### Advance CTE Board of Directors' Meeting

## **AGENDA**

April 7, 2019 10 a.m. – 12:05 p.m.

Meeting Room: Hampton Ballroom

1.	Welcome, Overview of Agenda 10 – 10:03 a.m.	Bernadette Howard President Pages 1-4
2.	Approval of January 30, 2019 Minutes 10:04 – 10:05 a.m.	Marcie Mack Secretary/Treasurer Pages 5-6
3.	Advance CTE Financial Reports 10:06 –10:16 a.m.	Marcie Mack Secretary/Treasurer Pages 7-22
4.	CTSO Discussion 10:17 – 10:27 a.m.	Kimberly Green Executive Director Pages 23-34
5.	Learning that Works for America Campaign 10:28 – 10:43 a.m.	Katie Fitzgerald Communications Manager Pages 35
6.	Federal Policy Update/Discussion 10:44 – 11:04 a.m.	Kathryn Zekus Senior Associate, Federal Policy Pages 36
7.	Higher Education Act Priorities 11:05 – 11:15 a.m.	Meredith Hills Policy Associate Pages 37-45
8.	Member Services Survey Results and Discussion 11:16 – 11:31 a.m.	Andrea Zimmermann Senior Associate, Member Engagement and Leadership Development

9.	Virtual Learning Strategy 11:32 – 11:42 a.m.	Andrea Zimmermann Senior Associate, Member Engagement and Leadership Development . <i>Pages 46-48</i>
10.	FY20 Elections and Nominations Committee Update 11:43 – 11:49 a.m.	Pradeep Kotamraju Past President . <i>Pages 49</i>
11.	ACTE Update 11:50 a.m. – Noon	LeAnn Wilson Executive Director . Pages 50-51
12.	Other items to be added/next meeting $Noon - 12:05 \ p.m.$	Bernadette Howard President

#### **Transition to Lunch in Roberts Restaurant**

Return to Hampton for Joint Board Meeting at 1 p.m.

#### **Upcoming Meeting**

**Advance CTE Conference Call** 

June 26, 2019: 2- 3 p.m. ET Purpose: Approve FY20 Budget

#### ADVANCE CTE BOARD OF DIRECTORS FY 19-20

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#### **President**

Ms. Bernadette Howard, State Director, Hawaii Lunalilo FWY Portable 1 Lower Campus Road Honolulu, HI 96822 mbhoward@hawaii.edu

#### **Vice President**

Dr. Sarah Heath, State Director, Colorado 9101 E. Lowry Blvd Denver, CO 80230 sarah.heath@cccs.edu

#### **Secretary-Treasurer**

Dr. Marcie Mack, State Director, Oklahoma 1500 W. 7<sup>th</sup> Avenue Stillwater, OK 74074 marcie.mack@careertech.ok.gov

#### **Past President**

Dr. Pradeep Kotamraju, State Director, Iowa Director, CTE Bureau Chief Division of Community Colleges Iowa Dept. of Education 400 east 14th Ave.
Grimes State Office Building Des Moines IA 50319
<a href="mailto:pradeep.kotamraju@iowa.gov">pradeep.kotamraju@iowa.gov</a>

#### Vacant

Region I – Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont Term expires: 6/30/20 Vacant

Region II – New Jersey, New York, Puerto Rico, Virgin Islands Term expires: 6/30/21

Dr. Lee Burket, Pennsylvania
Region III – Delaware, District of
Columbia, Maryland, Pennsylvania,
Virginia, West Virginia
333 Market Street
Bureau of Career and Technical Education
Harrisburg, PA 17126-0333
<a href="mailto:lburket@pa.gov">lburket@pa.gov</a>

Term expires: 6/30/20

Dr. Barbara Wall, Georgia
Region B – Alabama, Arkansas, Florida,
Georgia, Kentucky, Louisiana,
Mississippi, North Carolina, Puerto Rico,
South Carolina, Tennessee, Virginia, West
Virginia
1752 Twin Towers East
205 Jesse Hill Jr. Drive, S.E.
Atlanta, GA. 30334
bwall@doe.k12.ga.us
Term expires: 6/30/21

Ms. Jeralyn Jargo, Minnesota Region V – Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin Wells Fargo Place 30 East 7th Street St. Paul, MN 55101 jeralyn.jargo@minnstate.edu Term expires: 6/30/19

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Ms. Thalea Longhurst, Utah Region D – Colorado, Kansas, Montana, Nebraska, New Mexico, North Dakota, South Dakota, Texas, Utah, Wyoming 250 E 500 S, PO Box 144200 PO Box 144200 Salt Lake City, UT 84114-4200 thalea.longhurst@schools.utah.gov Term expires: 6/30/21

Mr. Dwight Johnson
Region E – Alaska, Arizona, California,
Hawaii, Idaho, Nevada, Oregon,
Washington, Guam
650 W State Street
Suite 324
Boise, ID 83720
dwight.johnson@cte.idaho.gov

Term expires: 6/30/21

Dr. Sheila Ruhland Associate Member Representative 9 Flad Circle Madison, WI 53711 ruhland11@gmail.com Term expires: 6/30/20

Dr. Charisse Childers
At Large State Director
3 Capitol Mall
Little Rock, AR 72201
<a href="mailto:charisse.childers@arkansas.gov">charisse.childers@arkansas.gov</a>
Term expires: 6/30/21

# Advance CTE Board of Directors' Meeting MINUTES

January 30, 2019 2:00 - 3:30 p.m.

**ATTENDEES:** Bernadette Howard, Sarah Heath, Marcie Mack, Pradeep Kotamraju, Thalea Longhurst, Sheila Ruhland, Jeralyn Jargo, Barbara Wall, Charisse Childers, Lee Burket

**STAFF:** Kimberly Green, Shannon Johnson

**WELCOME:** Howard greeted the Board and called the meeting to order.

**Review and Approval of October 22, 2018 Minutes:** Howard gave a brief review of the October 22, 2018 Board meeting minutes and asked for a motion to approve them.

**MOTION:** To approve the October 22, 2018 Board minutes, as presented.

Mack; Jargo.

MOTION ADOPTED.

**Review and Approval of FY20 Dues Increase and Renewal:** Green shared that from December 2017 to December 2018 there was a 1.9% increase in the Consumer Price Index (CPI) That translates to just shy of an \$11,000 increase in state dues, from FY19 to FY20 Dues.

**MOTION:** To approve a 1.9% increase in state dues for FY20.

Kotamraju; Ruhland. MOTION APPROVED.

**Review and Approval of Budget Modification:** Green explained that there are three parts to the budget modification.

- 1. Double the Investment: An increase in \$3,500 for supplies to be applied to the Government Relations budget. The funds will be used to purchase Double the Investment branded supplies to be used at the 2019 Spring Meeting, as well as to made available for members to use in their states.
- 2. Government Relations: An increase of \$750 of dues/subscriptions in the Government Relations budget. These funds will be used to join the Title IV-A Coalition as part of our federal policy strategy. Title IV-A Coalition is an alliance of more than 30 national organizations working together to advocate for maximum funding of the flexible block grant, which is authorized at \$1.6 billion for FY2018 under Title IV-A of the Every Student Succeeds Act (ESSA). Our subscription would be for 12 months.
- 3. New State Director Initiative: An increase of \$4,375 (\$875 for each of five modules) for consulting under the member supports budget. Funds are being requested to have the modules for the New State Director Initiative copyedited as they are refreshed this year. The FY19 budget included funds for layout and design but not copyediting.

**MOTION:** To approve the Advance CTE Budget Modification, as presented.

Burket; Mack.

MOTION APPROVED.

**DOUBLE THE INVESTMENT:** Green provided an update on the Double the Investment campaign, which will launch in February 2019. Supporters can go to <a href="www.isupportcte.org">www.isupportcte.org</a> to sign on to the pledge. On the website, there will be a full promotional toolkit to include social media templates, slides and blogs and impact stories. Based on the data from past campaigns, the organization has set a goal of 10,000 signatures before the end of April; the campaign will run for one year. The goal is to collect the signatures and bring them to Congress in spring 2020, to showcase the support there is for increasing the federal investment in CTE.

**ANNUAL MEETINGS:** Green shared that in December 2018, the Executive Committee discussed the meeting structure for 2019, 2020 and beyond. In 2019, we will forego the annual fall meeting and instead host a series of Perkins V-focused regional meetings. In 2020, the fall meeting will be replaced with the third summit on the future of CTE. Going forward, the Executive Committee has chosen to have both annual meetings be the pattern of the fall meeting, which means a shortening of the spring meeting.

Green explained that the 2019 regional meetings, which will partially be funded from grants, will give states an opportunity to share emerging ideas with their colleagues, iterate on them, improve them, etc. before states start writing their four-year state plans in earnest. The proposal is to hold three regional meetings in the September/ October timeframe.

Kotamraju asked if the organization is considering other sites from the past regional meetings. Green replied that regional distribution and feedback from the last round of regional meetings is being considered before contracting with sites.

Jargo said that the timing of this year's regional meetings might be tricky. She said that her state has some regional consultations already scheduled for September. Kotamraju said that Iowa has major conferences in September. He said that as long as they know the dates of the regional meetings they can send a team. Longhurst said that Utah has already planned a lot of their meetings around the typical fall meeting dates. Green said that we could send out a quick survey to the states to determine the best dates for the regional meetings.

**UPDATE ON PERKINS SUPPPORT AND GRANTS**: Green said that we have secured funding from the Bill and Melinda Gates Foundation and the Joyce Foundation to support states as they develop state plans and begin to implement Perkins V. The funding will be used for coaching a select group of states (dictated by the Foundatons), as well as four working group (open to all states), the regional meetings, resource development and a state plan peer review process. Once state plans are approved, the funding will also be used to a micro-site where we will house the state plans; the site will include a search feature to allow for comparison across states.

Howard adjourned the Advance CTE Board of Directors' Meeting at 2:39 p.m.

#### **FY19 Advance CTE Financial Report**

Report prepared by Kimberly Green, Executive Director

This report provides summary financial information for July 1, 2018 through March 24, 2019 or 33% of the fiscal year. The accountant has reconciled the financial statements through January 2019, which means investments are reflected through this date.

**INCOME:** Advance CTE has received 106% of its budgeted income, on target with projections. Fall and spring meeting registrations and sponsorships are heartily surpassing expectations. Also, participation in the regional meetings exceeded expectations, as many states brought more than the allotted five members of their state team. This resulted in unanticipated revenue.

**EXPENSES:** Advance CTE has spent 63% of its budgeted expenses, which is on target with projections. Staff time is now being reimbursed on a monthly basis, so staff time is a more accurate calculation. A new line was added to account for the unanticipated taxes, as explained by the accountant, for taxes on transportation benefits. The amount covers both last year and the estimated amounts for this year. Going forward, staff will account for this expense in the budget. Please see the budget report for additional details.

**ASSETS:** Assets total \$4,213,327.59 (includes FY20 state dues invoicing) with equity at \$3,238,460.35.

**INVESTMENTS**: The report from the Merrill Lynch advisor does not call for any adjustments to the portfolio at this time. The portfolio has a 7.97% rate of return, with the equity portion at 12.27% for the year (4.39 cumulative); this is compared to the Dow Jones Index (11.10% for the year; 6.78% cumulative) and the S & P 500 (11.08% for the year; 2.43% cumulative).

