

NASDCTEc Board of Directors' Meeting

**AGENDA**

April 7, 2015

Noon – 5 p.m.

Meeting Room: Hampton Ballroom

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1. Welcome, Overview of Agenda/Annual Report  
*Noon – 12:15 p.m. (15 minutes)*  
.....  
Rod Duckworth  
President  
*Pages 1 – 6*
  
2. Approval of Minutes  
*12:15 p.m. – 12:17 p.m. (2 minutes)*  
.....  
Jo Anne Honeycutt  
Secretary/Treasurer  
*Pages 7 – 11*
  
3. Approval of Consent Agenda  
*12:17 p.m. – 12:27 p.m. (10 minutes)*  
.....  
Rod Duckworth  
President  
*Pages 12 – 79*
  - Advocacy Plan Update
  - Career Clusters Logo User Agreements Update
  - Career Cluster Product Sales and Inventory Update
  - Communications Plan through June 30, 2015
  - Communications Update
  - Finance and Audit Committee Minutes
  - Legislative Update
  - Liaison Reports:
    - DECA
    - HOSA
  - Member Services and Meetings Update
  - Partnerships Update
  - Publications Update
  - Strategic State Policy Plan Update
  - Strategic Plan Update
  - Webinars Update
  
4. ACTE Partnership Update  
*12:27 p.m. – 12:50 p.m. (23 minutes)*  
.....  
LeAnn Wilson  
ACTE Executive Director  
  
Kimberly Green  
NASDCTEc Executive  
Director  
.....  
*Pages 80 – 84*
  
5. Nominations Committee Update  
*12:50 p.m. – 12:55 p.m. (5 minutes)*  
.....  
John Fischer  
Past President  
*Pages 85 – 86*

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|-----|---|---|
| 6.  | NASDCTEc Financial Reports<br><i>12:55 p.m. – 1:15 p.m. (20 minutes)</i><br>.....   | Jo Anne Honeycutt<br>Secretary/Treasurer<br><i>Pages 87 – 98</i>  |
| 7.  | FY16 Finance Committee Appointments<br><i>1:15 p.m. – 1:25 p.m. (10 minutes)</i><br>.....   | Karen Hornberger<br>Finance and Office Manager<br><i>Pages 99 – 100</i>   |
| 8.  | Bylaws and Board Policy Additions and Revisions<br><i>1:25 p.m. – 1:55 p.m. (30 minutes)</i><br>.....   | Karen Hornberger<br>Finance and Office Manager<br><i>Pages 101 - 103</i>  |
|     | <ul style="list-style-type: none"> <li>• <i>Rising Star Congressional Leader Award</i></li> <li>• <i>Nominations Policy Clarification</i></li> <li>• <i>Regional Election: Tie Vote Bylaws Amendment</i></li> <li>• <i>Board policy manual update</i></li> <li>• <i>Board commitment forms</i></li> </ul> |   |
| 9.  | CCTC Implementation Continuum Plans<br><i>1:55 p.m. – 2:15 p.m. (20 minutes)</i><br>.....   | Kate Blosveren Kreamer<br>Associate Executive Director<br><i>Pages 104 - 106</i>  |
| 10. | Career Clusters Leadership Pilot<br><i>2:15 p.m. – 2:45 p.m. (30 minutes)</i><br>.....  | Kate Blosveren Kreamer<br>Associate Executive Director<br><br>Andrea Zimmermann<br>State Policy Associate<br><i>Pages 107 - 113</i> |
|     | BREAK 2:45 P.M. – 3 P.M.  |   |
| 11. | Maintenance of Effort and Methods of<br>Administration Discussion<br><i>3 p.m. – 3:45 p.m. (45 minutes)</i><br>.....  | Steve Voytek<br>Government Relations<br>Manager<br><i>Page 114</i>  |
| 12. | 2015 Future of CTE Summit<br><i>3:45 p.m. – 4:15 p.m. (30 minutes)</i><br>.....   | Kimberly Green<br>Executive Director<br><i>Pages 115 – 126</i>  |
|     | <ul style="list-style-type: none"> <li>• <i>Planning team</i></li> <li>• <i>State team pilot</i></li> <li>• <i>Engagement of Board at Business Meeting</i></li> </ul>   |   |

13. Strategic Plan Discussion/NCTEF Update  
*4:15 p.m. – 4:45 p.m. (30 minutes)*

Kimberly Green  
Executive Director

Kate Blosveren Kreamer  
Associate Executive Director

.....  
*Pages 127 – 137*

- *Division of work between NASDCTEc/NCTEF*
- *What has been put on hold*
- *What needs to be added*

14. Other items to be added/next meeting  
*4:45 p.m. – 5 p.m. (15 minutes)*

Rod Duckworth  
President

**Upcoming Meetings**

**NASDCTEc Board Conference call: June 23, 2015**  
3 p.m. - 4 p.m. ET

**2015 Fall Summit**  
Gaylord Palms Resort & Convention Center  
Kissimmee, Florida  
Meeting: October 6-8, 2015  
Board Meeting: TBD

**2016 Spring Meeting**  
Marriott Wardman Park  
Washington, DC  
Meeting: May 23 – 25, 2016  
Board Meeting: Sunday, May 22, 2016

**NASDCTEc BOARD OF DIRECTORS**  
**FY 14-15**

**NASDCTEc President**

Mr. Rod Duckworth  
Chancellor  
Division of Career and Adult Education  
Florida Department of Education  
325 West Gaines Street, Suite 744  
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**NASDCTEc Vice President**

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**Secretary / Treasurer**

Ms. Jo Anne Honeycutt  
Director, Career and Technical Education  
North Carolina Department of Public  
Instruction  
6361 Mail Service Center  
Raleigh, NC 27699-6361  
Phone: 919-807-3879  
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**NASDCTEc Past President**

Mr. John Fischer  
Deputy Commissioner  
Vermont Agency of Education  
219 North Main Street, Suite 402  
Barre, VT 05641  
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Ms. June Sanford  
State Director Career and Technical  
Education/Connecticut State  
Department of Education  
165 Capitol Avenue  
Hartford, CT 06106  
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**Region I** - Connecticut; Maine;  
Massachusetts; New Hampshire; Rhode  
Island; Vermont  
Term: July 1, 2014 – June 30, 2017

Mr. Eric Suhr  
Bureau Chief  
Career and Technical Education  
New York State Education Department  
89 Washington Avenue Room 315 EB  
Albany, NY 12234  
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Email: esuhr@mail.nysed.gov  
**Region II** - New York; New Jersey; Puerto  
Rico; Virgin Islands  
Term: July 1, 2012 – June 30, 2015

Dr. Lee Burket  
Director, Bureau of Career and Technical  
Education  
Pennsylvania Department of Education  
333 Market Street 11<sup>th</sup> Floor  
Harrisburg, PA 17126  
Phone: 717-787-5530  
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Email: lburket@pa.gov  
**Region III** - Delaware; District of  
Columbia; Maryland; Pennsylvania;  
Virginia; West Virginia  
Term: July 1, 2014 – June 30, 2017

Ms. Jean Massey  
Associate Superintendent  
Mississippi Department of Education  
Office of Vocational and Workforce  
Development  
359 North West Street, PO Box 771  
Jackson, MS 39205  
Phone: 601-359-3090  
Fax: 601-359-6619  
Email: jmassey@mde.k12.ms.us  
**Region IV** - Alabama; Florida; Georgia;  
Kentucky; Mississippi; North Carolina;  
South Carolina; Tennessee  
Term: July 1, 2013– June 30, 2016

Ms. Kathleen Cullen  
Provost and Vice President of Student  
Success  
Wisconsin Technical College System  
4622 University Avenue, PO Box 7874  
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Email: Kathleen.cullen@wtcsystem.edu  
**Region V** - Illinois; Indiana; Minnesota;  
Michigan; Ohio; Wisconsin  
Term: July 1, 2013 – June 30, 2016

Mr. Eric Spencer  
State CTE Director  
College and Career Readiness Bureau  
New Mexico Public Education Department  
120 South Federal Place, Room 207  
Mailing; 300 Don Gaspar  
Santa Fe, NM 87501  
Phone: 505-827-1808  
Fax: 505-827-1820  
Email: eric.spencer@state.nm.us  
**Region VI** - Texas; Arkansas; Louisiana;  
Oklahoma; New Mexico  
Term: July 1, 2014 – June 30, 2017

Mr. Richard Katt  
State CTE Director  
Career Education  
Nebraska Department of Education  
301 Centennial Mall South  
Lincoln, NE 68509  
Phone: 402-471-4808  
Fax: 402-471-2545  
Email: rich.katt@nebraska.gov  
**Region VII** - Iowa; Kansas; Missouri;  
Nebraska  
Term: July 1, 2012– June 30, 2015

Mr. Wayne Kutzer  
State CTE Director  
Department of Career and Technical  
Education  
600 East Boulevard Avenue  
Bismarck, ND 58505  
Phone: 701-328-2259  
Fax: 701-328-1255  
Email: wkutzer@nd.gov  
**Region VIII** - Colorado; Utah; North  
Dakota; Montana; South Dakota; Wyoming  
Term: July 1, 2013– June 30, 2016

Mr. Mike Raponi  
State CTE Director  
Nevada Department of Education  
Office of Career Technical & Adult  
Education  
755 N. Roop Street Suite 201  
Carson City, NV 89701  
Phone: 775-687-7283  
Fax: 775-687-8636  
Email: mraponi@doe.nv.gov  
**Region IX** - Arizona; California; Nevada  
Term: July 1, 2012 – June 30, 2015

Ms. Eleni Papadakis  
Executive Director  
Workforce Training & Education  
Coordinating Board  
P.O. Box 43105  
Olympia, WA 98504  
Phone: 360-753-5662  
Fax: 360-586-5862  
Email: epapadakis@wtb.wa.gov  
**Region X** – Alaska; Idaho; Oregon;  
Washington  
**Term:** July 1, 2012 – June 30, 2015

Ms. Bernadette Howard  
State CTE Director  
Career and Technical Education  
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Fax: 808-956-9096  
Email: mbhoward@hawaii.edu  
**Region XI** - Hawaii; Commonwealth of  
Northern Marianas; Federated States of  
Micronesia; Republic of the Marshall  
Islands; Republic of Palau; Guam;  
American Samoa  
**Term:** July 1, 2014 – June 30, 2017

Dr. Sheila K. Ruhland  
President  
Tacoma Community College  
6501 S. 19<sup>th</sup> Street  
Tacoma, WA 98466  
Phone: 253-566-5100  
Fax: 253-566-5100  
Email: sruhland@tacomacc.edu  
**Associate Member Representative**  
**Term:** July 1, 2014 – June 30, 2017

NASDCTEc Board of Directors  
Conference Call  
**MINUTES**  
January 27, 2015  
3 - 4 p.m.

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**Attendees:** John Fischer, Scott Stump, Jo Anne Honeycutt, Rod Duckworth, June Sanford, Eric Suhr, Lee Burket, Jean Massey, Eric Spencer, Richard Katt, Mike Raponi, Eleni Papadakis, Bernadette Howard, Sheila Ruhland

**Absent:** Kathleen Cullen, Wayne Kutzer

**Staff:** Kimberly Green, Kate Blosveren, Karen Hornberger

**Guest:** Carolyn Skinner

**Welcome:** Stump welcomed the NASDCTEc Board to the call. Hornberger took the roll to ensure a quorum was present.

**Review and Approval of Minutes:** Duckworth presented the minutes from the November 4, 2014 NASDCTEc Board Meeting.

**MOTION: To approve the November 4, 2014 NASDCTEc Board Minutes as presented. Duckworth; Fischer.**  
**MOTION ADOPTED.**

**Executive Committee Update:** Stump shared that the NASDCTEc/NCTEF Executive Committee met with the ACTE Executive Committee the prior week. At that meeting, staff presented the joint work plan that has been used to guide more intentional coordination between our two organizations. The work plan began in January 2014 and has resulted in many accomplishments, including the merger of the Career Clusters Institute into the ACTE VISION conference. The work plan will be updated as a result of the January 2015 meeting and will be shared with the Board at the April meeting.

**Executive Director's Evaluation:** Stump shared that Executive Committee completed Green's FY14 evaluation, which was supposed to have been finalized in May of 2014. This evaluation is caught the organization up in its contractual obligations. The FY15 evaluation will be conducted in May 2015. Stump shared that the Executive Committee found that Green's performance exceeded in all categories of the evaluation.

**Year-Round Sponsorship Pilot:** Stump introduced the proposal for a year-round sponsorship pilot. The proposal was developed in response to feedback from sponsors and because NASDCTEc is hosting only one event in 2015 that will be eligible for sponsorship. The pilot would be a proof of concept and would help supplement lost revenue due to the nature of the fall 2015 event (being a closed event with no sponsorship opportunities). Stump shared that to be eligible to participate as a year-round sponsor, the sponsoring organization must have sponsored the Spring 2015 meeting at the gold or diamond level. There are two year-round sponsorship options affording differing levels of benefits; the first tier at \$3,000 and the second tier at \$5,000.

Each tier has several additional benefits, including a new logo for their website, their logo on a dedicated sponsor page, additional blogs and if you sponsor at the tier two a 45-minute webinar co-hosted with NASDCTEc. Scott shared that the Executive Committee provided input into the proposal and is in support of its implementation. As a pilot, staff will share back the results at the end of 2015 to see if this should become a permanent sponsorship opportunity.

**NCTEF Progress Update:** Stump provided an overview of the NCTEF draft Vision/Mission/Theory of Action. He reported that the NCTEF Board is working to define to clear mission and purpose that is aligned to NASDCTEc but is also distinct in its own right. The theory of action seeks to clarify the areas of focus for NCTEF. In addition, the Board has discussed the importance of having the right stakeholders engaged in leadership of NCTEF, consider new branding for NCTEF (perhaps a DBA to Learning that Works Foundation) and connecting this all to a fundraising strategy. The NCTEF Board will meet in March and again in April, with the goal of having an approved clear theory of action, mission, vision, governing recommendations and branding in place to guide work in the new fiscal year.

**Officer Resignation and Transition:** Stump shared that he has left the Colorado State Community College System and therefore he is not eligible to remain President of NASDCTEc/NCTEF. Page 19 of the bylaws states that it is the responsibility of the Board to manage any officer transition. The Executive Committee recommends that Rod Duckworth assume the position of President as well as Vice President; Jo Anne Honeycutt remain as Secretary/Treasurer and that John Fischer stay on as Past President for one additional year.

**MOTION: To approve the appointment of Rod Duckworth as President and Vice President through June 30, 2015.  
Katt; Sanford.  
MOTION ADOPTED.**

**Dues Increase for FY 15-16:** Hornberger presented the proposed dues for FY16 that includes a proposed consumer price index (CPI) increase of 1.6%. Hornberger gave a brief history on the dues and the policy to annually propose and increase in the amount of the 12-month shift in the CPI.

**MOTION: To increase state dues by 1.6% for FY16.  
Howard; Fischer.  
MOTION ADOPTED.**

**Approval of Stars of Education Awards:** Voytek presented two nominations for the Distinguished Service Congressional award. The nominee for the Congressional Distinguished Service award must be a current or former member of the United States Congress who has demonstrated a high level of national leadership, vision and achievement in CTE through meritorious contribution, innovative or unique achievements, expansion of the impact of or investment in CTE on students, and/or demonstrated evidence of superior performance. The first nomination is for Senator Kaine (D-VA) who has introduced several bills into legislation supporting CTE. He also co-founded and co-chaired the bipartisan Senate CTE Caucus, a first for the Senate. The second nomination is for Senator Al Franken (D-MN) he has been a new comer and has been increasingly more active in CTE. Green reminded the Board that when we

started the congressional awards that it was important that the individual did something national in scope and not just local impact. The staff feels strongly that Senator Kaine meets that criterion. Staff is recommending that a new category could be recommended to the Board to give an award to those ‘rising star’ Congressional CTE leaders, like Senator Al Franken.

**MOTION: To approve nomination for Senator Kaine for the 2015 Congressional Distinguished Service Award.  
Duckworth; Sanford.  
MOTION ADOPTED.**

**ESEA Recommendations:** Voytek reviewed the ESEA recommendations highlighting the recommended changes.

- Reframed introduction to reflect current political climate and progress that has been made to date on career readiness.
- A clearer recommendation to strengthen ESEA’s focus on secondary education to connect and align to other major pieces of education and workforce legislation.
- Incorporated an overarching theme throughout the recommendations to strengthen ESEA’s emphasis on career readiness.
- Strengthened recommendations to integrate academic and technical coursework.
- A new recommendation to promote accelerated learning models & competency based education – now aligned and better connected to the organization’s HEA priorities.
- Re-tooled individual learning plans to emphasize the scope and nature of the proposal. Now are “college and career ready plans.”
- High-quality standards recommendations remain but references to the Common Core and CCTC have been removed for political expediency.

Green shared that in order to give the Board sufficient time to review and give feedback on the recommendations, a vote will not be taken now. Instead, staff will send out a notice sharing a deadline for submitting edits/input. Staff will make revisions to the recommendations based on that input and then send around a final document for an electronic vote by the Board.

**Review of 990’s:** Skinner reported that the once the audit is complete the 990’s can be completed because all the numbers in the tax reports are drawn directly from the financial statements. The only thing that does not get put on the 990’s is the in-kind contributions. Everything else comes directly from the audited financial statements. Skinner specifically brought attention to page six where it describes the policies in place to protect the organization and questions related to governance. She explained that it is a good thing to see so many ‘yes’ answers. The Finance /Audit Committee unanimously approved the advancement of the 990s to the NASDCTEc Board for approval.

**MOTION: To approve the FY14 NASDCTEc 990s as presented.  
Suhr; Howard.  
MOTION ADOPTED.**

**FY 13-14 Audit Report:** Skinner reviewed the audit report with the Board stating that the finance statements are created by her and entered directly in the audit report. She shared that auditors stated that there were no issues with the financial statements and the records are in very good shape. She also mentioned that the statements were combined statements of both the Association and the Foundation, as is allowed due to shared governance. The Finance /Audit Committee unanimously approved the advancement of the audit to the NASDCTEc Board for approval.

Green shared that based on the recommendation from the lawyer and auditor, it has been recommended that the \$110,000 funds from Microsoft, currently sitting in a restricted asset account, be shifted to general NCTEF income next fiscal year.

Green also wanted to note a couple of things:

- The auditor suggested that the organizations have too much exposure to stock market fluctuations given the volume of investments in equity. This information was also shared with the Finance/Audit Committee when the auditor walked through the FY14 audit earlier in January. The Finance /Audit Committee will meet in April to review the investment policy statement implementation and consider a shift to a more conservative investment approach.
- The organizations do not have a policy in place to guide staff as to when an RFP should be conducted to hire a new auditing firm versus shifting lead auditing partners within the existing firm. Standard practice that is a shift of some sort is made after five years. At the request of the Finance/Audit Committee, staff is researching the topic and will present a proposed policy at the April committee meeting. This policy would require Board approval in June. For FY15, the Finance /Audit Committee directed staff to stay with the same firm but to benchmark auditing costs given the reduced activity in NCTEF.

Green asked if the Board wanted to vote on the audit now or wished to have more time to review the documents. Sanford moved to approve the audit.

**MOTION: To approve the FY14 NASDCTEc Audit Report as presented.  
Sanford; Duckworth.  
MOTION ADOPTED.**

**Additional Information:** Green stated due to Stump's resignation, there is a vacancy for the NASDCTEc SkillsUSA Liaison. Interested parties should contact her. Hornberger reminded the Board to RSVP for the lunch prior to the Spring Board meeting, as well as to be sure to turn in the Board Responsibilities and Commitment form.

**Meeting Adjourned: 4:00 p.m.**



COLORADO COMMUNITY  
COLLEGE SYSTEM

January 1, 2015

Dear National Association of State Directors of Career & Technical Education consortium Executive Committee, Board, NCTEF Board and Staff,

It is with a mixed set of emotions that I write this letter informing you of my intention to leave the Colorado Community College System after thirteen and a half years of service, resigning my position on December 31, 2014. I understand that this decision will also eliminate my standing as the Colorado State Director of Career & Technical Education resulting in a need to also respectfully resign my current office of President.

I have accepted position with Vivayic, a learning services business based in Lincoln, Nebraska that operates virtually across the United States and internationally. As such, I am excited to say that I will be able to work remotely from a home office. Reclaiming the over 4 hours of daily commute will allow me to reinvest that valuable time in my family, my community and in pursuit of a Master's degree.

I want to thank the Officers, Board Members, Staff and other State Directors for your guidance and assistance over the past seven years. I feel blessed to have worked with so many great people for such an important purpose and I look forward to seeing Career & Technical Education continue to evolve with the vision you set!

Sincerely,

Scott Stump  
Assistant Provost for Career & Technical Education  
Colorado Community College System

## **FY 2016 Advocacy Plan & Strategy**

### **Advocacy Plan:**

NASDCTEc will continue to advocate for CTE and the Perkins Act on Capitol Hill, within the Executive branch and directly to other stakeholder groups. Components of this year's advocacy plan are being implemented in various capacities in conjunction with other organizational initiatives to support these efforts.

To supplement these efforts, NASDCTEc and ACTE continue to closely collaborate on matters related public policy. Each month NASDCTEc and ACTE hold cross organizational policy calls to share information learned during the weeks prior, plan outreach strategies and legislative projects moving forward, provide updates on internal organizational developments, and negotiate joint policy positions on various issues of interest to the Association.

### **Congressional Meetings**

NASDCTEc will continue its direct lobbying efforts on Capitol Hill in both the House and the Senate. We plan to focus primarily on the authorizing committees (HELP & HEW) as well as the principal offices represented in each Chamber's Budget and Appropriations Committee. Since the last convening of the NASDCTEc Board of Directors in September, NASDCTEc has had 57 such meetings. These meetings have several broad goals (please note that this list is not exhaustive):

- Support the reauthorization of the Carl D. Perkins Career and Technical Education Act
- Implementation of NASDCTEc's Board-approved legislative recommendations for related legislation such as ESEA, HEA, WIOA etc.
- To support the planning, coordination, and execution of Congressional events in support of CTE
- To advocate for a strong federal investment in the Perkins BSG program and for stronger investments in the overall Labor-HHS-ED Appropriations space

Meetings have been and will continue to be bicameral and with both political parties. In light of the new Republican majority in the Senate and the larger one in the House, particular attention has been and will be paid to cultivating relationships with these offices. Where appropriate, NASDCTEc will continue to connect State Directors with Senate offices and to a lesser extent House offices.

### **Appropriations Levels**

NASDCTEc will be urging Congress and the Obama Administration to fund the Perkins Act at "pre-sequester" levels in FY 2016. This funding level is \$5.4 million above current levels for a total of \$1.123 billion and will be designated exclusively for the Perkins BSG program. Given the extreme partisanship and strong opposition to any increases to most non-defense discretionary programs from the current Congressional majorities, our request will have to reflect

these basic political realities. In the interim, NASDCTEc has ensured that its CTE Champions in both the House and the Senate echo this request in “Dear Colleague” letters being circulated this year.

The underlying issue preventing any debate about additional federal investments in education remains the sequester caps imposed by the Budget Control Act of 2011. NASDCTEc plans to work with several coalition groups this year to forcefully call for the repeal of these caps. Without changes to this law, funding for discretionary programs will remain frozen for the next decade. Moreover, non-defense programs such as the Perkins Act will continue to face reductions under these caps as pressure from the defense industry— whose appropriation is also capped for this same period— continues to mount.

Additionally, in an effort to better anticipate future disruptions in federal funding and the subsequent treatment of such disruptions by USDE, NASDCTEc staff have begun to develop a close working relationships with USDE’s Office of Budget Services personnel. These relationships will help NASDCTEc better understand the internal dynamics of the federal administration of Congressional appropriations and how that will likely impact states’ Perkins allocations and the timely availability of these resources.

### **Perkins Reauthorization**

NASDCTEc remains hopeful that Congress will reauthorize the Perkins Act in 2015. Nevertheless, there are a number of political realities that will make reauthorization in this Congress difficult. The prioritization of ESEA and HEA in both the House and the Senate is at the direct expense of the reauthorization of the Perkins Act. However, these reauthorizations present the opportunity for NASDCTEc to lay the groundwork for Perkins reauthorization by embedding the association’s priorities into these bills before Congress considers the Perkins Act. Moreover, both of these laws is much bigger and the debate surrounding them much more contentious than what is expected on Perkins reauthorization.

As Congress remains divided over many core issues in ESEA and HEA, Perkins remains a bipartisan issue that lawmakers can address in between or following the reauthorization processes for both of these laws. Thus, NASDCTEc and its partners will push for a thoughtful reauthorization whether that is in this Congress or the next one.

To that end, NASDCTEc staff will continue to meet with members of Congress, their staff, and other relevant policymakers to ensure the organization’s positions, recommendations, and priorities are incorporated into this process. Following each visit to a Senate office, staff will connect the State CTE Director with relevant Senate staff as appropriate. Moreover, NASDCTEc will continue to engage relevant Caucuses in each chamber to promote organizational positions and raise the visibility of the CTE enterprise more broadly.

### **Legislative Language**

In conjunction with ACTE, NASDCTEc has been formulating legislative language for the Perkins Act. This draft language is based solely on NASDCTEc Board-approved Perkins Act recommendations and priorities and is attached as a supplement to this report. While the language has been used in NASDCTEc’s advocacy efforts over the past year, the document

continues to evolve and strengthen as the legislative environment shifts and we receive input from the Hill.

The current draft focuses on the following sections:

- Intent and purpose of the law
- Definitions (Sec. 3)
- Accountability (Sec. 113)
- State Plan (Sec. 122)
- State Leadership Activities (Sec. 124)
- Local Plan (Sec. 134)
- Local Uses of Funds (Sec. 135)

NASDCTEc is planning to address Perkins' National Activities section this year and we also hope to begin crafting a replacement proposal for Title II of the law. Copies of this language are available upon request for interested NASDCTEc members not on the Board of Directors.

