	-7,704.65
Total Equity	\$ 2,409,761.74
TOTAL LIABILITIES AND EQUITY	\$ 2,735,621.33

Advance CTE
 Current Asset Allocation
 Association Accounts 749-04H01 & 7WD-04H50
 Period: July 1, 2015- June 30, 2016

<i>Current Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement		
	Equity	73%	\$ 1,734,416
	Fixed Income	25%	\$ 598,027
	Cash	2%	\$ 52,617
Sub-Total		100%	\$ 2,385,060
Cash Reserves			\$ -
Total Portfolio Value			\$ 2,385,060



<i>Proposed Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement		
	Equity	73%	\$1,734,416
	Fixed Income	25%	\$598,027
	Cash	2%	\$52,617
Sub-total		100%	\$2,385,060
Cash Reserves			\$0
Portfolio Value		100%	\$2,385,060



Relative Performance - Equity: Yearly

Performance period: 07/01/2015 to 06/30/2016

Period	Actual ROR(%)		Dow Jones Industrial Average Price Return(%)		MSCI World Index(%)		S&P 500 Price Return(%)	
	Year	Cum	Year	Cum	Year	Cum	Year	Cum
2016	8.18	7.55	2.90	1.76	(0.57)	(4.75)	2.69	1.73
US Equity	8.18	7.73						
2015	(0.58)	(0.58)	(1.10)	(1.10)	(4.20)	(4.20)	(0.93)	(0.93)
US Equity	(0.42)	(0.42)						
International Equity	(13.93)	(13.93)						

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

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

Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2015 to 06/30/2016

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2016	2,492,647	(250,000)	30,664	113,940	2,387,251	6.34	5.57
2015	2,559,296	(50,000)	46,317	(62,966)	2,492,647	(0.72)	(0.72)
Total	2,559,296	(300,000)	76,982	50,974	2,387,251		5.57

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

Account Review Summary 07/01/2015 - 06/30/2016

Account 749-04H01

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
Association-E.T.F.'s (749-04H01)									
<i>Ishares DJ US Consumer Goods (IYK)</i>	340	\$ 24,558	07/10/12			\$ 39,219	\$ 14,661		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	13	\$ 939	07/10/12	02/01/16	\$ 1,381	\$ -	\$ -	\$ 442	
<i>Ishares DJ US Consumer Goods (IYK)</i>	72	\$ 5,337	10/31/12			\$ 8,305	\$ 2,968		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	5	\$ 471	01/22/14			\$ 577	\$ 106		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	69	\$ 6,946	08/24/15			\$ 7,959	\$ 1,013		n/a
<i>Ishares Dow Jones US Energy (IYE)</i>	289	\$ 10,944	07/10/12	08/13/15	\$ 11,280	\$ -	\$ -	\$ 336	
<i>Ishares Dow Jones US Energy (IYE)</i>	59	\$ 2,416	10/31/12	08/13/15	\$ 2,303	\$ -	\$ -	\$ (113)	
<i>Ishares Dow Jones US Energy (IYE)</i>	30	\$ 1,489	01/22/14	08/13/15	\$ 1,171	\$ -	\$ -	\$ (318)	
<i>Ishares Russell Midcap (IWR)</i>	1000	\$ 96,760	10/20/06			\$ 168,200	\$ 71,440		n/a
<i>Ishares Russell Midcap (IWR)</i>	466	\$ 26,967	04/03/09			\$ 78,381	\$ 51,414		n/a
<i>Ishares Russell Midcap (IWR)</i>	298	\$ 32,577	10/31/12			\$ 50,124	\$ 17,547		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	502	\$ 35,305	07/10/12			\$ 52,851	\$ 17,545		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	13	\$ 914	07/10/12	02/01/16	\$ 1,315	\$ -	\$ -	\$ 400	n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	73	\$ 5,134	07/10/12	08/24/15	\$ 7,022	\$ -	\$ -	\$ 1,888	n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	119	\$ 8,376	10/31/12			\$ 12,528	\$ 4,152		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	28	\$ 2,118	05/10/13			\$ 2,948	\$ 830		n/a
<i>Ishares TR Dow Jones (DVY)</i>	46	\$ 2,212	08/12/11			\$ 3,923	\$ 1,711		n/a
<i>Ishares TR Dow Jones (DVY)</i>	58	\$ 2,788	08/13/11	02/01/16	\$ 4,328	\$ -	\$ -	\$ 1,539	
<i>Ishares TR Dow Jones (DVY)</i>	826	\$ 45,742	06/07/12			\$ 70,441	\$ 24,699		n/a
<i>Ishares TR Dow Jones (DVY)</i>	1733	\$ 97,546	07/10/12			\$ 147,790	\$ 50,244		n/a
<i>Ishares TR Dow Jones (DVY)</i>	541	\$ 31,251	10/31/12			\$ 46,136	\$ 14,885		n/a
<i>Ishares TR Dow Jones (DVY)</i>	32	\$ 2,100	05/10/13			\$ 2,729	\$ 629		n/a
<i>Ishares TR Dow Jones (DVY)</i>	851	\$ 59,965	12/10/13			\$ 72,573	\$ 12,608		n/a
<i>Ishares TR Dow Jones (DVY)</i>	277	\$ 19,729	01/22/14			\$ 23,623	\$ 3,894		n/a
<i>Ishares TR Dow Jones (DVY)</i>	109	\$ 7,711	02/14/14			\$ 9,296	\$ 1,585		n/a
<i>Ishares TR Dow Jones (DVY)</i>	57	\$ 4,605	12/30/14			\$ 4,861	\$ 256		n/a
<i>Ishares TR Dow Jones (DVY)</i>	96	\$ 7,671	02/19/15			\$ 8,187	\$ 516		n/a