**Board action required**: Approve FY19 financial reports.

Memberships				FY19 Ad	vance CTE Budget
State Memberships   \$565,069.00   \$548,603.00   97.1%   Waiting on California dues - second half of FY18 and first half of FY19 out Associate & Organizational   \$58,000.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,850.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00   \$78,950.00	NOOMS	• •	3/24/19 - 73%	between actuals to	Explanatory Notes
Associate & Organizational Weemberships   States have been adding members to their "leams" and we have had a lot Organizational Memberships   Spring meeting   Spring meeting meet					
Organizational Memberships Spring meeting registration Spring meeting spending spend	•	\$565,069.00	\$548,603.00	97.1%	
142.1%   Exceeded expectations   Colored registration   127.5 out to note! space con   Spin	Organizational Memberships	\$58,000.00	\$78,950.00	136.1%	members joining, bringing our total to over 600 for the first time ever. Please note this
Spring meeting   \$62,000.00   \$113,300.00   \$12.7%   Exceeded expectations. Increase due to staff outreach, general rise in incressin or CTE and Perkins V.   Feather Sponsorships   \$30,000.00   \$66,238.77   \$85,500.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,200.00   \$85,		\$99,000.00	\$140,712.00	142.1%	Exceeded expectations. Closed registration at 275 due to hotel space constraints.
sponsorships \$0,000.00 \$11,000.00 \$56,238.77 \$187.595 \$160 \$10,000.00 \$56,238.77 \$187.595 \$10,000 \$187.595 \$10,000.00 \$56,238.77 \$187.595 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,	Fall meeting registration	\$70,000.00	\$105,598.93	150.9%	Exceeded expectations. Closed registration at 200 due to hotel space constraints.
Fail meeting \$30,000.00 \$56,238.77   187.5%   Increase due to staff outreach, general rise in inc sponsorships   N/a \$65,200.00   N/a \$65,200.		\$62,000.00	\$113,300.00	182.7%	Exceeded expectations. Increase due to staff outreach, general rise in increased interest in CTE and Perkins V.
Regional meetings n/a \$65,200.00   n/a Regional meetings   n/a \$65,200.00   n/a Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meetings   n/a   Regional meeting	Fall meeting	\$30,000.00	\$56,238.77		Exceeded expectations. Increase due to staff outreach, general rise in increased
Final invoice for landscape analysis was submitted in September 2018 but has to be backfatted to June 2018, so all income will be recorded as fast to be backfatted to June 2018, so all income will be recorded as fast of rothis work was \$85,970.37; total expenses were \$48, 470.70 (spanning years).  Vermont \$4,000.00 \$4,000.00 100.0% Contract completed.  NJ Teacher Pipeline \$8,000.00 \$0.00 0.0% No work to date. Payment is made upon completion of deliverables. Interest/Dividend \$60,000.00 \$377.07  Other income \$0.00 \$377.07  Other income \$0.00 \$377.07  Office Move \$32,410.00 \$32,410.00 100.0% Contract completed.  NJ Teacher Pipeline \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.0		n/a	\$65,200.00		Many states brought more team members than the allotted 5 individuals. This
Vermont	Gates	\$37,000.00	\$0.00	0.0%	Final invoice for landscape analysis was submitted in September 2018 but the invoice has to be backdated to June 2018, so all income will be recorded as last fiscal year even though income was technically received in this fiscal year. Total income received for this work was \$85,970.37; total expenses were \$48, 470.70 (spanning both fiscal
Interest/Dividend		\$4,000.00			
Other income \$0.00 \$377.07   n/a   Did not budget for other income but received honorarium for participation in Technical Working Group.  Office Move \$32,410.00 \$32,410.00 \$0.00   100.0% Reimbursement has been invoiced, this recorded and showing as income. Reimbursement from the Center for Rent \$70,236.00 \$0.00   0.0% Reimbursement has been invoiced, this recorded and showing as income. Reimbursement than the table that the Center for Rent \$70,236.00 \$0.00   0.0% Reimbursement expected in April 2019.  Reserve withdrawal: Perkins V Implementation Initiative and January 2019 Budget Modification   \$21,369.47 \$0.00 \$0.0% All expenses covered by income. Do not anticipate needing this reserve with the processed.  EXPENSES		. ,			
Office Move \$32,410.00 \$32,410.00 \$32,410.00 \$100.0% Reimbursement from the Center for Rent \$70,236.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Interest/Dividend	\$60,000.00	\$42,143.52	70.2%	Includes through January 2019.
Reimbursement from the Center for Rent Reserve withdrawal: Perkins V Implementation Initiative and January 2019 Budget Modification  TOTAL REVENUES \$1,117,084.47 \$1,187,533.29 \$106.3%  EXPENSES Allocated Expenses to Specific Projects Member Supports \$38,045.00 \$5,088.42 \$13.4%  Member Supports \$33,405.00 \$8,778.02 \$8,778.02 \$28.0%  Evernment Relations \$31,405.00 \$8,778.02 \$13.4%  Government Relations \$31,405.00 \$8,778.02 \$13.1%  Fall Meeting \$58,403.26 \$58,173.59 \$99.6% On target.  Spring Meeting \$100,217.50 \$44.51.74 \$4.4% \$1,183.329 \$11.98.3 \$26.8%  Fall Meeting \$100,217.50 \$4.451.74 \$4.4% \$1.98.1 \$1.98.3 \$1.99.50 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.98.3 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.99.1 \$1.79.1 \$1.79.1 \$1.79.1 \$1.79.1 \$1.79.1 \$1.79.	Other income	\$0.00	\$377.07		Technical Working Group.
Reserve withdrawal: Perkins V Implementation Initiative and January 2019 Budget Modification  TOTAL REVENUES \$1,117,084.47 \$1,187,533.29 106.3%  EXPENSES Allocated Expenses to Specific Projects  Member Services \$21,199.25 \$17,792.75 83.9% On target. Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting modules happening on a rolling basis; costs for meals largely offset by specific projects and specific projects and specific projects  Member Supports \$38,045.00 \$5,088.42 \$13.4% Anticipate being under budget.  Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be belowed to the projected Spring Meeting \$100,217.50 \$4.451.74 \$4.4% A majority of expenses have not yet been incurred. Communications \$11,662.50 \$3,119.83 \$26.8% Website costs will be incurred in final quarter of year, as work was postpor Advance CTE Board \$12,848.00 \$9,140.63 71.1% On target.  Solven of the projected Double the Investment expenses and the projected of the projected o	Office Move	\$32,410.00	\$32,410.00	100.0%	Reimbursement expected in April 2019.
Perkins V Implementation Initiative and January 2019 Budget Modification  TOTAL REVENUES \$1,117,084.47 \$1,187,533.29 106.3%  EXPENSES  Allocated Expenses to Specific Projects  Member Services \$21,199.25 \$17,792.75 83.9% On target.  Polloy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting and language being under budget.  Below target. A majority of the projected Double the Investment expenses on a real fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below formunications \$11,662.50 \$3.119.83 26.8% Website costs will be incurred in final quarter of year, as work was postpor Advance CTE Board \$12,848.00 \$9.140.63 71.1% On target.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Anticipate being under budget.		\$70,236.00	\$0.00	0.0%	
EXPENSES Allocated Expenses to Specific Projects  Member Services \$21,199.25 \$17,792.75 83.9% On target.  Member Supports \$38,045.00 \$5,088.42 13.4% Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting modules happening on a rolling basis; costs for meals largely offset by specific plant budget.  Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below described by the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below described by the projected Double the Investment expenses have not perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below described by the projected of the projected of the projected of the projected of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below described by the projected of th	Perkins V Implementation Initiative and January 2019	\$21,369.47	\$0.00	0.0%	All expenses covered by income. Do not anticipate needing this reserve withdrawal.
Allocated Expenses to Specific Projects  Member Services \$21,199.25 \$17,792.75 83.9% On target.  Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting modules happening on a rolling basis; costs for meals largely offset by specific plants being under budget.  Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be bel	TOTAL REVENUES	\$1,117,084.47	\$1,187,533.29	106.3%	
Allocated Expenses to Specific Projects  Member Services \$21,199.25 \$17,792.75 83.9% On target.  Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting modules happening on a rolling basis; costs for meals largely offset by specific punder budget.  Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below target. As a result, this line of work is projected to be below the projected of the below target. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that projected.  Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting and sais; costs for meals largely offset by specific to projected to be below that projected.  Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting the projected to be below that projected.  Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyedition and leave to perkins passing, chose not be perkins passing, chose not be below to be perkins passing, chose not be below that projected to be below that projected to be below that projected to be below that	FYPENSES				
Member Services\$21,199.25\$17,792.7583.9% On target.Member Supports\$38,045.00\$5,088.4213.4% modules happening on a rolling basis; costs for meals largely offset by spot Anticipate being under budget.Government Relations\$31,405.00\$8,778.02Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below that the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity.Gates expenses\$37,00.00\$17,791.9448.1%Final costs for lan		Specific Project	ts		
Member Supports \$38,045.00 \$5,088.42 13.4% modules happening on a rolling basis; costs for meals largely offset by spondard budget.  Below target. A majority of the projected Double the Investment expenses hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, the projected to be below management capacity. As a result, the projected to be below management capacity. As a result, the below to projected to be below management capacity. As a result,				83.9%	On target.
Government Relations \$31,405.00 \$8,778.02 28.0% hit the books Due to Perkins passing, chose not to bring on a grad fellow of management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, this line of work is projected to be below management capacity. As a result, the below is projected to be below management capacity. As a result, the below is projected to be below management capacity. As a projected to be below management capacity. As a result, the below is projected to be below management capacity. As a result, the below is pr	Member Supports				Policy benchmark tool delayed until end of 2019 (\$1500 budget); copyediting of modules happening on a rolling basis; costs for meals largely offset by sponsors.
Spring Meeting \$100,217.50 \$4,451.74 4.4% A majority of expenses have not yet been incurred.  Communications \$11,662.50 \$3,119.83 26.8% Website costs will be incurred in final quarter of year, as work was postport Advance CTE Board \$12,848.00 \$9,140.63 71.1% On target.  Gates expenses \$37,000.00 \$17,791.94 48.1% Final costs for landscape analysis - copy editing and layout.  Vermont expenses \$6,405.00 \$2,162.68 33.8% Contract completed.  NJ Teacher pipeline expenses \$7,651.51 \$0.07 0.0% No activity yet this fiscal year.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Office Move \$45,160.00 \$22,369.19 49.5% Anticipate being under budget. Still have a few minor costs to incur but malexpenses were lower than projected.	Government Relations	\$31,405.00	\$8,778.02	28.0%	Below target. A majority of the projected Double the Investment expenses have not yet hit the books Due to Perkins passing, chose not to bring on a grad fellow due to management capacity. As a result, this line of work is projected to be below budget.
Communications\$11,662.50\$3,119.8326.8%Website costs will be incurred in final quarter of year, as work was postporAdvance CTE Board\$12,848.00\$9,140.6371.1%On target.Gates expenses\$37,000.00\$17,791.9448.1%Final costs for landscape analysis - copy editing and layout.Vermont expenses\$6,405.00\$2,162.6833.8%Contract completed.NJ Teacher pipeline expenses\$7,651.51\$0.070.0%No activity yet this fiscal year.Lobbying\$1,005.00\$82.638.2%Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.Office Move\$45,160.00\$22,369.1949.5%Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.					
Advance CTE Board \$12,848.00 \$9,140.63 71.1% On target.  Gates expenses \$37,000.00 \$17,791.94 48.1% Final costs for landscape analysis - copy editing and layout.  Vermont expenses \$6,405.00 \$2,162.68 33.8% Contract completed.  NJ Teacher pipeline expenses \$7,651.51 \$0.07 0.0% No activity yet this fiscal year.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Office Move \$45,160.00 \$22,369.19 49.5% Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.					
Gates expenses \$37,000.00 \$17,791.94 48.1% Final costs for landscape analysis - copy editing and layout.  Vermont expenses \$6,405.00 \$2,162.68 33.8% Contract completed.  NJ Teacher pipeline expenses \$7,651.51 \$0.07 0.0% No activity yet this fiscal year.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Office Move \$45,160.00 \$22,369.19 49.5% Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.					
Vermont expenses     \$6,405.00     \$2,162.68     33.8% Contract completed.       NJ Teacher pipeline expenses     \$7,651.51     \$0.07     0.0% No activity yet this fiscal year.       Lobbying     \$1,005.00     \$82.63     8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.       Office Move     \$45,160.00     \$22,369.19     49.5% Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.					
NJ Teacher pipeline expenses \$7,651.51 \$0.07 0.0% No activity yet this fiscal year.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Office Move \$45,160.00 \$22,369.19 49.5% Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.					
expenses \$7,651.51 \$0.07 0.0% No activity yet this fiscal year.  Lobbying \$1,005.00 \$82.63 8.2% Likely to increase as staff ramps up appropriations and HEA visits. These costs only, not staff time.  Office Move \$45,160.00 \$22,369.19 49.5% Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.		φυ,4υ5.υυ	φ∠, ι0∠.08	აა.გ%	Contract Completed.
Office Move \$45,160.00 \$22,369.19 \$49.5% costs only, not staff time.  Anticipate being under budget. Still have a few minor costs to incur but ma expenses were lower than projected.		\$7,651.51	\$0.07		7.
Office wove \$45,100.00 \$22,369.19 49.5% expenses were lower than projected.	Lobbying	\$1,005.00	\$82.63	8.2%	costs only, not staff time.
	Office Move	\$45,160.00	\$22,369.19	49.5%	expenses were lower than projected.
Perkins V   \$164,000.00   \$65,048.61   39.7%   attendees there were, this offset direct costs significantly. Full balance rem (\$25,000) and Resources (\$15,000). Likely will not use full budget due to r Gates and pending Joyce grants.	Implementation Initiative	\$164,000.00	\$65,048.61		(\$25,000) and Resources (\$15,000). Likely will not use full budget due to receipt of
Subtotal - Specific Projects \$535,002.02 \$214,000.10 40.0%	•	\$535,002.02	\$214,000.10	40.0%	

	FY19 Advance CTE Budget											
	Approved FY19	Actuals as of 3/24/19 - 73% of fiscal year	Variance between actuals to budget	Explanatory Notes								
General & Administrativ	ve Expenses											
Salaries and benefits	\$515,208.09	\$444,394.91	86.3%	Includes staff benefits and salaries through March 15, 2019. Reimbursement between organizations is now taking place on a monthly basis and has been completed through January 2019. Anticipate being over budget due to staff efforts re: Perkins implementation, which was not anticipated when staff time distribution was estimated for the budget.								
Telephone/Comm	\$100.00	\$63.00	63.0%	On target								
Office Supplies	\$705.00	-\$24.00	-3.4%	Refund of bottle deposit (move included water filter in refrigerator)								
Rent	\$14,229.36	\$12,152.38		Direct costs for July and August rent. Accountant is recording journal entries for \$5,733.76 each month for rent that is not actually paid but needs to be accrued according to accounting principles. This amount included only shows direct costs.								
Licenses/Fees	\$150.00	\$120.00	80.0%	Bill received but payments not yet made for annual incorporation fee.								
Merrill Lynch Charges	\$30,000.00	\$17,052.17	56.8%	Fees recorded through January 2019.								
Accounting	\$21,690.00	\$15,962.43	73.6%	On target.								
Taxes		\$1,595.00		Unanticipated taxes on transportation benefits (paying for last fiscal year and projected fees for this year). This information as shared with the Board via the accountant during the January 2019 Board call.								
Total G&A Expenses	\$582,082.45	\$491,315.89	84.4%									
Total Project Expenses	\$535,002.02	\$214,000.10	40.0%									
TOTAL EXPENSES	\$1,117,084.47	\$705,315.99	63.1%									
INCOME LESS EXPENSES	\$0.00	\$482,217.30										