### **Congressional CTE Site Visits**

NASDCTEc staff continue to visit exemplary CTE programs in the D.C. metropolitan area and to vet these sites as potential locations for Congressional member and staff visits. As part of this process, remains the goal of NASDCTEc to get every member of Congress and / or their staff to see a CTE program as the Perkins Act reauthorization process unfolds.

NASDCTEc is currently supporting several such efforts in conjunction with the Obama Administration and the Senate CTE Caucus.

### **Perkins Coalition**

If and when Perkins reauthorization progresses, NASDCTEc will re-convene a Perkins Coalition group in conjunction with ACTE. The purpose of this coalition is to foster collaboration and share information relating to the Perkins Act and the reauthorization process more broadly among and between primarily education and workforce stakeholder groups. Bringing together a diverse group of CTE stakeholders, this groups meets on an as-needed basis in relation to the Congressional progress towards reauthorization.

### **Perkins Briefing, Hearings and Events**

NASDCTEc staff will continue to work with Congressional staff to support events and briefings promoting CTE through both Congressional CTE Caucuses. NASDCTEc has already successfully coordinated several such events this year and will continue this work moving forward.

Although the House HEW Committee has said they do not plan to have any additional Perkins-related hearings, NASDCTEc will continue to monitor the hearing process for issues of importance to CTE. In the Senate, as Perkins reauthorization picks up pace, hearings will become more likely in the HELP Committee and NASDCTEc will constructively work with Committee throughout this process.

### **Updating NASDCTEc HEA, ESEA Recommendations**

All of NASDCTEc's advocacy efforts and work surrounding the Perkins Act and other education and workforce legislation is informed by the Board-approved recommendations. It is therefore critical that these documents reflect the most current organizational priorities for these laws. To that end, NASDCTEc staff have solicited Board and member input into the development of new recommendations as is the case for HEA and updating existing ones to reflect current Congressional dynamics as was the case with ESEA.

NASDCTEc staff have engaged and plan to continue to engage with State CTE Directors to vet policy proposals, provide insight into how federal policy could impact particular states or local communities, and to provide general policy guidance to ensure that NASDCTEc's formal policy positions reflect the best interests of the membership. On occasion, NASDCTEc will call on State CTE Directors to provide relevant examples to support the Association's policy positions and to provide policymakers with best practice examples for the crafting of sound federal CTE policy.

### **Perkins Roundtable Group**

NASDCTEc has continued to engage with a group of national employers and other associations around the reauthorization of the Perkins Act. Collectively the group has interests in closing the skills gap and promoting education and workforce development outcomes that are more aligned with needs of employers. Expertise in both the Perkins Act and CTE more generally is limited among much of the group and NASDCTEc has provided guidance to the group as the members craft a legislative proposal to reauthorize the law. While the likelihood of consensus among all of the members of the group is unlikely, NASDCTEc's involvement has helped to ensure that nearly all of the association's legislative language has been incorporated into this work. Additionally, NASDCTEc has participated in many Hill meetings in conjunction with this group, calling for the reauthorization of the Perkins Act, stronger federal investments for the program, and three broad areas of priority for the next iteration of the law:

- Alignment of CTE programs to the needs of the regional, state, and local labor market
- Support effective and meaningful collaboration between secondary and postsecondary institutions and employers
- Increase student participation in experiential learning opportunities such as industry internships, apprenticeships and mentorships

Presently, the group is re-circulating a sign-on letter promoting these principles and calling for Perkins reauthorization. Last year, over 250 groups from across the country signed-on in support.

### **Opportunity America: Jobs and Careers Coalition**

NASDCTEc is also engaged with Opportunity America, a smaller employer coalition which has asked us to serve as a policy advisor to the group. In return, NASDCTEc has been granted membership which includes direct access to members of Congress, greater access to employers and trade associations, the ability to guide much of their policy work in a direction that is beneficial to the CTE community, and other similar benefits. The coalition has a broad "skills agenda" and has specific interests in WIOA, Perkins, and HEA among other legislation. The group was formed in the middle of 2014 and is currently focused on the implementation of

WIOA, but has recently formed a working group to craft formal positions on Perkins reauthorization.

**Career Cluster<sup>®</sup> Logo User Agreements**  
*Report submitted by Karen Hornberger, Office and Finance Manager*

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Since the launch of the Career Cluster Logo user agreements there have been 893 user agreements signed from 48 states, the District of Columbia, and Ireland. This is an increase of 72 users since October, 2014. The top five usage states are Texas, 265, Wisconsin 68, Virginia, 52, North Carolina, 48 and Illinois, 39. .

Some of the identified uses for the logos include:

- College and Career Fairs
- Classroom decorations
- Promote CTE programs within their district
- Awareness and impact on students
- Professional Development
- Course selection guides

There is a wide range of people who download the Career Cluster Logo User Agreements including teachers, administrators, counselors, and directors.

**Career Cluster® Products Sales and Inventory Update**  
*Report submitted by Karen Hornberger, Finance and Office Manager*

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**Products:**

We are receiving our revenue share from the book co-authored with CORD entitled, *The Career Pathway Effect: Linking Education and Economic Prosperity*. The chart below shows the sales over the last four quarters. With the quarter ending December 31, 2014 the remaining balance of CORD expenses have been paid. All net sales receipts will accrue to NASDCTEc until the remaining balance of \$12,992.60 (author stipends) is paid. At that point, the 50/50 split between CORD and NASDCTEc will start again.

Quarter Ending:

March 31, 2014	June 30, 2014	September 30, 2014	December 31, 2014
\$542.75	\$243.42	\$205.31	\$1,135.69

As reported during our Fall Board Meeting at the end of September NCTEF received 40% budgeted income for products due to a large order that was purchased in early September. Since then sales have been slow but steady. To date, we have received 46% of our budgeted income. This does not include the sales for our revenue share from the book co-authored with CORD. In December additional Career Cluster material needed to be printed in order to make several full sets of Career Cluster brochures and fulfill orders.

**Lost Inventory:**

Resolution for the lost inventory has not yet been achieved. It was placed on the back burner due to other priorities. Former NASDCTEc/NCTEF President Scott Stump now works for the Vivayic and has indicated a desire to remedy this situation.

**Communications Plan through June 30, 2015**  
*Report submitted by Katie Fitzgerald, Communications Associate*

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In the first half of the year, NASDCTEc staff has worked to refine the NASDCTEc/NCTEF communications strategic plan, with the final objectives and strategies in place. The updated objectives include:

1. Raise visibility of NASDCTEc/NCTEF as leading voice on high-quality CTE programs of study
2. Raise visibility of high-quality CTE as the most effective strategy for graduating students ready for their next steps and supporting America's global competitiveness (as articulated through Vision Paper)
3. A broader array of stakeholders are engaged around the notion and goals of high quality CTE (directly and indirectly through our members), including an emphasis on business/industry
4. CTE: Learning that works for America is a nationally-recognized campaign and brand adopted by 49 states— and all of NASDCTEc/NCTEF's communications and case-making resources are aligned under this brand
5. Support the adoption, implementation and/or endorsement of Career Clusters<sup>®</sup> and/or Common Core Technical Core and/or programs of study across states
6. Support NASDCTEc's federal and state policy efforts through the reinforcement of effective partnerships, publications, messaging and engagement with policymakers.

The first half of the fiscal year's marketing plans focused primarily on the Spring Meeting and second annual Excellence in Action Awards. Marketing efforts have resulted in a multitude of successes including going well beyond our sponsorship goal for the 2015 Spring Meeting and receiving over 90 applications to the Excellence in Action Awards, with awards represented in nine of the Career Clusters<sup>®</sup> (up from six the previous year).

As we move into the second half of the year, staff will focus on the following strategies and related activities to ensure all objectives are met.

1. *Leverage the website, blog, social media tools and e-blasts to maximize the reach of informational and persuasive messaging tools to engage potential partners and key stakeholders<sup>123</sup>*

NASDCTEc has revamped many communication materials in the last year. We will continue to update and evolve our website, social media, blog and e-blasts in the following ways:

- Monthly updates of the homepage slides pointing to or repurposing NASDCTEc resources and information,
- Reinstating monthly Friends of CTE blog posts,

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<sup>1</sup> 2.3.10 - Maintain and expand social media strategy to engage broader set of stakeholders (NASDCTEc/NCTEF)

<sup>2</sup> 3.1.4 - Deliver timely information/resources to NASDCTEc's members and relevant stakeholders (including the blog, social media resources, etc.) (NASDCTEc/NCTEF).

<sup>3</sup> 5.5.4 - Put in place a content management/maintenance schedule/ system for the website (NASDCTEc/NCTEF)

- Develop a process for obtaining content from partners and leaders in CTE diversify content and build goodwill among partners,
- Integrating social media into the website for real-time updates, and
- Develop targeted e-blasts to go out on a regular schedule to our over 4,000 subscribers interested in topics from research to advocacy.

#### **Success Metrics:**

- To determine the effectiveness of this new e-blast strategy, NASDCTEc will monitor Constant Contact open rates (35% goal average), and click-throughs. We will also measure success on our consistency of sending the e-blasts every quarter.
- The effectiveness of the blog strategy will be measured by analyzing the Learning that Works blog Google Analytics, including the user visits and top posts of each month, with the goal of increasing views and click-throughs to blog posts that feature major NASDCTEc announcements, policy updates, events and publications.
- The effectiveness of the website strategy will be measured by tracking website page visits of the overall site, as well as pages we are specifically promoting (e.g. NASDCTEc events, recent publications and more). NASDCTEc will use Google Analytics to keep track of data, and report in the monthly Board of Director’s report. Our goal is to maintain at least 25,000 unique visitors to our website each month, over the course of a year.

2. *Engage in and maintain strong partnerships with critical education reform and business organizations, with a particular focus on those that can help amplify our federal policy agenda, our interactions with state policymakers and/or our direct impact on CTE in practice.*<sup>4</sup>

NASDCTEc is committed to identifying and developing national partnerships to promote CTE with related education organizations, policy organizations, federal agencies and business and industry/labor councils. There are a current of efforts in place to continually improve upon our partnership and our reach through the education reform community such as leveraging the Friends of CTE blogs. An additional step we will carry out this year are:

- Create an internal calendar of major events throughout the year (e.g., CTE Month, Teacher Appreciation Week, Manufacturing Month, etc.) so we can align our own communications (e.g., social media and Week in CTE blog posts) with those efforts.

#### **Success Metrics:**

- Monitoring and rating partner participation on a quarterly basis,
- Launching and monitoring a partner calendar event to be updated quarterly,

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<sup>4</sup> 1.3.2 - Highlight strong employer-education partnerships through multiple communications strategies (e.g. Friends of CTE blog series, papers, case studies, resources, etc.) (NASDCTEc/NCTEF).

3. *Support the utilization of the CTE: Learning that works for America campaign in all states through regular revisions of resources and direct technical assistance.*<sup>5</sup>

- Revisit and update branding best practices, as many are several years old and many new examples are regularly coming online, though scheduled requests for materials from members.
- Host standing cross-state calls where users can share lessons learned and challenges, each one featuring a state or local district that has embraced the campaign in a meaningful way. These calls should be inclusive of anyone in the state responsible for communications who may benefit from the campaign.
- Determine how new technologies can be utilized in promoting the campaign and best practices. (E.g. incorporating state/school videos on the YouTube page, etc.)
- Expand on our set of short case studies on the various approaches states have and can take to implement the campaign brand and resources.

#### **Success Metrics:**

- Every six months, review web-based resources and refresh as needed

4. *Maintain strong and effective two-way communications channels with members to ensure they are aware of NASDCTEc/NCTEF's activities, resources and events and that NASDCTEc/NCTEF is developing the research, tools and resources most needed by our members.*<sup>6,7,8</sup>

- Communications Committee  
NASDCTEc will re-launch a communications committee in May, using the Spring Meeting for recruitment. The committee will be composed of members and state communications staff designed to inform the development of new materials and brainstorm new communications initiatives that benefit membership and raise the profile of their work. This committee will serve as a 'kitchen cabinet,' and advise NASDCTEc, and also serve as a means of engaging members more directly.
- Case-making materials  
We are in the process of updating our case-making materials, specifically our fact sheets, talking points and state-focused materials. The first set were released in October 2014, the next set will be released in January 2015, and the state fact sheets will be released in early 2015. Included in this information will be tips on how to package or use NASDCTEc/NCTEF resources.
- In addition to the state fact sheets, we will explore other resources, such as PowerPoints, YouTube videos, talking points and other fact sheets, to support state and local advocates for CTE to be created throughout 2015 in line with our state policy strategy and federal

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<sup>5</sup> 2.3.4 - Develop a set of federal, state and employer-focused case-making resources that articulate what is high-quality CTE and feature examples of high-quality programs (NASDCTEc/NCTEF).

<sup>6</sup> 3.1.2 - Build an online library of members-focused resources. (e.g. overview of key initiatives, pieces of legislation, member benefits, etc.) (NASDCTEc/NCTEF).

<sup>7</sup> 3.4.4 - Annually identify member task forces to accomplish priority goals.

<sup>8</sup> 3.4.5 - Develop an electronic newsletter that shares NASDCTEc and state accomplishments, as well as articulates how members can use NASDCTEc resources (NASDCTEc).

policy goals.

**Success Metrics:**

- The success of this committee will be determined by the level of State CTE Director involvement, and hosting of quarterly meetings.
- NASDCTEc/NCTEF will promote new or updated resources through homepage slides, social media and the This Week in CTE blog series.
- On a quarterly basis, staff will monitor how often new or updated resources are accessed.
- Staff will review and update case-making materials two to three times per year. This includes fact sheets, talking points, one-pagers and videos.

5. *Conduct and leverage annual Excellence in Action Award to identify and embed high-quality CTE programs of study throughout communications, outreach and advocacy efforts.*<sup>9</sup>

NASDCTEc launched its second Excellence in Action Award, and winners will be featured at the 2015 Spring Meeting during a luncheon and reception. This Award is central to our broader communications and advocacy efforts, with the winners featured on fact sheets, Congressional newsletters, articles written for partner organizations, blogs, as well as in conversations with members of the media. We will focus on leveraging the award in the following ways:

- More proactively work with State Directors with award winners, and their communications staff, to ensure they have a communications strategy in place.
- Better engage members of Congress around the award winners/winning programs in their districts and states.
- Identify strategies for also leveraging high-quality, non-winners, including embedding them as “success stories” on our state pages on the website.
- Make a clearer connection between the award-winning programs and the NASDCTEc/NCTEF vision.

**Success Metrics:**

- NASDCTEc/NCTEF will increase the amount of applications to the award yearly, with the goal of awarding a program of study in each Career Cluster in 2017.
- NASDCTEc/NCTEF will successfully use the Award winning programs in communications and advocacy throughout the year.

6. *Build and maintain strong relationships with key members of the media.*<sup>10</sup>

NASDCTEc/NCTEF will focus on public relations efforts to increase presence of NASDCTEc as a credible and preferred source about news for CTE. We must also position members and staff to serve as experts in media outreach in their own states as well as nationally.

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<sup>9</sup> 2.3.6 - Launch and manage the Excellence in Action Awards program, utilizing these examples in advocacy and communications initiatives (NCTEF).

<sup>10</sup> 2.3.7 - Develop a media relations strategy and implementation plan, ensuring connections to our federal/state advocacy work, CCTC and CTE: Learning that Works Campaign (NASDCTEc/NCTEF).

- Develop reporter list of press who generally ‘get’ CTE that we can engage
- Provide support to states/members (through webinars, workshops and/or print materials) on social media strategies
- Build out the Newsroom page on the website, including adding “Press CTE Quick Facts” that can help the press quickly receive the information they need.
- Develop press releases and statements in anticipation of major publications, events and Federal policy changes or announcements. Publish joint releases or statements with major partners (e.g. ACTE), when needed. All releases will be published on the website under “Press Releases,” and sent to the media list.

**Success Metrics:**

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

7. *Educate staff<sup>11</sup>, Board and other spokespeople on key NASDCTEc messaging.*

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

- Providing resources including fact sheets on key messaging and talking points
- Review and update organizational style guide each year in collaboration with full staff
- Template PowerPoint with key messaging and talking points to be used during presentations
- Yearly staff training on talking points and messaging

**Success Metrics:**

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

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

NASDCTEc/NCTEF will determine the effectiveness of communications methods and strategies through the following:

- Monthly Board updates providing a snapshot of metrics including website, blog and social media traffic (NASDCTEc is doing this currently)
- Quarterly review of major communication efforts including the Excellence in Action Awards, CTE Learning that Works campaign, newsletter and e-communication traffic,

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<sup>11</sup> 5.5.2 - Maintain a style guide and ensure staff are properly briefed on the use of the guide.

social media and YouTube channel utilizing Google Analytics, Constant Contact and social media (Facebook and Twitter) metrics in an effort to determine what communication methods are most effective for communicating to NASDCTEc/NCTEF audiences. The first quarter review metrics will act as a baseline for NASDCTEc/NCTEF communication.

Lastly, the second half of the year's marketing efforts will be directed towards the Future of CTE Summit, to be held in October 2015, along with the CareerTech VISION conference in November 2015, where we will lead a variety of conference sessions. We will also continue to leverage our Excellence in Action Award winners throughout our communications and marketing efforts.

## Communication Update

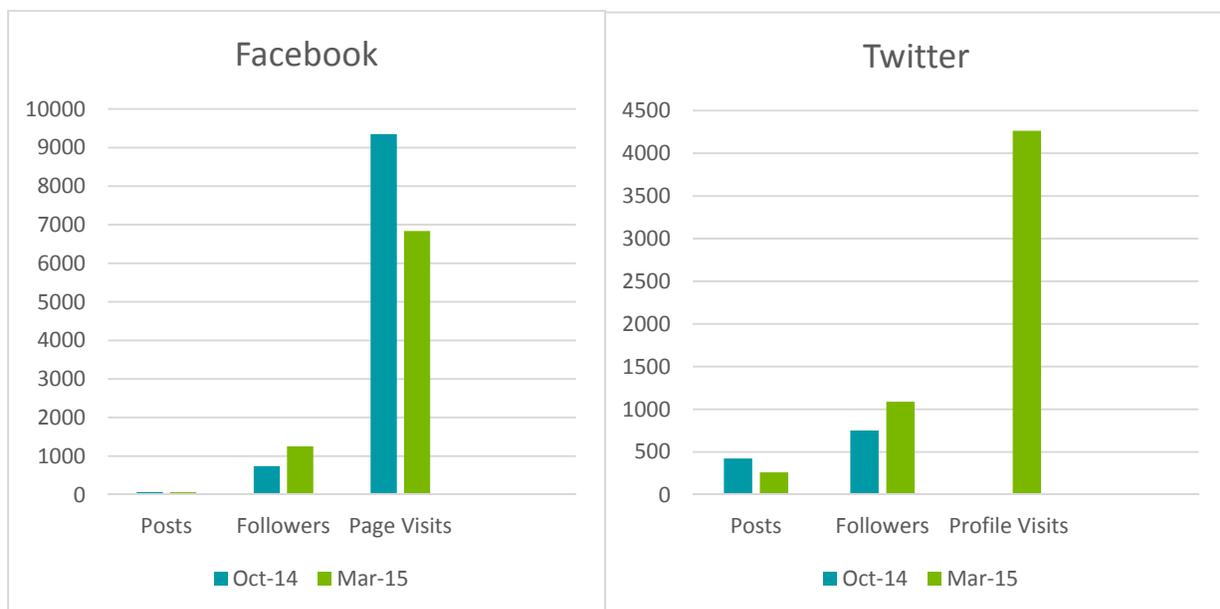
Report submitted by Katie Fitzgerald, Communications Associate

Since the October 2014 Board Meeting, NASDCTEc/NCTEF has undergone a variety of efforts to update and revamp our internal and external communication materials. This includes regular updates to the NASDCTEc website and social media; a new blog series; and a revamped NASDCTEc Member Newsletter and blog-round up. Below you will find updates on our various communications strategies.

### SOCIAL MEDIA

Social media engagement has steadily increased over the past six months, with significantly more followers on both Facebook and Twitter. The Facebook page overall reach is lower due to Facebook's new algorithm methodology beginning January 2015. Twitter also introduced a new metric feature, profile visits, which will be included in the social media updates going forward.

Staff has worked on cross promotion of Facebook posts and especially Tweets with key partners, and participated in the first NASDCTEc Twitter chat hosted by the National College & Career Readiness & Success (CCRS) Center highlighting CTE Month in February.



### CTE MONTH

February is CTE Month, a time to celebrate and elevate Career Technical Education (CTE) on national, state and local levels. To support CTE Month, NASDCTEc published weekly blog posts, participated in numerous Tweets utilizing the CTEMonth hashtag and included a CTE Month resource in every 'This Week in CTE' blog post. Additionally, we featured state proclamations and related resources on Facebook, Twitter, blog posts and in our February NASDCTEc Member Newsletter. Staff plan to work with the Association for Career and Technical Education to develop a more comprehensive plan for February 2016 CTE Month.

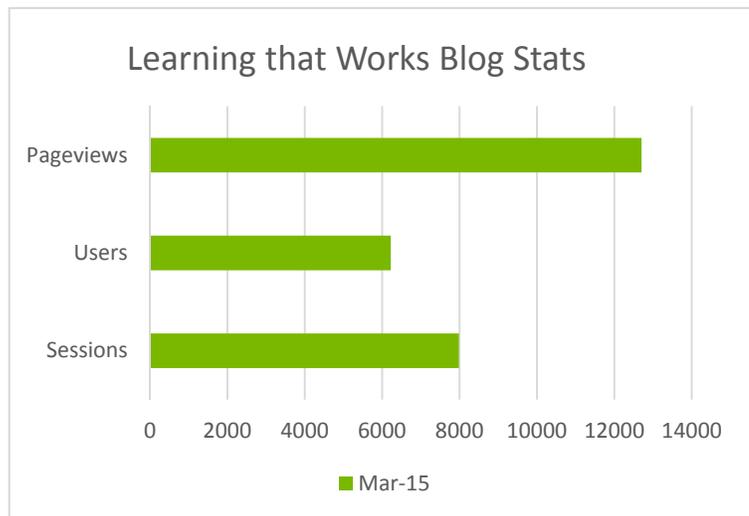
## CTE LEARNING THAT WORKS BLOG & BLOG ROUND UP

feature regular postings with a variety of (mostly weekly) series including:

- [Legislative updates](#)
- [State policy updates](#)
- [Research reviews](#)
- [Spring](#) and [fall](#) meeting posts.

In the past six months, we also launched two new regular series:

- [Inside International CTE](#), highlighting CTE/vocational education around the world (in partnership with Asia Society and cross-posted at Education Week monthly), and
- [This Week in CTE](#), a weekly round-up of information and resources from the week.



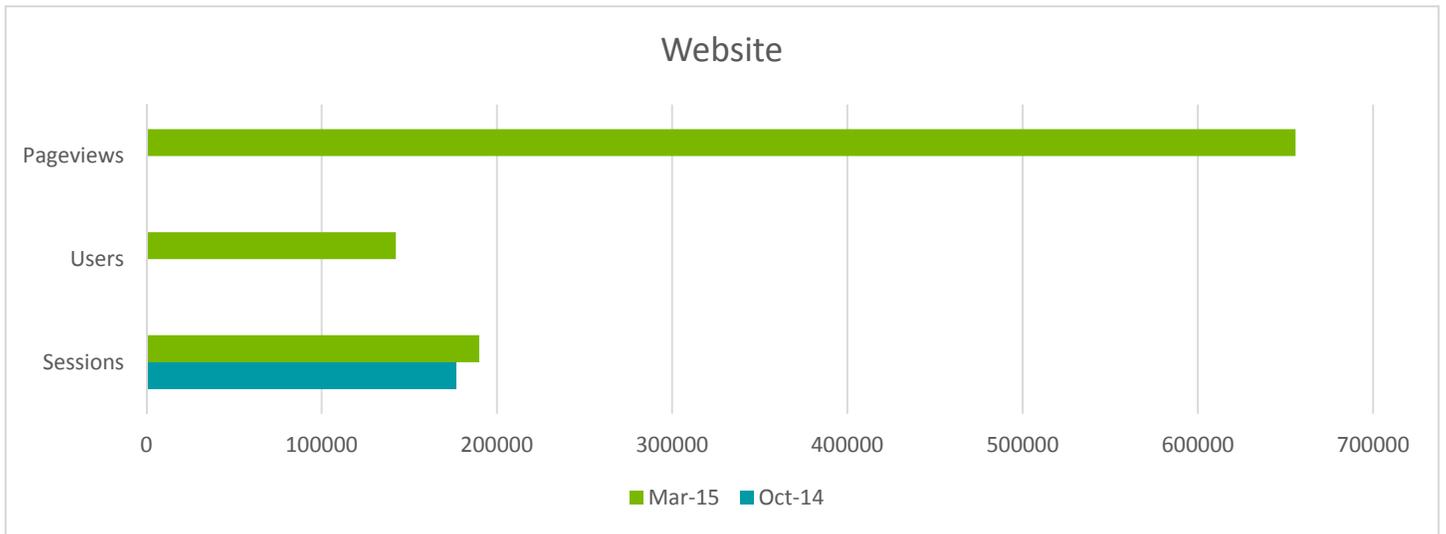
The Learning that Works Blog has featured 81 posts over the past six months, compared to 104 in the previous six. In addition, the blog began utilizing Google Analytics in October 2014. Going forward staff will record the blog sessions, users and page views in the communications report.

Additionally, staff recently revamped the weekly blog round-up with a template more in line with the newly launched NASDCTEc Member Newsletter (more information below), and featuring the top blog posts of the week based on Google Analytics. The 'Week in Review' e-blast sent to NASDCTEc members is now sent Monday morning instead of Friday afternoon, resulting in a consistently higher percentage of opens since its launch in February.