<i>S&P US PFD STK Index Fund (PFF)</i>	91	\$ 3,446	02/23/10			\$ 3,630	\$ 184		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	57	\$ 2,158	02/23/10	02/01/16	\$ 2,187	\$ -	\$ -	\$ 29	n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	471	\$ 17,977	07/15/10			\$ 18,788	\$ 811		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	322	\$ 12,593	07/10/12			\$ 12,845	\$ 252		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	292	\$ 11,689	10/31/12			\$ 11,648	\$ (41)		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	254	\$ 10,400	05/10/13			\$ 10,132	\$ (268)		n/a
<i>Vanguard Consumer (VCR)</i>	258	\$ 16,731	04/26/11			\$ 31,471	\$ 14,740		n/a
<i>Vanguard Consumer (VCR)</i>	12	\$ 778	04/26/11	02/01/16	\$ 1,391	\$ -	\$ -	\$ 613	
<i>Vanguard Consumer (VCR)</i>	38	\$ 2,464	04/26/11	08/24/15	\$ 4,514	\$ -	\$ -	\$ 2,050	
<i>Vanguard Consumer (VCR)</i>	62	\$ 4,589	10/31/12			\$ 7,563	\$ 2,974		n/a
<i>Vanguard Consumer (VCR)</i>	6	\$ 632	01/22/14			\$ 732	\$ 99		n/a
<i>Vanguard Dividend (VIG)</i>	413	\$ 21,756	08/03/11			\$ 34,378	\$ 12,622		n/a
<i>Vanguard Dividend (VIG)</i>	73	\$ 3,846	08/03/11	02/01/16	\$ 5,544	\$ -	\$ -	\$ 1,698	
<i>Vanguard Dividend (VIG)</i>	429	\$ 24,144	06/07/12			\$ 35,710	\$ 11,566		n/a
<i>Vanguard Dividend (VIG)</i>	1734	\$ 98,102	07/10/12			\$ 144,338	\$ 46,236		n/a
<i>Vanguard Dividend (VIG)</i>	538	\$ 31,647	10/31/12			\$ 44,783	\$ 13,136		n/a
<i>Vanguard Dividend (VIG)</i>	812	\$ 59,982	12/10/13			\$ 67,591	\$ 7,608		n/a
<i>Vanguard Dividend (VIG)</i>	266	\$ 19,716	01/22/14			\$ 22,142	\$ 2,426		n/a
<i>Vanguard Dividend (VIG)</i>	107	\$ 7,855	02/14/14			\$ 8,907	\$ 1,052		n/a
<i>Vanguard Dividend (VIG)</i>	56	\$ 4,599	12/30/14			\$ 4,661	\$ 63		n/a
<i>Vanguard Dividend (VIG)</i>	94	\$ 7,748	02/19/15			\$ 7,825	\$ 76		
<i>Vanguard Industrial ETF (VIS)</i>	286	\$ 10,466	04/03/09	08/21/15	\$ 28,677	\$ -	\$ -	\$ 18,211	
<i>Vanguard Industrial ETF (VIS)</i>	24	\$ 965	05/13/09			\$ 2,550	\$ 1,586		n/a
<i>Vanguard Industrial ETF (VIS)</i>	14	\$ 563	05/13/09	02/01/16		\$ -	\$ -	\$ (563)	
<i>Vanguard Industrial ETF (VIS)</i>	335	\$ 13,469	05/13/09	08/21/15	\$ 33,590	\$ -	\$ -	\$ 20,121	
<i>Vanguard Industrial ETF (VIS)</i>	374	\$ 19,968	07/15/10			\$ 39,745	\$ 19,777		n/a
<i>Vanguard Industrial ETF (VIS)</i>	210	\$ 14,507	10/31/12			\$ 22,317	\$ 7,810		n/a
<i>Vanguard REIT ETF (VNQ)</i>	349	\$ 25,632	05/10/13			\$ 30,946	\$ 5,314		n/a
<i>Vanguard REIT ETF (VNQ)</i>	14	\$ 1,028	05/10/13	02/01/16	\$ 1,084	\$ -	\$ -	\$ 56	
<i>Ishares S&P Developed (WPS)</i>	194	\$ 7,837	05/10/13			\$ 7,131	\$ (707)		n/a
<i>CBRE Clarion Global (IGR)</i>	779	\$ 7,648	05/10/13	02/01/16		\$ -	\$ -	\$ (7,648)	n/a
<i>CBRE Clarion Global (IGR)</i>	1965	\$ 15,114	12/10/13			\$ 16,172	\$ 1,058		n/a

<i>CBRE Clarion Global (IGR)</i>	968	\$ 7,446	12/10/13	02/01/16		\$ -	\$ -	FALSE	
<i>Powershares Inter Dvd Achiev (PID)</i>	2083	\$ 37,619	02/14/14	08/24/15	\$ 30,640	\$ -	\$ -	\$ (6,979)	
<i>Wisdomtree Total Divid ETF (DTD)</i>	145	\$ 9,559	12/10/13	02/01/16	\$ 9,989	\$ -	\$ -	\$ (9,559)	n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	234	\$ 15,427	12/10/13			\$ 17,957	\$ 2,530		
<i>Wisdomtree Total Divid ETF (DTD)</i>	195	\$ 13,026	01/22/14			\$ 14,964	\$ 1,938		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	529	\$ 35,327	01/22/14			\$ 40,595	\$ 5,268		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	27	\$ 1,789	02/14/14			\$ 2,072	\$ 283		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	61	\$ 4,614	12/30/14			\$ 4,681	\$ 67		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	25	\$ 1,896	02/19/15			\$ 1,919	\$ 22		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	230	\$ 16,851	12/10/13			\$ 20,585	\$ 3,734		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	112	\$ 8,206	12/10/13	02/01/16	\$ 8,697	\$ -	\$ -	\$ 491	
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	322	\$ 24,124	01/22/14			\$ 28,819	\$ 4,695		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	175	\$ 13,107	01/22/14			\$ 15,663	\$ 2,555		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	21	\$ 1,566	02/14/14			\$ 1,880	\$ 314		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	55	\$ 4,669	12/30/14			\$ 4,923	\$ 253		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	20	\$ 1,733	02/19/15			\$ 1,790	\$ 57		n/a
<i>Ishares US Financial Services ETF (IYF)</i>	72	\$ 5,989	01/22/14			\$ 6,188	\$ 199		n/a
<i>Ishares US Financial Services ETF (IYF)</i>	11	\$ 915	01/22/14	02/01/16	\$ 889	\$ -	\$ -	\$ (26)	
<i>Ishares US Financial Services ETF (IYF)</i>	221	\$ 18,382	10/21/14			\$ 18,993	\$ 610		n/a
<i>Prudential Jennison Health (PHSZX)</i>	961.013	\$ 47,368	10/01/14			\$ 37,547	\$ (9,822)		n/a
<i>Prudential Jennison Health (PHSZX)</i>	62.067	\$ 3,060	10/01/14	02/01/16		\$ -	\$ -	\$ (3,060)	
<i>Powershares Exch Traded Fund (PEY)</i>	84	\$ 1,074	08/24/15			\$ 1,306	\$ 232		n/a
<i>Powershares Exch Traded Fund (PEY)</i>	269	\$ 3,441	08/24/15	02/01/16	\$ 3,525	\$ -	\$ -	\$ 84	
<i>Powershares Exch Traded Fund (PEY)</i>	2443	\$ 30,854	08/24/15			\$ 37,989	\$ 7,135		n/a
<i>Vanguard High Div Yield ETF (VYM)</i>	954	\$ 62,386	08/21/15			\$ 68,173	\$ 5,787		n/a
<i>Vanguard High Div Yield ETF (VYM)</i>	164	\$ 11,134	08/13/15			\$ 11,719	\$ 586		n/a
<i>Vanguard High Div Yield ETF (VYM)</i>	53	\$ 3,598	08/13/15	02/01/16	\$ 3,427	\$ -	\$ -	\$ (171)	
Total		\$ 1,266,894				\$ 1,734,416	\$ 467,522		
Association-Preferred Stock (749-04H01)									
<i>Entergy Mississippi Inc</i>	1000	\$ 26,653	06/23/03	06/13/16	\$ 25,000	\$ -	\$ -	\$ (1,653)	5.55%