# Advance CTE/NASDCTEc Balance Sheet

As of March 24, 2019

	 Total
ASSETS	
Current Assets	
Bank Accounts	
1011 Cash-New BOA checking	504,129.83
1017 Merrill Lynch Cash - 749	176,233.78
1018 Merrill Lynch Cash - 7WD	 11,139.19
Total Bank Accounts	\$ 691,502.80
Accounts Receivable	
1200 Accounts Receivable	741,043.50
Total Accounts Receivable	\$ 741,043.50
Other Current Assets	
1100 Investments	
1131 Government Bonds	609,549.36
1159 Equities	2,091,797.03
Total 1100 Investments	\$ 2,701,346.39
1275 Security Deposit	9,000.00
1280 Due from Foundation	49,245.77
1299 Accrued Interest Receivable	2,463.10
1300 Prepaid Expense	631.27
1499 Undeposited Funds	3,250.00
Total Other Current Assets	\$ 2,765,936.53
Total Current Assets	\$ 4,198,482.83
Other Assets	
1400 Furniture and Fixtures	32,445.78
1405 Accumulated Depreciation - Furniture and Fixtures	-25,385.14
1410 Equipment	14,145.87
1450 Accumulated Depreciation- Equipment	-6,361.75
Total Other Assets	\$ 14,844.76
TOTAL ASSETS	\$ 4,213,327.59
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 Accounts Payable {105}	11,949.65
Total Accounts Payable	\$ 11,949.65
Other Current Liabilities	
2070 Accrued Vacation	95,547.76
2099 Deferred Revenue	0.00
2146 Deferred Revenue FY 18-19 State Dues	151,333.78
2147 Deferred Revenue FY 18-19 Associate Dues	45,325.03
2148 Deferred Revenue FY 19-20 State Dues	576,877.00
2149 Deferred Revenue FY 19-20 Associate Dues	4,500.00

Total 2099 Deferred Revenue	\$ 778,035.81
2102 Payroll Liabilities	32.50
Total Other Current Liabilities	\$ 873,616.07
Total Current Liabilities	\$ 885,565.72
Long-Term Liabilities	
2880 Deferred Rent and lease incentive	89,301.52
Total Long-Term Liabilities	\$ 89,301.52
Total Liabilities	\$ 974,867.24
Equity	
3000 Unrestricted Net Assets	2,681,996.29
3900 Earnings	299,483.22
Net Income	256,980.84
Total Equity	\$ 3,238,460.35
TOTAL LIABILITIES AND EQUITY	\$ 4,213,327.59

# Advance CTE/Center to Advance CTE Executive Investment Recommendation Summary March 2019 Submitted by Mark Friese, Merrill Lynch

In 2018 the U.S. stock market continued an almost ten year period of advancement. At the end of September, 2018 the U.S. markets reached an all-time historic high. But with a late year interest rate increase and continued worries about the tariff war with China and other countries the markets retreated and ended 2018 with a loss. Most of this loss was regained in January, 2019 after the Federal Reserve indicated a slowdown in interest rate increases and promising sign were implied of a settlement in the international tariff war.

We have had a long recovery from early 2009 and history would indicate that a correction of some degree would be likely in the future. We have positioned your portfolios in sectors of the market that are more defensive and should decline less in a correction. This would include sectors like consumer staples and utilities. In addition, a large percentage of the equity portion of portfolios is also focused on conservative, dividend producing, stock based indexes. These indexes provide income which has historically risen over time and should also provide additional stability in a declining market.

International markets have remained volatile and have also continued to under-perform the U.S. market. Investing in international markets also entails additional risks, such as currency and political risks. For these reasons both the association and foundation accounts have almost no international exposure.

Both Advance CTE and the Center to Advance CTE are in line with their investment policy statement guidelines and no additional changes are currently recommended. We continue to be watchful and will make adjustments as the year progresses. We continue to expect slightly higher interest rates and will add to bond exposure if warranted.

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

#### **Summary of recommended changes:**

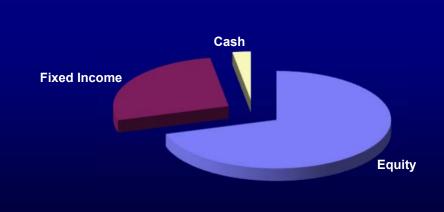
The above changes are intended to improve long-term performance and increase income from fixed income investments. Certain sectors of the market are recommended to be over-weighted also to improve long-term performance. These are sectors that tend to perform well during a difficult economic environment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

No direct costs are associated with making these changes.

# Advance CTE Current Asset Allocation Accounts 749-04H01 & 7WD-04H50 Period: July 1, 2018 - March 12, 2019

#### Current Portfolio

Asset Allocation Type:	e: Per Investment Policy Statement					
Equity	70%	\$	2,002,022			
Fixed Income	27%	\$	772,599			
Cash	3%	\$	73,361			
Sub-Total	100%	\$	2,847,982			
Cash Reserves		\$	100,000			
Total Portfolio Value		\$	2,947,982			



#### Proposed Portfolio

Per Investment Policy Statement					
70%	\$	2,002,022			
27%	\$	772,599			
3%	\$	73,361			
100%	\$	2,847,982			
	\$	100,000			
100%	\$	2,947,982			
	70% 27% 3% 100%	70% \$ 27% \$ 3% \$			



#### Account Review Summary 07/01/2018 - 02/28/2019

#### Account 749-04H01

Security Name	Quantity	Co	st Basis	Date Purchased	Date Sold/Mat	Sales Price	Mar	ket Value	Gai	n or (loss)	Realized Gain/Loss	Yield
Advance CTE-E.T.F.'s (749-04H01)	Quantity		31 Dasis	Date I dichased	Date Sold/Iviat	Sales Trice	IVIGI	Ket value	Gai	11 01 (1033)	Realized Galli/Loss	Ticid
, , ,												
Ishares DJ US Consumer Goods (IYK)	340	\$	24,558	07/10/12			\$	39,678	\$	15,120		n/a
Ishares DJ US Consumer Goods (IYK)	72	\$	5,337	10/31/12			\$	8,402	\$	3,065		n/a
Ishares DJ US Consumer Goods (IYK)	5	\$	471	01/22/14			\$	584	\$	112		n/a
Ishares DJ US Consumer Goods (IYK)	69	\$	6,946	08/24/15			\$	8,052	\$	1,106		n/a
Ishares Russell Midcap (IWR)	4000	\$	96,760	10/20/06			\$	214,600	\$	117,840		n/a
Ishares Russell Midcap (IWR)	1864	\$	26,967	04/03/09			\$	100,004	\$	73,037		n/a
Ishares Russell Midcap (IWR)	1192	\$	32,577	10/31/12			\$	63,951	\$	31,374		n/a
Ishares Tr Dow Jones US Tech (IYW)	352	\$	24,756	07/10/12			\$	64,603	\$	39,847		n/a
Ishares Tr Dow Jones US Tech (IYW)	119	\$	8,376	10/31/12			\$	21,840	\$	13,464		n/a
Ishares Tr Dow Jones US Tech (IYW)	28	\$	2,118	05/10/13			\$	5,139	\$	3,021		n/a
Ishares Tr Dow Jones US Tech (IYW)	126	\$	17,631	05/02/17			\$	23,125	\$	5,494		n/a
Ishares TR Dow Jones (DVY)	516	\$	28,575	06/07/12			\$	50,645	\$	22,070		n/a
Ishares TR Dow Jones (DVY)	1733	\$	97,546	07/10/12			\$	170,094	\$	72,548		n/a
Ishares TR Dow Jones (DVY)	541	\$	31,251	10/31/12			\$	53,099	\$	21,848		n/a
Ishares TR Dow Jones (DVY)	32	\$	2,100	05/10/13			\$	3,141	\$	1,041		n/a
Ishares TR Dow Jones (DVY)	851	\$	59,965	12/10/13			\$	83,526	\$	23,561		n/a
Ishares TR Dow Jones (DVY)	277	\$	19,729	01/22/14			\$	27,188	\$	7,459		n/a
Ishares TR Dow Jones (DVY)	109	\$	7,711	02/14/14			\$	10,698	\$	2,988		n/a
Ishares TR Dow Jones (DVY)	57	\$	4,605	12/30/14			\$	5,595	\$	989		n/a
Ishares TR Dow Jones (DVY)	96	\$	7,671	02/19/15			\$	9,422	\$	1,751		n/a
S&P US PFD STK Index Fund (PFF)	91	\$	3,446	02/23/10	12/04/18	\$ 3,167	\$	-	\$	-	\$ (279)	) n/a
S&P US PFD STK Index Fund (PFF)	471	\$	17,977	07/15/10	12/04/18	\$ 16,391	\$	-	\$	-	\$ (1,586)	n/a
S&P US PFD STK Index Fund (PFF)	322	\$	12,593	07/10/12	12/04/18	\$ 11,206	\$	-	\$	-	\$ (1,387)	n/a
S&P US PFD STK Index Fund (PFF)	292	\$	11,689	10/31/12	12/04/18	\$ 10,162	\$	-	\$		\$ (1,527)	n/a
S&P US PFD STK Index Fund (PFF)	254	\$	10,400	05/10/13	12/04/18	\$ 8,839	\$	-	\$	-	\$ (1,561)	) n/a
Vanguard Consumer (VCR)	258	\$	16,731	04/26/11			\$	43,393	\$	26,662		n/a
Vanguard Consumer (VCR)	62	\$	4,589	10/31/12			\$	10,428	\$	5,839		n/a
Vanguard Consumer (VCR)	6	\$	632	01/22/14			\$	1,009	\$	377		n/a

Vanguard Dividend (VIG)	338	\$ 17,806	08/03/11	\$ 36,812	\$ 19,006	n/a
Vanguard Dividend (VIG)	429	\$ 24,144	06/07/12	\$ 46,722	\$ 22,578	n/a
Vanguard Dividend (VIG)	1734	\$ 98,102	07/10/12	\$ 188,850	\$ 90,748	n/a
Vanguard Dividend (VIG)	538	\$ 31,647	10/31/12	\$ 58,594	\$ 26,947	n/a
Vanguard Dividend (VIG)	812	\$ 59,982	12/10/13	\$ 88,435	\$ 28,452	n/a
Vanguard Dividend (VIG)	266	\$ 19,716	01/22/14	\$ 28,970	\$ 9,254	n/a
Vanguard Dividend (VIG)	107	\$ 7,855	02/14/14	\$ 11,653	\$ 3,799	n/a
Vanguard Dividend (VIG)	56	\$ 4,599	12/30/14	\$ 6,099	\$ 1,500	n/a
Vanguard Dividend (VIG)	94	\$ 7,748	02/19/15	\$ 10,238	\$ 2,489	
Vanguard Industrial ETF (VIS)	24	\$ 965	05/13/09	\$ 3,419	\$ 2,454	n/a
Vanguard Industrial ETF (VIS)	374	\$ 19,968	07/15/10	\$ 53,276	\$ 33,308	n/a
Vanguard Industrial ETF (VIS)	210	\$ 14,507	10/31/12	\$ 29,915	\$ 15,408	n/a
Wisdomtree Total Divid ETF (DTD)	159	\$ 10,482	12/10/13	\$ 14,930	\$ 4,448	n/a
Wisdomtree Total Divid ETF (DTD)	195	\$ 13,026	01/22/14	\$ 18,311	\$ 5,284	n/a
Wisdomtree Total Divid ETF (DTD)	529	\$ 35,327	01/22/14	\$ 49,673	\$ 14,346	n/a
Wisdomtree Total Divid ETF (DTD)	27	\$ 1,789	02/14/14	\$ 2,535	\$ 746	n/a
Wisdomtree Total Divid ETF (DTD)	61	\$ 4,614	12/30/14	\$ 5,728	\$ 1,114	n/a
Wisdomtree Total Divid ETF (DTD)	25	\$ 1,896	02/19/15	\$ 2,348	\$ 451	n/a
Wisdomtree Tr Midcap Div Fc (DON)	255	\$ 6,227	12/10/13	\$ 9,114	\$ 2,886	n/a
Wisdomtree Tr Midcap Div Fc (DON)	966	\$ 24,124	01/22/14	\$ 34,525	\$ 10,401	n/a
Wisdomtree Tr Midcap Div Fc (DON)	525	\$ 13,107	01/22/14	\$ 18,764	\$ 5,657	n/a
Wisdomtree Tr Midcap Div Fc (DON)	63	\$ 1,566	02/14/14	\$ 2,252	\$ 686	n/a
Wisdomtree Tr Midcap Div Fc (DON)	165	\$ 4,669	12/30/14	\$ 5,897	\$ 1,228	n/a
Wisdomtree Tr Midcap Div Fc (DON)	60	\$ 1,733	02/19/15	\$ 2,144	\$ 411	n/a
Ishares US Financial Services ETF (IYF)	72	\$ 5,820	01/22/14	\$ 8,601	\$ 2,781	n/a
Ishares US Financial Services ETF (IYF)		\$ 18,382	10/21/14	\$ 26,401	\$ 8,018	n/a
Ishares US Financial Services ETF (IYF)	378	\$ 39,399	05/02/17	\$ 45,156	\$ 5,756	n/a
Prudential Jennison Health (PHSZX)	961.013	\$ 47,368	10/01/14	\$ 46,734	\$ (634)	n/a
Vanguard High Div Yield ETF (VYM)		\$ 62,386	08/21/15	\$ 81,920	\$ 19,534	n/a
Vanguard High Div Yield ETF (VYM)		\$ 11,134	08/13/15	\$ 14,083	\$ 2,949	n/a
Vanguard High Div Yield ETF (VYM)	87	\$ 7,429	12/04/18	\$ 7,471	\$ 42	n/a
Vanguard Total Bond (BND)		\$ 24,947	02/17/17	\$ 24,585	\$ (362)	n/a
Vanguard Total Bond (BND)	742	\$ 59,954	01/31/17	\$ 59,226	\$ (727)	n/a

Ishares 1-3 Year Treasury (SHY)	177	\$	14,958	01/31/17			\$ 14,824	\$ (135)		n/a
Ishares 1-3 Year Treasury (SHY)	164	\$	13,697	02/01/18			\$ 13,735	\$ 38		n/a
Ishares 1-3 Year Treasury (SHY)	509	\$	42,298	12/04/18			\$ 42,629	\$ 331		n/a
Ishares Tr Core Dividend (DGRO)	884	\$	32,125	02/01/18			\$ 32,337	\$ 212		n/a
Ishares Intl Select (IDV)	624	\$	22,077	02/01/18	10/23/18	\$ 19,144	\$ -	\$ -	\$ (2,933)	n/a
Total		\$ 1,	361,554				\$ 2,165,116	\$ 832,017		
Advance CTE-Money Market (749-04H01)							\$ 174,987			
749-04H01 Account Total							\$ 2,340,104	\$ 832,017		

Fees for period: \$17,226.13 Fees based on assets: \$17,226.13

This material is being provided to you upon your request and is for informational purposes only. The information contained herein has been obtained from sources or data that we believe to be reliable, but we do not offer any guarantees as to its accuracy or completeness. Market information is subject to change without notice and past performance is no guarantee of future results. Neither the information nor any opinion expressed constitutes a solicitation for the purchase or sale of any security or other instrument. Merrill Lynch considers your trade confirmations and account statements to be the official documentation of all of your transactions.