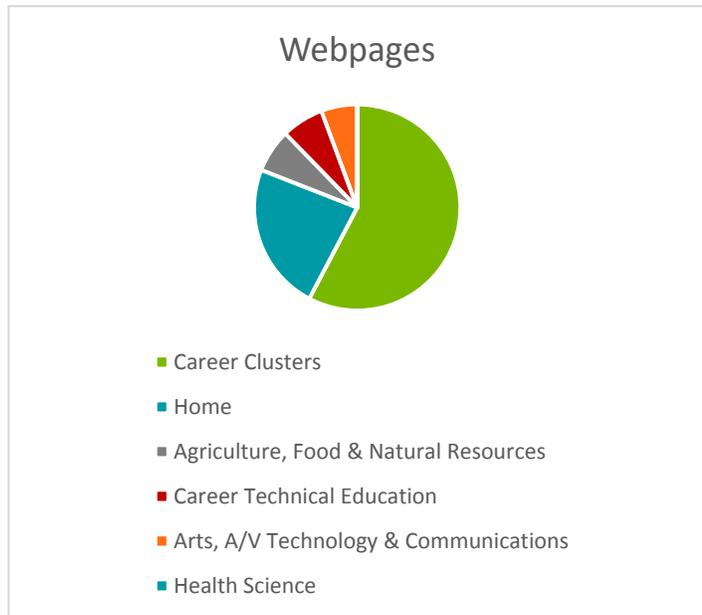
## WEBSITE

Since the launch of the revamped NASDCTEc/NCTEF website in June 2014, staff has continued to update and manage all pages in a timely manner, regularly updating homepage slides, events, resources, publications, staff profiles and more, resulting in increased site traffic. The new system also allows staff to manage all registration including the 2015 NASDCTEc Spring Meeting and the upcoming Future of CTE Summit, streamlining the management of these meetings.

Google Analytics is the primary tool used to measure the user engagement of careertech.org. In this figure you will see the number of sessions has increased by about 13,000 in this six-month period compared to the previous six months.



Google Analytics also allows staff to determine the most frequently visited pages on the NASDCTEc website. In the pie chart you can see Career Clusters and related information are overwhelmingly the top visited pages for the last six months.



**NEWSLETTER**

NASDCTEc’s new bi-monthly, members-only newsletter was launched in Summer 2014, with updates on federal policy, state policy, organizational movements and feature specific states to maximize exposure to peers. This gives our members a new way to access the behind-the-scenes work of NASDCTEc, illustrates the organization’s value to them, as well as opens a line of communication between staff and membership. Finally, it allows us to share updates with membership in a more personal fashion, helps put a face on states, with updates that may be too organization-specific to highlight in a public forum. Through these newsletters, NASDCTEc will also highlight new State CTE Directors or change in leadership.

NASDCTEc revamped the NASDCTEc bi-monthly newsletter sent to members in December 2014. Along with a new look, the member newsletter provides a variety of new features including a greeting from NASDCTEc/NCTEF’s Executive Director, a listing of events staff participated in, and a section featuring member and partner news.



We will continue to release the newsletter every other month through 2015 and then determine whether this model works for the Association and for its members.

### **CTE: LEARNING THAT WORKS FOR AMERICA USER AGREEMENT**

Currently 691 users have entered into the CTE: Learning that works for America<sup>®</sup> agreement. This figure is slightly lower than the last reported 694 users from the October 2014 communications report due to staff clean-up of the agreement list. Staff will continue to promote the user agreement, in addition to updating all Learning that works for America campaign resources as needed.

### **EXCELLENCE IN ACTION AWARD**

Last year, NASDCTEc/NCTEF launched the first annual *Excellence in Action Award*, recognizing six programs from across the country. It was a major success, particularly for the first year, with positive feedback from the winners, partner organizations and the media. NASDCTEc/NCTEF has selected the 2015 Excellence in Action Award winners, and will announce them during a luncheon and reception during the 2015 Spring Meeting. This will serve the dual purpose of promoting the event to membership, as well as raising the profile of the award itself by exposing it to the national audience present at the event.

Nine award winners representing nine Career Clusters<sup>®</sup> were selected from seven states and include:

- Agriculture, Chicago High School for Agriculture Sciences, Illinois, (*Agriculture, Food & Natural Resources Career Cluster*)
- Heating, Ventilation and Air Conditioning, Upper Valley Career Center, Ohio, (*Architecture & Construction Career Cluster*)
- Academy for Business and Finance, Bergen County Technical Schools – Bergen County Academies, New Jersey, (*Business Management & Administration Career Cluster*)
- Emergency Medical Services, Walters State Community College, Tennessee, (*Health Science Career Cluster*)
- Culinary Arts Academy, Lorain County Joint Vocational School, Ohio, (*Hospitality & Tourism Career Cluster*)
- Early Childhood Education, Henderson County High School, Kentucky, (*Human Services Career Cluster*)
- Welding Technology Program, Butte-Glenn Community College, California, (*Manufacturing Career Cluster*)
- Marine, Biology and Biological Oceanography, Marine Academy of Science and Technology, New Jersey, (*Science, Technology, Engineering & Mathematics Career Cluster*)
- Transportation, Distribution and Logistics, Omaha Bryan High School, Nebraska, (*Transportation, Distribution & Logistics Career Cluster*)

In addition to recognizing their work at the Spring Meeting, we will feature winners throughout the year through one-pagers, in blog posts, as part of our Career Clusters' strand at the CareerTech VISION conference and on webinars.

## **MEDIA ENGAGEMENT**

NASDCTEc has maintained strong media contacts throughout the year to raise the visibility of high-quality CTE. Staff has worked with a variety of journalists resulting in quotes or mentions in [eight articles](#) since the October 2014 meeting. Staff has also recently been in contact with reporters from the *Wall Street Journal*, *The Hechinger Report* and *National Journal*. All articles and related journalists are kept in a media tracking list. In an effort to expand relationships with press at both national and state levels, NASDCTEc will monitor and record reporters who cover the CTE beat, and reach out to them on a case-by-case basis.

## **MAJOR UPDATES**

### **NCTEF Re-branding**

Pending approval from the National Career Technical Education Foundation's (NCTEF) Board on March 20, NCTEF will go through a rebranding process in the coming months.

Communications efforts will focus primarily on developing a strategy for re-branding and communicating the Foundation's new focus and name internally and externally. Many of the current communications projects, like the Learning that Works for American campaign and Excellence in Action Awards will move to the Foundation in alignment with the Foundation's mission and theory of action.

### **Partnerships**

NASDCTEc/NCTEF relies on strong national partners to drive communications efforts and will continue to do so throughout the fiscal year. Key highlights include a new blog series focusing on international CTE programs developed in partnership with Asia Society, NASDCTEc's first Twitter chat hosted with CCRS Center, an upcoming blog post by Project Lead the Way, and joint press releases, news statements and monthly communications calls with ACTE.

Staff will continue to seek out new partners, as well as build on the strong partnerships already in place for future events, publications, promotion and advocacy.

## **COMMUNICATION AND ADVOCACY RESOURCES**

### **CTE Monthly Newsletter**

Published monthly in cooperation with ACTE, this advocacy newsletter is shared with over 1,500 individuals, including members of Congress, Hill staffers, and education organizations. Each month a different Career Cluster is selected and a CTE program is featured as a high-quality example. If you are not yet on the distribution list please contact Steve Voytek at: [Svoytek@careertech.org](mailto:Svoytek@careertech.org)

### **State CTE Director Advocacy Calls**

Approximately every quarter, NASDCTEc hosts an advocacy call to update its members on the most recent legislative activity and news impacting the CTE community. An agenda is circulated to the State Director listserv multiple times prior to each call and members are strongly encouraged to suggest items for discussion on the call beforehand.

These calls provide members insights into the legislative process, analysis for what to expect moving forward and a status report on NASDCTEc's federal advocacy efforts to date. State Directors, their staff, and / or their designees are strongly encourage to actively participate in these calls and engage with NASDCTEc staff and their fellow State Directors.

### **Legislative Updates and Webinars**

NASDCTEc regularly sends out legislative updates to its membership covering the latest national news and developments related to CTE. These are simultaneously sent via email and are also posted to the Learning that Works blog where they can be viewed by category.

Additionally, NASDCTEc staff host live, public webinars in the late Spring and early Autumn covering the latest CTE news and policy. These webinars, along with all of our other webinars, are available on our resources page at [www.careertech.org](http://www.careertech.org).

### **CTEWorks YouTube Page**

NASDCTEc/NCTEF relaunched our YouTube page under the name CTEWorks to more closely align with other NASDCTEc/NCTEF social media channels. In addition to launching under a new name, the page has been updated to include seven videos developed with the Center for Occupational Research and Development (CORD) to serve as a preview of the introductory workshops designed to be the catalyst for the development and implementation of a career pathways system. The workshop series is based on *The Career Pathways Effect: Linking Education and Economic Prosperity*, an insightful book that looks at solutions to major education and economic problems facing the United States through the lens of career pathways. Over time, we will host our on-demand webinars and other videos created on our YouTube page.

NASDCTEc/NCTEF Finance and Audit Committee

**MINUTES**

**CONFERENCE CALL**

January 15, 2015

3 p.m. – 4 p.m.

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**Attendees:** Jo Anne Honeycutt, John Fischer, Tim Hodges, Bernadette Howard, Mike Mulvihill

**Staff:** Kimberly Green, Karen Hornberger, Kate Blosveren

**Guests:** Don Marshall, Kim Hoffman, Carolyn Skinner

**Welcome:** Honeycutt welcomed the Finance/Audit Committee and thanked them for joining the call.

**Approval of Finance Committee Minutes:** Honeycutt presented the minutes from the September 18, 2014 conference call of the Finance/Audit Committee.

**MOTION: To approve the September 18, 2014 Finance/Audit Committee minutes. Mulvihill; Howard.**  
**MOTION ADOPTED.**

**FY 13-14 Audit Report:** Hornberger introduced the auditor, Don Marshall from Dembo, Jones, Healy Pennington & Marshall, PC. Marshall was pleased to share that the audit went well again this year. There were no issues with the financial statements and the records are in very good shape. He also mentioned that the statements are combined statements covering both the Association and the Foundation due to the shared governance. Marshall explained that the accountant and the staff prepared the footnotes and the financial statements. He stated that no adjustments were needed. Marshall noted that the finances are well-managed, including having good internal controls and bookkeeping practices.

Marshall pointed out that based on the recommendation from the lawyer, it is recommended that the \$110,000 funds from Microsoft, currently sitting in a restricted asset account, be shifted to general NCTEF income next fiscal year. Marshall also mentioned that as NCTEF considers its future fundraising plans, if the organization were to receive any government grants in excess of \$750,000, more rigorous and special auditing requirements kick in due to the OMB a-133 circular.

Marshall stated that he had discussed the investments with Green/Hornberger when reviewing the draft audit with them. Green shared the recent investment policy statement change adopted by the Finance/Audit Committee and Boards which gave the investment advisor flexibility to increase the exposure for stocks/bonds. Marshall pointed out at that time and wanted to underscore with the Committee that he finds the organization to have a lot of money in stocks and bonds in relation to total assets. This is fine when the markets are up but creates a lot of exposure and potential loss if markets decline. The gains, both realized (from sales) and unrealized gains (from holding securities that have gone up in value but you haven't sold yet) can really help the bottom line of the organization and actually become part of the budgeted revenues. The problem is what will the organizations do if the markets go down? A ten percent drop in the markets would translate into a \$250,000+ loss, whether realized (sold) or just the value of holding the securities (unrealized).

Marshall stated that in FY14, there was \$248,403 of net investment income (realized and unrealized gains, interest, dividends, less investment advisory fees). Therefore, if there is a \$250,000 loss, that translates into a swing of negative \$500,000 vs. the \$248,403 gain in FY14.

Marshal feels that the organization may need cash to further fund NCTEF as it reorients itself to a new funding model. This may be one reason to cut back on stocks and bonds. The obvious downside, Marshall pointed out, is that if the markets go up, the potential growth of those investments is lost. In his opinion, we have too much exposure to market fluctuations. Marshall also wanted to note that he is not a registered advisor but has a MBA in finance and is closely tuned into the markets and what advisors are saying.

Mulvihill asked what intra-entity asset and intra-entry liability is on page six. Hornberger stated that it was the Foundation's reimbursement to the Association for staff salaries and benefits dedicated to Foundation-focused work from January 1 – June 30, 2014.

**MOTION: To recommend the NASDCTEc and NCTEF FY 13-14 audit report and financial statements to the full Boards of Directors for approval. Howard; Fischer.**

**MOTION APPROVED.**

**Review of the 990's:** Green shared with the Finance/Audit Committee that once the audit is complete the 990's (tax forms) can be completed because all of the numbers in the tax filing are drawn directly from the audited financial statements. Green specifically brought attention to page six where it describes the policies in place to protect the organization (e.g. whistleblower, records retention, conflict of interest). Carolyn Skinner, Accountant from Dixon Hughes Goodman, LLP, joined the call and shared that there were no areas of concern that she needed to highlight. She indicated that Green and Hornberger go through the 990's very carefully, read all the statements and make adjustments to the statements or ask questions where they are unsure of the language or numbers. This level of attention to detail is commendable. Hornberger asked if there were any other questions for Skinner. There were no further questions.

**MOTION: To recommend the NASDCTEc 2013 990's and NCTEF 2013 990's to the full Boards of Directors for approval. Fischer; Mulvihill.**

**MOTION APPROVED.**

**Auditors:** Hornberger stated that staff is looking to the Finance/Audit Committee for guidance on selection of an audit firm for FY15. Marshall shared that there is no legal need to change partners or switch firms. With that said, he stated most non-profits do either rotate firms or partners after five years to be proactive and be in alignment with Sarbanes-Oxley (which does not directly apply to non-profits but is used as a guide by most as a measure of good practice).

The original agreement with Dembo, Jones, Healy, Pennington & Marshall, PC was for three years. The agreement was extended to cover the audit for FY14. Staff is seeking guidance for FY15:

- Should we stay the current course and stick with the same firm, same partner?
- Stay with the same firm but change partners?
- Conduct an RFP to select a new firm?

Staff recommends a one-year extension with the current auditing firm, after doing a cost benchmarking. The NCTEF financials will be substantially simpler due to the limited activity in FY15, therefore staff believes the price should be reduced to reflect reduced effort by the auditing firm. Staff further recommends work to begin soon to conduct a RFP solicitation for FY16. Green suggested that there might be times when it is in the best interest of the organizations to consider a new firm, as sometimes firms get comfortable with clients. Starting with anew brings a fresh set of eyes to the books.

**MOTION: To recommend extending the contract with current audit firm for the FY15 audit. Staff shall benchmark the fees to ensure FY15 audit rates are fair and reasonable given the status of the NCTEF financials. Staff shall begin the RFP process for selecting a new auditing firm for FY 16-20.  
Mulvihill; Howard.  
MOTION APPROVED.**

Green stated that there are no Board-approved policies in place that guide the decision on when or if we should change auditing firms or partners. The Finance/Audit Committee agreed that the organizations should have a policy in place and asked that staff conduct research and bring forward information and a draft audit firm/partner rotation policy to the next Finance/Audit Committee call.

Meeting Adjourned: 4:01 p.m. ET

**Legislative Update: October 2014 through March 2015**

**2014 Midterm Elections and the 114<sup>th</sup> Congress**

Congressional midterm elections took place on November 4, 2014 and resulted in the Republican Party increasing its majority in the House of Representatives and retaking control of the Senate. With both Chambers fully controlled by the GOP, the politically acrimonious dynamic between Congress and the Obama Administration has continued to worsen.

The key Committees in both Chambers that will oversee the reauthorization of the Carl D. Perkins Career and Technical Education Act (Perkins) — the Senate’s Health, Education, Labor, and Pensions (HELP) Committee and the House’s Education and the Workforce (HEW) Committee— now look dramatically different in the 114th Congress which convened formally on January 3, 2015.

Former Ranking Member of the Senate’s HELP Committee, Lamar Alexander (R-TN), has become Chairman of this committee and he has prioritized the reauthorization of the Elementary and Secondary Education Act (ESEA) and the Higher Education Act (HEA). Additionally, the retirement of former Chairman Tom Harkin (D-IA) positioned Senator Patty Murray (D-WA) to take the Ranking Member position on the HELP Committee. Both Senators Alexander and Murray were among the main architects of the recent reauthorization of the Workforce Innovation and Opportunity Act— evidence that the two are capable of finding common legislative ground.

In the House HEW Chairman John Kline (R-MN) retained his position as Chairman after receiving permission from the House leadership (current House rules cap panel leadership at three terms). For House Democrats, Representative Bobby Scott (D-VA) filled the vacancy left by the retirement of former HEW Ranking Member George Miller (D-CA) and is now the top Democrat on the committee. Recent public comments from Chairman Kline and other HEW Committee Members make the chances for consideration of Perkins reauthorization in this Chamber much higher than in the Senate where ESEA and HEA have continued to dominate the HELP committee’s workload.

Since Career Technical Education (CTE) and Perkins remain solid bipartisan issues, full Republican control of Congress will have much larger ramifications on the federal budget and appropriations process. Many Congressional Republicans, particularly in the leadership, have continued to advocate for larger investments in discretionary defense programs, primarily at the expense of non-defense discretionary programs (where Perkins is situated) in order to maintain the sequester provisions contained in the Budget Control Act of 2011. Ending sequestration will be a huge priority for the Obama Administration and Congressional Democrats who have advocated for greater investments in non-defense discretionary programs— a position that puts them directly at odds with much of the Republican Party.

As of this writing, Rep. Van Hollen (D-MD) along with several other Democratic co-sponsors, have introduced an amendment to the House Republican's recently released budget resolution (a proposal that would significantly reduce federal funding for all non-defense discretionary programs over the next decade). The Van Hollen amendment would transfer budget authority for federal funding for CTE (i.e. the Perkins Act) from the discretionary side of the budget to the mandatory side. Put differently, Perkins funding would not require annual Congressional appropriations action, but rather would be funded indefinitely like other mandatory programs such as Social Security, Medicare, and Medicaid.

This amendment would be funded by raising additional revenue through the closure of existing tax loopholes and other methods of raising additional federal revenue. In light of this, the amendment's passage is unlikely in a Republican controlled Congress, but is significant insofar as it demonstrates Congress' acknowledgement of the critically important nature of the federal investment in CTE.

### **The 2015 Consolidated and Further Continuing Appropriations Act**

Following protracted partisan debate for most of 2014, Congress failed to come to a comprehensive legislative agreement to fund the federal government at the start of Fiscal Year (FY) 2015. When this new federal Fiscal Year began on October 1, 2014, Congress passed a "Continuing Appropriations Resolution" (CR) which extended FY 2014 spending levels into the new FY 2015. This CR was set to expire in December 11, 2014 and covered all federal discretionary programs including the Perkins basic state grant (BSG) program.

Although overall funding levels remained the same over this period, imbalances in revenue levels between FY 2014 and FY 2015 resulted in a 0.0554 percent reduction to all discretionary programs including the Perkins Act's BSG program. While this reduction was applied to most programs' FY 2015 allocation, the nature of the Perkins BSG program allowed the U.S. Department of Education to retroactively reduce states' last portion of their FY 2014 allocation which was disbursed on October 1, 2014. In total, 38 states' FY 2014 allocations were reduced by this percentage and resulted in an aggregate reduction of \$425,000 for the program.

During this time, NASDCTEc worked with several coalition advocacy groups including the Committee for Education Funding (CEF) and Non-Defense Discretionary United (NDD United) to advocate for a comprehensive replacement of the CR— known as an omnibus appropriations bill which consolidates individual funding bills into one legislative package to fund all federal discretionary programs— in order to fully-fund the Perkins BSG program. This work was part of NASDCTEc's larger efforts to reverse the harmful funding reductions to the Perkins Act basic state grant program caused by sequestration and **to solidify the 96 percent restoration of sequester cuts NASDCTEc was successful in securing during Congressional negotiations in the earlier part of the year for FY 2014.** NASDCTEc also worked in conjunction with ACTE on these issues, [sending a separate letter](#) to Congressional appropriators on these issues and focusing on the negative impact these stop-gap funding measures had on the CTE community.

After missing the December 11 deadline and granting themselves an extension further into December, Congress was successful in passing the *2015 Consolidated and Further Continuing Appropriations Act* (H.R. 83)— hybrid legislation that intermixes elements of a CR and more

comprehensive omnibus appropriations legislation alluded to above. Ongoing partisan fighting between Congressional Republicans and the Obama Administration over the President's executive action on immigration caused Republicans to tie the temporary CR provisions to funding for the U.S. Department of Homeland Security while fully funding all other federal Departments and Agencies for the remainder of FY 2015.

Since the legislation combined elements of both a CR and an omnibus, the legislation became known as a "CRomnibus" and largely maintains FY 2014 spending levels into FY 2015. Despite a \$166 million cut to the U.S. Department of Education (ED), **NASDCTEc was successful in maintaining funding levels for the Perkins BSG program at the same levels as states received in FY 2014.** As a reminder, these funding levels reflect a 96 percent restoration of the sequester cuts to the program in 2012— another significant NASDCTEc achievement during last year's Congressional appropriations negotiations. Significantly, the CRomnibus replaces the earlier CR's small across-the-board cut to 38 states' FY 2014 allocation. ED's Office of Career, Technical, and Adult Education (OCTAE) has been in contact with those states that were impacted by this reduction and are now individually reimbursing states for this rescission.

### **President's FY 2016 Budget Request**

Each year the President formally begins the federal budget and appropriations process by releasing a budget request to Congress outlining the various spending levels and policy priorities for the Administration for the upcoming year. In February the Obama Administration released its FY 2016 budget request which calls for significant increases in federal spending above the allowable budget caps imposed by the sequestration provisions contained in the Budget Control Act of 2011 (BCA). While these caps essentially freeze spending for the next decade, the President has proposed doing away with these limits through a combination of revenue increases and targeted spending cuts elsewhere in the federal budget.

Overall, the Administration requested an additional \$3.6 billion for ED's discretionary budget which amounts to a 5.4 percent increase for the Department on the whole. Significantly, the budget request proposes an additional \$200 million for Perkins via the creation of a new competitive grant program called the American Technical Training Fund (ATTF). Loosely similar to the soon-to-be expired Trade Adjustment and Assistance Community College and Career Training (TAACCCT) grant program and ED's perennial request for a CTE "innovation fund" outlined in its 2012 CTE Blueprint for Perkins reauthorization, the ATTF would be jointly administered by the U.S. Department of Labor and ED.

Disappointingly, the Administration requested level-funding for the Perkins BSG program which remains approximately \$5.4 million below pre-sequester levels. However, the budget request does include an additional \$2 million for Perkins' National Activities for the administration of the ATTF. The request also includes familiar proposals such as \$125 million for high school re-design efforts focused on STEM-themed high schools and targeted towards underrepresented student populations. Additionally, the President called for \$70 million for state longitudinal data system (SLDS) grants— double what the program has received in years past.

While the President's budget request remains an important document that will guide most of the Administration's activities and policies for the coming year, it was largely dismissed as a non-

starter by the Republican majority in Congress. NASDCTEc and ACTE [issued a joint response](#) welcoming the President’s investments in skills training, but called for additional funding for the Perkins BSG program.

### **Carl D. Perkins Career and Technical Education Act**

There has been little formal Congressional activity on Perkins since last October. The House and the Senate Committees tasked with overseeing the reauthorization of the law have focused their efforts on overhauling the Elementary and Secondary Education Act (ESEA) since the 114<sup>th</sup> Congress began in January.

In the Senate, Senators Casey (D-PA) and Enzi (R-WY) have remained the HELP Committee’s leads on Perkins reauthorization. In conjunction with the Chairman and Ranking Member, they have agreed to four overarching principles for Perkins reauthorization, but have not moved forward with anything more formal or substantive since that time:

- 1.) Supporting secondary-postsecondary CTE collaboration
- 2.) Strengthening CTE program relevancy to the local, regional and state economy
- 3.) Promoting employer engagement in CTE program development and implementation
- 4.) Encouraging cross-systems collaboration between various education and workforce programs

In the House, NASDCTEc’s meetings with HEW staff indicate that the Chamber’s priority areas for Perkins reauthorization largely echo those of the HELP Committee’s. Public comments earlier this year from Chairman Kline indicate that the HEW Committee and many of its members would like to consider Perkins reauthorization sometime in this Congress. Moreover, a recent House hearing on increasing opportunity in education focused predominately on CTE and need to strengthen federal and state support for these programs. Many members— both Democrats and Republicans— used the opportunity to voice their support for CTE and the Perkins Act. Juxtaposed against the HELP Committee’s public record to date, enthusiasm for reauthorization appears to be more probable in this Chamber.

At present, the House and Senate CTE Caucuses have remained the primary epicenter for CTE and Perkins-related activity in this Congress. Co-Chairs of these caucuses, from both parties and from both Chambers, have hosted many briefings on topics of interest to the CTE community, introduced CTE legislation and have continued to use this platform to voice support for CTE and the Perkins Act over the past several years. NASDCTEc Executive Director Kimberly Green was also [asked to testify in a special CTE Caucus event](#) hosted in Harrisburg, Pennsylvania by Rep. Glenn “GT” Thompson (R-PA) before a combination of federal and state lawmakers. The hearing focused on the need to strengthen state and federal support for CTE, the role of employers in the development and implementation of CTE, and explored ways to improve CTE student outcomes.

As work on the budget and appropriations process has continued, members of these Caucuses have been central figures in supporting adequate funding levels for the Perkins Act BSG program.

**NASDCTEc has successfully supported efforts in both Chambers to call on Congressional appropriators to fund the Perkins Act BSG program at “pre-sequester” levels for FY 2016— \$5.4 million over the current levels.** Reps. Langevin (D-RI) and Thompson (R-PA) have led a “Dear Colleague” letter effort in the House and Senator Blumenthal (D-CT) is spearheading the same request in the Senate. The CTE Caucuses have been instrumental in supporting these requests.

To date, the most significant legislative proposal which would amend current Perkins law is the *Educating Tomorrow’s Workforce Act of 2015*. This legislation was first introduced in 2014 and was re-introduced in this Congress by Senators Kaine (D-VA) and Portman (R-OH). Significantly, this legislation introduces a more rigorous statutory definition for a CTE program of study (POS)— a proposal that closely mirrors similar proposals NASDCTEc has been promoting for several years in its legislative language (attached and provided as a supplement to this report). The legislation also incorporates several other legislative priorities for NASDCTEc including the introduction of a local needs assessment and encouraging greater cross systems alignment. The chances of passage for this standalone bill are slim, but will likely serve as a building block to be used for a more comprehensive reauthorization proposal in the future. NASDCTEc has continued to [support](#) this legislation and other similar proposals from these and other Senators that are reflective of [NASDCTEc’s Perkins priorities](#).