<i>Entergy Mississippi Inc</i>	100	\$ 2,662	06/23/03	06/13/16	\$ 2,500	\$ -	\$ -	\$ (162)	5.55%
<i>Entergy Mississippi Inc</i>	221	\$ 5,802	10/31/12	06/13/16	\$ 5,525	\$ -	\$ -	\$ (277)	5.55%
<i>Total</i>						\$ -	\$ -		
Association-Money Market (749-04H01)						\$ 14,496			
749-04H01 Account Total						\$ 1,748,912	\$ 467,522		

Fees for period: **\$23,946.00**

Fees based on assets: **\$23,946.00**

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

**National Association of State Directors of Vocational
Account Review Summary 07/01/2015 through 06/30/2016**

Account 7WD-04H50 (Association)

Cost Basis	Buy/Sell	6/30/2016		Gain/Loss
\$578,465	Various	\$598,027		\$19,562

Managed Fixed Income Portfolio

Estimated Accrued Interest	\$2,228
Money Market	\$38,121
Account Total	\$638,376

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

This report provides summary financial information for July 1 through October 1, 2016 or 25% of the fiscal year. The accountant has reconciled the financial statements through August 31, 2016. Therefore, salary and benefit numbers, as well as accounts related to investments will only reflect activity through August 31, 2016.

INCOME: As of October 1, Advance CTE has received 67.4% of its budgeted income. Meeting registrations (budget: \$62,500; actual: \$57,855) and sponsorships (budget: \$30,000; actual: \$18,500) are trailing expectations. Despite writing off nearly \$4,000 in uncollectable associate dues (as a result of the membership audit), new organizational memberships have helped us stay on track with budget goals for associate dues. All states, except Alaska, are projected to renew memberships.

EXPENSES: Advance CTE expended 22.4% of projected expenses. The only over budget item is credit card charges, largely due to more utilization of the online payment portal for meetings. As was noted in the approval of the FY17 budget, we will be conducting a reconciliation of salaries and benefits on a quarterly basis. The first quarter reconciliation will occur in October, thus reducing salaries and benefits based on staff timesheets.

ASSETS: Assets total \$3,018,190.74, with equity at \$2,432,943.77.

INVESTMENTS: The report from the Merrill Lynch advisor does not call for any adjustments to the portfolio at this time. The portfolio has approximately a 1.96% rate of return, with the equity portion at 2.87%, which is higher than the Dow Jones Index (2.63%) but lower than the S & P 500 (3.43%).

Board action required: Approve FY17 financial reports.

Approved Advance CTE FY17 Budget

	Approved FY17	Actuals as of 10/1/16	Actuals to Budget	Explanatory Notes
INCOME		25% of fiscal year		
State Memberships	\$499,395.05	\$459,461.00	92%	Reflects actual state dues as of the end of September. Projected to receive additional dues in October (new fiscal year).
Associate & Org. Memberships	\$51,917.50	\$52,125.00	100%	Reflects actual associate and organizational dues as of the end of September. Given the membership reconciliation, we wrote off nearly \$4,000 in unpaid associate dues. This has been offset by a number of new organizational memberships.
Conference Registrations	\$135,000.00	\$57,855.00	42.9%	Fall meeting registrations trailing expectations. Targeted income was \$62,500.
Conference Sponsorships	\$73,000.00	\$18,500.00	25.3%	Fall meeting projections are running behind the target of \$30,000. We will have the Kuder in-kind contribution for the boat cruise, which will have a value of approximately \$20,000.
Interest/Dividend	\$75,000.00	\$6,109.31	8.1%	Reflects July and August 2016.
Other income	\$10,462.00	\$3,500.00	33.5%	Income from honorarium for serving on equity technical working group, middle grades grant and the Aspen Prize for Community Colleges.
Reserve withdrawal	\$7,554.81	\$0.00	0.0%	None at this time.
Reserve withdrawal - Reimburse The Center to Advance CTE	\$33,835.00	\$0.00	0.0%	None at this time.
TOTAL REVENUES	\$886,164.36	\$597,550.31	67.4%	
EXPENSES				
Allocated Expenses to Specific Projects				
Speakers	\$1,000.00	\$0.00	0.0%	No expense incurred to date. Fall meeting not yet held.

Approved Advance CTE FY17 Budget

	Approved FY17	Actuals as of 10/1/16	Actuals to Budget	Explanatory Notes
Meals (Hotels/Catering)	\$95,300.00	\$0.00	0.0%	No expense incurred to date. Fall meeting not yet held.
Travel/Lodging	\$26,000.00	\$316.26	1.2%	
Awards/Gifts	\$1,605.00	\$189.50	11.8%	Covers gavel. Remaining costs will be incurred at spring meeting (Stars of Education award).
Audio Visual	\$14,000.00	\$0.00	0.0%	No expense incurred to date. Fall meeting not yet held.
Printing/Copying	\$28,250.00	\$15,200.40	53.8%	Fee covers printing of vision documents.
Telecommunications (telephone/communications)	\$8,608.08	\$3,709.60	43.1%	Includes pre payment for website work and membership management platform.
Postage/Overnight	\$3,450.00	\$640.85	18.6%	Includes shipment of vision documents to all members and Summit participants.
Supplies	\$4,000.00	\$330.45	8.3%	
Education/Training	\$3,500.00	\$255.00	7.3%	Staff development goals will be finalized in November, following October performance evaluations.
Dues/Subscriptions	\$8,052.61	\$1,356.59	16.8%	Annual subscriptions are paid upon receipt.
Bank Charges - Credit Card Fees	\$4,011.00	\$1,505.49	37.5%	Increased usage of credit cards for processing meeting registrations and memberships.
Reimbursement to The Center to Advance CTE for project- specific work	\$33,835.00	\$0.00	0.0%	
Legal fees	\$3,380.00	\$0.00	0.0%	
Contractors (consultants)	\$5,000.00	\$0.00	0.0%	
Subtotal - Specific Projects	\$239,991.69	\$23,504.14	9.8%	
General & Administrative Expenses				