# National Association of State Directors of Vocational Account Review Summary 07/01/2018 through 08/31/2018

Account 7WD-04H50 (Association)

 Cost Basis
 Buy/Sell
 2/28/2019
 Gain/Loss

 \$611,220
 Various
 \$604,567
 -\$6,653

**Managed Fixed Income Portfolio** 

Estimated Accrued Interest\$2,496Money Market\$14,107Account Total\$621,170

- oThe investment products sold by Merrill Lynch, Pierce, Fenner & Smith Incorporated and the insurance products sold by Merrill Lynch Life Agency Inc.:
- Are not insured by the FDIC or any other government entity;
- Are not deposits or obligations of, or guaranteed by, Bank of America, or any of its affiliates; and
- May be subject to investment risks, including the possible loss of investment principal.

# Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2018 to 02/28/2019

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	ROR Period(%)	ROR Cum(%)
2019	2,742,566	0	4,088	214,621	2,961,275	7.97	2.66
2018	2,884,524	0	50,382	(192,341)	2,742,566	(4.92)	(4.92)
Total	2,884,524	0	54,470	22,281	2,961,275		2.66

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

## **Relative Performance - Equity: Yearly**



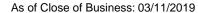
Performance period: 07/01/2018 to 02/28/2019

	Actual R		Dow Jo Industrial A PR(%	Average	Dow Jo Industria TR(%	al Avg	MSCI Em Markets TR		MSCI World		S&P 500	PR(%)	S&P 500	TR(%)
Period	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum	Year	Cum
2019	12.27	4.39	11.10	6.78	11.62	8.52	9.01	(0.24)	9.89	(2.91)	11.08	2.43	11.48	3.84
US Equity	12.27	4.43												
2018	(7.02)	(7.02)	(3.89)	(3.89)	(2.77)	(2.77)	(8.49)	(8.49)	(11.64)	(11.64)	(7.78)	(7.78)	(6.85)	(6.85)
US Equity	(6.98)	(6.98)												
International Equity	(3.32)	(3.32)												

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

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

# **Sector Analysis - Summary**





	Current Holdings	Custom I	Model		All Equity compared to Custo	om Model		
Sector	Total Holdings(%) 0% 25%		Model(%)	Gap- Model vs. Current(%)	ML Holdings(\$)	Model(\$)	Gap- Model vs. Holdings(\$)	
Equity		, ,	, ,	` ,	<u> </u>	``,	<b>5</b> (1)	
Health Care		10.76	15.10	4.34	274,934	593,174	318,240	
Consumer Staples		9.64	7.10	(2.54)	246,232	278,910	32,677	
Information Technology		14.55	19.80	5.25	371,761	777,804	406,043	
Consumer Discretionary		12.51	10.10	(2.41)	319,622	396,759	77,136	
ndustrials		15.20	9.50	(5.70)	388,229	373,189	(15,040)	
Materials	_	4.06	2.80	(1.26)	103,605	109,993	6,387	
inancials		11.92	13.80	1.88	304,490	542,106	237,616	
Communication Services		4.44	10.10	5.66	113,382	396,759	283,377	
Jtilities		9.04	3.20	(5.84)	230,836	125,706	(105,130)	
Energy		4.29	5.40	1.11	109,573	212,128	102,556	
Real Estate	-	3.58	3.10	(0.48)	91,460	121,777	30,317	
Equities Blend		0.00	0.00	0.00	126	0	(126)	
tal					2,554,250			

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

# **Sector Analysis - Summary**





#### **Date of Composition Information Obtained for Pooled Investments**

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, 529 portfolios, or external account proxies, the portfolio holdings reported by the fund as of the date identified below are reflected in the current portfolio analysis. Note that mutual funds change their portfolio holdings on a regular (often daily) basis. Accordingly, this analysis may not accurately reflect the current composition of the accounts included.

#### **Mutual Funds**

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

# **Size and Style Analysis - Summary**



As of Close of Business: 03/11/2019

	Current Holdings	Custom Model			All Equity compared t			
Size And Style	Total Holdings(%) 0% 50%	Current(%)	Model(%)	Gap- Model vs. Current(%)	ML Holdings(\$)	Model(\$)	Gap- Model vs. Holdings(\$)	
Equity		,	( )	,	<b>3</b> (1,7	· · /		
Large Cap Growth		30.61	33.00	2.39	781,786	1,296,341	514,554	
Large Cap Value		32.24	26.00	(6.24)	823,526	1,021,359	197,833	
Small/Mid Cap Growth		17.48	8.00	(9.48)	446,556	314,264	(132,292)	
Small/Mid Cap Value		18.83	8.00	(10.83)	481,086	314,264	(166,822)	
International Equity		0.29	25.00	24.71	7,357	982,076	974,719	
Equities Blend		0.55	0.00	(0.55)	13,938	0	(13,938)	
Total Equity Assets					2,554,250			

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

# **Size and Style Analysis - Summary**



As of Close of Business: 03/11/2019

#### **Date of Composition Information Obtained for Pooled Investments**

If the accounts included in this analysis hold mutual funds, closed end funds, annuities, 529 portfolios, or external account proxies, the portfolio holdings reported by the fund as of the date identified below are reflected in the current portfolio analysis. Note that mutual funds change their portfolio holdings on a regular (often daily) basis. Accordingly, this analysis may not accurately reflect the current composition of the accounts included.

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wutuai Funds					
Security	Security Description	Data As Of	Security	Security Description	Data As Of
PHSZX	PGIM JENNISON	01/31/2019			
Exchange Traded Funds					
Security	Security Description	Data As Of	Security	Security Description	Data As Of
DGRO	ISH TR CORE DIVID GROWTH	01/31/2019	IYW	ISHARES U.S. TECHNOLOGY	01/31/2019
SHY	ISHARES 1-3 YEAR	01/31/2019	VOX	VANGUARD COMMUNICATION	01/31/2019
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IYF	ISHARES U.S. FINANCIAL	01/31/2019	DON	WISDOMTREE US MIDCAP DIV	01/31/2019
IYH	ISHARES U.S. HEALTHCARE	01/31/2019	DTD	WISDOMTREE US TOTAL	01/31/2019



















#### To: Advance CTE Board of Directors

Thank you for the opportunity for the CTSOs to share a brief update from our organizations. As you can tell from these reports CTSOs are doing well and continue to be an integral part of high quality CTE.



Business Professionals of America (BPA) remains a champion of Career and Technical Education and supporter of students in the field of business and information technology education. BPA has a total membership of nearly 45,000 students across 25 states and the territory of Puerto Rico, serving Middle level, Secondary, and Post-secondary students as well as providing leadership development opportunities for our advisors and other stakeholders.

A change in leadership has sparked the enthusiasm for a new direction for BPA. On April 2, 2018, Dr. LouAnn Ross joined the BPA family and has been creating an exciting new vision for the organization. Under Dr. Ross' leadership, the organization continues to look forward to new opportunities and a new direction. BPA has a newly designed website, which provides improved functionality, a more modern and engaging design and enhanced content areas in an effort to help stakeholders access what they are looking for in a few clicks. <a href="https://www.bpa.org">www.bpa.org</a>

BPA also created a new position, the Director of Technology Integration this January with the intent that the position would steward the growth and development of the technology and education departments for BPA and has already led in the formation of new strategic partnerships and the creation of new programs and technology initiatives.

BPA is gearing up for the National Leadership Conference in Anaheim, California, May 1-5, 2019 and there are new partners, programs, competitions and service activities that will truly engage our student members and provide an unmatched opportunity for leadership development.

The 2018-2019 has been an exciting one, albeit a building block for even more innovative and exciting opportunities for our members. The organization remains on track to learn from the past and harnesses the full potential of our forward momentum in this new era of possibility and a brand new perspective on career and technical student organizations, as well as, career and technical education



#### Future Business Leaders of America-Phi Beta Lambda, Inc. (FBLA-PBL)

- FBLA-PBL continues to focus on implementing its four new strategic priorities:
  - Defining distinctly different experiences for each division.
  - Serving more students by seeking out untapped membership opportunities.
  - Building out a robust alumni strategy.
  - Becoming a student-only membership organization.
- A task force was created to help define distinctly different experiences for each division: collegiate, high school, and middle school. A curriculum framework was developed for each division and review committees were assembled to align FBLA-PBL's current programs to the framework and offer suggestions on program innovations.
- Preparations are underway for the 2019 FBLA-PBL National Leadership Conference to be held in San Antonio, Texas this summer. Over 13,000 members and advisers are expected to attend where they will take part in a slate of activities that include business tours and career panels, along with standard conference programming of workshops, Competitive Events, and the March of Dimes mini-walk.
- The PBL Division of FBLA-PBL hosted its very own PBL Career Connections Conference in New York City for the first time last October. PBL will return to the Big Apple October 24-26, 2019 where PBL members will focus on improving their business networking skills, touring successful businesses such as Uber and Bloomberg, and taking part in career-enhancing workshops.
- FBLA members will attend National Fall Leadership Conferences (NFLCs) in Washington, D.C.; Birmingham, AL; and Denver, CO.
- The Board of Directors of FBLA-PBL continues its search to replace current CEO Jean Buckley who is retiring in August. A celebration reception is planned at the NLC to recognize Jean for her long-term service and contributions to the organization.



#### Family, Career and Community Leaders of America

- CTE Month FCCLA Week, please view a highlight video from FCCLA Week to see how our members celebrated this year: https://www.youtube.com/watch?v=Yan-Fbvyx-c
- The FCCLA National Leadership Conference will take place in Anaheim, California on June 30 – July 4, 2019. We look forward to bringing together over 8,000 student leaders and advisers to expand their leadership skills, listen to inspiring speakers, explore career pathways and compete among the nation's top qualifiers in STAR Events. FCCLA has partnered with Disney to offer our attendees career intensive training experiences in the Culinary and Fashion industries.
- We are excited to launch a pilot career pathway Industry Immersion. The inaugural Industry Immersion will take place this May in Chicago, Illinois with its focus on Hospitality and Tourism. A select group of Junior and Senior FCCLA members will get to attend the National Restaurant Show to see the various levels of this industry, engage with industry professionals and specialists, and gain a more in-depth understanding of the world of hospitality.
- FCCLA Board of Directors established a flat rate pilot membership rate of \$250 for Middle Level Chapters. An FCS teacher can affiliate all of their members for this flat rate by importing their class rosters.
- Membership is ahead of this time last year and ahead of our final membership from last year. We are excited to see this growth.
- FCCLA released the updated Career Connection program. This update was sponsored by Goodheart Wilcox publishers. The units cover the topics of:
  - My Skills Students learn about themselves and practice being productive, promotable employees as they link their personal interests, skills, and goals to careers.
  - My Life Students learn to manage interconnected roles in careers, families, and communities by exploring choices and skills that help balance these roles.
  - My Career Students gain a better understanding of work and learn how to find and land a job.
  - My Path Students identify steps they can take to reach career and lifestyle goals.



#### National FFA Membership

• National FFA Membership reached an all-time record high of 669,988 members from 8,630 FFA chapter for the 2017-2018 school year.

#### National FFA Convention

- Attendance at the 91<sup>st</sup> National FFA Convention and Expo (2018) in Indianapolis, Indiana was a record 69,944 with 41,261 attending the Garth Brooks concert.
- The 91<sup>st</sup> FFA Convention and Expo hosted the first "Blue Room 365" that put an emphasis of innovative technology in agriculture.
- Based upon the site selection committee recommendation the National FFA Board of Directors selected Indianapolis, Indiana to host the 2025-2031 National FFA Convention and Expo.
- Delegates at the 91<sup>st</sup> FFA Convention and Expo changed National FFA Membership type from "Active" to "Student", National FFA Membership type from "Alumni" to "Adult" and moved the National FFA Honorary Degree from a membership type to a Degree.