### **The Workforce Innovation and Opportunity Act (WIOA)**

Last summer the Workforce Investment Act (WIA) was successfully reauthorized as the Workforce Innovation and Opportunity Act (WIOA). NASDCTEc was successful in including a number of its legislative priorities into this legislation such as the elimination of the “sequence of services” provision, the introduction of common performance metrics across all core WIOA programs, a strengthened emphasis on career pathways and sector strategies, as well as improvements for the workforce development system’s direct contracting system.

However, there are still a number of outstanding issues regarding the law’s implementation and its likely impact on the CTE community. Although WIOA required the U.S Departments of Labor (DOL), Education (ED), and Health & Human Services (HHS) to issue guidance and regulations to states and local communities to aid in implementation and resolve unclear portions of the statute by January 15, 2015, the Departments quietly missed this deadline and announced that they were delaying the release of these regulations and guidance until “Spring 2015.”

While the release of these regulations will only be a proposal— the Departments are required to solicit public input on this with a timeline for full adoption and implementation of the rules beginning in 2016— NASDCTEc is planning to dialogue with the Departments during this process to ensure that the CTE community’s interests are fully reflected in the final version of the regulations. To date, NASDCTEc has provided [formal comment](#) on the implementation of WIOA’s common performance metrics as well as a responding to a Request for Information (RFI) to the law’s new focus on [career pathways systems](#).

### **Elementary and Secondary Education Act**

As outlined elsewhere, both the House and the Senate HEW and HELP Committees respectively have prioritized the reauthorization of the Elementary and Secondary Education Act (ESEA). In

anticipation of this, NASDCTEc completely updated and revised its [recommendations for ESEA](#) reauthorization following substantial input from its board members.

Having already fully passed a full reauthorization proposal in the last Congress, the House HEW Committee used the *Student Success Act* (H.R. 5) as a foundation for its reauthorization efforts this year. Chairman Kline re-introduced this legislation with a few minor modifications, but overall the legislation's goal seeks to dramatically reduce the federal role in K-12 education.

The HEW Committee's consideration of this bill was extremely contentious and support for or opposition to the bill fell strictly along party lines. During this time the Obama Administration issued several veto threats, voicing particular concern over the GOP's proposals on Title I portability, reduced funding levels for Title I, and a multitude of other provisions that are anathema to nearly all Congressional Democrats and the White House. Nevertheless, the HEW Committee passed the Student Success Act and it was subsequently brought to the House floor for full consideration in late February. NASDCTEc was successful in supporting an amendment from Reps. Thompson (R-PA) and Langevin (D-RI) that would encourage states to outline how they would use ESEA funds to support work-based learning opportunities and other activities in support of student career readiness. The amendment was successfully adopted by the House during the first half of the bill's consideration in the House. However, NASDCTEc did [voice concerns](#) regarding funding levels for the bill through its appropriations coalition, the Committee for Education Funding.

Although the bill proposes to significantly roll back the federal role in education, consolidates over sixty programs and give an even greater degree of autonomy to states and local communities, certain elements of the House Republican Caucus, along with outside Conservative groups, felt that the legislation did not go far enough in this regard. As a result, House Republican leadership did not have the necessary votes to support the bill's passage and was forced to pull it from consideration. As of this writing, the House has not included consideration of this legislation for the month of March putting the earliest date for further consideration by the House sometime in mid-April 2015. Each day that the bill is delayed diminishes the likelihood of its passage and is compounded by a series of upcoming Congressional recesses.

In the Senate, HELP Committee Chairman Lamar Alexander (R-TN) introduced a discussion draft proposal for the reauthorization of ESEA. NASDCTEc provided [formal comment](#) on this draft which focused on specific provisions in the draft that could have implications for the future reauthorization of the Perkins Act. Overall, the proposal mirrors the House's bill inasmuch as it seeks to reduce the federal role in K-12 education and grant more autonomy for states and local communities' implementation of the law.

Parallel to the Senate HELP Committee's consideration of ESEA, NASDCTEc successfully supported the introduction of the *Career Ready Act of 2015*. This legislation would amend current ESEA law by encouraging states to incorporate multiple indicators of career readiness into their accountability systems. It also seeks to strengthen the Elementary and Secondary School Counseling grant program—a funding stream that both the House and Senate proposals seek to consolidate—by incorporating clearer career preparation components into the grant.

NASDCTEc supported the drafting of this legislation and is hopeful that elements of the bill will be incorporated into the larger ESEA reauthorization process.

The education community largely expected the reauthorization process in the Senate to continue in much the same way as it has in the House— strictly on partisan lines. However, after several committee hearings on ESEA, Chairman Alexander and Ranking Member Patty Murray (D-WA) announced that they would attempt bipartisan negotiations for an ESEA reauthorization proposal. These negotiations are ongoing as of this writing and closed to the public and to staff outside of the Chairman and Ranking Members’ offices. It is critically important to note that these negotiations are extremely similar to how the Workforce Innovation and Opportunity Act was passed by Congress last year. Thus, a path forward for ESEA could be reminiscent of that experience. In the interim, NASDCTEc expects a bipartisan proposal to emerge from this process sometime the week of April 13<sup>th</sup>.

### **Higher Education Act**

The Higher Education Act (HEA) expired at the end of 2013 and Congress began its initial reauthorization process in May 2013 to collect input and recommendations from stakeholder groups including NASDCTEc. In anticipation of future consideration of HEA, NASDCTEc created a [new set of recommendations](#) that will guide the Association’s advocacy efforts for the renewal of this law based on substantial input provided by the NASDCTEc board.

Since last year, Congress has held a series of HEA-related hearings in both Chambers on a wide range of topics. The major subjects of these hearings have been on affordability, access to quality programs, student financial aid, and innovative approaches to improving the delivery of postsecondary education, particularly competency based education models. NASDCTEc has been monitoring these hearings for topics of interest to the CTE community.

Additional Congressional hearings are expected to continue throughout the year, but neither Chamber has proposed a clear timeframe for HEA reauthorization. Broadly speaking, most Committee members in the House and the Senate hope to consider HEA following ESEA, but the feasibility of passing two significant education bills in one Congress is extremely low. Again, this leaves open the opportunity to consider a smaller piece of legislation, such as the Perkins Act, if the Committees cannot come to a larger agreement on HEA.

As a reminder, NASDCTEc and its partners in the Higher Education community, were successful in reinstating the “ability to benefit” provision for HEA’s Pell Grant program in the FY 2014 and FY 2015 appropriations bills— an achievement that will be difficult to repeat in the next appropriations cycle for FY 2016.

### **Administration Led Postsecondary Initiatives—Gainful Employment, College Ratings and America’s College Promise**

In addition to Congressional activity on HEA, President Obama has also made college affordability and access a major educational priority of his administration.

In November of last year, the Administration finalized stricter “gainful employment” regulations for certain postsecondary institutions offering career-focused programs. This is the

Administration's second attempt to promulgate stricter standards for these programs— the first was struck down by a federal district court after immense legal pressure from private colleges and for-profit postsecondary institutions.

After several negotiated rulemaking sessions over the course of 2014 between the Department and key higher education stakeholder groups, the Obama Administration released a final version of these stricter standards which is a product of over five years of negotiations. Currently, HEA requires that for-profit programs and certificate programs at non-profit private and public institutions prepare students for “gainful employment.” However, HEA does not currently define this term and these regulations seek to more fully articulate this concept.

The new standards were ultimately weakened by the Administration and do not include a program cohort default rate (pCDR)— a feature that was included in previous iterations of this rule. Instead two new accountability metrics based on students' debt-to-earnings ratios for their total and discretionary income will be used to determine whether or not programs are adequately preparing students for future employment. These regulations will apply to almost all for-profit postsecondary institutions, as well as non-degree programs at public and private nonprofit institutions, including certain community colleges and area CTE centers.

These regulations are set to go into effect July 1, 2015 and have a significant transition period built into the regulation's implementation. However, two lawsuits have been launched in opposition to these regulations and the outcomes of these proceedings will ultimately determine the implementation of these new rules.

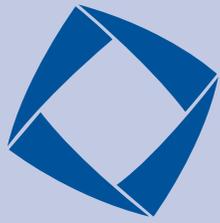
The Administration has also sought to promulgate new rules regarding the teacher preparation grant programs contained in HEA (TEACH grant program). NASDCTEc and ACTE provided [formal comment in response](#) to this proposal, urging the Administration to reevaluate its proposal as it relates to CTE teacher preparation and calling on Congress to address these issues within the context of the law's forthcoming reauthorization.

The Obama Administration has also announced the initial development of a “college ratings framework” that seeks to rate postsecondary institutions based on three broad categories of high, medium and low performers based on a series of yet-to-be fully determined metrics. NASDCTEc [provided formal comment](#) into the development of the ratings system and was not wholly supportive of the proposal. The proposal is set to have a trial run during the 2015-16 academic year and further revisions to the framework are expected before, during and after this period.

Earlier this year, President Obama announced America's College Promise— a proposal that seeks to make the first two years of a first-time student's postsecondary education tuition free. The proposal would create partnerships between the federal government and states interested in participating. Federal funding would cover 75 percent of a student's first two years in a qualifying program and would require each state to cover the remaining quarter— a cost savings the Administration estimates could save the average full-time community college student \$3,800 a year.

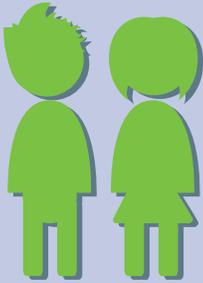
To qualify, students would be required to attend classes on at least on a half-time basis, maintain a 2.5 GPA while enrolled, and continue to make progress toward the completion of their program. The Administration expects these students to be able to earn at least half the credit needed for a four-year degree, or successfully complete a certificate or two-year degree leading to a career.

Under the proposal, community colleges will be required to offer programs that fully articulate to local public universities and colleges or are training programs with an occupational focus that lead to a postsecondary credential that is in-demand from employers in order to qualify for funding. As with most of the President's education agenda, Congress met this proposal— and many of the Administration's other higher education initiatives— with deep skepticism.



# DECA

## MARCH 2015 UPDATE



**211,618**  
**MEMBERS**

DECA's high school division hit a membership milestone with 211,618 members - and it continues to climb. DECA has 3,500 chapters - a net of 75 over last year.

**811**  
**CHAPTERS**

DECA's chapter campaigns served as a catalyst for advocacy, community service, Global Entrepreneurship Week, membership and promotion efforts. Over 800 chapters earned recognition in the campaigns.



**285**  
**CERTIFIED**

DECA certified 285 gold-level school-based enterprises an increase of nearly 60 over last year.



**1,700**  
**SUBMISSIONS**

In its third year, DECA's Idea Challenge double submissions to 1,700 in celebration of Global Entrepreneurship Week.



**8,650**  
**APPLICATIONS**

More than 8,650 completed applications were received for DECA scholarships.



**23**  
**OFFICER VISITS**

DECA's Executive Officer Teams made 23 visits to association and regional DECA events.



**31.6**  
**MILLION**

That's how many impressions DECA made through social media. Our Twitter followers increased by 7,656 and Facebook fans by 3,461. There were 649,459 page views on decadirect.org (a 172% increase), and 150,000 users (a 200%) utilized information from this resource. DECA also debuted the all-new deca.org website in November.



**21<sup>ST</sup> CENTURY SKILLS**

DECA's conference programs were redesigned showing their link to National Curriculum standards and 21<sup>st</sup> Century Skills. Participation continues to be strong.



**\$85,000**  
**SUPPORT**

DECA secured a net gain of \$85,000 through new partnerships.

### ADMINISTRATOR'S DAY

You're invited to the DECA Administrator's Day at the 2015 DECA International Career Development Conference in Orlando, Fla., on Monday, April 27. RSVP at [https://deca.formstack.com/forms/deca\\_2015administratordaysvp](https://deca.formstack.com/forms/deca_2015administratordaysvp).



## 8,400 HOSA-Future Health Professionals will fill the Anaheim Arena for the 38th National Leadership Conference, June 24-27, 2015!



Hugo Quezada, National HOSA President, and his 2014-2015 National Executive Council, will lead the 2015 NLC as professionally and creatively as they have the entire membership year. As the delegates enter the Anaheim Arena, they will notice the atmosphere will be much different as pictured above. The 360° staging and special built screens will tell the 2014-2015 HOSA Story in an exciting manner. The sights, sound, and official apparel completely surrounding the stage in the center of the Arena with delegates, health industry representatives, partners, Friends of HOSA, guests will certainly create an atmosphere of anticipation that something special has been planned by the National Executive Council. The first special happening will be the removal of the circular screen on the 360° screen by lifting it out of sight toward the ceiling. As the screen is removed, National President Hugo Quezada will be standing as the announcer introduces him to signal the beginning of the Opening Session of the 38th NLC! Please join us!

### CTE State Directors' Invitation

The 2015 National Leadership Conference of HOSA-Future Health Professionals is an opportunity for CTE State Directors to experience the energy and enthusiasm of HOSA members and advisors. You will also be able to meet representatives of the health industry who recognize and support HOSA in its efforts to recruit, develop and retain future health professionals to fill the health industry pipeline with skilled talent.

CTE State Directors will be provided VIP access to the four general sessions, 85 educational workshops, 100 HOSA Expo exhibits, and 55 competitive events including our newest event—Medical Innovation. HOSA is also hosting workshops for Health Science State Supervisors and will provide a special briefing for CTE State Directors.

Among the HOSA partners attending NLC 2015 are: U.S. Department of Health and Human Services, Medical Reserve Corps, US Public Health Service, IBM, Deloitte, Phoenix University, CVS, National Library of Medicine, U.S. Department of State, FEMA, Global Dental Relief, U.S. Army, Uniformed Services University of the Health Sciences (USUHS), UCLA Center for East-West Medicine, and many, many more.

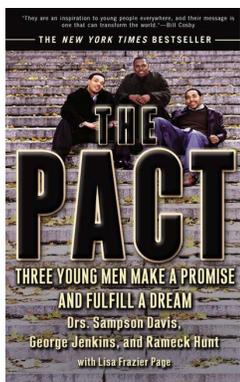
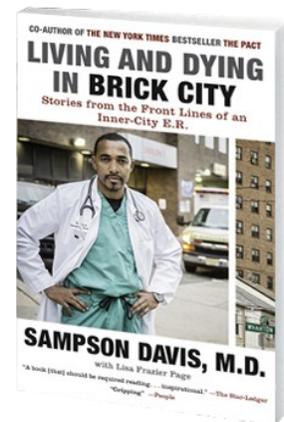
# HOSA Welcomes NLC Opening Night Keynoter Dr. Sampson Davis

## “Dedication, Determination and Discipline”

HOSA welcomes Dr. Sampson Davis to the Opening General Session on Wednesday, June 24 at 7:30 PM to be the NLC keynoter. He has agreed to stay after the session to autograph his best selling books so don't forget to bring the two medical reading books from your classroom to be signed.

*Living and Dying in Brick City*, a current medical reading book, is a riveting personal exploration of the healthcare crisis facing inner-city communities, written by Dr. Davis, who grew up in the very neighborhood he is now serving.

In this book, Dr. Davis looks at the health crisis in the inner city from a rare perspective: as a doctor who works on the front line of emergency medical care in the community where he grew up, and as a member of that community who has faced the same challenges as the people he treats every day. He also offers invaluable practical advice for those living in such communities, where conditions like asthma, heart disease, stroke, obesity, and AIDS are disproportionately endemic.



*The Pact*, a former HOSA medical reading book, is about three young doctors that grew up in the streets of Newark, facing city life's temptations, pitfalls, even jail. But one day these three young men made a pact. They promised each other they would all become doctors, and stick it out together through the long, difficult journey to attaining that dream. Sampson Davis, George Jenkins, and Rameck Hunt are not only friends to this day—they are all doctors. This is a story about the power of friendship. Of joining forces and beating the odds. A story about changing your life, and the lives of those you love most...together.

## Who is Dr. Sampson Davis?

Dr. Sampson Davis was raised as the fifth of six children in Newark, one of New Jersey's poorest cities. As a child Davis grew-up in cramped living quarters, surrounded by fragmented families, crime and drugs. Still, he was a good student, able to strike the fragile balance between being smart yet socially acceptable on the streets. It was this combination of skills, Davis says, that were most critical to his survival.

Davis has appeared on numerous talk and radio shows including *Oprah*, *TODAY*, *The View*, *Michael Baisden* radio show, *Tavis Smiley*, *Dr. Oz* and NPR as well as numerous print publications. Ms. Winfrey also delivered the highest honor naming Davis, “The Premiere Role Model of the World”. Davis was honored in 2000 with the Essence Lifetime Achievement Award and also named one of their forty most inspirational African Americans in the country. He is the youngest physician to receive the National Medical Association's highest honor.

Today, Davis spends his time practicing medicine and traveling the country delivering keynote speeches with timely messages. Davis believes it is important to give education a sense of style and fashion. Graduating with honors, Davis received his bachelor's degree from Seton Hall University, his medical degree from Robert Wood Johnson Medical School and completed his residency in Emergency Medicine at the same hospital where he was born, Newark Beth Israel Medical Center.

Today, Davis is a Board Certified Emergency Medicine Physician at several emergency departments in New Jersey. He has been a weekly correspondent on the *Tom Joyner Morning Radio Show* and CNN where he highlighted prevalent and life-changing medical topics. Davis has also co-authored three *New York Times* best-selling books entitled *The Pact*, *We Beat the Street* and *The Bond*.



In 2000 during his residency, Davis along with his best friends felt the burning need to give back to communities in need, and together created The Three Doctors Foundation. This non-profit organization offers a series of free public programs focused upon health, education, leadership and mentoring.

# HOSA–100 National Council Advisory Member Dr. Paul Grundy

Dr. Paul Grundy MD, is IBM's Global Director of Healthcare Transformation. He is one of only 38 IBM'ers, and the only physician, selected into IBM's senior industry leadership forum known as the IBM Industry Academy.

Part of his work is directed towards shifting healthcare delivery around the world towards data driven, accountable, consumer-focused, primary-care based systems through the adoption of new philosophies, primary-care pilot programs, new incentives systems, and the information technology required to implement such change. Part of his role is to drive a point of view around the transformation needed in healthcare as health care moves globally towards data based accountability. In this role for IBM, he also serves as a Director, Accreditation Council for Graduate Medical Education (ACGME); a member of the Institute of Medicine; Adjunct Professor, University of Utah Department and the President of the Patient-Centered Primary Care Collaborative.

Prior to joining IBM, Dr. Grundy was a senior diplomat at the United States State Department. Dr. Grundy attended medical school at the University of California San Francisco and trained at John Hopkins University. He has worked extensively on the International AIDS Pandemic, including writing the United States' first piece of legislation addressing AIDS Education in Africa.



## Dr. Paul Reed, U.S. Public Health Service Recognition Session Keynoter Addressing Ebola

Dr. Paul Reed briefed American health care workers and members of the US Public Health Service who were sent to work at a new hospital outside Monrovia, the capital of Liberia. Dr. Reed was the Chief Medical Officer for the modular trauma hospital installed by the U.S. military over more than a month at a cost of \$10.4 million. It houses up to 25 infectious patients near the international airport and staffed by 69 members of the US Public Health Service, who will treat health care workers from abroad as well as from Liberia. More than 150 Liberian medical workers had died from Ebola when Dr. Reed arrived in Liberia. Dr. Reed will share his experiences in dealing with the deadly virus since future health professionals will be dealing with infectious diseases in their career and it will be worthwhile first-person experiences.

On Thursday, Dr. Reed will conduct a workshop on the challenges of wearing the correct apparel and performing simple tasks to avoid contracting the Ebola virus. The workshop will be held in the Exposition area if you are interested in Ebola.

## Membership Factoids

- Membership in 2014-2015 will surpass the organization's goal of **180,000 members**.
- HOSA will celebrate its **31st consecutive membership increase** since HOSA's inception in 1976 at NLC 2015.
- HOSA membership has gone international with affiliations in Mexico, Italy, Canada, American Samoa with potential in Germany, United Kingdom and Guam.
- Total number of states and territories: **54**
- Total number of chapters: **4,500**

## Medical Innovation—HOSA's Newest Competitive Event!

This event is being piloted this year and will be carefully evaluated and revised. The purpose of the Medical Innovation event is for HOSA members to analyze emerging technologies in health that related to science, computers, engineering, biotechnology, math and/or the delivery of health care, and to share their understanding with others. Teams consisting of two to four competitors shall develop a visual display and/or demonstration of an aspect of a medical innovation to be presented to the judges. Competitors will be judged on their understanding and insight into the use and value of the medical innovation, as well as their ability to present themselves and communicate the use of a medical innovation. The competitors' keys to success include: display table; team members; and, health information. The vital question to be answered was—"Did the display and presentation leave viewers excited about the innovation's potential to improve the delivery of health care?"



55 Competitive Events for Secondary and Postsecondary/Collegiate



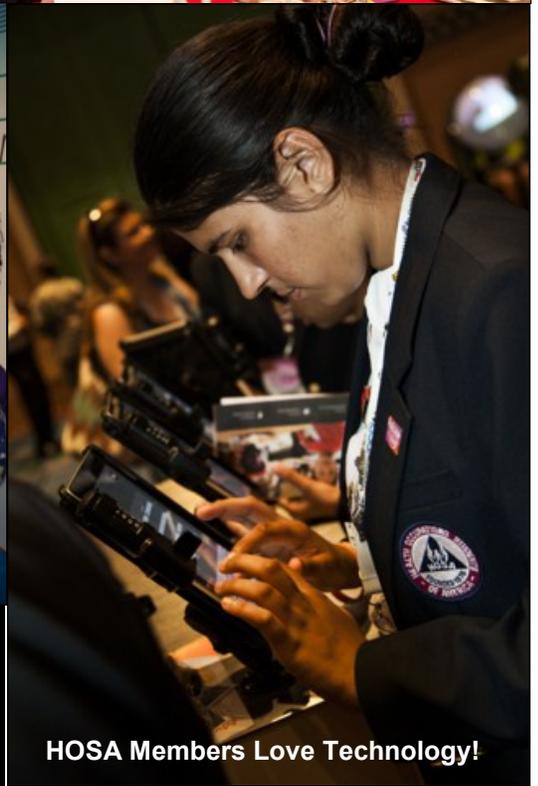
HOSA Knowledge Events



HOSA Exhibits



For more information about HOSA-Future Health Professionals and/or to attend the 38th National Leadership Conference, contact:  
 Jim Koeninger, Ph.D., Executive Director, [jim.koeninger@hosa.org](mailto:jim.koeninger@hosa.org)  
 548 Silicon Drive, Suite 101 Southlake, TX 76092 972.874.0062



HOSA Members Love Technology!

**Member Services and Meeting Update**  
*Report submitted by Karen Hornberger, Finance and Office Manager*

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**State CTE Director Updates (from most recent)**

- **Wyoming:** Mr. Guy Jackson, Interim State CTE Director, has officially been appointed State CTE Director of Wyoming in March 2015
- **Arkansas:** Dr. Charisse Childers was appointed State CTE Director in January 2015
- **Colorado:** Ms. Cindy Le Coq was appointed as Interim State CTE Director in January 2015
- **Oklahoma:** Ms. Marcie Mack, Interim State CTE Director, has officially been appointed State CTE Director of Oklahoma in January 2015
- **Texas:** Ms. Diane Salazar was appointed State CTE Director of Texas in January 2015
- **Virgin Islands:** Ms. Nancy E. Callwood was appointed State CTE Director in January 2015
- **Utah:** Ms. Thalea Longhurst, State CTE Director, Career, Technical & Adult Education, has been appointed Utah State Director effective November 25, 2014.

**Meeting Update**

**Meeting Sponsorship Trends:**

- 2014 Fall Sponsorships increased by 60% and our 2015 Spring Sponsorships increased by 40% over the prior meeting year.
- At the Fall Meeting we saw an increase in sponsorships with two new sponsors and four returning sponsors for the first time in a couple of years. Our total number of sponsors at the Fall Meeting was 13.
- This Spring there were six new sponsors that have never sponsored with NASDCTEc before and a total of 17 sponsors - the highest number of sponsors that NASDCTEc has ever had.
- The sponsorship levels were re-organized this spring with a slight increase in the Gold and Silver levels, the Platinum level was discontinued and a year-round sponsorship was added for the Gold and Diamond sponsors of the 2015 Spring Meeting.
- There has been an overwhelming response from our sponsors this spring who have increased their support to the Diamond level. First time ever to have seven Diamond level sponsors.
- The year-round sponsorship pilot is looking promising with two sponsors; Certiport and Today's Class. We hope to have a couple more year-round sponsors to help offset the additional expenses of the 2015 Fall Summit.

Sponsors want the best visibility and face time with our members they can achieve. They are looking to become more of a partner, engaging in collaborative efforts, rather than being a vendor. They want to see measurable outcomes of where their dollars are being spent.

### **Meeting Registration Trends:**

- As reported in the Spring of 2014, the attendance for the 2013 Fall Meeting was the highest of Fall Meetings in several years. This was a result of a very strong program, with an agenda posted early allowing State CTE Directors to plan accordingly.
- The goal for the 2014 Fall Meeting was to meet or exceed 2013 registration count. With another strong agenda the 2014 Fall Meeting exceeded the 2013 Fall Meeting registration count by six registrations and with a 10% increase in registration revenue.
- Similarly the 2014 Spring Meeting had a huge increase in attendance with 185 registrations compared to the 136 attendees at the 2013 Spring Meeting.
- The 2015 Spring Meeting is currently still receiving registrations as of March 17, 2015. We are slightly behind in registrations compared to the 2014 Spring Meeting but on track to meet our budgeted registration revenue and have exceeded registrations compared to the 2013 Spring Meeting registrations.