Approved Advance CTE FY17 Budget

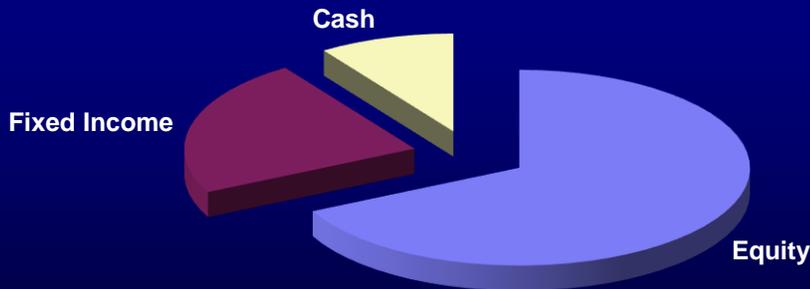
	Approved FY17	Actuals as of 10/1/16	Actuals to Budget	Explanatory Notes
Salaries	\$411,262.71	\$101,233.06	24.6%	Includes full staff salaries through end of August. First quarter reimbursement will take place in October.
Full employee benefits	\$81,591.90	\$31,569.40	38.7%	Includes full staff salaries through end of August. First quarter reimbursement will take place in October.
Rent	\$80,889.46	\$26,602.08	32.9%	Covers July - October.
Licenses/Fees	\$2,709.00	\$1,653.00	61.0%	Covers annual corporation registration, fee to Oklahoma to process dues, 401(k) annual plan fee
Office Supplies	\$700.00	\$77.54	11.1%	
Communications	\$130.00	\$14.76	11.4%	
Postage/Overnight	\$216.88	\$48.04	22.2%	Monthly Stamps.com fee for July, August and September.
Printing/Copying	\$10.00	\$0.00	0.0%	
Equipment & Furniture	\$3,812.07	\$560.98	14.7%	Copier lease for July, August and September.
Bank Charges	\$60.00	-\$15.00	-25.0%	Reimbursed for wire transfer fee. No offset charged incurred to date.
Merrill Lynch Charges	\$31,500.00	\$5,090.35	16.2%	Covers July and August.
Accounting	\$27,381.00	\$4,792.54	17.5%	Covers July and August.
Legal	\$1,690.00	\$0.00	0.0%	No bill received to date but services have been rendered.
Insurance - Directors	\$3,679.65	\$3,365.61	91.5%	Covers annual insurance policies (business umbrella, equity bond, directors and officers liability, etc.). Includes key person insurance for first quarter.
Liaison & Meetings	\$540.00	\$35.10	6.5%	
Total G&A Expenses	\$646,172.67	\$175,027.46	27.1%	
Total Project Expenses	\$239,991.69	\$23,504.14	9.8%	
TOTAL EXPENSES	\$886,164.36	\$198,531.60	22.4%	

Advance CTE/NASDCTEc
Balance Sheet
As of October 1, 2016

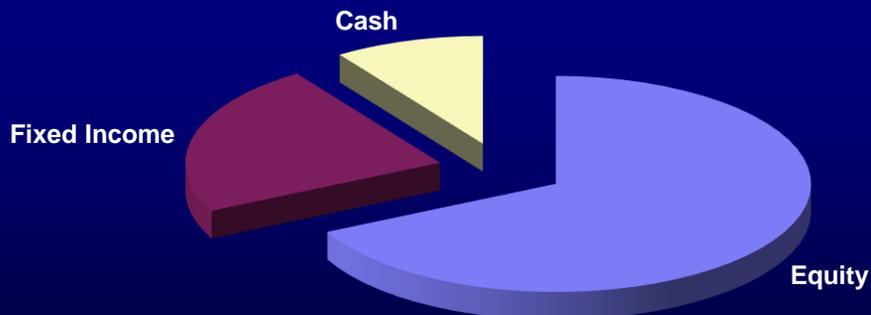
	Total
ASSETS	
Current Assets	
Bank Accounts	
1010 Cash- Bank of America	248,124.65
1017 Merrill Lynch Cash - 749	213,481.59
1018 Merrill Lynch Cash - 7WD	36,993.68
Total Bank Accounts	\$ 498,599.92
Accounts Receivable	
1200 Accounts Receivable	112,689.35
Total Accounts Receivable	\$ 112,689.35
Other current assets	
1100 Investments	
1131 Government Bonds	600,034.73
1159 Equities	1,780,322.40
Total 1100 Investments	\$ 2,380,357.13
1275 Security Deposit	9,000.00
1299 Accrued Interest Receivable	2,129.68
1300 Prepaid Expense	9,174.66
1499 Undeposited Funds	6,240.00
Total Other current assets	\$ 2,406,901.47
Total Current Assets	\$ 3,018,190.74
Other Assets	
1400 Furniture and Fixtures	25,107.21
1405 Accumulated Depreciation - Furniture and Fixtures	-24,409.96
1410 Equipment	17,255.43
1450 Accumulated Depreciation- Equipment	-14,642.65
Total Other Assets	\$ 3,310.03
TOTAL ASSETS	\$ 3,021,500.77
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2070 Accrued Vacation	80,020.42
2099 Deferred Revenue	
2142 Deferred State Dues FY 16-17	459,139.50
2143 Deferred Associate Dues FY 16-17	49,397.08
Total 2099 Deferred Revenue	\$ 508,536.58
Total Other Current Liabilities	\$ 588,557.00
Total Current Liabilities	\$ 588,557.00
Total Liabilities	\$ 588,557.00
Equity	
3000 Net Assets	1,954,431.63
3900 Earnings	455,330.11
Net Income	23,182.03
Total Equity	\$ 2,432,943.77
TOTAL LIABILITIES AND EQUITY	\$ 3,021,500.77

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

<i>Current Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement	
	Equity	68%
Fixed Income	23%	\$ 600,035
Cash	10%	\$ 250,475
Sub-Total	100%	\$ 2,630,832
Cash Reserves		\$ -
Total Portfolio Value		\$ 2,630,832



<i>Proposed Portfolio</i>	Asset Allocation Type: Per Investment Policy Statement	
	Equity	68%
Fixed Income	23%	\$600,035
Cash	10%	\$250,475
Sub-total	100%	\$2,630,832
Cash Reserves		\$0
Portfolio Value	100%	\$2,630,832



Advance CTE & The Center to Advance CTE Executive Investment Recommendation Summary

Submitted by Mark Friese, Merrill Lynch

This has been a very unusual year. Volatility in the U.S. markets has been very high. At the beginning of this year the market was down about 5% due to financial issues in China. The market eventually recovered from this and then later declined with issues in Europe. The market also recovered from this event.

Interest rates are currently near all-time historic lows, but are expected to be increased for the first time in many years. Bonds move inversely with interest rates, so we are expecting a decline in bonds looking forward. For this reason both the NASD *Association* account and the NASD *Foundation* accounts are above the ranges for equities. We see no indication that interest rates will be rising significantly in the near term. When interest rates start to increase and bonds decline in price we will reallocate from equities to bonds.

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

Both the Foundation's and Association's equity exposure performed in line with the general markets.

There has been increasing volatility in the U.S. markets due to events outside our country. Problems with Greece, Puerto Rico and China are just some examples. The international equity exposure in your portfolio is currently less than 3%. Area like central Europe are starting to improve, but starting from deeply depressed levels.

Sufficient cash is available to meet intermediate cash flow needs that were estimated by the association.

Recently additional cash was added to your portfolios. I will set up a meeting with Kimberly Green to discuss upcoming budgeted expenses and if investing this cash is appropriate.

No changes are currently recommended.