#### National FFA Governance and Legislation

- In January 2019 the 116<sup>th</sup> Congress approved modifications (HR 439) to the National FFA Charter (PL 105-225) to change the governance structure of the National FFA Organization to allow the agricultural education profession to select its board structure, board membership and board leadership.
- Delegates at the 92<sup>nd</sup> National FFA Convention and Expo (2019) will act up on multiple Constitutional and Bylaw amendments that will redefine the governance structure of the National FFA Organization.
- The National FFA Board of Directors approved and the sale of the National FFA Merchandising Center in January 2019. Merchandise sales has been outsourced to a company that focuses on picking, packing and shipping.
- In January 2019 the National FFA Board of Directors approved to begin the process of dissolving the Employee Defined Benefit Pension Plan. Employees currently may participate in a Defined Contribution Pension Plan.

#### National FFA Appointments

- Buddy Deimler (Utah) was officially seated as the National FFA Treasurer beginning January 1, 2019.
- Travis Bradshaw (Oklahoma) was selected to serve as the adult representing secondary students in Agriculture to serve on the National Council for Agricultural Education.



#### **SkillsUSA Report to Advance CTE Board**

SkillsUSA has once again involved more students than ever before during this academic year. This marks the 16th consecutive year of growth. Total combined professional and student membership as of March 4, 2019 is 365,002 and that is approximately 4,000 members over same date last year. We will be processing and counting new membership until April 15, when the final membership report will be published. In comparison to last year, preliminary data indicates growth in middle school and college/postsecondary membership. A total of 29 state associations exceeded last year's membership. Other SkillsUSA news:

- Participation was higher than ever at the Washington Leadership Training Institute, with 545 participants coming from 26 states. On Tuesday, September 25 participants advocated at the offices of 23 senators, 105 representatives and the U.S. Department of Labor for a total of 131 advocacy visits.
- On Oct. 3, SkillsUSA launched the WorldSkills USA team with a new microsite, social media and a national press release about the team. The 22 members of the WorldSkills USA team will visit sponsor 3M and complete individual and group training between now and August when they compete in Kazan, Russia. The WorldSkills USA team microsite including is located at: <a href="www.worldskillsusa.org">www.worldskillsusa.org</a>.
- On Dec. 14, Kelly Horton and Tim Lawrence, along with national officers Janice Oh and Kaylee Corvin, attended the U.S. Department of Education "Rethink CTE" summit. More than 100 national thought leaders attended, including top educators, industry leaders and federal and congressional officials. Secretary of Education Betsy DeVos spoke, and discussions were led by Scott Stump, the assistant secretary of the Office of Career, Technical and Adult Education.
- In November, SkillsUSA exceeded our individual giving campaign goal for #GivingTuesday and ended at \$10,287 raised. With CareerSafe's matching grant, SkillsUSA raised \$20,287 for core mission support.
- On Feb. 8, SkillsUSA was invited to participate in a CTE 101 briefing for Capitol Hill staffers as a recruitment push for the House CTE Caucus and a co-sponsorship push for the House's CTE Month resolution, hosted by Reps. Jim Langevin (D-R.I.) and Glenn Thompson (R-Pa.). Tim Lawrence used the lens of SkillsUSA to describe how CTSOs benefit both education and industry. To hear Tim's remarks, go to our podcast channel: www.skillsusa.org/publications-news/podcasts/
- SkillsUSA Week was celebrated Feb. 3-9 inside classrooms across the country and was shared via a comprehensive social media plan. National events included a tour of Nash Community College in Rocky Mount, N.C.; a visit to Crawford County Career and Technical Center in Meadville, Pa.; and a tour of Catawba Valley Community College in Conover, N.C. Joining staff, state leaders, and national officers were representatives from our sponsor, Channellock Inc.
- Feb. 5 was SkillsUSA Advocacy Day. SkillsUSA national officers, Channellock

representatives, and staff visited Washington, D.C. to advocate for SkillsUSA and CTE Month. They began the day at the U.S. Department of Education's Office of Career, Technical and Adult Education, where they were greeted by Assistant Secretary of Education Scott Stump. Attending the meeting were Casey Sacks, Sharon Miller, Steve Brown, Craig Stanton, Richard Petty, Jim Williams and Mike Chamberlain. They also went to the U.S. Department of Labor for a meeting with Laurie Rowe, senior policy advisor to Secretary Alexander Acosta. Other groups visited the offices of Rep. Jim Langevin (R.I.), Rep. Rob Portman (Ohio); Rep. Glenn Thompson; Sen. Tim Kaine (Va.) and Sen. Bob Casey Jr. (Pa).

- SkillsUSA continues development on SkillsUSA CONNECT, a member portal that will serve as a comprehensive hub for connecting members, instructors, business and industry partners and our staff.
- In February, SkillsUSA brought together alumni, business partners, state directors, local
  chapter advisors, current students and board members together for an Alumni Task
  Force meeting. The team worked to actualize the organization's dream of all SkillsUSA
  chapters having an active local alumni chapter to provide resources and support in
  providing every member the opportunity for career success. The task force developed a
  strategic plan and will begin building an alumni leadership structure to support the new
  plan.
- SkillsUSA social media and website use continues to grow. Website visits average 398,801 visits per month, which equals 1,196,403-page views by 951,363 users. On Twitter, our best tweet this quarter was the announcement of Career and Technical Education Month with a reach of 52,109 and over 10,300 organic impressions.
- Recent news articles published about SkillsUSA included "When Co-Curriculars Spark
  Careers: Over 80 Years, How Career and Technical Student Organizations Have Evolved
  from Bricklaying to Business Management to Robotics" by Kate Stringer of 74million.org.
  SkillsUSA worked with the reporter and is mentioned throughout, including former
  member Brice Harader Pate, former WorldSkills competitor Kieron Kohlmann and
  instructor Bart Taylor. The nonprofit news website, based in New York City, focuses on
  U.S. education. For these and other stories, go to: <a href="www.skillsusa.org/publications-news/press-room/">www.skillsusa.org/publications-news/press-room/</a>
- Over 1,675 people have registered for the SkillsUSA Brand Center at
   <u>www.skillsusabrandcenter.org</u>. The online management system for brand assets makes
   it easier for local chapters and state associations to generate logos and dynamic
   collateral including letterhead, business cards and program covers.
- SkillsUSA and partner Klein Tools will conduct a National Signing Day on May 8, similar
  to the familiar athletic Signing Day. High school seniors in select construction trades
  programs will announce career plans as they sign a letter of intent for a job offer,
  apprenticeship or advanced technical training.
- SkillsUSA is working to integrate the SkillsUSA Framework into the technical standards
  for the SkillsUSA Championships, our national competitive events program. Designed to
  reward students for excellence, involve industry in evaluating student performance and
  keep training relevant to employers' needs, the SkillsUSA Championships is our most
  public-facing event. The SkillsUSA Framework serves as the blueprint for career
  readiness and benchmarks students as they demonstrate and articulate personal,

- workplace and technical skills grounded in academics.
- The SkillsUSA *Career Essentials Suite* of curriculum, assessments and a career readiness credential is gaining support in several states. Business and industry is in the process of validating the assessment and credential and a press event will be held in June to recognize the first students credentialed as career ready through the assessment.
- Work continues on the SkillsUSA headquarters building, including installation of a new boiler, addition of a storage building, reconfiguration of current office space, workstation and server upgrades, and plans for a student amphitheater in back of the building.
- SkillsUSA is still in process for the search for a new executive director with Tim Lawrence's retirement in February 2020 and is hiring for several new staff positions. Current staff is 34 full-time employees.



Partnerships are an important part of the Technology Student Association (TSA). This past year TSA collaborated with CompTIA, a non-profit IT trade association, to collectively address the challenge of filling the STEM pipeline. TSA student members our learning to become critical thinkers, problem solvers and technologically literate leaders of tomorrow. Its partnership with CompTIA is helping to make their journey a reality. Additionally, as a result of its work with CompTIA, TSA is developing a new series of competitive events for computer science students.

TSA's partnership with the U.S. Army continued this year whereby TSA managed for AEOP (Army Educational Outreach Program) the Junior Solar Spring contest for middle school students, and Unite, a summer program for underserved and underrepresented STEM high school students. Participation in both programs increased.

TEAMS (Tests of Engineering Aptitude, Mathematics and Science) had a successful competition season this past year within TSA. TEAMS is a national one-day STEM contest for middle and high school students to address global issues. The 2018 theme was Engineering a Greener World and was based on one of the National Academy of Engineering Grand Challenges. Through TEAMS, contestants learn critical job readiness skills such as teamwork, analytical thinking, and multidimensional problem solving.

TSA's leadership program, LEAP (Leadership. Education. Achievement. Personal Growth.), continues to be offered to its 250,000 middle school and high school members. LEAP rounds out student members' educational experience by developing key soft skills through community service, competitive events, public speaking, and networking with peers and mentors. LEAP is now integrated into all of TSA's 70 STEM competitions. LEAP is based on the book *The Student Leadership Challenge*.

The 2018 national TSA conference was held last June in Atlanta, Georgia. During this annual event TSA celebrated its 40th anniversary. The 2019 conference will be held in the Washington, DC area, at the Gaylord National Hotel and Convention Center, from June 28th to July 2nd. Over 8500 conference participants are expected.

# Future Health Professionals HOSA

ADVANCE CTE ISSUE



#### 2019 HOSA, Inc. Board Officers

The **HOSA**, **Inc. Board** meeting was held on January 12, 2019 in Southlake, Texas. Those elected to lead HOSA, Inc. for 2019 include (L-R): Janet Villarreal, HOSA, Inc. Board Chair; Dana Stringer, Secretary; Jason Huff, Chair-Elect; and, Dr. Peg Enslen, Immediate Past Chair. Janet is the Texas State Advisor, the largest HOSA State Association with 35,2000 members. Dana is the Alabama State Advisor with 9,329 members. Jason is a former local, state and national HOSA officer as well as the Transplant Administrator at Cincinnati Children's Hospital Medical Center; and, Peg is the Delaware State Advisor with 1,400 members.

The **HOSA International Executive Council** (lower right-hand corner includes (L-R): Austin Brewer, Postsec/Collegiate VP; /Araoluwa Omotowa, Western Reg. VP; Kartik Tyagi, Sec. Bd. Rep; Sarah Fleischman, President; Burgin Mackey, Posts/Colleg. Board Rep; Vivian Do, President-Elect; Darius Thomas, Central Reg. VP; and, Riya Gupta, Eastern Reg. VP.

# HOSA 2019 42nd Annual International Leadership Conference

Disney's Coronado Springs Resort June 19-22, 2019

The highlight of the year for HOSA members is the International Leadership Conference. This year the ILC will be held in one of our favorite venues—Disney's Coronado Springs Resort in Orlando!

The 42nd Annual ILC offers many opportunities for members, advisors and partners. We expect 11,000 members, advisors, partners, guests, judges, exhibitors, and presenters to attend ILC 2019.

The ILC program can be viewed at: ilc.hosa.org.

#### ILC 2019 Highlights include:

- 4 dynamic general sessions
- HOSA University for members, state officers and advisors
- Exhibits for future health professionals
- Competitive events for future health professionals to demonstrate their leadership, professional and technical skills
- Annual business meeting of the student organization conducted by voting delegates
- Health education symposium for future health professionals and advisors
- View the new ILC opportunities on pp.2-3.

#### **Membership Demographics**

HOSA-Future Health Professionals is extremely proud of the 2018-2019 membership demographics report. The health industry tells us that it is essential that the health workforce be composed of more minorities. They report a need for African American and Hispanic health providers, particularly nurses. The report also touched on the diversity lacking among executive leadership positions within healthcare.

One of our partners asked if we were willing to help them develop a high school pipeline of future health professionals. That, of course, is the reason we changed the name of HOSA by adding Future Health Professionals. The partner happens to be located in a large HOSA membership state which means the pipeline concept is in place and the demographics are in alignment with their intended pipeline output.

HOSA Demographics: Non-White: 52% | White: 48%

Asian: 11.4% | African American: 11.7% | Hispanic: 20.1% | Other: 8.8%

Gender: Female: 81.5% | Male 19.9%



# National Geographic Learning Academic Testing Center at 2019 ILC

National Geographic Learning, a part of Cengage Publishing, is launching the Academic Testing Center, in partnership with HOSA-Future Health Professionals at the 2019 International Leadership Conference. The Academic Testing Center will provide HOSA delegates the opportunities to demonstrate their basic knowledge in preparation to become future health professionals in eleven science areas.

The **55-item tests** will be provided by National Geographic Learning/ Cengage. The eleven areas to be tested include:

- 1. Anatomy & Physiology
- 2. Medical Math
- 3. General Chemistry
- 4. Organic Chemistry
- 5. Biochemistry
- 6. Biology
- 7. Microbiology
- 8. Physics
- 9. Human Heredity
- 10. Allied Health Statistics
- 11. Bioengineering

The Testing Center will be able to test **250 delegates** during each 90-minute session on Tuesday, Wednesday, Thursday, and Friday. Delegates that do not pre-register for testing will be able to register on-site if space is available. Space is limited.



HOSA members appreciate the opportunities to test themselves since they must sit for certification exams and entrance exams in their future as a health professional. This is good experience and they can measure their readiness for college and future exams.

#### Recognition

- A certificate of participation will be awarded to all tested.
- HOSA advisors will receive a Certificate of Excellence if their HOSA member is ranked in the Top 10.
- Top 10 will be recognized at the Grand Awards Session with 1st, 2nd, & 3rd places receiving special recognition.