## Partnerships Update

*Submitted by Kate Blossveren, Associate Executive Director  
and Kimberly Green, Executive Director*

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NASDCTEc/NCTEF continues to enjoy a broad array of partnerships with organizations representing the full range of CTE stakeholders – educators, policymakers, employers and even students. We currently have 65 active partners, although the value and strength of these partnerships does vary considerably. Below is an overview of some of our highest-impact partnership activities, contracts (and potential funding streams) from partner organizations and a full list of our 65 partners.

### Major Initiatives

- **Future of CTE Summit:** One of the most significant differences between the upcoming Summit to set the CTE vision and the one NASDCTEc held in 2009-10 is that we have invited a group of national organizations to serve as co-conveners, with the goal of setting a vision for CTE that is truly shared across organizations and stakeholders. The Summit co-conveners – each of whom will serve on the planning committee, participate in the Summit and help define the final vision – Association for Career and Technical Education (ACTE), Council of Chief State School Officers (CCSSO), Council of State Governments (CSG), National Association of State Boards of Education (NASBE), National Governors Association (NGA), National Skills Coalition (NSC) and the U.S. Chamber of Commerce Foundation. We are still working to secure the American Association of Community Colleges (AACC) as a Summit co-convener.
- **Maryland SkillsUSA Bus Tour:** In partnership with the American Youth Policy Forum and Maryland State Department of Education/SkillsUSA Maryland, NCTEF is co-hosting a bus tour on Saturday April 18 to bring about 25 participants representing national education organizations, Congressional offices, press and the philanthropic community to Maryland's State Leadership and Skills Championship.
- **WIOA Combined State Plan Initiative:** NASDCTEc was invited to participate in a cross-organizational conversation and initiative, led by the National Skills Coalition, to explore the opportunities, challenges, viability, and benefits of Workforce Innovation and Opportunity Act (WIOA) combined state plans. The groups involved in the discussion represent the array of federal programs that are eligible to be part of a WIOA combined state plan including adult education, TANF, etc. In addition, the group is likely to pursue joint comments to the draft WIOA regulations, which are expected to be released the week of March 23.
- **National Academies are advising the National Sciences Foundation's Directorate on Education and Human Resources (DEHR)** in how to best guide its future workforce development investments (which total nearly \$1 billion a year). NASDCTEc's Executive Director is serving on a select committee to plan a summer 2015 convening to place topics, leading thinkers and researchers in front of the DEHR leadership to help inform, influence and frame their future funding priorities. At this time, DEHR funds largely individual scholarship programs (e.g. Noyce), individual school programs (I-TEST) and individual community colleges (Applied Technology Education Centers). Little is directed to systemic reform, Career Technical Education (CTE), career pathways or K-12

(or K-12 with linkages to postsecondary). The ability to influence this future investment poses a great opportunity for CTE and perhaps funding opportunities for NCTEF.

- Lumina Credentialing Summit: NASDCTEc was invited to be co-sponsor of Lumina Foundation ‘conversation’ on credentialing, which will include a number of dialogues over the coming months, the launch of a website and culminating with a National Credentials Summit this fall. See the draft “invite” letter for a listing of other co-sponsors.
- Our leadership sits on the advisory boards of the National Technical Honor Society, National Career Academy Coalition, Manufacturing Skills Standards Council, American National Standards Institute, the National Visiting Committee for Supply Chain Management, and the Pearson Employability Advisory Committee

### **Contract Work**

- NASDCTEc is partnering with Achieve to co-host a roundtable on CTE and competency-based pathways on May 7.
  - This will be an invite-only roundtable with representatives from eight states (all members of Achieve’s competency-based pathways working group), and focus on elevating common challenges with integrating CTE and competency-based pathways, and potential solutions that can be scaled and replicated within and across states.
  - Following the roundtable, NASDCTEc is responsible for writing a briefing paper summarizing the event and the overall discussion. This paper will be co-released in June 2015.
- NASDCTEc/NCTEF has also been included in a proposal Asia Society is submitting to the Project Management Institute (PMI) Education Foundation (along with ACTE).
  - The proposal is to develop create an online course and toolkit for early high school teachers and guidance counselors to educate CTE teachers and counselors, and their students, about the need to be globally competent and the global career opportunities that exist in CTE pathways; and build teacher capacity to integrate global competence into CTE career exploration and classroom projects.
  - NASDCTEc will serve on the advisory board, provide overall guidance and advise on the project, connect Asia Society to relevant experts and resources in CTE and industries, and help us disseminate the online course and toolkit to the field. The project would run from June 2015-June 2017. The proposal has already moved through the initial review stages by PMI and is on track to be funded.
- Finally, NCTEF has joined RTI International, Jobs for the Future, National Center for College and Career Transitions (NC3T), Vivayic, Avar Consulting Inc. (Avar), and Quality Information Partners (QIP) in pursuing OCTAE’s latest indefinite-delivery, indefinite-quantity (ID/IQ) contract offering for Improving CTE. The first step in applying for this multi-year contract from OCTAE was submitting a Capability Statement in February. The nature of the ID/IQ contract is that it allows for flexibility in the types of deliverables the Department of Education can request over time.

## FULL LIST OF PARTNERS

Achieve	National Academies
Achieving the Dream	National Alliance for Partnerships in Equity
ACT Inc.	National Association of State Boards of Education
AFSCME	National Association of Workforce Boards
Alliance for Excellent Education	National Board for Professional Teaching Standards
American Association of Community Colleges	National Career Academy Coalition
American Association of School Administrators	National Career Development Association
American Federation of Teachers	National College & Career Readiness & Success Center
American School Counselors Association	National Center for Supply Chain Management
American Youth Policy Forum	National Conference of State Legislatures
America's Promise Alliance	National Education Association
ANSI/WorkCred	National Skills Coalition/CIAW
Asia Society /Longview Foundation	National Technical Honor Society
Association for Career and Technical Education	NCC-CTSO
Boeing	New America Foundation
Business Roundtable	NGA
Change the Equation	NRAEF
Citizen Schools	OCTAE
CLASP	Opportunity America
College Board	Opportunity Nation
Committee for Education Funding	PARCC
CORD	Perkins Roundtable Coalition
Council of Chief State School Officers	Project Lead the Way
Council of State Governments	RTI (MPR Associates)
U.S. Department of Labor	Smarter Balanced
Education Commission of States	Southern Regional Education Board
Education Trust	State Directors of CC
Great Teachers & Leaders Center	STEM Connector
IBM	UC Berkley
Industry Workforce Needs Council	US Chamber/US Chamber Foundation
International Baccalaureate	USDOT
Jobs for the Future	WDQC
MSSC	

## Join the dialogue on credentialing

DRAFT | Date TBA, 2015

Dear colleague:

Lumina Foundation and the undersigned organizations are pleased to invite your organization to join us in a national conversation on ways to transform our nation's highly diverse and fragmented credentialing system into one that is student-centered and learning-based. We are convinced that such a system is needed for several reasons: to ensure educational quality, increase access, multiply the benefits of increased attainment, reduce social inequity and foster individual progress.

A learning-based credentialing system would recognize and reward the learning inherent in all high-quality credentials -- from badges and certifications to apprenticeships and certificate programs, all the way through degree programs and post-doctoral studies. Such a system would reduce the barriers that students and workers face as they seek to gain the skills and credentials they need to succeed in the workplace and in life. It would build employers' trust in credentials as they seek the skilled employees they need to compete globally. Also, in such a system, individuals would have to demonstrate achievement of clear, concrete and well-conceived learning outcomes to earn a quality credential.

We believe that change in the U.S. credentialing marketplace must come from the producers and users of credentials themselves. It cannot and should not be mandated from above. Therefore, we want to engage all stakeholders in a frank discussion about the problems posed by our current system and ways to voluntarily address these problems.

During the next several months, we hope to conduct a mix of conversations - within constituency groups, with national policy organizations, and in specific regions where interest in reimagined credentialing is growing. No top-down strategy can achieve the transformation that this group feels is necessary to improve the nation's credentialing system. Rather, the multiple stakeholders in that system must see the benefits of change and act voluntarily to bring about that change. As key stakeholders, you and your members can play a critical role by joining these conversations. Your participation can take several forms, as described below.

## Initial co-sponsors

- AARP Foundation
- ACT Foundation
- AFL-CIO/AFT
- American Association of Community Colleges
- American Association of State Colleges and Universities
- American Council on Education
- American Federation of Teachers
- American National Standards Institute's Workcred
- Aspen Institute's Skills for America's Future
- Association of Private Sector Colleges and Universities
- AT&T Foundation
- Business Roundtable
- Center for Law and Social Policy
- Complete College America
- Corporation for a Skilled Workforce
- Council for Adult and Experiential Learning
- Georgetown University Center on Education and the Workforce
- George Washington Institute for Public Policy
- Hope Street Group
- Institute for Evidence-Based Change
- Institute for Higher Education Policy
- Joyce Foundation
- Manufacturing Institute
- National Association of State Directors of Career Technical Education Consortium / National Career Technical Education Foundation
- National Institute for Learning Outcomes Assessment
- National Skills Coalition
- New America Foundation
- Phi Theta Kappa Honor Society
- Southern Association of Colleges and Schools Commission on Colleges
- University of Wisconsin-Madison's Center on Wisconsin Strategy
- Workforce Data Quality Campaign

We invite you to join the initial co-sponsoring organizations and hope you will participate in one of the convenings planned for this spring and summer. Details of those meetings are forthcoming.

We have just launched a website [address TBA], to act as a digital platform for the national dialogue and to provide a robust collection of research and resources on credentialing in the U.S. We urge you to visit the site and respond to questions about: credentialing-related challenges facing students, employers, workers and policymakers; how a transformed system would have to function to accrue real benefits for these users; and what steps each of the stakeholders could take to create a learning-based, student-centered system. Also, we hope you will suggest additional resources that we can add to the site to increase its value to users.

Also, we'd like to explore other ways in which you and your members might be involved. For example: Could credentialing issues be discussed at one of your upcoming meetings? Might you be willing to host a webinar? Would you be willing to write an article for your newsletter or blog to solicit input? If any of these avenues seem attractive to you, our partners at Corporation for a Skilled Workforce (CSW) and the Center for Law and Social Policy (CLASP) can help. CSW/CLASP, who are supporting the national dialogue, can provide background materials, assist in agenda development and perhaps facilitate a session.

We plan to summarize the input we receive during these early conversations and share it this fall at a National Credentialing Summit. At the Summit, we hope to use what has been learned to chart a collaborative way forward.

If you agree to join this important national conversation, please [click here](#) to indicate your level of potential interest. Holly Zarville, who directs Lumina's work in this area, or someone from the CSW/CLASP team will be following up to work with you to determine how you can best contribute and to discuss how Lumina and CSW/CLASP might support your efforts.

We look forward to talking with you further about this critical national dialogue.

Sincerely,

A handwritten signature in black ink, appearing to read 'J.P. Merisotis', written in a cursive style.

Jamie P. Merisotis  
President/CEO  
Lumina Foundation

In the last six months, NASDCTEc has published two major policy reports and one policy brief:

- *The State of Career Technical Education: Employer Engagement in CTE* (December 2014) is our second annual “State of CTE report,” exploring the state role in fostering and accelerating [employer engagement in CTE](#). In total, 46 states and one territory provided data. This report provides an in-depth analysis of the promising practices and policies states are employing to support and increase employer engagement to ensure CTE programs remain relevant and rigorous. Since releasing the paper, it has been covered in [Ed Week](#), been the topic of two well-attended webinars, distributed to over 25 partner organizations and visited on the website by 434 individuals.
- *2014 in Review: State Policies Impacting CTE* (January 2015, with ACTE) is our second annual report co-developed with ACTE. This report provides a state-by-state review of policy changes impacting CTE during 2014 across the country. In total, all but four states made legislative or regulatory changes relevant to CTE in 2014 on topics ranging from funding to credit transfer policies. Since releasing the paper, it has been covered in [Ed Week](#), been the topic of a co-hosted webinar with ACTE, presented on the Hunt Institute’s weekly partners call, and cross-posted on a number of organizations’ sites, including [ECS](#) and AIR’s College & Career Readiness & Success Center [blog](#).
- *Endorsements, Electives & More: CTE in State Graduation Requirements* (March 2015) explores common approaches to offering or requiring CTE courses and assessments within a statewide set of graduation requirements, offer illustrative examples of state-level policies and elevates implementation issues for consideration. *(No link provided as the brief will be published the final week of March)*

### **Other Publications**

In addition, RTI International/ National Center for Innovation in Career and Technical Education released a report, *State Strategies for Financing Career and Technical Education*, for the U.S. Department of Education. The report, which focuses on how state funding is distributed to local secondary and postsecondary programs, used survey data collected by NASDCTEc.

Finally, in April, NASDCTEc/NCTEF released its first-ever annual report, charting the major initiatives and accomplishments of the organization in the 2014 calendar year. The report will be shared at the Spring meeting and a public version will be posted on our website in May. This report will serve to inform our members and partners of our strengths and initiatives, as well as be used in fundraising/development activities.

### **Fact Sheets/Case-Making Materials**

In the past six months, NASDCTEc has also released two new fact sheets, three sets of talking points, and a one-pager connecting CTE: Learning that works for America<sup>®</sup> campaign with CTE month:

- CTE Delivery Systems (January 2015, [PDF](#))
- CTE and Student Achievement (February 2015, [PDF](#))
- CTE Month & the Learning that Works Campaign (February 2015, [PDF](#))
- CTE Talking Points: The Basics (November 2014, [Word](#) & [PDF](#))
- CTE Talking Points: The Skills Gap (November 2014, [Word](#) & [PDF](#))
- CTE Talking Points: Innovation & Entrepreneurship (November 2014, [Word](#) & [PDF](#))

**Looking ahead**, NASDCTEc has the following publications planned through the end of 2014-15 fiscal year.

- *Preparing a Globally Competent Workforce through High-Quality Career and Technical Education* (April/May 2015 with Asia Society, ACTE, College Board). This white paper will define global competency and make the case for integrating it into CTE instruction, by defining the need for global competency and sharing case studies of globally-minded CTE programs. This paper is the result of a six-plus month effort across these partner organizations.
- Reflect, Transform & Lead progress papers (May 2015). As part of the stage-setting for the Future of Career Technical Education Summit,” we are releasing a series of short briefs to take stock of what has been accomplished and what still needs attention since the release of the original CTE Vision. The five briefs – each aligned with one of the CTE vision principles – will be released over a five-week period throughout May.
- Competency-Based Education & CTE (June 2015, with Achieve). In May, NASDCTEc and Achieve are co-hosting a small-group roundtable discussion on integrating CTE into competency-based pathways. Following up on this roundtable, NASDCTEc will be drafting a brief on the topic to be released in June with Achieve.
- State-specific fact sheets, which were last updated in 2011.

## Strategic State Policy Plan (2015-2016)

Report submitted by Andrea Zimmermann, State Policy Associate

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Across the country, state legislatures and boards of education are increasingly interested in Career Technical Education (CTE) in recognition of its role in the college- and career-ready (CCR) policy structure. However, many of these policies largely give only lip service to the idea of career readiness or overlook it entirely. While many states are taking action, there is no national voice on CTE reform within states, leading to missed opportunities, at best, and misinformed policies that undermine advances in both the academic and technical fields, at worst.

NASDCTEc/NCTEF is well positioned to provide guidance in this space given our extensive work with states, depth of knowledge on CTE policy and strong partnerships with key organizations at the state and national level. In 2014, NASDCTEc/NCTEF further grew its sphere of influence by establishing key state-focused partnerships, hiring of a new staff member dedicated to state policy and laying the critical groundwork for an expanded and respected role in the future.

With this as a foundation, we present the following strategic plan to strengthen and guide our work in the state policy space. Embedded within this plan are links to the broader organizational strategic plan to ensure that our work in state policy is aligned to missions for NASDCTEc and NCTEF. Additionally, suggested success metrics have been provided for each strategy.

NOTE: With an eye toward the coming landmark events such as the Future of CTE Summit (Summit) and expected Perkins reauthorization, we must acknowledge these will likely create a shift in organizational priorities – as well as the potential capacity strain for staff. As such, we have categorized the following state policy activities as *planned* and *potential* to present a more realistic view of what we can accomplish through the first quarter of 2016. We also present these *potential* activities as a means to spur discussion of how and in what ways NASDCTEc and NCTEF may wish to pursue them in the future.

### Objectives:

To help states advance high-quality CTE, NASDCTEc/NCTEF will:

1. Keep NASDCTEc membership up to date of major state policy activity relating to CTE
2. Elevate NASDCTEc/NCTEF's profile across states and nationally as a state policy leader in CTE
3. Through partnerships, build consensus among the national education community and relevant governing organizations around the role of CTE/ "career" in the CCR agenda
4. Provide clear guidance to NASDCTEc members and other state policymakers on effective and positive CTE/career readiness-focused policies
5. Support state implementation of Perkins and other relevant federal policy as well as other state-level policies, specifically programs of study and related areas, to help advance high-quality CTE across the country

## **Major Strategies:**

To meet these objectives, NASDCTEc/NCTEF will:

1. Develop and maintain resources to support state CTE policy development such as up-to-date state profiles, a members-only database of state CTE policies, a policy framework of CTE/career readiness policies, regular publications and blog posts on key legislative and regulatory policy
2. Forge strategic partnerships with key education and governing groups to advance and enhance NASDCTEc/NCTEF's state CTE policy efforts through collaborative deliverables
3. Provide cross-state solutions, resources and technical assistance related to state implementation of federal policy, the Common Career Technical Core, programs of study; and support state-led projects such as the Career Clusters<sup>®</sup> Leadership Pilot
4. Craft and execute a dissemination strategy aligned to the NASDCTEc/NCTEF communication strategy to ensure resources are reaching key audiences

## **Key audiences:**

- State CTE Directors
  - State governing officials (governors, legislators, state board members, etc) and key staff
  - Other relevant state policymakers and key staff
  - CTE administrators and educators (secondary/postsecondary)
  - State board of education members and/or relevant postsecondary governing bodies
  - State-focused and national education communities and other relevant partners
- 

## **Major Strategies (in detail):**

- 1. Develop and maintain resources to support state CTE policy development such as up-to-date state profiles, a members-only database of state CTE policies, a policy framework of CTE/career readiness policies, regular publications and blog posts on key legislative and regulatory policy**

### Web-based Resources

(Planned activities)

#### State Policy Database<sup>1</sup>

This database currently exists as a downloadable resource for NASDCTEc members at [careertech.org](http://careertech.org), and contains the more than 150 state policies enacted in 2014, as featured in the NASDCTEc/ACTE publication, “State Policies Impacting CTE: 2014 Year in Review.” Members may search among 16 unique categories to learn more about what other states are doing to better inform state-level policy development.

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<sup>1</sup> 2.2.5 - Develop a new section of the website focused on state CTE policy, that includes a state policy database. (NASDCTEc/NCTEF)

Options are being explored to build this work into an embedded database within the website, and could include 2013 state activity as well as proposed and approved policies within the current calendar year. The strategy for building out such a database will be developed and implemented starting in summer 2015.

#### NASDCTEc Blog<sup>2</sup>

Staff regularly provide state CTE policy updates through the organization's blog, which has a wide-reaching audience and is one of NASDCTEc's most effective ways of disseminating resources and materials to the CTE stakeholders.

#### State Profiles<sup>3</sup>

The state profiles are a powerful platform to highlight and promote each state's CTE system. Currently, these profiles are often used by educators, news media and other policy organizations to learn more about a specific state. Partner organizations such as the College & Career Readiness & Success Center draw heavily from these profiles for CTE-related information to inform their own websites' state profiles.

Staff update the information in these profiles bi-annually as new data become available. State winners of NASDCTEc's Excellence in Action award are also added to the "Success Stories" section.

#### State Fact Sheets

NASDCTEc's state fact sheets were last updated in 2011, and are in the process of being redesigned and updated. By crafting fact sheets with more compelling narratives and information, these advocacy tools will provide greater value to the CTE community and interested stakeholders. Once the redesign is finished, staff will keep the fact sheets updated through a regular schedule.

#### Webinars<sup>4</sup>

On-demand and live webinars may be used to promote new NASDCTEc resources as well as provide important foundational information to the CTE community and interested stakeholders. In concert with NASDCTEc's growing state policy platform, webinars will be leveraged as another tool to increase awareness and understanding of state CTE policy.

#### Success Metrics:

The effectiveness of the web-based resources will be measured through:

- Google Analytics to track web traffic on the blog as well as other relevant state policy-related pages on careertech.org. NASDCTEc will use Google Analytics to track and report this data in the monthly Board of Directors' report.

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<sup>2</sup> 3.1.4 - Deliver timely information/resources to NASDCTEc's members and relevant stakeholders (including the blog, social media resources, etc.). (NASDCTEc/NCTEF)

<sup>3</sup> 2.3.3 - Develop and maintain state profiles/fact sheets that explain and promote CTE in each state. (NASDCTEc/NCTEF)

<sup>4</sup> 3.1.1 - Conduct periodic webinars on relevant topics for NASDCTEc members. (NASDCTEc)

- Cisco and Adobe Connect webinar tracking reports (includes surveys, registration and attendance numbers)

### Publications<sup>5</sup>

(Planned activities)

#### State Policy Framework for CTE and Career Readiness Policies

Staff have begun to amass state-focused policies for CTE and career readiness categorized across 16 distinct areas, and are now poised to take the next step and apply the next level of analysis through a policy framework. Using those 16 categories as the basis of the framework, we would consider the elements that help make a policy successful as well as the barriers. The categories include graduation requirements, standards and accreditation, industry-recognized credentials, and work-based learning. Through this tool, we will seek to evaluate new and existing policies to identify potential issues states should consider during implementation and monitoring.

This work would take place as part of the developing scope of work for the revamped NCTEF. As the NCTEF vision and mission is approved, this framework would serve as a guide to provide thoughtful guidance to states, media and other CTE stakeholders seeking high-quality examples and best practices.

#### Issue Briefs, White Papers and Case Studies

By further expanding into the state policy arena, many areas of NASDCTEc's work have benefited, including our regular publications. Having ready access to a wealth of knowledge on state policy, examples and best practices has been foundational to elevating NASDCTEc's status as the premier national organization for CTE.

In recognition of this coming Summit, a majority of our issue briefs in 2015 will focus on updates to the five principles laid out in the 2010 "Reflect, Transform, Lead: A New Vision for Career Technical Education." Other planned briefs include upcoming co-authored papers with Achieve on competency-based education and state CTE pathways to graduation as well as white papers and case studies related to issues tackled by the Career Clusters Leadership Pilot, including course sequences and work-based learning.

#### Annual Year in Review brief ("State Policies Impacting CTE: Year in Review")

Co-authored with ACTE, this brief provides a comprehensive scan of legislative and regulatory activities affecting CTE. This scan, presented without judgment, provides the community with an informed list of all activity taking place across the 50 states and D.C., and in turn, helps contribute to future CTE-positive legislation. The 2015 edition will be released in February 2016.

#### Annual State of CTE series

Started in 2013, the annual series, "The State of Career Technical Education," presents an opportunity for NASDCTEc/NCTEF to fulfill their role as thought leaders within the

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<sup>5</sup> 2.1.5 - Develop a state policy work plan, that may include the creation of sample state legislation and policies in support of increasing access to high-quality CTE and adoption/implementation of CCTC and Career Clusters. (NASDCTEc/NCTEF)

CTE community by providing much-needed 50-state research or analysis to important issues facing the field. Since the series' launch, installments have covered topics such as CTE standards and employer engagement.

In 2015, the "State of Career Technical Education" series provide a critical look-back over the past five years since the inaugural CTE Vision was released. This report will serve as a touchstone for states and key partners participating in the Summit, which will put forth a bold vision and collaborative strategy for the future of CTE.

#### Success Metrics:

The success of NASDCTEc/NCTEF's state policy-focused publications will be measured by:

- Timely publication of high-quality reports and briefs;
- Feedback from State CTE Directors on quality and utility of publications
- Monitoring Google Analytics (views of reports/publications on NASDCTEc website); and
- Tracking media engagement (e.g. mentions of reports in articles and interviews).

## **2. Forge strategic partnerships with key education groups to advance and enhance NASDCTEc/NCTEF's state CTE policy efforts through collaborative deliverables<sup>6</sup>**

(Both planned and potential activities)

#### Council of Chief State School Officers (CCSSO)

With the Chiefs' public commitment to career readiness, NASDCTEc will continue to play an active role in the organization's ongoing efforts to promote high-quality CTE and career readiness for all students. Specifically, following the publication of CCSSO's "Opportunities and Options: Making Career Preparation Work for Students," NASDCTEc Executive Director Kimberly Green has been invited to make formal presentations at national convenings and Congressional briefings. NASDCTEc continues to be involved in informal conversations with CCSSO to help provide guidance on how to translate the recommendations into state technical assistance. Additionally, CCSSO has signed on to be a Summit co-convenor, which will provide an excellent opportunity to further position CTE and NASDCTEc/NCTEF to be embedded in future work with the Chiefs.

#### National Conference of State Legislators (NCSL)

As a bipartisan national organization representing state lawmakers and their staff, the National Conference of State Legislators (NCSL) is well positioned to provide a neutral platform for promoting high-quality CTE. Currently, NCSL has co-hosted a webinar on state CTE financing models with NASDCTEc and invited our staff to speak at its national conference. It also actively promotes NASDCTEc publications and webinars through its various networks.

#### ACTE<sup>7</sup>

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<sup>6</sup> 1.2.2 - Partner with key organizations on state policy initiatives (e.g. competency-based education, CCSS, CCTC, postsecondary alignment). Utilize the partnership matrix to target, manage and monitor partnership effectiveness. (NASDCTEc/NCTEF)

<sup>7</sup> 1.6 - Collaborate and coordinate with ACTE on key initiatives and advocacy efforts in support expanded access to and quality of CTE. (NASDCTEc/NCTEF)

As part of NASDCTEc/NCTEF and ACTE's joint commitment to collaborate on key initiatives and advocacy efforts, NASDCTEc will continue to work with ACTE to produce the annual Year in Review brief and look for additional ways to leverage new and existing efforts related to state policy.