Relative Performance - Equity: Yearly

Performance period: 07/01/2016 to 08/31/2016

Period	Actual ROR(%)		Dow Jones Industrial Average Price Return(%)		MSCI World Index(%)		S&P 500 Price Return(%)	
	Year	Cum	Year	Cum	Year	Cum	Year	Cum
2016	2.87	2.87	2.63	2.63	4.01	4.01	3.43	3.43
US Equity	2.87	2.87						

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

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

Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2016 to 08/31/2016

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2016	2,387,251	200,000	6,302	39,403	2,632,956	1.96	1.96
Total	2,387,251	200,000	6,302	39,403	2,632,956		1.96

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

Sector Analysis - Summary

As of Close of Business: 09/08/2016

Sector	Total Holdings(%)		Current Holdings		Gap-Model vs. Current(%)	All Equity compared to Custom Model		
	0%	25%	Current(%)	Model(%)		ML Holdings(\$)	Model(\$)	Gap-Model vs. Holdings(\$)
Equity								
Health Care			8.66	14.70	6.04	159,243	479,095	319,853
Consumer Staples			12.80	10.10	(2.70)	235,268	329,174	93,907
Information Technology			11.88	20.40	8.52	218,331	664,867	446,536
Consumer Discretionary			13.37	12.60	(0.77)	245,680	410,653	164,973
Industrials			15.02	10.00	(5.02)	276,042	325,915	49,873
Materials			4.71	2.80	(1.91)	86,571	91,256	4,685
Financials			9.83	16.30	6.47	180,682	531,242	350,560
Telecommunication Services			1.46	3.00	1.54	26,908	97,775	70,866
Utilities			10.85	3.00	(7.85)	199,375	97,775	(101,601)
Energy			4.71	7.10	2.39	86,620	231,400	144,780
Real Estate			6.52	0.00	(6.52)	119,797	0	(119,797)
Equities Blend			0.18	0.00	(0.18)	3,279	0	(3,279)
Total						1,837,796		

* 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: 09/08/2016

Date of Composition Information Obtained for Pooled Investments

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

Mutual Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PHSZX	PRUDENTIAL JENNISON	07/29/2016			

Closed End Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IGR	CBRE CLARION GLOBAL	03/31/2016			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IEI	ISHARES 3-7 YEAR	No Date Reported	PEY	POWERSHARES EXCH TRADED	07/29/2016
CIU	ISHARES INTERMEDIATE	No Date Reported	VCR	VANGUARD CONSUMER	07/29/2016
IWR	ISHARES RUSSELL MIDCAP	07/29/2016	VIG	VANGUARD DIVIDEND	07/29/2016
DVY	ISHARES SELECT	07/29/2016	VYM	VANGUARD HIGH DVD YIELD	07/29/2016
IYK	ISHARES U.S. CONSUMER	07/29/2016	VIS	VANGUARD INDUSTRIAL ETF	07/29/2016
IYF	ISHARES U.S. FINANCIAL	07/29/2016	VNQ	VANGUARD REIT ETF	07/29/2016
PFF	ISHARES U.S. PREFERRED	07/29/2016	BND	VANGUARD TOTAL BOND MKT	No Date Reported
IYW	ISHARES U.S. TECHNOLOGY	07/29/2016	DTD	WISDOMTREE TOTAL DIVID	07/29/2016
WPS	ISHRS S&P DEVELOPED EX-	07/29/2016	DON	WISDOMTREE TR MIDCAP DIV	07/29/2016

Size and Style Analysis - Summary

As of Close of Business: 09/08/2016

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			26.20	33.00	6.80	481,479	1,075,520	594,042
Large Cap Value			32.98	26.00	(6.98)	606,031	847,380	241,349
Small/Mid Cap Growth			16.20	8.00	(8.20)	297,754	260,732	(37,022)
Small/Mid Cap Value			23.01	8.00	(15.01)	422,961	260,732	(162,229)
International Equity			1.10	25.00	23.90	20,187	814,788	794,601
Equities Blend			0.51	0.00	(0.51)	9,385	0	(9,385)
Total Equity Assets						1,837,796		

* 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: 09/08/2016

Date of Composition Information Obtained for Pooled Investments

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

Mutual Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
PHSZX	PRUDENTIAL JENNISON	07/29/2016			

Closed End Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IGR	CBRE CLARION GLOBAL	03/31/2016			

Exchange Traded Funds

Security	Security Description	Data As Of	Security	Security Description	Data As Of
IEI	ISHARES 3-7 YEAR	07/29/2016	PEY	POWERSHARES EXCH TRADED	07/29/2016
CIU	ISHARES INTERMEDIATE	07/29/2016	VCR	VANGUARD CONSUMER	07/29/2016
IWR	ISHARES RUSSELL MIDCAP	07/29/2016	VIG	VANGUARD DIVIDEND	07/29/2016
DVY	ISHARES SELECT	07/29/2016	VYM	VANGUARD HIGH DVD YIELD	07/29/2016
IYK	ISHARES U.S. CONSUMER	07/29/2016	VIS	VANGUARD INDUSTRIAL ETF	07/29/2016
IYF	ISHARES U.S. FINANCIAL	07/29/2016	VNQ	VANGUARD REIT ETF	07/29/2016
PFF	ISHARES U.S. PREFERRED	07/29/2016	BND	VANGUARD TOTAL BOND MKT	07/29/2016
IYW	ISHARES U.S. TECHNOLOGY	07/29/2016	DTD	WISDOMTREE TOTAL DIVID	07/29/2016
WPS	ISHRS S&P DEVELOPED EX-	07/29/2016	DON	WISDOMTREE TR MIDCAP DIV	07/29/2016

Account Review Summary 07/01/2016 - 08/31/2016

Account 749-04H01

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
Association-E.T.F.'s (749-04H01)									
<i>Ishares DJ US Consumer Goods (IYK)</i>	340	\$ 24,558	07/10/12			\$ 39,620	\$ 15,063		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	72	\$ 5,337	10/31/12			\$ 8,390	\$ 3,053		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	5	\$ 471	01/22/14			\$ 583	\$ 112		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	69	\$ 6,946	08/24/15			\$ 8,041	\$ 1,095		n/a
<i>Ishares Russell Midcap (IWR)</i>	1000	\$ 96,760	10/20/06			\$ 174,460	\$ 77,700		n/a
<i>Ishares Russell Midcap (IWR)</i>	466	\$ 26,967	04/03/09			\$ 81,298	\$ 54,331		n/a
<i>Ishares Russell Midcap (IWR)</i>	298	\$ 32,577	10/31/12			\$ 51,989	\$ 19,413		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	502	\$ 35,305	07/10/12			\$ 58,518	\$ 23,213		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	119	\$ 8,376	10/31/12			\$ 13,872	\$ 5,496		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	28	\$ 2,118	05/10/13			\$ 3,264	\$ 1,146		n/a
<i>Ishares TR Dow Jones (DVY)</i>	46	\$ 2,212	08/12/11			\$ 3,961	\$ 1,750		n/a
<i>Ishares TR Dow Jones (DVY)</i>	826	\$ 45,742	06/07/12			\$ 71,127	\$ 25,385		n/a
<i>Ishares TR Dow Jones (DVY)</i>	1733	\$ 97,546	07/10/12			\$ 149,229	\$ 51,683		n/a
<i>Ishares TR Dow Jones (DVY)</i>	541	\$ 31,251	10/31/12			\$ 46,586	\$ 15,334		n/a
<i>Ishares TR Dow Jones (DVY)</i>	32	\$ 2,100	05/10/13			\$ 2,756	\$ 655		n/a
<i>Ishares TR Dow Jones (DVY)</i>	851	\$ 59,965	12/10/13			\$ 73,280	\$ 13,315		n/a
<i>Ishares TR Dow Jones (DVY)</i>	277	\$ 19,729	01/22/14			\$ 23,852	\$ 4,123		n/a
<i>Ishares TR Dow Jones (DVY)</i>	109	\$ 7,711	02/14/14			\$ 9,386	\$ 1,675		n/a
<i>Ishares TR Dow Jones (DVY)</i>	57	\$ 4,605	12/30/14			\$ 4,908	\$ 303		n/a
<i>Ishares TR Dow Jones (DVY)</i>	96	\$ 7,671	02/19/15			\$ 8,267	\$ 595		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	91	\$ 3,446	02/23/10			\$ 3,649	\$ 203		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	471	\$ 17,977	07/15/10			\$ 18,887	\$ 910		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	322	\$ 12,593	07/10/12			\$ 12,912	\$ 319		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	292	\$ 11,689	10/31/12			\$ 11,709	\$ 20		n/a
<i>S&P US PFD STK Index Fund (PFF)</i>	254	\$ 10,400	05/10/13			\$ 10,185	\$ (215)		n/a
<i>Vanguard Consumer (VCR)</i>	258	\$ 16,731	04/26/11			\$ 32,616	\$ 15,885		n/a
<i>Vanguard Consumer (VCR)</i>	62	\$ 4,589	10/31/12			\$ 7,838	\$ 3,249		n/a
<i>Vanguard Consumer (VCR)</i>	6	\$ 632	01/22/14			\$ 759	\$ 126		n/a