# School Age Trauma Training (SATT) at 2019 ILC

HOSA-Future Health Professionals is pleased to be part of a federally funded research study to prepare materials for teachers to use to train students to "stop the bleed" by using tourniquet kits. Homeland Security funded a grant to prepare materials that will produce the best results possible for students to learn and retain the process for administering a tourniquet and stopping the bleed in a traumatic situation like has occurred in too many schools across the country. The research project was awarded to the National Center for Disaster Medicine and Public Health, American Red Cross and HOSA-Future Health Professionals.

At the ILC, HOSA is asking HOSA members who are rising seniors or younger to participate in the study. Several sessions will be conducted on Thursday and Friday (all day) to teach students how to use a tourniquet properly, then, provide them the opportunity to apply what they learned in a realistic situation. Those participating will be pre-registered unless we need more to be tested to achieve the 400 students tested quota.

Students that have had Stop the Bleed training are not eligible to participate in this testing to avoid skewing the results. We are hopeful that 400 students will register for the research study. Those that register will receive a certificate of participation in a Homeland Security funded project. The certificate will be most helpful in the future in documenting participation in a reputable research project.

Training sessions will be held on Thursday, June 20, and Friday, June 21, with sessions held each day at::

- 8:00—9:30 am
- 9:30—11:00 am
- 11:00—12:30 pm
- Lunch
- 2:00—3:30 pm
- 3:30—5:00 pm

Goal to be trained and tested: 400

Requirement: Signed HOSA Consent and Conduct Form



# **HOSA-100 National Advisory Council**

The HOSA-100 National Advisory Council serves as a vital champion of HOSA-Future Health Professionals. Council members provide HOSA with their professional expertise; their diverse knowledge of perspectives; their connections to local, state, national and international resources, or colleagues; their philanthropic support or other valued assistance; and, promote HOSA-Future Health Professionals as the pathway for young people interested in the pursuit of careers in health beginning in middle or high school and continuing through postsecondary/collegiate institutions and medical, pharmacy, dental, and nursing schools.

#### Chairman

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

#### **Vice Chair**

Michael J. Manyak, M.D. Director, Global Med Affairs, GlaxoSmithKline

#### **Members**

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William Barnes, Ph.D.

Sean Callinicos Senior Vice President, Global Government Relations and Public Policy, Cardinal Health

Kevin Cevasco, Lead Architect Watson Health, Federal IBM

Patricia Cornet, Co-Founder, Women of Color in Pharma Director, Global Scientific Societies and Cooperative Groups Global Medical Oncology, Bristol-Myers Squibb

Ernie DuPont, Director of Workforce Initiatives CVS Health

Paul Grundy, M.D., Global Director, Healthcare Transformation, Health TeamWorks

RADM Joyce Johnson, Professor Medical School & Health Administration Graduate Program, Georgetown University

Saralyn Mark, M.D., President Solutions, LLC & iGiannt



HOSA-100 National Advisory Committee Member, Doug Wolf, gave his kidney to his mother. The surgery was successful and he is a splendid rolemodel for future health professionals!

Robert Popovian, PharmD, MS Senior Director, Advocacy and Professional Relations, Pfizer, Inc.

Ann Powell, Director, Healthcare Policy and Advocacy, Johnson & Johnson

Sabrina Spitaletta, Director Center for Public Health, Milken Institute

CAPT Robert J. Tosatto Reserve Corps (2003-2017)

Laura J. Stewart, Senior Product Manager Education, Cengage

Lori Tremmel Freeman, Chief Executive Officer, National Association of County and City Health Officials (NACCHO)

Miah Wander, Researcher Medical Devices Team, Microsoft Research

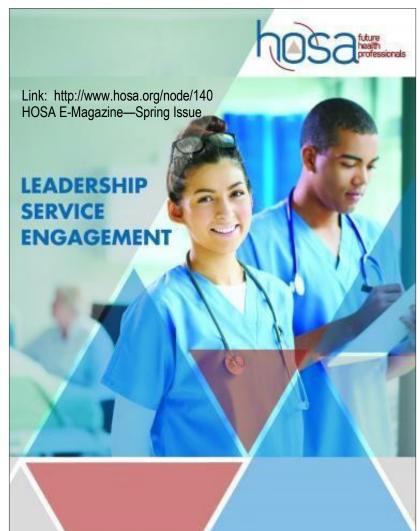
Doug Wolf, Director, Strategic Initiatives Boys & Girls Clubs of Columbus (OH)





# **HOSA Patch Exchange Program**

- The HOSA Delegate Assembly approved the new HOSA-Future Health Professionals' patch at the 2019 ILC. The new patch also features the new brand and name HOSA-Future Health Professionals. HOSA's four new core values Learn, Lead, Serve and Innovate.
- HOSA will implement a "Patch Exchange Program" starting with the 2019 HOSA ILC and continuing until December 31, 2019.
- At HOSA's 2019 ILC, new patches will be exchanged for old patches at no cost. (FREE)
- After ILC until December 31, 2019, patches can be exchanged with HOSA Headquarters for \$1.
- Starting January 1, 2020, the new patch will be required as the official HOSA uniform and can be purchased from Awards Unlimited for \$3.80.
- After the middle of June 2019, new patches can be purchased directly from Awards Unlimited for \$3.80.





#### **HOSA-Future Health Professionals' Staff Members & Contractors**

Back Row (L-R): Christian Angelson, Washington Office Associate; Bobby Crandall, Director of Technology; Jim Koeninger, Ph.D., Executive Director; Karen Batchelor, CE Mgmt. Team Liaison; Carie Staub, Asst. Dir. CE; Bergen Morehouse, Dir., CE Mgmt. Team; George Sifakis, Director, Washington Office; Jeff Koeninger, Dir., Membership; Front Row (L-R): Laura Sheppard, Sr. Dir.; Nancy Allen, Assoc. Dir.; Karen Koeninger, Deputy Exec. Dir.; Jan Mould, Asst. Dir. CE; Amy Gallimore, Dir. Publications. Not pictured: Kimberly Spivey, Sr. Dir. Advancement; and, Jason Koeninger, Software Architect.

#### **Learning that works for America Campaign Update**

Report submitted by Katie Fitzgerald, Communications Manager

The CTE: Learning that works for America campaign was launched over eight years ago to help support states in committing to high-quality CTE and communicating about CTE with internal and external stakeholders. The brand promise, which is the anchor of the campaign, is largely based on the 2010 vision, *Reflect, Transform & Lead: A New Vision for Career Technical Education*. Since then, Advance CTE has released a new vision, *Putting Learner Success First: A Shared Vision or The Future of CTE*, conducted national research on messaging, provided technical assassinate to states in their communications efforts and created a number of resources and tools related to communications. We endeavored to update the brand promise at the Fall 2018 Board meeting but did not arrive at language that was acceptable to the Board. As staff sought to take another pass at revising the brand promise, we wanted to revisit and reaffirm the purpose of the campaign. We first explored the data we had on utilization of the campaign

As such, the campaign may need to be rethought and adjusted to meet the needs of states. Twenty-nine State CTE Directors are signed onto the campaign, to date. Currently, per the membership services survey, 24 State CTE Directors say they use the Learning that works for America brand as their statewide brand for CTE. In the comments, State Directors said they use it in a variety of ways, including in presentations, on name badges, publications, on websites, etc. Five State Directors responded that they have their own statewide brand, and eight say they have no brand. Eighteen say they have used Advance CTE resources and tools related to communications.

Currently, State Directors must sign onto the campaign once they move into the role. Local users submit a request to use the campaign to Advance CTE staff, staff coordinates with the State Director in the user's state, and Advance CTE staff approves and sends the logo and materials to the local users. While his process is in place, staff has little control over how the logos are used once they are released to the user. This creates an administrative burden on staff, with little evidence that it keeps the fidelity of the brand intact. Additionally, 32 State Director respondents (90 percent), said that CTE perception is somewhat of a challenge in their state, indicating there is still work to be done to help states improve the perception of CTE in their state.

Looking at the data, we realized we had some more fundamental questions about the campaign that we wanted to discuss with the Board before we take the next step in refreshing the brand promise.

#### **Board action required:** Discussion pertaining to the following:

- Is there value of restricting access to the Learning that works for America campaign?
- How can Advance CTE best support communications efforts, both with those states that use the Learning that works for American brand and those that do not?

<u>116<sup>th</sup> Congress</u>: The 2018 midterm elections resulted in in numerous changes in the new Congress. Some highlights related to the committees that handle education and funding legislation are included below:

- Democrats gain control of the House with 234 seats
  - House Committee on Education Labor sees 14 new Democrats and 10 mew Republicans
  - House Appropriations Subcommittee on Labor, Health and Human Services, Education and Related Agencies (Labor-HHS-Ed) sees three new Democrats and one new Republican
- Republicans retain control of the Senate, picking up two seats to hold a 53-47 majority
  - Senate Health, Education, Labor and Pensions (HELP) Committee sees two new Republicans and one new Democrat
  - Senate Appropriations Subcommittee on Labor, Health and Human Services,
     Education and Related Agencies (Labor-HHS-Ed) sees one new Republican

New members of Congress were sworn in on January 3, 2019 and began to hire staff at that time. Some offices do not yet have an education staffer. Advance CTE has started to meet with new offices to introduce ourselves and position Advance CTE as the go-to expert on CTE. Progress in setting up meetings has been challenged by the timing of this year's appropriations season because new offices hired staff at the same time that we need to meet with congressional appropriators.

Apprenticeship: As the Administration continues its efforts to develop and implement an Industry-Recognized Apprenticeship Program (IRAP), congressional efforts on apprenticeship have heated up as well. In collaboration with the Apprenticeship Forward Collaborative (a coalition dedicated to the expansion of high-quality apprenticeship programs), Advance CTE weighed in on notices from the U.S. Department of Labor regarding the construct of third-party accreditors approving industry-recognized apprenticeship programs. In addition, congressional staff sought out feedback from Advance CTE on the "Effective Apprenticeships to Rebuild National Skills Act" (EARNS), a proposal to codify the current registered apprenticeship system and broaden apprenticeship efforts to include youth and pre-apprenticeship. Advance CTE provided feedback on the proposal in collaboration with New America, the group leading the effort of which Advance CTE is apart, called the Partnership to Advance Youth Apprenticeship (PAYA). The bill was introduced in December 2018 and Advance CTE anticipates an updated proposal will be introduced in the coming months.

Elementary and Secondary Education Act (ESEA): In January, Advance CTE joined the Title IV-A coalition, which supports the funding for the Student Support and Academic Enrichment grants authorized under the Every Student Succeeds Act (ESSA). These funds may support well-rounded education, of which CTE is apart. The coalition will be doing a campaign to build awareness and support for the grants and has sought examples of how states and districts are leveraging these funds. Advance CTE has asked the State CTE Directors for some examples and have received a few, but are looking for additional examples. These examples would not only

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### **Updates to Advance CTE's HEA Reauthorization Recommendations**

Report Submitted by Meredith Hills, Policy Associate

In 2016, Advance CTE's Board approved the organization's first-ever recommendations for the reauthorization of the Higher Education Act (HEA). Those recommendations were re-approved in 2017 by the Board and again in 2018, with revisions in language and content that reflect the organization's brand and priorities.

As the 116<sup>th</sup> Congress makes movement to reauthorize HEA, Advance CTE is following the issues that lawmakers are prioritizing. This, combined with feedback from Advance CTE's HEA Kitchen Cabinet, led Advance CTE to add a specific recommendation to lift the ban on Pell Grants for incarcerated individuals.

#### **Additions:**

 Support reinstating Pell Grant for incarcerated individuals. This would give hundreds of thousands access to postsecondary education, and allow these learners to pursue meaningful employment when released from prison

#### **Deletions:**

 Removed the year-round Pell recommendation because year-round Pell has been reinstated.

**<u>Board Actions Required:</u>** Vote to approve the revised Advance CTE Recommendations for the reauthorization of the Higher Education Act

support this campaign, but could help highlight the opportunities for coordination across CTE and ESSA.

Fiscal Year (FY) 2020 Budget and Appropriations Update/Double the Investment: During CTE Month, Advance CTE launched a campaign to double the federal investment in CTE. This is a shared campaign and we provided our members with a preview webinar and early access to campaign materials (e.g., a one-pager, PowerPoint, talking points, partner guide, sign, promotional toolkit, fact sheet and graphics) prior to the public launch. In addition, we provided key partners with a heads-up on the launch and secured early support from many groups in the education community, many of whom submitted their logos for display and have helped push out the campaign by email and social media. While the launch itself was successful, early efforts to secure signatures have not yet taken off. As of March 19, the campaign has 71 supporters, representing 22 states and 16 Career Clusters ®. However, the top Cluster represented is Education and Training, with many signatures coming from education institutions or nonprofit groups. Going forward, Advance CTE will be targeting campaign efforts on employers who have already signed on to encourage them to reach out to other employers.

By highlighting the campaign during multiple sessions at the Spring Meeting, we believe that that focus will re-invigorate and re-engage our members to double down on their commitment to securing signatures and work toward garnering 10,000 signatures by April. In addition to securing signatures, supporters of the campaign may also submit blogs and testimonials to be featured on the website, engage on social media, and more, all of which we also plan to highlight during the Spring Meeting. We have also started a bi-monthly newsletter to provide the membership and campaign supporters with regular updates on the campaign and to highlight the resources available.

Going forward, Advance CTE plans to continue to create resources and provide technical assistance to make it as easy as possible for our members to promote the campaign. In addition, we will partner with business and industry associations to reach larger numbers of employers. We have built an engagement strategy that will continuously be updated and have processes in place to check in internally to strategize about the campaign.