Other<sup>8,9</sup>

Consistent with its strategic plan, NASDCTEc/NCTEF will continue to seek strategic partnerships with additional key groups such as national organizations (i.e. National Governors Association, National Association of State Boards of Education) and education reform groups (i.e. Achieve, College & Career Readiness & Success Center, Education Commission of the States, Jobs for the Future, etc.). Some of these organizations, including the NGA and the Council of State Governments, have signed on to be co-conveners for this year's Summit and many others will be invited.

Success Metrics:

We will measure success by:

- Monitoring and rating partner participation on a quarterly basis through the Partnership Matrix;
- Actively working with partners to increase cross-promotion via social media and organization websites;
- Publishing at least one Friends of CTE Blog post per year from a state-policy focused partner organization; and
- Partnering at least six times a year on publications and/or webinars with national, high-visibility partners, at least half of which must be state policy-focused.

**3. Provide technical assistance and other resources related to state implementation of federal policy, the Common Career Technical Core, programs of study; and support state-led projects such as the Career Clusters<sup>®</sup> Leadership Pilot**

(Potential activities)

Common Career Technical Core<sup>10,11</sup>

Thanks to the work done for the 2013 "State of Career Technical Education: An Analysis of State CTE Standards," NCTEF has the ability to draw upon this 50-state research base to develop resources or in-person technical assistance to related to state implementation of the CCTC. With the Board-approved CCTC Continuum of Adoption, NCTEF will be able to better target resources to help states implement the content standards and/or the Career Ready Practices. Future work in this area will be influenced by the Board's discussion in April 2015.

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<sup>8</sup> 1.2.3 - Engage and support the National Governors Association "America Works" campaign, ensuring positive positioning for CTE. (NCTEF)

<sup>9</sup> 1.5.2 - Strengthen and expand partnerships with key education/workforce development organizations, institutions, etc. to support effective PD opportunities. Utilize the partnership matrix to target, manage and monitor partnership effectiveness. (NCTEF)

<sup>10</sup> 2.2.6 - Create resources to support state adoption and implementation of the CCTC/Career Clusters. (NCTEF)

<sup>11</sup> 2.2.7 - Conduct an initiative to put in place appropriate measurements of the CCTC. (NCTEF)

### Career Clusters Leadership Pilot<sup>12</sup>

The deliverables being developed by the ongoing Career Clusters Leadership Pilot offer a natural opportunity for NCTEF as it seeks to define the scope of its work. The two Pilots in Manufacturing and Agriculture, Food & Natural Resources have started work on critical CTE areas of need including work-based learning, industry-recognized credentials and course sequences.

It has become clear that there is a need and desire to continue building on and scaling this initial work to the other Career Clusters. However, without a change in existing strategy, this tremendous opportunity may need to be tabled for future consideration, due to current capacity restraints within the states and NASDCTEc/NCTEF.

### State implementation of federal policy<sup>13,14</sup>

With the coming reauthorization of Perkins, NASDCTEc expects to provide technical assistance to the states to assist them in implementing the new law to maximize the opportunity and potential for their CTE systems. This will likely be a mix of in-person and virtual meetings.

### Other<sup>15</sup>

With growing new and existing partnerships with state-policy focused organizations, there is the potential for NCTEF to play a role in connecting states to broader education reform efforts such as the Common Core State Standards and Next Generation Science Standards, as well as STEM-related and competency-based education work. NCTEF is still contracted with Achieve to support the NGSS career readiness work and, eventually, the development of NGSS pathways in 3-4 Career Clusters, although this work is currently on hold.

### Success Metrics:

Success metrics will be determined as NASDCTEc/NCTEF plans to undertake specific activities.

## **4. Craft and execute a dissemination strategy aligned to the NASDCTEc/NCTEF communication strategy to ensure resources are reaching key audiences**

Any dissemination plan will be aligned to the organizations' Communications Strategy, including social media to promote regular state policy updates, engagement of traditional media outlets to elevate major publications and projects from NASDCTEc/NCTEF and ongoing communications with our members through the newsletter, e-blasts and other relevant channels.

More broadly, as noted in the Communications Strategy, for any state policy publication or resource, we will develop a release and dissemination strategy at least a month before the set

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<sup>12</sup> 1.3.4 - Conduct Career Clusters governance pilot (NCTEF)

<sup>13</sup> 1.1.3 - Convene CCSSO, NGA and NASBE to develop a common policy platform to for the state role in Perkins. (NASDCTEc)

<sup>14</sup> 2.2.2 - Develop and host resources and workshops related to Perkins implementation following reauthorization. (NASDCTEc)

<sup>15</sup> 2.2.8 - Create resources and supports for states to connect CTE with broader reform efforts (CCSS, NGSS, STEM, competency-based). (NCTEF)

release date and, as needed, develop materials around publications – e.g. talking points, one-pagers, etc. – to highlight how they can be best utilized.

**Two-Year NASDCTEc/NCTEF Strategic Plan  
For Period of 2014-2015**

Target	Goal	Strategy	Timeline	Update
<b>1. Build and maintain strong and effective partnerships with key education, workforce and economic development, and philanthropy organizations to advance</b>				
	1.1 - Develop, maintain and grow partnerships in support of NASDCTEc's federal legislative priorities.			
		1.1.1 - Strengthen and expand partnerships with Congress, federal agencies, education associations, post secondary associations, workforce/economic development, employer-focused organizations, companies and labor unions. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Ongoing	Staff continue to meet quarterly to reassess the strength and value of each partnership. Partnership matrix is consolidated on an annual basis and supplemented throughout the year.
		1.1.2 - Support the ongoing efforts of the Workforce Data Quality Campaign and contribute to its advocacy efforts to support collection of nationally comparable, valid and reliable data.	Ongoing	NASDCTEc has continued to support the work of WDQC which has been helpful in articulating formal positions on issues related to data and CTE. Staff have supported a number of WDQC's formal communications to Congress and the Administration over the past year, regularly attended and engaged with the partner meetings, supported the development of data fact sheets and have participated in Congressional briefings of interest.
		1.1.3 - Convene CCSSO, NGA and NASBE to develop a common policy platform to for the state role in Perkins.	Summer 2015	Staff presented to the NASBE Study Committee on Career Readiness. All three organizations are co-conveners of the Future of CTE Summit but none of them have taken formal positions on Perkins.
	1.2 - Develop, maintain and grow partnerships in support of NASDCTEc's state policy initiatives/support.			
		1.2.1 - Develop a state policy work plan, to include the identification of priority partner organizations to collaborate with in support of increasing access to high-quality CTE and state adoption/implementation of CCTC.	Ongoing	A full state policy strategy will be shared with the Board at the April 2015 meeting.

		1.2.2 - Partner with key organizations on state policy initiatives (e.g. competency-based education, CCSS, CCTC, post secondary alignment). Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Ongoing	Staff continues to meet quarterly to discuss partnerships. NASDCTEc has strengthened many partnerships in the past six months, particularly around state policy-focused organizations. In particular, NGA, CCSSO, NASBE and CSG are all Summit co-conveners. Staff have presented at NASBE, CCSSO and NSCL events. We also have an active partnership with Achieve around CBE and CTE
		1.2.3 - Engage and support the National Governors Association "America Works" campaign, ensuring positive positioning for CTE.	Spring 2014	NGA is Summit partner and work will be connected through that initiative.
	1.3 - Engage in strategic partnerships with business-led organizations to strengthen business (including or and workforce development) involvement in the Career Technical Education enterprise.			
		1.3.1 - Strengthen and expand partnerships with employer-focused organizations. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Ongoing	Staff continues to meet quarterly to discuss partnerships. The Chamber is a Summit co-convenor and employer groups are regularly engaged through Perkins coalition.
		1.3.2 - Highlight strong employer-education partnerships through multiple communications strategies (e.g. Friends of CTE blog series, papers, case studies, resources, etc.).	Ongoing	Staff worked with Project Lead the Way to develop a Friends of CTE blog post. After consideration, Friends of CTE will be broken out into multiple categories including Friends of CTE - Employers featuring employer/industry-specific posts, and general Friends of CTE which will feature national partners like Project Lead the Way (PTLW). PTLW is working with staff to introduce multiple employers for future employer/industry Friends of CTE posts. The PTLW post will be released in late March/early April. Staff is still determining how to best use the examples of employer engagement collected during the employer engagement survey/report.
		1.3.3 - Develop case-making resources, targeted to the business community, designed to promote awareness of and seek support for CTE.	Ongoing	In the past six months, we have released three new fact sheets and three sets of talking points to help members, advocates make the case for CTE. The next focus is updating our state-specific fact sheets.

		1.3.4 - Conduct Career Clusters governance pilot.	2015	The CCLP is underway with deliverables expected to be released in Summer 2015
		1.3.5 - Identify employer champions (one for each Career Cluster) to feature in the roll out the business resolution campaign results.	2016	The business resolution is on hold until closer to Perkins reauthorization. Utilizing CCLP, Perkins coalition and award winners to cultivate employer partners/engagement.
		1.3.6 - Partner with the CTSOs to leverage their employer partnerships for advocacy and advancement of high-quality CTE.	Ongoing	We continue to participate in quarterly NCC-CTSO meetings; partnering with SkillsUSA to co-host tour of Maryland's statewide conference.
	1.4. - Engage in strategic partnerships that raise the visibility of Career Technical Education and NASDCTEc/NCTEF as a leader in the field (e.g., Advisory Boards)			
		1.4.1 - Utilize and manage the partnership matrix to expand and strengthen relationships with external organizations.	Quarterly meetings 2014 - 2015	See above.
		1.4.2 - Create and utilize criteria to guide decision-making around partnerships.	Quarterly meetings 2014 - 2015	COMPLETED and in use. )
		1.4.3 - Determine feasibility of CRPC continuation and focus.	Winter 2015	No work has occurred in this space, but is a possible area of focus for Foundation
		1.4.4. - Engage DOL, DHHS and other federal agencies to support the alignment and understanding of "career pathways" and other related initiatives	Ongoing	Meet quarterly with OCTAE leadership. A thought partner for the JFF Career Pathways project. Invited three federal agencies to spring meeting. Responded to RFI on career pathways memo. Inviting RPOS grantees to VISION sessions. NASDCTEc also participated in a number of White House events and input sessions.
	1.5 - Develop, leverage and maintain partnerships that support NASDCTEc efforts to provide professional development to our members, their staff and other key CTE stakeholders			
		1.5.1 - Conduct and support the CORD and NASDCTEc CP workshops/webinars.	defined schedule in 2014	CORD/NASDCTEc developed seven introductory videos to the CP Workshops. All videos were uploaded to the newly launched YouTube channel and promoted through social media channels; we are in process of finalizing MOU with ACTE and CORD for VISION and future ACTE events

		1.5.2 - Strengthen and expand partnerships with key education/workforce development organizations, institutions, etc. to support effective PD opportunities. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Ongoing	We continue to meet quarterly to discuss partnerships. In discussions with CORD, ACTE, CCSSO and SREB on how to support states. A potential area of collaboration for the Foundation.
	1.6 - Collaborate and coordinate with ACTE on key initiatives and advocacy efforts in support expanded access to and quality of CTE.			
		1.6.1 - Co-convene a joint Executive Committee meeting between ACTE and NASDCTEc/NCTEF.	January 2014 & 2015	Completed; planning for this to stay an annual meeting.
		1.6.2 - Develop a plan to implement the recommendations and outcomes from the joint ACTE/NASDCTEc Executive Committee.	Ongoing	ACTE and NASDCTEc have developed a joint work plan and update it quarterly.
		1.6.3 - Jointly develop an operational definition of and criteria for "high-quality CTE programs" to inform legislative priorities, professional development, etc.	Fall 2015	This work is in process. ACTE staff who lead this effort reconsiders her doctoral thesis. In the interim, NASDCTEc has developed federal policy language to advance this concept. Also, NASDCTEc is participating with the Central REL and related states to develop a matrix of quality criteria. This will also likely be influenced by the Summit.
<b>2. Engage in the formation and dissemination of legislation and public policy that impacts education, economic, and workforce development in support of</b>				
	2.1 - Develop federal and state legislative priorities that support, promote and increase access to high-quality Career Technical Education.			
		2.1.1 - Solicit information from membership about reauthorization priorities through surveys, working groups, and other means.	Ongoing	Staff have successfully crafted new HEA recommendations which have been approved by the NASDCTEc board of directors. Association recommendations for ESEA have also been updated with board input and final approval. NASDCTEc is currently seeking Board approval for how to formalize the association's position on several technical provisions contained in the Perkins Act.
		2.1.2- Develop and disseminate legislative language to Congressional and federal policymakers, as well as other stakeholder associations, to influence the reauthorization process.	Ongoing	Work on legislative language continues. This year staff plan to address the national activities section of the law and to consider a replacement proposal for Title II. This language is still evolving based on membership feedback and feedback received from Congress to date.

		2.1.3 - Engage members of Congress and staff during reauthorization through briefings, school visits, and other advocacy activities.	Ongoing	NASDCTEc promoted and attended a school visit to Montgomery College in partnership with ACTE during CTE Month (February); we are planning a tour of SkillsUSA Maryland's statewide conference in April. John Fischer testified before Congress and Kimberly Green testified before the House CTE Caucus. Staff have been engaged in a number of Senate CTE caucus briefings.
		2.1.4 - Host regular Perkins coalition conference calls to support organizational priorities and unify advocacy efforts during reauthorization.	Ongoing	These calls are currently on hiatus until Perkins reauthorization begins to move.
		2.1.5 - Develop a state policy work plan, that may include the creation of sample state legislation and policies in support of increasing access to high-quality CTE and adoption/implementation of CCTC and Career Clusters	Spring/Summer 2014	A full state policy strategy will be shared with the Board at the April 2015 meeting; as of now it does not focus on creating sample legislation, but will further expand our state policy work
	2.2 - Support NASDCTEc's members to advance and implement federal and state policies and legislation that promote and increase access to high-quality Career Technical Education.			
		2.2.1 - Host quarterly advocacy calls for State Directors and staff.	Ongoing	Quarterly advocacy calls have been scheduled for the remainder of 2015.
		2.2.2 - Develop and host resources and workshops related to Perkins implementation following reauthorization.	Post-Reauthorization	Still contingent on Perkins reauthorization progress. Currently on hold.
		2.2.3 - Develop pre-recorded webinars on relevant policy and legislative topics of interest to members.	Ongoing	Pre-recorded webinars continue to be available on NASDCTEc's website: <a href="http://careertech.org">careertech.org</a>
		2.2.4 - Connect Congressional staff with their State Director following each Hill visit (focus is primarily on Senate but may also include key House leadership).	Ongoing	In progress-- matches have been made where appropriate.
		2.2.5 - Develop a new section of the website focused on state CTE policy, that includes a state policy database.	Spring 2015	A state policy tracker tool has been shared with members; over the summer, we will determine how to expand such a database to be web-based, include more years of policy and focus only on effective policies

		2.2.6 - Create resources to support state adoption and implementation of the CCTC/Career Clusters.	2015	A set of potential activities will be discussed with the Board at the April 2015 meeting.
		2.2.7 - Conduct an initiative to put in place appropriate measurements of the CCTC.	Spring 2015	COMPLETED.
		2.2.8 - Create resources and supports for states to connect CTE with broader reform efforts (CCSS, NGSS, STEM, competency-based).	Ongoing	Upcoming papers on CTE and global competency and CTE and competency-based pathways.
	2.3 - Leverage and expand the use of the CTE: Learning that works for America campaign to support public policy and advocacy efforts.			
		2.3.1 - Launch a "sign-on" resolution campaign to cultivate and demonstrate employer/business for high-quality CTE.	2016	This work is on hiatus until 2016.
		2.3.2 - Launch a national campaign to get every member of Congress to see a CTE program.	Ongoing	Ongoing through work with both House and Senate CTE Caucuses
		2.3.3 - Develop and maintain state profiles/fact sheets that explain and promote CTE in each state.	Fall 2014/Winter 2015	The state web pages are updated bi-annually; the state-focused fact sheets are still a priority but got delayed. The goal is to develop and release them by the end of the fiscal year
		2.3.4 - Develop a set of federal, state and employer-focused case-making resources that articulate what is high-quality CTE and feature examples of high-quality programs.	Summer/Fall 2014	We are in the process of developing fact sheets on the nine Excellence in Action Award winners highlighting high-quality programs of study with intended distribution April 2015. Staff will reach out to programs of study who did not receive the award, but were still very high quality programs to feature in blog posts throughout the year.
		2.3.5 - Engage in the Industry Workforce Needs Council campaign to promote CTE.	Ongoing	Next meeting will be at NAWB forum--IWNC's newest partner organization. NASDCTEc is a lead partner. IWNC considering going under Opportunity America for operations.

		2.3.6 - Launch and manage the Excellence in Action Awards program, utilizing these examples in advocacy and communications initiatives.	January-June 2014	With strong Board participation, nine awards are being given in seven states. Award winners will be featured at the 2015 Spring Meeting during a luncheon, reception, with the opportunity to showcase their program during breakout sessions. We will continue to promote these programs of study through one-pagers, webinars, on the Learning that Works blog and in the NASDCTEc Member Newsletter.
		2.3.7 - Develop a media relations strategy and implementation plan, ensuring connections to our federal/state advocacy work, CCTC and CTE: Learning that Works Campaign.	Ongoing	We have continued to track our engagement with the media including all articles that mention NASDCTEc, while also developing a database of reporters we have worked with, or that cover the CTE beat. We promoted our Employer Engagement paper and State Policy Paper and related webinars to press with good response and engagement. We continue to coordinate with ACTE on press releases/statements around major federal policy changes utilizing PR Newswire for releases of major initiatives/reports.
		2.3.8 - Create a communications taskforce of state communications staff. The taskforce will guide the work of NASDCTEc/NCTEF in the development of casemaking tools and resources, as well as expanding state implementation of the CTE: Learning that works for America campaign.	Spring 2015	To be announced at Spring meeting with goal of convening group starting in May 2015.
		2.3.9 - Launch redesigned website.	Spring 2014	COMPLETED.
		2.3.10 - Maintain and expand social media strategy to engage broader set of stakeholders.	Ongoing	We have steadily increased our social media presence including participating in our first Twitter chat with CCRS Center during CTE Month (February). We also relaunched our YouTube page under the handle CTEWorks to better streamline our social media channels. We continue to promote events, publications, news, information and resources from NASDCTEc and our partners.
<b>3. Provide, encourage and support professional development to expand the skills, content knowledge and leadership of NASDCTEc members.</b>				
	3.1 - Develop, arrange and/or deliver resources to expand the skills, content knowledge and leadership of NASDCTEc members.			

		3.1.1 - Conduct periodic webinars on relevant topics for NASDCTEc members	Ongoing	Over the past six months, NASDCTEc has hosted five webinars, three in partnership with other national organizations. We also held SD-only webinars in Nov 2014 on Perkins implementation.
		3.1.2 - Build an online library of members-focused resources. (e.g. overview of key initiatives, pieces of legislation, member benefits, etc.)	Ongoing	The members only section has continued to grow; by migrating the Spring meeting registration to the website has encouraged more members to use their log-in and begin to navigate those resources. We have also updated our "About NASDCTEc" one-pager and streamlined the "Join Today" pages of the website.
		3.1.3 - Build online library of pre-recorded webinars to educate the public about CTE.	Ongoing	We currently have six on-demand webinars and have another two - three in development.
		3.1.4 - Deliver timely information/resources to NASDCTEc's members and relevant stakeholders (including the blog, social media resources, newsletter, etc.).	Ongoing	Ongoing
		3.1.5 - Develop and implement an annual editorial schedule resulting in a coordinated set of resources to include briefs, webinars, on-demand webinars, resources, etc.	Revisited quarterly.	Ongoing
	3.2 - Develop, arrange and/or host convenings to expand the skills, content knowledge and leadership of NASDCTEc members.			
		3.2.1 - Conduct Spring 2014 meeting.	April 2014/2015	Spring 2015 is currently in progress
		3.2.2 - Conduct 2014 Achieving Excellence Institute.	Summer 2014/Winter 2015	Planning is well underway for merger of Career Clusters sessions in CareerTech VISION conference.
		3.2.3 - Conduct Fall 2014 meeting.	Oct-14	Fall 2014 Meeting has been completed
		3.2.4 - Develop a strategy that reconsiders reconvenings of all states for future (Summit, re-conceptualized spring and fall meetings, Institute).	Fall 2014/Fal 2015/Winter 2015	Planning is well underway for merger of Career Clusters sessions in CareerTech VISION conference, as well as the Future of CTE Summit. The Summit will result in clear workstreams and content to drive future PD.
		3.2.5 - Host (virtual or in-person) convening of members to support planning and implementation of next federal CTE legislation.	Post-Reauthorization	Currently on hiatus until Perkins reauthorization timeline becomes clearer.
	3.3 - Develop and implement a robust, year-round intensive program to support the on-boarding and leadership development of State CTE Directors.			

		3.3.1 - Develop and implement a plan to a more formalized on boarding process for new members to NASDCTEc.	Winter/Spring 2015	Not yet started.
		3.3.2 - Develop and implement a plan to support skills and leadership development of State Directors/state leaders throughout the year.	Winter/Spring 2015	Piloting a new SD mentoring program at the spring meeting, where new SD are matched with a SD based on challenges/solutions. Customized resource packets are being created.
	3.4 - Implement a member engagement strategy to ensure NASDCTEc is addressing their needs and provide opportunities for members to inform NASDCTEc's work			
		3.4.1 - Conduct bi-annual member services survey to determine member satisfaction and priorities.	2015	On hold pending ACTE survey and pre-Summit survey.
		3.4.2 - Conduct a quarterly assessment of staff interaction/support/member engagement.	Quarterly	We continue to meet quarterly to discuss member engagement/interactions. If a member state is at a lower level of engagement, targeted engagement strategies are implemented.
		3.4.3 - Develop an annual report to the members identifying accomplishments and progress toward accomplishment of goals.	Spring/Summer 2015	We will be releasing our first annual report in April 2015; 5 progress reports on each CTE Vision principle will be released in May 2015.
		style	Integrated into other projects	
		3.4.5 - Develop an electronic newsletter that shares NASDCTEc and state accomplishments, as well as articulates how members can use NASDCTEc resources.	Summer 2014	Staff revamped the NASDCTEc Member Newsletter giving it a fresher look, and including new features: Greeting from the Executive Director and a Member and Partner updates where members can share what's happening in their state.
	3.5 - Actively encourage alignment and collaboration between secondary and post secondary leaders within and beyond NASDCTEc's members			

		3.5.1 - Convene a postsecondary engagement task force to advise NASDCTEc on how to better engage postsecondary CTE stakeholders, what resources and PD should be offered to support secondary-postsecondary alignment, and what key partnerships need to be made.	Winter 2015/2016	Per January 2015 Executive Committee meeting, on hold until after Summit. Engaging post secondary partners more fully in fall and spring meetings. All states encouraged to bring secondary and post secondary representative to Summit.
<b>4. Develop and implement actions that address NASDCTEc's organizational governance and fiscal security that ensures successful accomplishment of</b>				
	4.1 - Review NASDCTEc/NCTEF Board of Directors' governing structure, policies and bylaws to ensure alignment with strategic goals.			
		4.1.1 - Convene a task force to analyze the existing Board governance model and develop recommendations on issues such as composition, role and commitment of public members, etc. (note: may include organizational name change).	Winter 2015/2016	Per January 2015 Executive Committee meeting, on hold until after Summit.
		4.1.2 - Conduct a comparative analysis of NASDCTEc/NCTEF's income sources and distribution to like-sized and -minded organizations and determine components and feasibility of fee-for-service model.	Winter 2015/2016	Per January 2015 Executive Committee meeting, on hold until after Summit.
	4.2 - Review NASDCTEc/NCTEF membership structure to strengthen the organization's fiscal security and membership base			
		4.2.1 - Convene a task force to develop a set of recommendations for an updated state team membership model that supports both secondary and post secondary state Career Technical Education leadership.	Winter 2014/2015	Proposal at Spring 2015 meeting for pilot.
	4.3 - Develop and implement a fundraising plan to support public policy, partnerships, and professional development priorities.			
		4.3.1 - Develop and implement a Year-Round Sponsorship plan (pending approval from the Board)	Spring/Summer 2014	The staff presented a new year-round sponsorship proposal in light of the reduced sponsorship income for the 2015 Fall Summit. The Board re-evaluated and approved the new year-round sponsorship as a pilot for 2015. We expect to propose a another year-round sponsorship during the October 2015 meeting for 2016.
		4.3.2 - Develop a fundraising plan, to include identifying priority fund-able projects, cultivate relationships with key funders, etc.	2015	Ongoing and largely connected to Foundation planning and re-branding effort
<b>5. Implement Ongoing Core Work of NASDCTEc/NCTEF</b>				
	5.1 Ensure effective, accurate, legally compliant and efficient management of NASDCTEc/NCTEF.			
		5.1.1 - Ensure membership contact information is accurate and up to date - listservs, database of website, constant contact.	ongoing	Memberships are continually updated regularly. With the State Membership Dues going out in March - we audit and align all contact information.