Vanguard Dividend (VIG)	413	\$ 21,756	08/03/11		\$ 35,171	\$ 13,415	n/a
Vanguard Dividend (VIG)	429	\$ 24,144	06/07/12		\$ 36,534	\$ 12,390	n/a
Vanguard Dividend (VIG)	1734	\$ 98,102	07/10/12		\$ 147,667	\$ 49,565	n/a
Vanguard Dividend (VIG)	538	\$ 31,647	10/31/12		\$ 45,816	\$ 14,169	n/a
Vanguard Dividend (VIG)	812	\$ 59,982	12/10/13		\$ 69,150	\$ 9,167	n/a
Vanguard Dividend (VIG)	266	\$ 19,716	01/22/14		\$ 22,653	\$ 2,937	n/a
Vanguard Dividend (VIG)	107	\$ 7,855	02/14/14		\$ 9,112	\$ 1,257	n/a
Vanguard Dividend (VIG)	56	\$ 4,599	12/30/14		\$ 4,769	\$ 170	n/a
Vanguard Dividend (VIG)	94	\$ 7,748	02/19/15		\$ 8,005	\$ 257	
Vanguard Industrial ETF (VIS)	24	\$ 965	05/13/09		\$ 2,679	\$ 1,714	n/a
Vanguard Industrial ETF (VIS)	374	\$ 19,968	07/15/10		\$ 41,746	\$ 21,778	n/a
Vanguard Industrial ETF (VIS)	210	\$ 14,507	10/31/12		\$ 23,440	\$ 8,934	n/a
Vanguard REIT ETF (VNQ)	349	\$ 25,632	05/10/13		\$ 31,051	\$ 5,418	n/a
Ishares S&P Developed (WPS)	194	\$ 7,837	05/10/13		\$ 7,324	\$ (514)	n/a
CBRE Clarion Global (IGR)	1965	\$ 15,114	12/10/13		\$ 16,801	\$ 1,687	n/a
Wisdomtree Total Divid ETF (DTD)	234	\$ 15,427	12/10/13		\$ 18,343	\$ 2,917	
Wisdomtree Total Divid ETF (DTD)	195	\$ 13,026	01/22/14		\$ 15,286	\$ 2,260	n/a
Wisdomtree Total Divid ETF (DTD)	529	\$ 35,327	01/22/14		\$ 41,468	\$ 6,141	n/a
Wisdomtree Total Divid ETF (DTD)	27	\$ 1,789	02/14/14		\$ 2,117	\$ 328	n/a
Wisdomtree Total Divid ETF (DTD)	61	\$ 4,614	12/30/14		\$ 4,782	\$ 168	n/a
Wisdomtree Total Divid ETF (DTD)	25	\$ 1,896	02/19/15		\$ 1,960	\$ 63	n/a
Wisdomtree Tr Midcap Div Fc (DON)	230	\$ 16,851	12/10/13		\$ 20,971	\$ 4,121	n/a
Wisdomtree Tr Midcap Div Fc (DON)	322	\$ 24,124	01/22/14		\$ 29,360	\$ 5,236	n/a
Wisdomtree Tr Midcap Div Fc (DON)	175	\$ 13,107	01/22/14		\$ 15,957	\$ 2,849	n/a
Wisdomtree Tr Midcap Div Fc (DON)	21	\$ 1,566	02/14/14		\$ 1,915	\$ 349	n/a
Wisdomtree Tr Midcap Div Fc (DON)	55	\$ 4,669	12/30/14		\$ 5,015	\$ 346	n/a
Wisdomtree Tr Midcap Div Fc (DON)	20	\$ 1,733	02/19/15		\$ 1,824	\$ 90	n/a
Ishares US Financial Services ETF (IYF)	72	\$ 5,989	01/22/14		\$ 6,633	\$ 644	n/a
Ishares US Financial Services ETF (IYF)	221	\$ 18,382	10/21/14		\$ 20,359	\$ 1,976	n/a
Prudential Jennison Health (PHSZX)	961.013	\$ 47,368	10/01/14		\$ 39,152	\$ (8,217)	n/a
Powershares Exch Traded Fund (PEY)	84	\$ 1,074	08/24/15		\$ 1,323	\$ 249	n/a
Powershares Exch Traded Fund (PEY)	2443	\$ 30,854	08/24/15		\$ 38,477	\$ 7,623	n/a
Vanguard High Div Yield ETF (VYM)	954	\$ 62,386	08/21/15		\$ 69,566	\$ 7,180	n/a

Vanguard High Div Yield ETF (VYM)	164	\$ 11,134	08/13/15			\$ 11,959	\$ 825		n/a
<i>Total</i>		\$ 1,266,894				\$ 1,780,322	\$ 513,428		
Association-Money Market (749-04H01)						\$ 213,482			
<i>749-04H01 Account Total</i>						\$ 1,993,804	\$ 513,428		

Fees for period: \$3,995.29

Fees based on assets: \$3,995.29

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

**National Association of State Directors of Vocational
Account Review Summary 07/01/2016 through 08/31/2016**

Account 7WD-04H50 (Association)

Cost Basis	Buy/Sell	8/31/2016	Gain/Loss
\$581,722	Various	\$600,035	\$18,313

Managed Fixed Income Portfolio

Estimated Accrued Interest

\$2,130

Money Market

\$36,919

Account Total

\$639,083

Career Technical Student Organization (CTSO) Liaison Discussion
Report submitted by Kate Kreamer, Deputy Executive Director

Currently, Advance CTE Board members serve as liaisons for four Career Technical Student Organizations (CTSOs). In an effort to streamline the appointment process and clarify the expected roles and responsibilities of those liaisons, Advance CTE staff made outreach to those four CTOS to collect consistent information on terms, meetings and overall expectations. Below is a summary of that information.