A few weeks after the campaign launched, the President released his Fiscal Year 2020 (FY2020) budget proposal. The proposal includes a 12.5 percent cut overall for the U.S. Department of Education and a 9.7 percent cut overall for the U.S. Department of Labor. Some key programs are highlighted below and the specific levels for each program can be found in the <u>U.S.</u>

Department of Education budget summary and the <u>U.S.</u> Department of Labor budget in brief:

- Investments in the Strengthening Career and Technical Education for the 21st Century Act (Perkins V):
  - o CTE State Grants: proposed level funding for the Perkins Basic State Grants at the amount provided by Congress in FY19. The President's budget also includes the recommendation that Congress authorize changes to increase the fees collected for H-1B visas and redirect 15 percent of that revenue to provide an increase in funding for CTE State Grants. However, we are still examining this proposal and at this point, it is unclear if this would be a practical way to ensure more resources for CTE State Grants and how much funding could be realized.

- o National Programs: proposed increase of \$12.58 million above the amount provided by Congress in FY19 to support the new Innovation and Modernization grants authorized under Perkins V.
- Student Support and Academic Enrichment Grants, authorized under Title IV-A of the Every Student Succeeds Act (ESSA), which can support CTE as part of a well-rounded education: proposed for elimination. The authorization level is \$1.6 billion.
- Supporting Effective Instruction State Grants, authorized under Title II of ESSA, which can support CTE professional development: proposed for elimination. The authorization level is over \$2 billion.
- Pell Grants: proposed to keep the maximum Pell grant frozen at its current level, rescind \$2 billion from the Pell reserve (the unobligated funds for the program that have been previously appropriated), and expand the access to the Pell grant to short-term programs.
- State formula grants provided through Title I of the Workforce Innovation and Opportunity Act (WIOA): proposed level funding at the amount provided by Congress in FY19.
- Adult Education and Family Literacy State Grants: proposed decrease of \$156.2 million below the level provided by Congress in FY19.
- Apprenticeship grants: proposed level funding at the amount provided by Congress in FY19, noting that these funds should be directed to Industry-Recognized Apprenticeships.

Advance CTE will continue to advocate for Congress to make a strong down payment on the goal of doubling the federal investment made in Perkins in FY2018 by FY2024. Advance CTE and ACTE have partnered on numerous appropriations meetings with staff for key Congressional appropriators and have also made numerous requests to individual offices regarding this request. In addition, Advance has supported efforts to raise the spending caps put in place by the Budget Control Act to avoid across-the-board cuts to all programs as well as efforts to support other programs that support CTE efforts, such as Title IV-A and Title II of ESSA, and other initiatives that could include provisions favorable to CTE, such as efforts to include investments in CTE in an infrastructure package. Advance CTE remains active in the Campaign to Invest in America's Workforce (a coalition dedicated to increased funding for workforce development programs) and also strengthened our commitment to the Committee for Education Funding (CEF), the largest and oldest coalition dedicated to increasing the federal investment in education across the continuum of early education, K-12, postsecondary and adult education, as Kathryn Zekus was elected to CEF's Board of Directors in December.

<u>Higher Education Act (HEA)</u>: In January, the U.S. Department of Education released recommendations to make significant changes to a variety of higher education regulations. The Committee on Accreditation and Innovation, Subcommittee on Distance Learning and Educational Innovation, Subcommittee on TEACH Grants and Subcommittee on Faith-Based Entities, all comprised of stakeholders, will begin negotiating the proposals starting on January 14 and attempt to reach consensus. If the committee and subcommittees do not reach consensus, the Department of Education will determine whether or not to move forward with regulations.

Congress has also made HEA reauthorization a priority, with Senate leadership on the Health, Education, Labor and Pensions (HELP) Committee signaling that they wish to work in a bipartisan matter. Senator Murray (D-WA), the ranking member on the Committee has indicated

that she wishes to pursue a comprehensive reauthorization in lieu of a piecemeal approach. However, members of Congress have continued to introduce individual bills amending HEA. Advance CTE anticipates that individual bills with broad bipartisan support will likely influence the final version of a comprehensive reauthorization. Four bills that encompass some of Advance CTE's HEA recommendations have been reintroduced in the new Congress with bipartisan co-sponsors, good progress that means that they could be included in the comprehensive effort to reauthorize HEA. Those four bills are as follows:

- The Making Education Affordable and Accessible Act, which would expand access to high-quality dual-enrollment programs;
- The Preparing and Retaining Education Professionals Act (PREP Act), which would allow the teacher preparation provisions of HEA to apply to CTE;
- The Jumpstart Our Businesses by Supporting Students Act (JOBS Act), which would allow Pell grants to support short-term programs with appropriate quality guardrails included; and
- The College Transparency Act, which would allow for program level data on postsecondary programs to become available, among other key provisions.

#### Strengthening Career and Technical Education for the 21st Century Act (Perkins V):

Between October and March, Advance CTE responded to the following information collection requests and the status of each is included in parentheses:

- Perkins V Draft State Plan Guide released in Fall 2018: Responded and provided guidance to Advance CTE members on how to weigh in
- Perkins V Draft State Plan Guide revised based on public comment released in Winter 2019: Responded and provided guidance to Advance CTE members on how to weigh in. This draft included most of our recommendations, resulting in a less burdensome and more reasonable transition plan for states.
- The Consolidated Annual Report Guide released in Winter 2019: Responded and provided guidance to Advance CTE members on how to weigh in.
- Guidance recommending that all Perkins data collection occur through the EDFacts Submission System: Responded and provided guidance to Advance CTE members on how to weigh in.
- State survey regarding the Student Support and Academic Enrichment Grants authorized under Title IV-A of the Every Student Succeeds Act (ESSA) in Fall 2018: Responded and the revised version was released in Winter 2019. Our comments resulted in the inclusion of CTE as part of the survey; which will allow the U.S. Department of Education to better understand how these funds are being spent and if they are being leverage for CTE.

Advance CTE will continue to monitor the Federal Register for guidance that impacts CTE leaders and respond as needed on behalf of our members.

Advance CTE has continued to focus on ensuring members have Perkins V resources as they embark on the planning process to implement it. In the fall, nearly every state and territory sent a team to these meetings. Advance CTE developed numerous <u>planning and implementation</u> resources that were used both during and after the meetings. We have also continued to maintain an online discussion forum for State CTE Directors in the Moodle online platform (which allows

for users to access Perkins V resources, respond to discussion questions and ask questions of Advance CTE and other State CTE Directors). As members continue to dig into the provisions in Perkins V and begin four-year state plan development, we will continue to provide on-demand technical assistance to states. In addition, we have also introduced a new bi-monthly <u>blog</u> and email series that connects our resources to Perkins V in a reader-friendly format.

**Board action required:** Response to the following discussion questions:

#### **Discussion Questions:**

- We recognize that some of Advance CTE's members will be able to easily engage employers and others will need more tools in order to support the campaign. The website currently features resources that will help our members make outreach to employers, including a one-pager, FAQ, promotional tool kit, PowerPoint and talking points, graphics and more. In addition, we plan to a webinar and provide bi-monthly updates featuring new resources and ways to support the campaign.
  - o What additional resources would be most helpful to our members?
  - o Would other types of technical assistance be helpful?
  - o Would you be willing to write a blog or submit a testimonial on the impact of CTE?
- Does the Board think state CTE leaders are aware of and taking advantage of opportunities to align implementation and funding across ESSA and Perkins? Or is this an area where more guidance is needed?



# Advance CTE Recommendations for the Reauthorization of the Higher Education Act

As Congress considers the reauthorization of the Higher Education Opportunity Act (P.L. 110-315), the challenges facing our nation's economy, most notably the skills shortage, must be central to these debates. Our nation's higher education system must become more responsive to the evolving demands of an ever more competitive global economy. Too many employers report a shortage of qualified workers, while university and college graduates burdened with tremendous debt are unable to find work related to their fields of study. This calls for a major realignment of our nation's higher education policies. The forthcoming reauthorization process will provide Congress a critically important opportunity to achieve this vision for investing in America's workforce by ensuring affordable and accessible postsecondary opportunities for every learner.

Advance CTE, representing the state leadership for secondary, postsecondary and adult Career Technical Education (CTE) in all 50 states and U.S. territories, offers the following recommendations for the reauthorization of the Higher Education Act (HEA):

#### **Higher Education Is Workforce Development:**

- Strengthen Connections to the Labor Market: While there are many important purposes for higher education, we must acknowledge and bring to the forefront the system's responsibility and role in preparing the nation's future workforce. The U.S. higher education's system is one of the nation's largest investments in its workforce. Acknowledging this, Advance CTE recommends that future HEA legislation prioritize support for education and training programs that lead to high-growth and in-demand occupations and industry sectors and respond to local, regional or state needs.
- Foster Job-Driven Postsecondary Partnerships: Community and Technical Colleges have a long history of working with employers of all sizes to meet the talent pipeline needs of the American economy. However, more can be done to ensure that these employer-education partnerships are more common. The Trade Adjustment and Assistance Community College and Career Training (TAACCCT) grant program most recently supported such partnerships with targeted investments for several years. Unfortunately funding for this initiative has run out, reducing these institutions' ability to effectively engage with the employer community. Advance CTE therefore recommends that new HEA legislation include annual funding over the law's authorization period for new investments comparable to the TAACCCT grant program focusing on local, regional or state high-growth, in-demand occupations and industry sectors provided at community and technical colleges. Such funding should be provided above and beyond existing investments the law makes into the postsecondary education system.

#### Eliminate Barriers to Financial Aid Program Access

• Affirm the Importance of All Postsecondary Credentials: A large and rapidly increasing portion of all postsecondary learners enroll in "noncredit" courses, and this figure is expected to continue to

grow. These programs typically lead to a postsecondary credential that often has a more immediate connection to an occupational skill or competency than most associate or baccalaureate degree programs and are frequently offered at a substantially lower cost to learners. Despite this, postsecondary learners enrolled in many short-term education and training programs are ineligible to access federal financial aid under current law due to overly burdensome program length requirements. Advance CTE recommends reducing current program length requirements for learner financial aid eligibility under Title IV of HEA for programs that lead to a recognized postsecondary credential, as defined by the Workforce Innovation and Opportunity Act (WIOA), and demonstrate a connection to an in-demand or high-growth occupational sector that aligns with local, regional or state needs. This includes expanding Pell Grant eligibility to include short-term programs that can lead to a recognized postsecondary certificate, license or credential. Advance CTE supports the JOBS Act, which promotes Pell eligibility for high-quality job training programs that are at least eight weeks and result in industry-recognized credentials and certificates.

- Increase Support for Non-traditional Learners to Succeed in Postsecondary Education: Through the implementation of career pathways and CTE programs of study, an increasing number of nontraditional learners (those over the age of 24) are enrolling in postsecondary education to acquire additional skills to stay competitive in the labor market. These learners often face barriers to postsecondary completion and federal higher education policy has not kept pace with the additional needs of these learners. Where possible, HEA should support efforts that afford greater opportunities to earn credit for prior learning either from experiences on the job, through military service or in the classroom. Moreover, to effectively support these nontraditional learners, Advance CTE recommends that HEA legislation support equitable access to federal financial aid and other wrap-around institution-based support services such as child care, tutoring and job search assistance.
- Reinstate Pell Grant Eligibility in Prisons: Since 1994, those incarcerated who would otherwise be eligible, have been denied access to Pell Grants. In 2015, the U.S. Department of Education began the Second Chance Pell pilot, renewed in 2019, that opened Pell Grants to prisoners in the experimental sites included in this program. Eliminating the ban on Pell in all prisons would give hundreds of thousands access to postsecondary education, and allow these learners to pursue meaningful employment when released from prison. Advance CTE recommends reinstating Pell Grants in Prisons to allow all learners the opportunity for postsecondary attainment, and set them up for career success.

#### [MH1]

#### Streamline Data Collection and Ensure Cross-systems Alignment

- Adopt Common Performance Metrics: Programs supported through federal legislation such as HEA, WIOA, the Carl D. Perkins Career and Technical Education Act (Perkins) and the Every Student Succeeds Act (ESSA), have unique purposes but oftentimes serve overlapping populations. Each law maintains distinctive accountability and performance metrics that, taken together, create a reporting burden for states and institutions while decreasing the value and integrity of the data collected. Advance CTE recommends the creation of common measures, where practical, to align workforce and education programs as well as the adoption of related common terminology and measurement methods.
- **Promote Cross-systems Collaboration**: State education systems should support seamless transitions between the secondary and postsecondary education levels to ensure that they work together collaboratively rather than in isolation. To build upon existing state efforts, Advance CTE

recommends that future HEA legislation promote a smooth transition to postsecondary education, and ultimately the workforce, by incentivizing program models such as dual or concurrent enrollment, programs of study and career pathways wherever practical.

- Develop and Expand Statewide Data System Capacity: The ultimate role of postsecondary education is to prepare learners for rewarding careers that promote economic self-sufficiency and align the nation's talent pipeline needs. To achieve this, a newly reauthorized HEA must be able to hold programs and institutions accountable for the employment outcomes of their learners. However, current law restricts the collection of the information necessary to do this and prevents adequate program evaluation of other critical learner outcomes. To that end, Advance CTE recommends repealing the law's ban on the creation of a student unit record system. Relatedly, future legislation should incentivize the development of state longitudinal data systems that enable sharing of data within and among states.
- Expand the Scope of Data Collection: Postsecondary programs must continuously evolve to support the needs of learners and guide them to academic achievement and success in the workforce. This can only happen if appropriate data is collected and shared across systems. Advance CTE recommends expanding the scope of data collected to track short and long-term outcomes of learners in terms of academic attainment and experience in the workforce. In addition, Advance CTE recommends disaggregation of data collected to at a minimum reflect race, ethnicity, gender and age. This is pivotal to understand the composition of learners and ensure high-quality postsecondary opportunities for all.