		5.1.2 - Ensure that all Board approved policies are implemented properly and completely.	ongoing	Board policy manual updated after each Board meeting. Policies used to guide staff decisions.
		5.1.3 - Standard operations manual (SOP) is maintained and reflective of current policy and practice.	ongoing	SOP Manual is updated on an ongoing basis and reviewed in yearly.
		5.1.4 - Effective use of Basecamp/Backpack as project management and communications tools.	ongoing	This continues to be part of staff performance evaluations. The tool is continually used.
		5.1.5 - Establish and implement an effective formal on boarding process for Board members and officers.	July 2014	We plan to formalize the process of the on-boarding process for the Board members with this FY turnover July 1, 2015.
		5.1.6 - Manage the annual nominations and elections process in a fair and compliant manner.	July 2014/July 2015	COMPLETED for 2015.
		5.1.7 - Maintain the standard operations manual, ensuring it is regularly updated to reflect current content, passwords and relevant files. This should include project planning/meeting procedures.	ongoing	All procedures are up to date and are reviewed every 6 months.
	5.2 Ensure that the finances of the organization are accurate and in compliance with all legal requirements.			
		5.2.1 Financial tools and documents are used in accordance with Board-approved policies, including the investment policy statement, and ensure all transactions are legally compliant, accurate and ensure necessary separate of duties (checks/balances).	ongoing	All financial tools are used in accordance with Board-approved policies. Each is reviewed by the lawyer, accountant, auditor or investment advisor.
		5.2.3 - Conduct an annual audit and implement any recommendations or management notes.	October 2014	COMPLETED for FY15. FY 15 will take place in November 2015.
		5.2.3 - Maintain an effective grants management system.	ongoing	ongoing
		5.2.4 - Maintain appropriate security measures to ensure passwords, employee privacy, etc. are protected.	ongoing	ongoing
		5.2.5 - Implement measures to ensure appropriate back up of all financial information, resources, etc.	ongoing	Quarterly checks with Dr. BackUp and off-site, remote back up service.
	5.3 Ensure that all human resource functions are handled in a timely, accurate and legal manner.			
		5.3.1 - Human resource tools and documents are used in accordance with policies/legal requirements.	ongoing	All tools and documents are updated on a regular basis in accordance with policies/legal requirements.
		5.3.2 - Establish an implement a formalized staff on boarding process.	July 2014	Onboarding process has been created but has not been formalized yet. Formalizing June 2015.
		5.3.3 - Annually conduct a human resources briefing to review any personnel policy or benefits changes.	April 2014	For FY 15 a benefit summary will be created for each employee in June.
		5.3.4 - Accurate and timely benefits management - retirement, transportation subsidy, payroll, etc.	Ongoing	Ongoing

		5.3.5 - Implement an annual performance evaluation system.	October 2014	Evaluations will be conducted in accordance with the established performance evaluation cycle.
		5.3.6 - Annually review personnel policies and ensure they are legally compliant.	April 2014	These will be reviewed in May 2015 and submitted to the Board in June for approval.
		5.3.7 - Ensure staff are implementing the necessary computer back ups to protect the content and intellectual property of the organizations.	Ongoing	There are regular follow up with the Dr Back up to review backups.
		5.3.8 - Maintain an online, accessible standard operations manual. Coordinate updates with staff on a regular basis.	Ongoing	Ongoing
	5.4 Effectively manage the Career Cluster Products			
		5.4.1 - Ensure inventory controls are properly implemented.	Ongoing	Ongoing and evaluated during each annual audit.
		5.4.2 - Provide customer service and support that ensures high levels of satisfaction.	Ongoing	Ongoing. Will be measured on member services survey.
		5.4.3 - Conduct annual physical inventory.	July 2014/July 2015	FY 15 inventory will be scheduled for July 2015.
		5.4.3. - Develop a plan for phasing out the Career Cluster product inventory.	Summer 2014	The Board reversed the decision to phase out products due to the reliance on the revenue stream.
		5.4.4 - Pilot test the Cafe Press online store.	January 2014	After spending nearly a year to get this store up and running, it was determined that this was not a good use of our time/resources.
	5.5 - Ensure resources, communications and tools developed are high-quality, error-free, support the brand and consistent with the style guide.			
		5.5.1 - Put in place a formal editing process for all written resources, communications and tools.	Ongoing	During the planning process for any written report, document or resource, we identify multiple reviews throughout its development.
		5.5.2 - Maintain a style guide and ensure staff are properly briefed on the use of the guide.	Summer 2014	Communications staff maintain and update the style guide on a regular basis.
		5.5.3 - Maintain and manage the CC and CTE style guides (signed by users), including managing user agreements.	Ongoing	We have a process in place for collecting and managing user agreements. Staff report on user agreements in monthly Board updates.

		5.5.4 - Put in place a content management/maintenance schedule/ system for the website.	Late spring 2014	Our communications associate regularly reviews various sections of our website for updates/errors. We also have built in blog blocks on our legislative pages to allow for the most current analyses to be featured. And we have a schedule in place for regularly updating data on state pages.
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## Webinars Update

Submitted by Kate Blossveren, Associate Executive Director

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Over the past six months, NASDCTEc has hosted five [webinars](#), three in partnership with other national organizations. Below is a summary of those webinars and the participation information.

Webinar Topic	Month	# Participants
Badging 101: The What, The Why & The How (with NOCTI)	October 2014	95 participants (6 State CTE Directors)
The State of Employer Engagement in CTE	December 2014	78 participants (8 State CTE Directors)
Strategies for Financing CTE (with RTI International and National Conference of State Legislatures)	January 2015	63 participants (12 State CTE Directors)
2014 State CTE Policy Review (with ACTE)	February 2015	33 participants (6 State CTE Directors)
Employer Engagement: State Perspectives	February 2015	42 participants (10 State CTE Directors)

Finally, in November, NASDCTEc held a series of four State Director-only webinars/conference calls to discuss innovative practices, leadership opportunities and what states can be doing now to most effectively leverage the current law, drawing on the results of the state survey on Perkins implementation. In total, 37 states participated in these calls, organized by regions.

Over the next three months, NASDCTEc has a number of webinars planned, including:

- A series of webinars throughout April and May featuring our Excellence in Action award winners, likely three webinars in total, each featuring three winning programs.
- In either June or July, we will co-host a webinar with the Asia Society on a new white paper we are co-releasing this fall on CTE and global competency.

In addition to live webinars, NASDCTEc has also been building a library of [on-demand webinars](#), the most recent addition being *The Common Career Technical Core: The Development Process*.

In the past six months, the on-demand webinar page has been visited by 227 users, for a total of about 425 users since we launched last June. Unfortunately, we cannot track clicks on individual webinars because they are hosted by Adobe, a third-party site. We are in the process of migrating them over to YouTube, and will host any future webinars on YouTube there for easier access.

We currently have another two on-demand webinars in process on *The CTE Vision 101* and *Programs of Study*, which will be posted in Spring 2015. Over the next six months, we also plan to release on-demand webinars on the *Common Career Technical Core's Alignment Study* and *the Career Readiness Partner Council*. We will also ask the State Directors and membership if

there are other topics they would like to have on hand and incorporate them into our calendar of on-demand webinars.

Finally, in February, we released a series of seven short webinars, each focusing on one of the seven Career Pathways Effect workshop, in partnership with CORD. They can all be found on our [YouTube channel](#) and we are leveraging them to market the workshops.

## ACTE Collaboration Update

*Submitted by Kate Blosveren & Kimberly Green*

Over the past two years, the Association for Career and Technical Educators (ACTE) and NASDCTEc have worked to strengthen our partnership as the nation’s two leading CTE organizations. While we have always enjoyed a good relationship, both organizations believed there was more we could do to work together, coordinate efforts, and be more intentional in the way we communicate and engage with one another.

Following up on the 2014 joint Executive Committee meeting, NASDCTEc and ACTE created a joint work plan to enable more intentional coordination and identify new collaboration opportunities. ACTE and NASDCTEc put the work plan into a Google Drive document, allowing it to be a “living document,” reviewed regularly by each organization. Our leadership have quarterly calls scheduled to discuss it, make key updates and strategize next steps.

The work plan helped facilitate a number of successful collaborations that occurred in 2014 – such as monthly calls between ACTE’s and NASDCTEc’s policy teams and communications teams, the development of an MOU that formally integrated the National Career Clusters<sup>®</sup> Institute into CareerTech VISION starting in 2015, and other more discrete resources.

During the second annual joint meeting of our executive committees in January 2015, we discussed and revised the work plan; This updated work plan is summarized below, identifying work already in process or completed (green), still in the planning phase (yellow), and on hold or still to be discussed formally (red).

<i>Collaboration</i>	<i>Status</i>
<i>Advocacy/policy</i>	
<ul style="list-style-type: none"> <li>Policy/advocacy staff hold monthly calls to discuss collaboration on engagement of Congressional offices, including Hill visits and school visits; draft language for Perkins; CTE Monthly newsletters; aligned recommendations on other major federal legislation; coordination and support for CTE Caucuses; and other efforts and projects.</li> <li>Co-develop and release the annual <i>Year in Review</i> on state CTE policy</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>While each organization may initiate separate projects, NASDCTEc and ACTE will continue work to coordinate and work toward a common and public understanding of what “high-quality” CTE is to inform Perkins reauthorization, professional development activities and other initiatives.</li> </ul>	Plan
<ul style="list-style-type: none"> <li>Coordinate on activities to better engage the business community in advocating for CTE (e.g., business resolution)</li> <li>Coordinate on a campaign to increase congressional visits to see CTE programs.</li> </ul>	On hold (until Perkins draft completed)
<i>Communications</i>	
<ul style="list-style-type: none"> <li>Communications staff hold monthly calls to discuss opportunities for collaboration as well as cross-organizational promotions</li> </ul>	Ongoing

<ul style="list-style-type: none"> <li>• Cross-walk and ensure state profiles are consistent and explore other state-focused tools</li> </ul>	
<ul style="list-style-type: none"> <li>• Proactively plan strategy for NASDCTEc to better support 2016 CTE month</li> <li>• Collectively find and leverage creative ways to let members know about partnership and joint activities (i.e., short videos produced by ACTE with Kim and LeAnn, Techniques, regular blog series, etc.)</li> <li>• Jointly develop a press engagement strategy for promoting federal policy work (e.g., joint press statements, budget requests, etc.) and at least one joint op-ed</li> </ul>	Plan
<b><i>Meetings &amp; Conferences</i></b>	
<ul style="list-style-type: none"> <li>• MOU in place for integrating Career Clusters content into VISION CareerTech conference and conference planning underway</li> <li>• ACTE built NASDCTEc into Core Curriculum grant/work plan</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>• MOU with NASDCTEc, CORD &amp; ACTE on Career Pathways Effect workshops</li> <li>• Explore offering CPE workshops at future ACTE events (i.e., National Policy Seminar, Best Practices conference, etc.)</li> </ul>	Plan
<ul style="list-style-type: none"> <li>• Engage states hosting regional ACTE conferences about ways we can jointly support them (e.g., range of themes, speaker bank, common resources, etc.). Explore possibility of each region focusing on specific issues.</li> </ul>	To be planned (post-VISION)
<b><i>Leadership Development</i></b>	
<ul style="list-style-type: none"> <li>• NASDCTEc will survey State Directors and ACTE will survey their state leadership to determine the relationship between each State CTE Director and their ACTE chapter, from both perspectives (Spring/Summer 2015)</li> <li>• Based on survey of State Directors and ACTE leaders, develop resources to support collaboration</li> <li>• Through joint and organization-specific work, both ACTE and NASDCTEc will intentionally embed/discuss postsecondary policies, programs and partners</li> <li>• Collaborate around PD and resources for local secondary and postsecondary practitioners focused on implementation of CCTC.</li> </ul>	Plan
<b><i>Resources</i></b>	
<ul style="list-style-type: none"> <li>• Share a regularly updated calendar of publications (briefs, reports, etc.) and webinars</li> <li>• NASDCTEc supports/provided content for Techniques</li> <li>• Produce at least one webinar jointly</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>• Begin series from the ACTE president in NASDCTEc blog</li> </ul>	Plan
<b><i>Organizational Leadership – Coordination</i></b>	
<ul style="list-style-type: none"> <li>• Serve as liaisons on each other Boards</li> <li>• Provide free registrations to organizations’ meetings</li> <li>• Board members each automatically receive membership to other Association</li> <li>• Quarterly meetings between Kim, Kate, LeAnn &amp; Steve</li> <li>• Host annual Joint ACTE-NASDCTEc Executive Committee meeting</li> </ul>	Ongoing
<ul style="list-style-type: none"> <li>• Formally compare strategic plans to determine overlap, leverage points and gaps</li> </ul>	Plan

- Jointly pursue grant money/funding to support new initiatives through mutual discussion and agreement on strategic targets related to funding and projects.

### ***CareerTech VISION Update***

In December, NASDCTEc and ACTE signed a memorandum of understanding (MOU) to integrate the Career Clusters Institute content into ACTE's VISION CareerTech Conference. We are now in the process of finalizing the content of our nine session, described below. The focus of the sessions will be on Career Clusters as a delivery system for high-quality programs of study, and will feature the intersection of policy and practice in advancing CTE.

We are also working to finalize an MOU with ACTE and CORD for two Career Pathways Effect workshops that will be offered as pre-sessions at the VISION conference. We have a verbal commitment for the two sessions, with revenues to be split three ways between the organizations, but a formal MOU is not yet in place. Our goal is to have it finalized in in early April.

### **SESSION 1: Career Clusters & Programs of Study in Policy & Practice**

This session will kick off the Career Clusters strand and provide an overview of the National Career Clusters<sup>®</sup> Framework, programs of study and how both are impacting policy and practice across the nation.

Presenters:

- Kim Green
- Rod Duckworth
- Jo Anne Honeycutt

### **SESSION 2: Lessons Learned from Rigorous Programs of Study**

In 2010, the Office of Career, Technical and Adult Education (OCTAE) within the U.S. Department of Education launched the Rigorous Program of Study (RPOS) initiative, awarding grants to six states to advance the 10 components of a rigorous program of study. Join OCTAE and local leaders in discussing this effort, its impact and lessons learned along the way.

- Robin Utz, OCTAE
- Patti Beltram, Peoria Unified School District, Arizona
- Jim Means, Wichita Public Schools, Kansas

### **SESSION 3: Leveraging Re-Imagined Employer Advisory Committees: A Strategy For Driving Quality in CTE**

A number of states are re-tooling their local advisory committees to strengthen standards, credentials and partnerships between educators and employers. Learn about Louisiana's new JumpStart initiative, which brings together representatives from school districts, two- and four-year colleges, and local industry and economic and workforce development leaders to design regional plans for course pathways, work-based learning programs and industry-recognized credentials.

- John White, State Superintendent of Instruction (invited)
- Deidre Jackson, BASF
- Moderator: Patricia Felder

#### **SESSION 4: Implementing and Measuring Career Readiness Standards**

Whether they are called employability, 21st century or simply career readiness skills, students' ability to solve problems, work in teams, communicate effectively and develop career plans, among other key competencies, are critical to have, but difficult to measure. This session will explore two national approaches, the Career Ready Practices and SkillsUSA's Career Readiness Curriculum.

- Kate Blossveren
- Wayne Kutzer
- Tim Lawrence, SkillsUSA
- Kelly Horton, SkillsUSA

#### **SESSION 5: CTE Courses & College Readiness**

Over the past decade, the University of California (UC) System has recognized over 12,000 CTE courses as meeting admissions requirements for UC, California State University System and the California Community College System through a collaborative process led by UC and the California Department of Education. This session will delve into this process, as well as the UC Curriculum Integration Institutes, which bring high school and postsecondary educators together to develop integrated CTE-academic courses.

- Russ Weikle
- TBD

#### **SESSION 6: Scaling Career Coaches**

Providing intensive and hands-on career guidance and advisement is a critical but often under-provided support for students. Alabama is one state that has committed to providing career coaches at scale through partnerships between districts and community colleges. This session will share insights on Alabama's statewide initiative and what the career coaching looks like in practice.

- Phil Cleveland
- TBD

#### **SESSION 7: Industry-Recognized Credentials**

Florida has made industry-recognized credentials (IRCs) a focal point of its CTE system, aiming to increase access to and the attainment and quality of IRCs through changes in policy and practices. This session will explore the major policy changes Florida has put in place to support the attainment of quality IRCs and how practitioners and employer partners are engaged throughout the process.

- Rod Duckworth
- TBD

#### **SESSION 8: Recognizing Excellence in STEM**

As part of North Carolina's robust STEM strategy, the state has created a process for recognizing excellent STEM programs and schools. By identifying 11 STEM Attributes, the state can assess a quality STEM program in K-12, offered in or out of school, and at the elementary, middle and high school levels, using a common rubric. This rubric can be a useful tool in any CTE leader's toolbox when considering the quality and effectiveness of a program.

- Jo Anne Honeycutt
- Christy Cheek, CTE Director in Buncombe County Schools
- Erlene Brogden, Wayne County (invited)

**SESSION 9: The Best of the Best: Excellence in Action Award Winners**

Since 2014, NASDCTEc has organized the Excellence in Action awards to recognize and honor high-quality programs of study from across the country. Get an in-depth look into the selection process, learn about the 2015 award-winning programs, and engage in small-group discussions on excellence in action with the winning applicants.

- Patricia Felder
- 2-3 winners TBD

## NASDCTEc Regional Election Results

*Report prepared by Karen Hornberger, Finance and Office Manager*

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Following the bylaws and Board policies, the staff conducted the elections for regional representatives on the NASDCTEc Board of Directors. The process involved an initial announcement and solicitation for nominations in January 2015; electronic ballots distributed on February 13<sup>th</sup> with votes due by March 9<sup>th</sup>.

The following are the election results, to be announced at the NASDCTEc Business meeting on April 9, 2015. Until then, results are confidential. These Board terms will begin July 1, 2015 and end on June 30, 2018.

### **Region II**

New York, New Jersey, Puerto Rico, Virgin Islands

Marie Barry of New Jersey elected

### **Region VII**

Iowa, Kansas, Missouri, Nebraska

Pradeep Kotamraju of Iowa elected

### **Region IX**

Arizona, California, Nevada

Mike Raponi of Nevada re-elected

### **Region X**

Alaska, Idaho, Oregon, Washington

No nominees/no election

The bylaws state that it is the responsibility of the Active Members in each of the eleven geographic regions to select, at the appropriate membership meeting, their respective directors to serve on the Board of Directors. The by-laws do not state specifically what to do if there are no nominations or no one is elected by the directors serving that region. The bylaws do state that if a vacancy in any director's position shall be filled for the un-expired term by majority vote of the remaining directors then in office. This position can only be filled by the following State CTE Directors:

Curtis Clough – Alaska

Dwight Johnson – Idaho

Laura Roach – Oregon

Eleni Papadakis – Washington

**Board Action:** Determine the process for selecting a State Director to serve as the Region X NASDCTEc Board Representative.

Not later than June 30, 2015, appoint a State Director to serve as the Region X NASDCTEc Board Representative.

**NASDCTEc Financial Report**  
*Report prepared by Kimberly Green, Executive Director*

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This report provides summary financial information for the period of July 1, 2014 through February 28, 2015 or 67% of the fiscal year.

**INCOME:**

Income is strong and exceeds targets in all categories. All states have paid dues except for one and that state has submitted an intent form to pay at the end of the fiscal year. Sponsorships for the spring meeting were tremendous, bringing the income for the category to 188% of budget goals. Interest is also exceeding income goals at 91%, despite only 67% of the fiscal year having passed.

**EXPENSES/LIABILITIES:**

To date, 64% of budgeted expenses have been spent. The majority of expense categories are on target. Accounting fees are being watched, as they may exceed budget. Licenses and fees exceeded the budget due to increased fees and a mandatory IRS plan revision that was not accounted for in the estimates. The salary and benefits category reflects NCTEF's reimbursement of \$20,694.51 in salary and \$9,094.01 in benefits for the first half of the fiscal year. January 2015 going forward, the budget reflects NASDCTEc paying for the full salary and benefits of staff, with this half of the fiscal year being reimbursed after June 30, 2015.

**ASSETS:**

As of February 28, 2015, the Association's fiscal position was strong with total assets at \$2,857,781.81 and total equity at \$2,537,051.63. This represents a 7% decrease in assets and a 2% increase in equity compared to 2014.

**INVESTMENTS:**

The reports have been prepared by Mark Friese, advisor from Merrill Lynch and reflect investments aligned to the Board-approved investment policy statement. At this time, no modifications are requested for the investment portfolio. The equity portion of the portfolio is exceeding last year's cumulative performance (7.24% compared to 4.70%). The overall portfolio is also doing well, at 4.51% compared to 2.85% last year.

**APPROVED NASDCTEc FY15 BUDGET**

	<b>Approved</b>	<b>Actuals</b>	<b>Budget to</b>	<b>Explanatory Notes</b>
<b>INCOME</b>	<b>FY15</b>	<b>As of 2/28/15</b>	<b>Actuals</b>	
			<b>67% of fiscal year</b>	
State Memberships	\$491,897.65	\$513,994.00	104%	Outstanding dues: California
Associate & Org. Memberships	\$36,290.00	\$41,525.00	114%	Outstanding invoiced dues totals \$525.
Conference Registrations	\$130,500.00	\$139,820.00	107%	This income item as of March 20, 2015. Fall registrations 130 full, paid registrations and 149 attending. Spring registrations -133 full, paid registrations and 167 attending.
Conference Sponsorships	\$45,600.00	\$85,562.00	188%	This income item as of March 20, 2015. Spring meeting sponsorships were tremendous at \$52,000.
Interest/Dividend	\$50,400.00	\$45,668.55	91%	As of February 28, well above income targets.
Other income	\$8,000.00	\$7,658.84	96%	Received \$4995 contract income that was not budgeted.
Reserve withdrawal	\$121,920.00	\$0.00	0%	None withdrawn at this time.
Reserve fund withdraw - Communications campaign support	\$42,325.00	\$0.00	0%	None needed at this time. Direct communications expenses, including staff time/benefits is approximately \$31,000.
<b>TOTAL REVENUES</b>	<b>\$926,932.65</b>	<b>\$834,228.39</b>	<b>90%</b>	
<b>EXPENSES</b>				
<b>Allocated Expenses to Specific Projects</b>				
Speakers	\$2,500.00	\$0.00	0%	No fall meeting expenses. None projected for spring meeting.
Meals (Hotels/Catering)	\$58,000.00	\$22,011.90	38%	Spring meeting expenses not yet incurred.
Travel/Lodging	\$22,350.00	\$9,336.53	42%	On target.
Awards/Gifts	\$22,050.00	\$667.85	3%	Does not include spring fees, which include will include the Excellence in Action awards (\$18,000)
Audio Visual	\$7,500.00	\$2,427.80	32%	Includes fall meeting expenses only.
Printing/Copying	\$2,866.60	\$1,148.64	40%	Does not include spring meeting printing. Will be on target after the meeting.
Communications (telephone/communications)	\$8,465.00	\$5,846.42	69%	Slightly above target.
Postage/Overnight	\$475.00	\$87.57	18%	Lower than projected due to continued increase in electronic communication.
Supplies	\$2,350.00	\$592.59	25%	Does not include spring meeting fees.
Education/Training	\$3,500.00	\$740.00	21%	Planned professional development in last quarter of year but still likely to be underbudget.
Subscriptions/Dues (publications and subscriptions)	\$9,518.00	\$6,401.11	67%	On target.
Bank Charges -CC FEES	\$3,600.00	\$3,621.37	101%	More registrations and sponsorships paid by credit cards due to new registration portal. Slightly above budget.
Contractors (consultants)	\$27,390.00	\$10,242.58	37%	Below budget due to staff graphics capability. Budget reflects budget modification approved in October 2014. (+\$3390).
<b>Subtotal - Specific Projects</b>	<b>\$170,564.60</b>	<b>\$63,124.36</b>	<b>37%</b>	
<b>General &amp; Administrative Expenses</b>				
Salaries	\$455,224.47	\$271,537.09	60%	Reflects repayment of \$20,694.51 from NCTEF for staff salaries from July - December 2014.
Bonues	\$52,800.00	\$28,565.12	54%	Reflects budget modification approved in October 2014.

				Reflects repayment of \$9,044.01 from NCTEF for staff benefits from July - December 2014.
Full employee benefits	\$115,354.70	\$99,087.91	86%	
Rent	\$111,628.00	\$73,254.47	66%	Include rent through the end of February.
Office Maintenance	\$2,175.00	\$1,825.00	84%	Annual expenses
Licenses/Fees	\$2,600.00	\$3,200.16	123%	There was a required IRS retirement plan update that was not included in the budget. This was for \$400. Additionally, the annual filing fee for the retirement account was greater than anticipated.
Office Supplies	\$1,025.00	\$216.44	21%	
Communications	\$250.00	\$186.46	75%	A bit above target.
Postage/Overnight	\$216.88	\$152.92	71%	Will be reduced once postage is drawn down and allocated against projects.
Printing/Copying	\$25.00	\$3.10	12%	Lower than projected due to continued increase in electronic communication.
Equipment & Furniture	\$5,969.00	\$1,785.48	30%	Equipment purchases scheduled for last quarter of fiscal year.
Bank Charges	\$325.00	\$45.00	14%	Lower than projected fees.
Merrill Lynch Charges	\$30,000.00	\$22,126.38	74%	Includes fees for three out of four quarters.
Accounting	\$28,908.00	\$23,334.90	81%	Largely on target, as fees include annual audit and 990 preparation. Watching closely as fees are very close to budget targets.
Legal	\$550.00	\$0.00	0%	No fees incurred to date. Fees projected in last quarter for review of several policies.
Insurance - Directors	\$4,757.00	\$4,554.00	96%	Annual expenses
Liaison & Meetings	\$750.00	\$259.29	35%	
<b>Total G &amp; A Expenses</b>	<b>\$812,558.05</b>	<b>\$530,133.72</b>	<b>65%</b>	
<b>Total Project Expenses</b>	<b>\$170,564.60</b>	<b>\$63,124.36</b>	<b>37%</b>	
<b>TOTAL EXPENSES</b>	<b>\$983,122.65</b>	<b>\$593,258.08</b>	<b>60%</b>	
<b>INCOME LESS EXPENSES</b>	<b>-\$56,190.00</b>	<b>\$240,970.31</b>		

**NASDCTEc**  
**Balance Sheet**  
As of February 28, 2015

	<b>TOTAL</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1010 Cash- Bank of America	35,400.25
1017 Merrill Lynch Cash - 749	113,548.05
1018 Merrill Lynch Cash - 7WD	27,713.61
<b>Total Bank Accounts</b>	<b>\$ 176,661.91</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	94,789.91
<b>Total Accounts Receivable</b>	<b>\$ 94,789.91</b>
<b>Other current assets</b>	
<b>1100 Investments</b>	
1131 Government Bonds	730,025.23
1159 Equities	1,799,554.75
<b>Corporate Bonds</b>	
1126 Entergy Mississippi	34,198.05
<b>Total Corporate Bonds</b>	<b>\$ 34,198.05</b>
<b>Total 1100 Investments</b>	<b>\$ 2,563,778.03</b>
1275 Security Deposit	9,000.00
1280 Due from Foundation	22.60
1299 Accrued Interest Receivable	2,992.02
1300 Prepaid Expense	73.98
1499 Undeposited Funds	3,475.00
<b>Total Other current assets</b>	<b>\$ 2,579,341.63</b>
<b>Total Current Assets</b>	<b>\$ 2,850,793.45</b>
<b>Other Assets</b>	
1400 Furniture and Fixtures	25,879.23
1405 Accumulated Depreciation - Furniture and Fixtures	-24,107.74
1410 Equipment	21,183.41
1450 Accumulated Depreciation- Equipment	-15,966.54
<b>Total Other Assets</b>	<b>\$ 6,988.36</b>
<b>TOTAL ASSETS</b>	<b>\$ 2,857,781.81</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 Accounts Payable (105)	-14,700.51
<b>Total Accounts Payable</b>	<b>-\$ 14,700.51</b>
<b>Other Current Liabilities</b>	
2070 Accrued Vacation	67,980.94
2099 Deferred Revenue	
2136 Deferred State Dues FY 14-15	202,180.00

2137 Deferred Associate Dues FY 14-15	20,508.00
2138 Deferred Income FY 14 - 15	5,000.00
2139 Deferred State Dues FY 15-16	39,572.00
<b>Total 2099 Deferred Revenue</b>	<b>\$ 267,260.00</b>
2100 Due to Foundation	189.75
<b>Total Other Current Liabilities</b>	<b>\$ 335,430.69</b>
<b>Total Current Liabilities</b>	<b>\$ 320,730.18</b>
<b>Total Liabilities</b>	<b>\$ 320,730.18</b>
<b>Equity</b>	
3000 Net Assets	1,954,431.63
3900 Earnings	492,713.58
Net Income	89,906.42
<b>Total Equity</b>	<b>\$ 2,537,051.63</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 2,857,781.81</b>

## NASD Executive Investment Recommendation Summary

The last few years have been a very unusual investment environment for both bonds and stocks. For bonds, interest rates are currently near all time historic lows and prices are near all time highs. For stocks, the performance over the last few years has been well above long-term historical averages. At the beginning of 2015, interest rates slowly started to rise. If the U.S. economy continues to improve, there will be Federal Reserve action to further increase interest rates. It is important to note, in a rising interest rate environment bonds decline in value. For this reason both the NASD *Association* account and the NASD *Foundation* accounts are near the high range for equities per the investment policy statement. If the economy continues to improve and bonds decline in value we will reevaluate our exposure to bonds.