	Term	Meeting Commitments (2016-17)
DECA	3 years	<ul style="list-style-type: none"> • 3 in-person meetings/year • 3-4 days long <ul style="list-style-type: none"> ○ August ○ Week of December 5 ○ March
National FFA	3 years	<ul style="list-style-type: none"> • 4 total meetings per year • January 17-19, 2017 (in Person/paid for by National FFA) • Not covered, but can be attended virtually <ul style="list-style-type: none"> ○ May 1-3, 2017 ○ August 8-10, 2017 ○ October 22, 2017 • All meetings in Indianapolis • January/August are joint with National FFA Foundation Board of Trustees • Dedicated agenda time in January
HOSA	3 years	
SkillsUSA	1-3 years (Advance CTE's choice)	<ul style="list-style-type: none"> • 4 total meetings per year • 3 in person board meetings are 1 ½ days and 1 daylong web-based meeting <ul style="list-style-type: none"> ○ October 1-2, 2016 (in conjunction with WorldSkills in Niagara Falls) ○ December 5-6, 2016 (web-based) ○ March 15-16, 2017 (either Leesburg, VA or Jacksonville, FL) ○ June 25, 2017 (in conjunction with SkillsUSA National Leadership and Skills Conference in Louisville, KY)

	Liaison Roles/Responsibilities
DECA, SkillsUSA, HOSA	<ul style="list-style-type: none"> • Provide an update on any major federal, national or cross-state efforts • Provide an update on Advance CTE's priorities • Be engaged and informed in order to offer a unique perspective on CTSO's strategies/initiatives • Identify possible opportunities for engagement and partnership at the organizational and/or state levels

National FFA	<p>To advise the National FFA Board of Directors in regard to ensuring that the strategic direction of the National FFA Organization helps its members meet the current and future demands of the agriculture, food and natural resources industry.</p> <p>By fulfilling this purpose, the National FFA Board of Directors would expect from Stakeholder Representation the following impacts and outcomes:</p> <ol style="list-style-type: none"> 1. Provide feedback regarding: Is the National FFA strategic direction consistent and supportive of Advance CTE goal, programs and initiatives? 2. Provide feedback in regard to how decisions made by the National FFA Organization affects Career and Technical Education from the local to national levels and vice versa. 3. Provide feedback in regard to how the National FFA Organization should respond/be proactive/react to changes in Career and Technical Education from the local to national levels. 4. Provide input which best practices prepares all FFA members for Career and Technical Education careers in the agriculture, food and natural resources sciences industry. 5. Provide accurate and timely information regarding wants, needs, current conditions and trends of Career and Technical Education. 6. Advice regarding how the National FFA Organization can be an appropriate player in the broader educational community (e.g. career and technical education, USDE, universities and post-secondary institutions). 7. Share how to address the continual challenge to consider the scope of our diverse population of current and future/potential FFA members. 8. Provide a sense of transparency in regard to the groups each stakeholder represents.
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Board Action Required: Discussion and Potential Vote on Consistent Liaison Policy

- Is there additional information Board members would like about or from the CTSOs to inform the liaison appointment process?
- For those who have or are serving as CTSO liaisons, what have been the benefits of that experience? That drawbacks?
- Going forward, Advance CTE will collect information on terms, meetings, etc. on annual basis to help facilitate and simplify the involvement of our Board member liaisons. Are there other ways in which Advance CTE and/or the CTSOs can support or facilitate the liaison commitment?
- The majority of CTSOs have a three-year term commitment. Does this feel like the appropriate length or should we make another recommendation (e.g., a two-year appointment allowing Board members one full year on the Advance CTE Board before assuming the liaison role)?

Legislative Update: May through September 2016

FY 2017 Budget and Appropriations Update

Congress Makes Progress on Spending Bills but Falls Short

The February release of the President’s final budget request formally began the federal budget and appropriations process for Fiscal Year (FY) 2017—set to begin on October 1, 2016. Although the Bipartisan Budget Agreement brokered by former Speaker John Boehner (R-OH) covers the current 2016 and 2017 federal fiscal years, members of the Republican party have been unable or, in some instances, unwilling to pass a budget framework using this agreement.

Despite the lack of a budget, both the House and the Senate appropriations committees pressed forward with their own Labor-Health and Human Services-Education (Labor-HHS-ED) funding proposals. These spending bills are the legislative vehicles where the Carl D. Perkins Act (Perkins) derives annual funding.

Advance CTE has been advocating for a restoration of the remaining sequester reductions to Perkins through these appropriations process and for larger funding increases via the unrelated effort to reauthorize the law.

In June, the full Senate Appropriations Committee approved their FY 2017 Labor-HHS-ED funding bill which would provide level funding for the Perkins basic state grant program at \$1.18 billion and the law’s National programs at \$7.4 million. These funding levels for Perkins have been in place since 2014 when Advance CTE was successful in restoring 96 percent of the program’s sequestration-related cuts. This maintenance of Perkins funding was a small victory given the current FY 2017 budget cap mandated a \$220 million cut in education funding overall. Of particular note, this bill also proposed to restore “year-round” Pell grants—a key Advance CTE priority for the Higher Education Act— as well as increase the maximum Pell award.

In July, the House Labor-HHS-ED Appropriations committee approved its own FY 2017 Labor-HHS-ED funding bill. The legislation would provide level funding for the Perkins Act at the same levels proposed in the Senate’s companion bill. The maintenance of Perkins funding in this legislation was a much bigger victory for Advance CTE as education programs were reduced by \$1.3 billion overall in this proposal. Unlike the Senate, the House bill would not restore year-round Pell, but it would increase the maximum Pell award at the same level as proposed by the Senate. Additionally, many “policy riders” were attached to this legislation including provisions that would prevent the Obama Administration from implementing its “gainful employment” regulation.

Neither of these bills have advance since their respective passages out of committee. Since that time, lawmakers have been at odds over how to come to an agreement for how to fund the

federal government for FY 2017. With a limited number of legislative days left in September and the Presidential elections approaching, Congress will most likely pass a “continuing resolution” (CR) to extend current funding levels into the upcoming 2017 federal fiscal year.

A vigorous debate has been ongoing for most of the summer and into the fall over how long a prospective CR should last. Hard line conservatives in the Republican party want a long-term CR to last into next March to coincide with the need to raise the nation’s debt ceiling. Moderate Republicans, President Obama, and the Democratic Party all would like a short-term CR lasting through December into a prospective lame duck session of Congress.

Advance CTE has been advocating for a short-term CR lasting through December which will provide the opportunity for additional increases for Perkins at that time. With elections over and with many lawmakers, including the President, set to retire, the ability for education programs, such as Perkins, to receive funding increases is much higher than it has in the recent past.

Nevertheless, a CR of any kind will most likely result in a small across-the-board rescission of Perkins funding as has been seen in the prior two years. Advance CTE recommends that states absorb this rescission using their state leadership funding so as not to require a re-run of local formula grants. Advance CTE expects a comprehensive omnibus spending bill to replace the CR in December and will continue to advocate for more funding for the Perkins Act at that time.