#### **Increase Flexibility for Innovative Educational Models**

- Promote Competency-Based Learning: Postsecondary CTE programs have been on the forefront of one of the most important innovations in education delivery— competency-based education. Such an approach emphasizes the importance of attaining specific skills and knowledge in a postsecondary educational setting, tailored to each learner's unique pace for learning, rather than on units of time to measure coursework. The Experimental Sites Initiative, contained in current HEA law, supports such programs in limited instances and should be expanded to further demonstrate the efficacy of competency-based postsecondary education programs. To build on these efforts, Advance CTE recommends greater flexibility be given to states and postsecondary institutions to implement high-quality and innovative programs and strategies that use a competency-based learning approach.
- Expand Career Guidance: Given the changing nature of the workplace, learners need greater opportunities to explore various career pathways to familiarize themselves with the career options available and their related educational and skill requirements before and during their postsecondary education program of choice. Supplemented with robust guidance, these activities help learners make more informed choices regarding which postsecondary education program will best prepare them to successfully transition into a rewarding career. Advance CTE therefore recommends that future HEA legislation support and encourage career exploration, guidance and advisement throughout the entire educational spectrum.
- Increase Opportunities for Experiential Learning: More than ever before, employers are valuing real-world work experiences as a core component of a student's qualifications for employment. Experiential learning opportunities provide learners the opportunity to apply what they have learned in the classroom to the real world and foster the development of employability skills that enhance their ability to successfully transition into the modern workplace. Advance CTE recommends that future HEA legislation encourage and support opportunities for learners to participate in

experiential learning activities such as internships, mentorships and other forms of real-world work experiences. Additionally, Advance CTE recommends incorporating work based learning opportunities, such as registered apprenticeships programs, as recognized academic experience.

# Develop and Nurture the CTE Teacher Workforce

• Prepare and Support Quality CTE Educators: Across the country, State CTE Directors consistently report a persistent shortage of CTE instructors. To address this shortage and to develop the CTE instructor workforce needed to meet the growing demand for CTE programs, teacher preparation activities authorized in current law should afford prospective teachers the opportunity to gain relevant technical training in the industry area where they intend to teach. Moreover, greater flexibility should be given to teacher preparation programs to recruit and support mid-career professionals seeking to transition into the classroom through alternative pathways to certification, while continuing to maintain high-quality standards for recruitment. To effectively support these efforts, Advance CTE recommends that future HEA legislation include funding and support services for CTE teacher preparation and related professional development.

Advance CTE represents state and territory leaders of CTE through leadership and advocacy that supports an innovative and rigorous CTE system that prepares learners for both college and careers. State CTE Directors lead the planning and implementation of CTE in their respective states and these recommendations reflect their priorities.

For more information, please contact: Advance CTE 8484 Georgia Avenue Suite 620, Silver Spring, MD 20910 | 301-588-9630 <u>nww.careertech.org</u>

#### **Virtual Professional Learning Strategy**

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

The cornerstone of Advance CTE's professional learning offerings are its bi-annual Spring and Fall Meetings. However, roughly half of Advance CTE's members rarely, if ever, attend an inperson meeting due to restrictive in-state travel budgets and other demands. In between those meetings, members have the opportunity participate in webinars, where they can learn about the latest trends and how other states are tackling CTE's toughest challenges, but staff know that these offerings need to be strengthened to meet members' needs throughout the year. With the passage of Perkins V, Advance CTE has decided to forgo its regular 2019 Fall Meeting, which also prompted staff to take this opportunity to revisit its virtual professional learning strategy to provide members with offerings to learn throughout the year and as they need it.

The objectives of this multi-faceted strategy are to:

- Provide year-round, high-quality professional learning that increases members' knowledge and enhances cross-state sharing;
- Raise awareness and utility of Advance CTE's myriad resources, both old and new; and
- Establish the new online community forum, Moodle, to be accessible to all state members for peer-to-peer knowledge and resource sharing.

Strategy 1: Support virtual cross-state sharing for State Directors

In fall 2018, staff established an online community forum, Moodle, as a space for State Directors to share their most pressing Perkins V questions with Advance CTE staff and their peers. Building on the success of Moodle in the fall, staff are working to evolve this forum from focusing explicitly on Perkins V to being a space where State Directors can pose questions and share resources on a broad range of topics in real-time. The goal is for this to be a largely self-driven space where Stat Directors proactively share knowledge and resources. This will functionally replace the <a href="mailto:statedirectors@careertech.org">statedirectors@careertech.org</a> listsery, though that will still be used from time to time by Advance CTE staff to communicate easily with State Directors.

- Timeline: February 2018
- Status: Space has evolved; now developing a strategy to foster conversation.
- Success measured by:
  - o Frequency and quality of conversations that are initiated by State Directors
  - o Increase in overall engagement by State Directors within Moodle

Strategy 2: Establish a pilot monthly call led by and for State Directors to empower cross-state knowledge and resource sharing

During the Regional Perkins Implementation Meetings in fall 2018, State Directors asked for more dedicated spaces for them to connect between meetings. Staff developed these "Fourth Fridays" calls as a way to meet this need. These calls will be piloted from February to June 2019. These monthly calls are designed to be an intentional space arranged by an Advance CTE staff member and led by a State Director. The host state will be voluntary and shift from month to month. Topics for these calls would drawn from, and reinforced by, conversations in Moodle, new or relevant resources from Advance CTE and other issues brought forth by State Directors.

Staff will use a webinar platform to create the most interactive, engaging space for conversation. To run these calls, staff have adopted the popular "Problems of Practice" consultation model from its in-person meetings. The host state will present its "problem," participants will ask clarifying questions and provide suggestions or solutions based on their own experience. Resources can be shared in real-time via the webinar platform or by email. The call's recording and shared resources are then posted to Moodle as a follow-up activity and will help to further develop Moodle usage among State Directors.

- Timeline: February-June 2019

- Status: Launched

- Success measured by:

o Number of states participating in calls

o Practice of states offering to host calls rather than being asked by staff

#### Strategy 3: Scale Moodle to be used by State Members

Staff will use a similar strategy as State Directors to cultivate behavior and use of Moodle. However, intentionality and consistency will be important to develop this behavior since this member category is not used to having these kinds of engagement opportunities. Staff are hopeful that these spaces can help to increase members' sense of value and satisfaction. Additionally, staff plan to develop community rules to help provide a useful, safe space for all participants. The space will need to be more heavily moderated and monitored during the early phase of implementation. This will need to be a collective effort overseen by the person responsible for Member Engagement but other program staff will assist in a rotating manner to help with moderating the Moodle, adding at least one prompt during their assigned week, and intervening when community rules have been broken.

- Timeline: July 2019 to coincide with membership renewal
- Status: Staff doing the necessary preparations to ensure a successful launch.
- Success measured by:
  - o Participation and activity within Moodle
  - o Number of member-driven posts and discussions

Strategy 4: Develop a robust stream of webinar content from Advance CTE and its partners

As evidenced by the Member Services Survey, many Advance CTE members – from State Directors to Organizational Members – are often unaware of the myriad resources and fact sheets available to them. Staff will begin to better use its webinar platform to raise awareness and discuss these resources or important topics of the moment. In 2019 and 2020, Advance CTE will only offer one in-person professional learning meeting due to other obligations, which means there will be a great need to better supplement members' professional learning through virtual offerings such as webinars. Additionally, Advance CTE has many partners who offer a range of quality, topical webinars that would be of interest to its membership. Advance CTE can and should do a better job promoting partners' webinars as another way to supplement its members' learning opportunities.

- Timeline: May 2019
- Status: Staff are brainstorming the list of partners with relevant webinars and also consider its own resource development schedule to develop a robust schedule.

- Success measured by:
  - o Participation on webinars
  - o Diversity of states and members who participate
  - o Post-survey analysis of webinar content

Board action needed: Discussion.

#### Questions for Discussion:

- 1. (Related to Strategy 1) Describe your personal experiences with Moodle. What has worked for you? What hasn't? Is there a way in which we can improve your experience?
- 2. (Related to Strategy 2) Similarly, please share your thoughts on the Fourth Fridays call structure. What are you hoping to get from this kind of virtual space? How can we spur further engagement in a conference call format that doesn't create the inevitable pile-up of everyone jumping in at the same time?
- 3. (Related to Strategy 4) What would you like from Advance CTE webinars? Currently, they focus on our new reports. Is there another focus you would prefer? Do you like the current format?
- 4. Are there other virtual professional learning opportunities not listed here that Advance CTE should consider?

The Nominations Committee was tasked with developing a slate of candidates for Secretary/Treasurer, two Regional Representatives (Regions A and C) positions and the second At-Large State CTE Director representative position.

The Nominations Committee is chaired by current Past President Pradeep Kotamraju, and included other Past Presidents (Rich Katt, Rod Duckworth, Marie Barry and Pat Ainsworth), the current Advance CTE/The Center to Advance CTE Vice President (Sarah Heath), former Advance CTE Board members (Eleni Papadakis), and one Associate-State member (Erin Larsen).

As is the tradition, the Committee recommends that the Executive Committee move "up" one position, Sarah Heath to President, Marcie Mack to Vice President and Bernadette Howard to Past President.

A call for nominations was sent out to all State CTE Directors in early 2019, which included the nominations criteria and form. The following nominations were received:

### Secretary/Treasurer

1. Heather Justice - Texas

#### At-Large Representative

- 1. Katie Graham Nebraska
- 2. Emily Passias Ohio
- 3. Elaine Perea New Mexico

Region A Representative (Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virgin Islands)

1. Jay Ramsey - Vermont

Region C Representative (Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Ohio, Oklahoma, Wisconsin)

1. Jeralyn Jargo - Minnesota

The Committee met and approved all candidates as being qualified to serve. All nominees were contacted and confirmed their interest in the Board positions. The vote for FY20 Board officers and representatives will take place at the Business Meeting on April 8, 2019.

**Board action:** Vote to approve the proposed FY20 slate of candidates, including succession of officers



# ACTE Report to Advance CTE Board of Directors March 12, 2019

- In addition to the CareerTech VISION Counselor Workshop that took place in December, ACTE is coordinating several Counselor Workshops with our affiliates including one at the Oregon ACTE Annual Conference in April and another with Georgia ACTE that will take place on May in Atlanta.
- ACTE has an MOU with Advance CTE to develop a set of Career Clusters concurrent sessions at CareerTech VISION 2019 in Anaheim.
- ACTE is pleased to be working with Advance CTE on Oregon's state plan contract and broader grant activities to support states implementing Perkins V work.
- ACTE is working to support increased investments in Perkins including through Advance CTE "double the investment" campaign.
- ACTE's new Board of Director elections nominations are due June 15. Please let us know if you have recommendations.
- ACTE is participating in Advance CTE's Equity in CTE Committee. Separately, ACTE has launched a Diversity Task Force.
- The Postsecondary Leadership Success Program at ACTE Sponsored by the ECMC Foundation inaugural class has been selected. This is an ECMC Foundation supported fellowship that ACTE has launched. Kim Green will be addressing the first meeting of the cohort this March. Please consider nominations for the second class that will be announced in the Fall of 2019.
- The High Quality CTE Program of Study publication series has launched as well as a series of mini-webinars, an online self evaluation instrument and other resources.
   We are happy to work with states and discuss how these activities might be helpful in your work.
- A short series of Middle School webinars has been launched and our Middle School web page also includes a link to Advance CTE's Expanding Middle School CTE publication series. (<a href="https://www.acteonline.org/middle-school-cte/">https://www.acteonline.org/middle-school-cte/</a>)
- New themes for ACTE's *Techniques* magazine have been announced. Please consider submitting entries for the magazine.
  - (https://www.acteonline.org/publications/techniques/techniques-editorial-calendar/)

- Thank you to everyone who participated in a very successful CTE Month celebration in February and to Kim Green for participating in our school visit to the Academies of Loudon which also included Education Secretary Betsy DeVos. This year's CTE Month student video contest winders have been announced and can be viewed on ACTE's CTE Month page (<a href="www.acteonline.org/cte-month">www.acteonline.org/cte-month</a>)
- New CTE Administrator and Global Competency Through CTE courses have been launched in CTE Learn, ACTE's online learning portal.
- The second book in a three-part series of New Administrators books has been launched thanks to our partnership with NOCTI. We are happy to discuss bulk rate sales.

# **Upcoming event dates:**

ACTE Region V Conference, Bozeman, MT – April 10-13, 2109
ACTE Region IV Conference, Oklahoma City, OK – April 16-18, 2019
ACTE Region I Conference, Beaver County/Pittsburgh area – April 24-26, 2019
ACTE Region III Conference, Lisle, IL – June 12-14, 2019
Best Practices and Innovations Conference, Tucson, AZ – September 25-27, 2019
ACTE Region II Conference, Raleigh, NC – October 3-5, 2019
CareerTech VISION Conference, Anaheim, CA – December 4-7, 2019

Thanks to Advance CTE for our continuing partnership!

For additional information on these or other activities: LeAnn Wilson, Executive Director <a href="mailto:lwilson@acteonline.org">lwilson@acteonline.org</a> 703-683-9347