Elementary and Secondary Education Act (ESEA)

The Bipartisan ESEA Agreement Turns Heated

The U.S. Department of Education (USDE) has moved forward with the implementation of the Every Student Succeeds Act (ESSA)—legislation that reauthorization the Elementary and Secondary Education Act (ESEA), the law formerly known as No Child Left Behind. Earlier this year, Advance CTE developed an [ESSA resource](#) for the membership.

Advance CTE has engaged with USDE during the rulemaking process, providing [formal comments](#) and input on the implementation of state accountability systems, the importance of career readiness indicators, CTE’s role in a “well-rounded education”, standards alignment with CTE, and the state and local planning processes.

While Advance CTE has avoided commenting on the rulemaking process for the law’s “supplement-not-supplant” (SnS) provisions, disagreements between Congressional Republicans and the Obama Administration have grown increasingly heated over the past year. Republicans argue that the administration’s interpretation of ESSA’s SnS provisions amounts to federal overreach while the administration contends that SnS provisions must be implemented strongly to uphold the civil rights legacy of the law. These differences have spilled over into virtually all other federal education policymaking this year and has been the main reason why Congressional Republicans have attempted to significantly limit the Secretary of Education’s legal authority in many other laws, including the Perkins Act.

Advance CTE will continue to monitor the progress of ESSA implementation and will engage with relevant stakeholders when and as appropriate.

Workforce Innovation and Opportunity Act

Regulations: Better Late Than Never

After a six month delay, the U.S. Department of Labor (USDOL) published the [final rules](#) and regulations for the implementation of the Workforce Innovation and Opportunity Act (WIOA). Advance CTE has been [engaging](#) with this process since 2014 when the law was first passed by Congress on a wide range of topics including state planning, the performance accountability system, CTE’s role in service delivery, and, chiefly, the sharing of one-stop center infrastructure costs.

Advance CTE was successful in convincing USDOL to incorporate many of its recommendations for the improvement of these regulations, particularly with regards to the sharing of one-stop center infrastructure costs. Advance CTE developed an [analysis of these rule summarizing the final requirements](#).

In the coming months, Advance CTE expects USDOL and other federal agencies to release additional non-regulatory guidance for the implementation of this law. Advance CTE will continue to engage in this process and keep members abreast of these efforts.

Higher Education Act (HEA)

A Likely Priority for Next Congress

Congressional efforts to reauthorize the Higher Education Act (HEA) have stalled this calendar year. Given the upcoming Presidential election and the high likelihood that the Senate could change majority parties next year, lawmakers have been unwilling to formally consider a large reauthorization process such as HEA. In the interim, issues that have come to the fore on the campaign trail—such as college affordability and campus safety— have generated interest in smaller piecemeal legislation that have been introduced or are being developed in this Congress.

Advance CTE continues to advocate for its [HEA priorities](#) and plans to be part of the process when it is taken up by lawmakers— something that increasingly appears to be set for calendar years 2017 or 2018. Advance CTE is also exploring a number of new strategic partnerships with likeminded organizations ahead of this process to build support for many of the organization’s HEA priorities.

Carl D. Perkins Career and Technical Education Act

Congressional Efforts Continue to Take Shape

In June, the House Education and the Workforce Committee (HEW) introduced a bill to reauthorize Perkins—the [Strengthening Career and Technical Education for the 21st Century Act](#) (H.R. 5587). Sponsored by Reps. Glenn “GT” Thompson (R-PA) and Katherine Clark (D-MA), the bipartisan legislation was marked up by the full committee on July 7th and subsequently approved by [a margin of 37-0](#).

Advance CTE [supported the passage](#) of this legislation out of the committee at that time and sent a [letter of support](#) to that effect to the Chairman and Ranking Member of HEW which also noted a few outstanding concerns, particularly the inclusion of a problematic definition for a secondary

CTE concentrator. Nevertheless, the bill seeks to align Perkins to other federal legislation such as ESSA and WIOA while streamlining the requirements of the law to more effectively support high-quality CTE. Advance CTE developed a summary and analysis of the legislation [which is available here](#).

Following committee passage of H.R. 5587, Advance CTE began to strongly advocate for a solution to the secondary CTE concentrator definition. Despite much effort, time ran out over the summer to fully address this concern, at least within the House Perkins bill.

In early September, the full U.S. House of Representatives overwhelmingly supported the passage of H.R. 5587 by a 405 – 5 margin. Ahead of the vote Advance CTE [sent a letter of support](#) to lawmakers in the House urging passage of the legislation, but still noting concern with the secondary CTE concentrator definition. Following the vote, Advance CTE [issued a press statement](#) reiterating the premise of this letter. This positioned the organization to take a firmer stance on the concentrator issue as reauthorization efforts moved towards the Senate.

In September, Advance CTE communicated that without a fix to the House Perkins bill's proposed secondary CTE concentrator definition, the organization would actively oppose new legislation. These efforts are still ongoing. In mid-September, the Senate Health, Education, Labor, and Pensions Committee (HELP) noticed a markup of a forthcoming draft bill for September 21, 2016. While a discussion draft was released, it is not likely that this legislation will be taken up in full by the committee at this mark-up.

With many contradictory pieces of information coming from the Senate HELP committee, Advance CTE has continued to engage with the reauthorization process but it is uncertain how this effort will actualize at the time of this writing.

Nevertheless, Advance CTE will continue to advocate for its [updated Perkins recommendations](#) and engage with the reauthorization process for the remainder of the 114th Congress.

Board action required: None

Perkins Reauthorization Score Card		
Advance CTE Recommendation	House Perkins Bill	Senate Perkins Bill
<i>Strengthen linkages to the labor market; only support high-wage, skill, demand, or growth fields</i>	Key theme in HR 5587	
<i>Alignment to rigorous standards</i>	Requires alignment to rigorous state-identified standards as required in other federal laws	
Innovation Funding	Expands support for innovation but does not provide separate funding stream	
Partnerships with employers	A key theme and requirement in HR 5587	
Consortia Incentives	Bill encourages them and provides state / local flexibility for implementation	
WIOA Combined State Plan	Final bill empowers Perkins eligible agency to decide on WIOA state plan participation	
Career counseling / Planning	Bill contains supportive language throughout for counseling	
CTE Programs of Study	Bill emphasizes and incentivizes CTE POS throughout but does not mandate all funding go out via POS	
Accountability Measures	HR 5587's accountability measures are a slight improvement, but unit of analysis must be addressed	
Support for Research / Professional Development	House bill's research component extremely problematic, but support for PD is robust at all levels	
State flexibility / autonomy	HR 5587 preserves eligible agency's autonomy and protect essential functions of a state director	
State administration / leadership	State level set asides are all maintained and in some instances increased (reserve fund)	
Maintenance of Effort	HR 5587 contains all of Advance CTE's MOE recommendations	

KEY

Fully aligned to Advance CTE's Perkins Recommendation
Partial alignment
No alignment