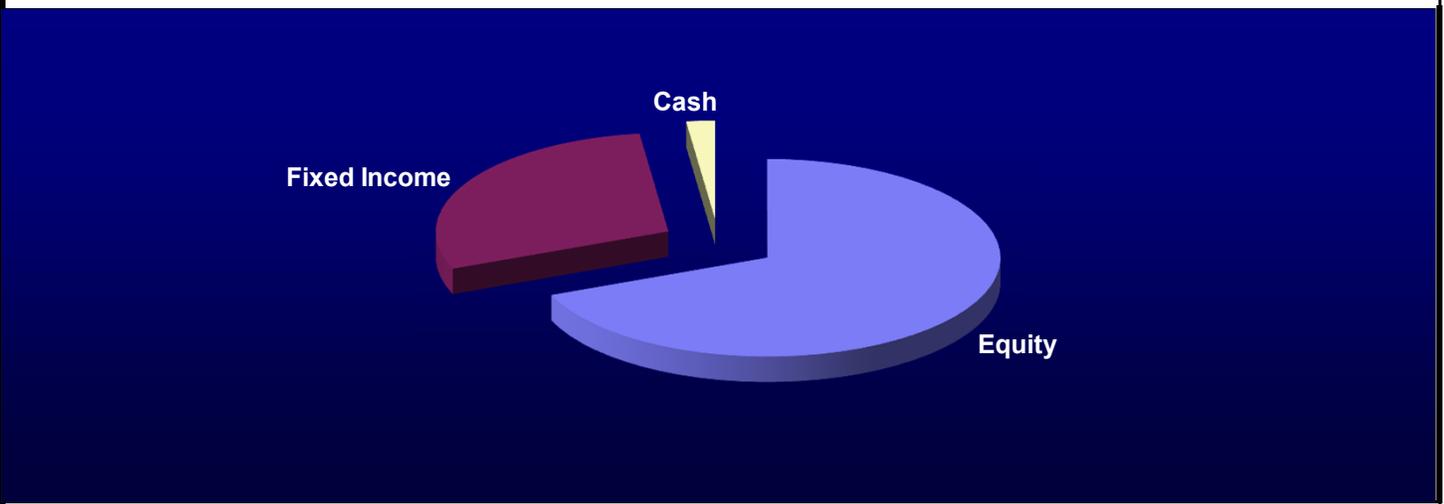
2014 was an exceptional year for the equity markets. The S&P 500 (general market) returned over 11%, exceeding historical averages. Interestingly, and as we expected bonds did not fare so well returning less than 1% for short-term bonds. Although the U.S. economy is showing strong indications of economic recovery the overseas market have not been as favorable. Recently however, positive improvements in Europe have started to emerge. Our current exposure to the international markets is below 1%.

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

**No changes are currently recommended.**

National Association of State Directors  
 Current Asset Allocation  
 Association Accounts 749-04H01 & 7WD-04H50  
 Period: July 2014 to February 2015

<b><i>Current Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	69%	\$ 1,802,547
	Fixed Income	29%	\$ 764,223
	Cash	2%	\$ 41,262
	Sub-Total	100%	\$ 2,608,032
	Cash Reserves		\$ 100,000
	Total Portfolio Value		\$ 2,708,032



<b><i>Proposed Portfolio</i></b>	Asset Allocation Type:		Per Investment Policy Statement
	Equity	69%	\$1,802,547
	Fixed Income	29%	\$764,223
	Cash	2%	\$41,262
	Sub-total		\$2,608,032
	Cash Reserves		\$100,000
	Portfolio Value	100%	\$2,708,032



# Relative Performance - Equity: Yearly

Performance period: 07/01/2014 to 02/28/2015

Period	Actual ROR(%)		S&P 500 Price Return(%)	
	Year	Cum	Year	Cum
<b>2015</b>	<b>2.43</b>	<b>7.24</b>	<b>2.21</b>	<b>7.36</b>
US Equity	2.39	7.53		
International Equity	4.34	(4.05)		
<b>2014</b>	<b>4.70</b>	<b>4.70</b>	<b>5.03</b>	<b>5.03</b>
US Equity	5.02	5.02		
International Equity	(8.04)	(8.04)		

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

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

# Time Weighted Rate of Return by Period: Yearly



Performance period: 07/01/2014 to 02/28/2015

Period	Opening Balance(\$)	Contributions/ (Withdrawals)(\$)	Interest/ Dividends(\$)	Appreciation/ (Depreciation)(\$)	Closing Balance(\$)	Total Portfolio ROR		Period(%)	Cum(%)
						Period(%)	Cum(%)		
2015	2,764,372	(100,000)	5,756	37,900	2,708,028	1.61	4.51		
2014	2,583,137	100,000	43,250	37,985	2,764,372	2.85	2.85		
<b>Total</b>	<b>2,583,137</b>	<b>0</b>	<b>49,006</b>	<b>75,885</b>	<b>2,708,028</b>		<b>4.51</b>		

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

## Account 749-04H01

Security Name	Quantity	Cost Basis	Date Purchased	Date Sold/Mat	Sales Price	Market Value	Gain or (loss)	Realized Gain/Loss	Yield
<b>Association-E.T.F.'s (749-04H01)</b>									
<i>Ishares DJ US Consumer Goods (IYK)</i>	353	\$ 25,496	07/10/12			\$ 38,082	\$ 12,586		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	72	\$ 5,337	10/31/12			\$ 7,767	\$ 2,430		n/a
<i>Ishares DJ US Consumer Goods (IYK)</i>	5	\$ 471	01/22/14			\$ 539	\$ 68		n/a
		\$ 31,304							
<i>Ishares Dow Jones US Energy (IYE)</i>	289	\$ 10,944	07/10/12			\$ 12,915	\$ 1,971		n/a
<i>Ishares Dow Jones US Energy (IYE)</i>	59	\$ 2,416	10/31/12			\$ 2,637	\$ 221		n/a
<i>Ishares Dow Jones US Energy (IYE)</i>	30	\$ 1,489	01/22/14			\$ 1,341	\$ (148)		n/a
<i>Ishares Russell Midcap (IWR)</i>	1000	\$ 96,760	10/20/06			\$ 173,520	\$ 76,760		n/a
<i>Ishares Russell Midcap (IWR)</i>	466	\$ 26,967	04/03/09			\$ 80,860	\$ 53,893		n/a
<i>Ishares Russell Midcap (IWR)</i>	298	\$ 32,577	10/31/12			\$ 51,709	\$ 19,132		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	588	\$ 41,353	07/10/12			\$ 63,957	\$ 22,604		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	119	\$ 8,376	10/31/12			\$ 12,944	\$ 4,568		n/a
<i>Ishares Tr Dow Jones US Tech (IYW)</i>	28	\$ 2,118	05/10/13			\$ 3,046	\$ 927		n/a
<i>Ishares TR Dow Jones (DVY)</i>	104	\$ 5,000	08/12/11			\$ 8,262	\$ 3,262		n/a
<i>Ishares TR Dow Jones (DVY)</i>	826	\$ 45,742	06/07/12			\$ 65,617	\$ 19,875		n/a
<i>Ishares TR Dow Jones (DVY)</i>	1733	\$ 97,546	07/10/12			\$ 137,670	\$ 40,124		n/a
<i>Ishares TR Dow Jones (DVY)</i>	541	\$ 31,251	10/31/12			\$ 42,977	\$ 11,726		n/a
<i>Ishares TR Dow Jones (DVY)</i>	32	\$ 2,100	05/10/13			\$ 2,542	\$ 442		n/a
<i>Ishares TR Dow Jones (DVY)</i>	851	\$ 59,965	12/10/13			\$ 67,603	\$ 7,638		n/a
<i>Ishares TR Dow Jones (DVY)</i>	277	\$ 19,729	01/22/14			\$ 22,005	\$ 2,276		n/a
<i>Ishares TR Dow Jones (DVY)</i>	109	\$ 7,711	02/14/14			\$ 8,659	\$ 948		n/a
<i>Ishares TR Dow Jones (DVY)</i>	57	\$ 4,605	12/30/14			\$ 4,528	\$ (77)		n/a
<i>Ishares TR Dow Jones (DVY)</i>	96	\$ 7,671	02/19/15			\$ 7,626	\$ (45)		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	148	\$ 5,604	02/23/10			\$ 5,944	\$ 340		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	471	\$ 17,977	07/15/10			\$ 18,915	\$ 939		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	322	\$ 12,593	07/10/12			\$ 12,932	\$ 339		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	292	\$ 11,689	10/31/12			\$ 11,727	\$ 38		n/a
<i>S&amp;P US PFD STK Index Fund (PFF)</i>	254	\$ 10,400	05/10/13			\$ 10,201	\$ (200)		n/a
<i>Spdr Gold Trust (GLD)</i>	133	\$ 20,367	06/07/12	12/30/14	\$ 15,357	-	-	\$ (5,010)	n/a

<i>Spdr Gold Trust (GLD)</i>	27	\$ 4,478	10/31/12	12/30/14	\$ 3,118	-	-	\$ (1,360)	n/a
<i>Vanguard Consumer (VCR)</i>	308	\$ 19,973	04/26/11			\$ 37,758	\$ 17,784		n/a
<i>Vanguard Consumer (VCR)</i>	62	\$ 4,589	10/31/12			\$ 7,601	\$ 3,011		n/a
<i>Vanguard Consumer (VCR)</i>	6	\$ 632	01/22/14			\$ 736	\$ 103		n/a
<i>Vanguard Dividend (VIG)</i>	486	\$ 25,602	08/03/11			\$ 40,241	\$ 14,639		n/a
<i>Vanguard Dividend (VIG)</i>	429	\$ 24,144	06/07/12			\$ 35,521	\$ 11,377		n/a
<i>Vanguard Dividend (VIG)</i>	1734	\$ 98,102	07/10/12			\$ 143,575	\$ 45,473		n/a
<i>Vanguard Dividend (VIG)</i>	538	\$ 31,647	10/31/12			\$ 44,546	\$ 12,899		n/a
<i>Vanguard Dividend (VIG)</i>	812	\$ 59,982	12/10/13			\$ 67,234	\$ 7,251		n/a
<i>Vanguard Dividend (VIG)</i>	266	\$ 19,716	01/22/14			\$ 22,025	\$ 2,309		n/a
<i>Vanguard Dividend (VIG)</i>	107	\$ 7,855	02/14/14			\$ 8,860	\$ 1,005		n/a
<i>Vanguard Dividend (VIG)</i>	56	\$ 4,599	12/30/14			\$ 4,637	\$ 38		n/a
<i>Vanguard Dividend (VIG)</i>	94	\$ 7,748	02/19/15			\$ 7,783	\$ 35		
<i>Vanguard Industrial ETF (VIS)</i>	286	\$ 10,466	04/03/09			\$ 31,168	\$ 20,702		n/a
<i>Vanguard Industrial ETF (VIS)</i>	373	\$ 14,997	05/13/09			\$ 40,650	\$ 25,653		n/a
<i>Vanguard Industrial ETF (VIS)</i>	374	\$ 19,968	07/15/10			\$ 40,759	\$ 20,791		n/a
<i>Vanguard Industrial ETF (VIS)</i>	210	\$ 14,507	10/31/12			\$ 22,886	\$ 8,379		n/a
<i>Vanguard REIT ETF (VNQ)</i>	363	\$ 27,007	05/10/13			\$ 30,263	\$ 3,257		n/a
<i>Ishares S&amp;P Developed (WPS)</i>	194	\$ 7,837	05/10/13			\$ 7,512	\$ (326)		n/a
<i>CBRE Clarion Global (IGR)</i>	779	\$ 7,648	05/10/13			\$ 7,081	\$ (567)		n/a
<i>CBRE Clarion Global (IGR)</i>	2933	\$ 22,560	12/10/13			\$ 26,661	\$ 4,101		n/a
<i>Blackrock Global (MALOX)</i>	933.707	\$ 20,000	05/10/13	02/19/15	\$ 19,057	-	-	\$ (943)	n/a
<i>Powershares Inter Dvd Achiev (PID)</i>	2083	\$ 37,619	02/14/14			\$ 38,056	\$ 437		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	379	\$ 24,986	12/10/13			\$ 28,702	\$ 3,716		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	195	\$ 13,026	01/22/14			\$ 14,767	\$ 1,741		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	529	\$ 35,327	01/22/14			\$ 40,061	\$ 4,734		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	27	\$ 1,789	02/14/14			\$ 2,045	\$ 256		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	61	\$ 4,614	12/30/14			\$ 4,620	\$ 6		n/a
<i>Wisdomtree Total Divid ETF (DTD)</i>	25	\$ 1,896	02/19/15			\$ 1,893	\$ (3)		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	342	\$ 25,056	12/10/13			\$ 29,518	\$ 4,462		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	322	\$ 24,124	01/22/14			\$ 27,792	\$ 3,668		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	175	\$ 13,107	01/22/14			\$ 15,104	\$ 1,997		n/a
<i>Wisdomtree Tr Midcap Div Fc (DON)</i>	21	\$ 1,566	02/14/14			\$ 1,813	\$ 247		n/a

Wisdomtree Tr Midcap Div Fc (DON)	55	\$ 4,669	12/30/14		\$ 4,747	\$ 78	n/a
Wisdomtree Tr Midcap Div Fc (DON)	20	\$ 1,733	02/19/15		\$ 1,726	\$ (7)	n/a
Ishares US Financial Services ETF (IYF)	83	\$ 6,709	01/22/14		\$ 7,442	\$ 733	n/a
Ishares US Financial Services ETF (IYF)	221	\$ 18,382	10/21/14		\$ 19,815	\$ 1,433	n/a
Prudential Jennison Health (PHSZX)	1023.08	\$ 50,428	10/01/14		\$ 57,436	\$ 7,008	n/a
<b>Total</b>		\$ 1,288,499			\$ 1,799,555	\$ 511,055	
<b>Association-Preferred Stock (749-04H01)</b>							
Entergy Mississippi Inc	1000	\$ 26,692	06/23/03		\$ 25,888	\$ (804)	5.79%
Entergy Mississippi Inc	100	\$ 2,665	06/23/03		\$ 2,589	\$ (77)	5.79%
Entergy Mississippi Inc	221	\$ 5,808	10/31/12		\$ 5,721	\$ (87)	5.79%
<b>Total</b>					\$ 34,198	\$ (968)	
<b>Association-Money Market (749-04H01)</b>					\$ 113,548		
<b>749-04H01 Account Total</b>					\$ 1,947,301	\$ 510,088	

**Fees for period:** \$17,067.31

**Fees based on assets:** \$17,067.31

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

**National Association of State Directors of Vocational  
Account Review Summary 07/01/2014 through 02/28/2015**

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

Cost Basis	Buy/Sell	2/28/2015		Gain/Loss
\$711,105	Various	\$730,025		\$18,920

**Managed Fixed Income Portfolio**

**Estimated Accrued Interest** \$2,992  
**Money Market** \$27,714  
**Account Total** \$760,731

**Finance and Audit Committee Appointments:** Two Finance and Audit Committee appointments will expire on June 30, 2015. The first is Bernadette Howard (NASDCTEc Board representative). The second is Mike Mulvihill (Associate Member Representative). These are appointed positions by the NASDCTEc Board of Directors.

The Committee is charged by the Board to:

- Review and recommend approval of an annual operating budget;
- Regularly review financial results;
- Ensure the maintenance of an appropriate capital structure; and,
- Oversee the management of organization-wide financial assets.

The Finance and Audit Committee meet quarterly by conference call and in person at annual conferences, when necessary. The positions are for a two-year term beginning July 1, 2015.

**Discussion:**

Dr. Sheila Ruhland, NASDCTEc Associate Member Board Representative, has volunteered to serve as a NASDCTEc Board Representative to the Finance and Audit Committee.

A request seeking an associate member volunteer went out to the list serve and an updated report will be provided at the NASDCTEc Board Meeting.

In January, Eric Spencer resigned as a NASDCTEc Board Representative on the Finance and Audit Committee. In February, the Executive Committee appointed Rich Katt from Nebraska to fill the position until his NASDCTEc Board term ends on June 30, 2015. Another Board member will need to be appointed to complete the second half of the term from July 1, 2015 – June 30, 2016.

**Board Action:**

- To appoint Dr. Sheila Ruhland to serve as a NASDCTEc Board Representative to the Finance and Audit Committee with a term of July 1, 2015 to June 30, 2017.
- To select from list of interested members, an Associate Member Representative to the Finance and Audit Committee with a term of July 1, 2015 to June 30, 2017.
- To appoint a NASDCTEc Board member to fulfill the balance of two-year term temporarily being filled by Rich Katt. This position must be filled by a NASDCTEc Board member. The term expires on June 30, 2016.

**Auditor Rotation:** The Finance and Audit Committee directed staff to research and provide information, as well as a recommendation related to auditor rotation and selection. The information will be presented to the Finance and Audit Committee in May, guiding the development of a proposed new Board policy to make clear when an RFP to select a (new) auditing firm is needed versus when we should rotate partners within the same firm. Upon approval from the Finance and Audit Committee, the proposed policy will come to the Board for approval. Staff were also directed to benchmark audit pricing and to try to secure a lower fee this

year due to the reduced assets in NCTEF, as well as substantially fewer and less complicated transactions. Staff has secured a \$1,000 or 8% reduction in the audit fee for FY15.

**Rising Star Proposal**  
*Submitted by Steve Voytek, Government Relations Manager and  
Karen Hornberger, Finance and Office Manager*

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The Stars of Education Award program is an annual event in conjunction with our Spring Meeting that recognizes up to three categories – Distinguished Service Congressional, State CTE Director Emeritus, as well as State CTE Director Rising Star. Candidates are nominated by the NASDCTEc membership and are approved by the NASDCTEc Board of Directors.

Traditionally NASDCTEc’s Star of Education Awards program has recognized individuals for service or actions in the past. In order to support NASDCTEc’s advocacy efforts and aid in the cultivation of new CTE champions in Congress, staff recommends the creation of an additional Congressional award to honor members of congress who have demonstrated an interest and / or have supported CTE in some fashion. The **Congressional Rising Star Award** would recognize up to two Members of Congress (one in the House of Representatives and the other in the Senate) who has shown promise in this regard and the award would be used to help develop a deeper relationship with their office as well as grow their interest in CTE.

The proposed criterion for this new award category is below:

**Congressional Rising Star: A Senator or Representative** – (not more than one winner per year)

The nominee must be a current Member of Congress and be nominated by a NASDCTEc member who is either a constituent of the member’s state or district. The nominee must have at least one documented and verifiable action in support of CTE (sponsoring legislation, supporting CTE funding, vocalizing support of CTE etc.). Special consideration should be given to nominees who have a stronger record of support whose actions can be more easily documented.

In keeping with existing awards policy related the current Congressional Award, it is recommended that the Board confer with the NASDCTEc staff in the selection of Senators/Representatives. Also, in the absence of nominations from the membership, NASDCTEc staff may recommend members of Congress for this award.

The candidates would be nominated and approved the NASDCTEc Board of Directors. The estimated budget impact is \$400, to cover the cost of two awards – one for a member of the House of Representatives and the other from the Senate.

**Board Action:** Vote on whether to add this award category.

Vote on recommended award criteria.

## Nominations Clarification

*Submitted by Kimberly Green, Executive Director*

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The form used to nominate NASDCTEc/NCTEF Officers states that “Nominations can only be offered by consortium members.” It is not clear who is covered by the term “consortium members” – all members, including associate and organizational members or just State CTE Directors. The bylaws, which call State CTE Directors “active members” notes that nominations for officers and election of officers are limited to “active members.” The relevant bylaws excerpts are below. It is current practice to limit nominations for the Associate Member position on the NASDCTEc Board to Associate Members (organization and non-organizational).

*A. Active Member. Any of the fifty states, Puerto Rico, the Virgin Islands, that District of Columbia, the Commonwealth of the Northern Marinas, the Federated States of Micronesia, the Republic of Marshall Islands, the Republic of Palau, Guam, or American Samoa is eligible to be an Active Member through its state or territorial agency designated director of career technical education. Active Members shall have all the rights and privileges of membership in the Corporation, including the right to hold office and to vote.*

### *Section 2. Election of Officers and Qualifications*

*Only those individuals who are active members and are the designated Director of Career Technical Education of a state or territorial agency are eligible to be officers. The officers of the Corporation shall be elected by the active members of the membership of the Corporation at the annual meeting of the membership.*

**Board action:** Clarify if associate and/organizational members can nominate candidates to serve as NASDCTEc/NCTEF officers.

**Regional Election: Proposed Tie Vote Bylaws Amendment**  
*Report prepared by Karen Hornberger, Finance and Office Manager*

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**BACKGROUND:** Last Spring, the ballot count for one of the regional Board election resulted in a tie - three votes for each of the two candidates. The bylaws did not provide direction on what to do in this situation. Staff provided the information to the Executive Committee on its call in March 2014 to determine next steps. The Executive Committee decided that in the instances of a tie vote, the State CTE Director with the longest tenure shall be seated as regional representative.

Based on this information, the following Bylaws Article IV Board of Directors; Section 3 Amendment: is recommended:

Section 3.     Election and Term of Office

The terms of the officers serving on the Board of Directors shall be consistent with their terms of office as officers. The directors serving the Associate Members and the eleven regions shall serve three-year terms. It shall be the responsibility of the Active Members in each of the eleven geographic regions to select, at the appropriate membership meeting, their respective directors to serve on the Board of Directors. It shall be the responsibility of the Associate Members to select, at the appropriate membership meeting, their director to serve on the Board of Directors. **In the event of a tie vote, the director with the longest tenure shall be elected to serve on the Board of Directors.**

With the affirmative vote of the Board, this bylaws amendment will be presented to the full membership for a vote at the NASDCTEc Business meeting on April 9, 2015.

**Common Career Technical Core Implementation**  
*Submitted by Kate Blosveren, Associate Executive Director*

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In October 2014, the NASDCTEc Board approved an updated “adoption” policy for the Common Career Technical Core (CCTC), extending it to include a continuum of activities – from full adoption to implementation and endorsement of the end-of-program of study standards (see below.) NASDCTEc intends to align its resources and technical assistance around the CCTC to this continuum.

To date, much of our implementation support has been in the form of research laying the groundwork for what it would take for states to transition to the CCTC from their current standards.

**Existing implementation resources:**

- Alignment studies between each states’ secondary and/or postsecondary standards and the CCTC
- Alignment studies between the CCTC and 18 sets of industry-based standards
- The inclusion of voluntary performance elements and sample indicators for the 16 Career Clusters and 79 Career Pathways to support practitioner-level implementation.

At the request of a State CTE Director, we recently put out a request for information on how states were implementing the CCTC on our listserv. To date, four states have adopted some or all components of the CCTC and another dozen states report having already used the CCTC to inform their standards, with more states planning to do so when their next revision cycle hits. This is based on limited information as only about a quarter of states responded to the request.

Through this request, we attempted to gather state-developed resources around the CCTC, although there are very few in use at this time. As such, below are some resources that are under consideration to support states moving forward:

**PROPOSED implementation resources** (some which are low-cost and others that would require significant staff and/or financial resources; most would support states’ ability to help the CCTC become part of local instruction after adopting, implementing or endorsing the standards.)

- Conduct a survey of State CTE Directors on the use of CCTC, using the elements included in the CCTC continuum to get a better baseline of where states are (and what they most want/need to move forward)
- Crosswalk/alignment between CCTC and the Common Core State Standards/College and Career Readiness Standards (ON HOLD)
- Crosswalk/alignment between CCTC and the Next Generation Science Standards (*ON HOLD*) (*this is related to NGSS work to develop multiple high school pathways including in CTE/STEM areas such as Agriculture, Health Science and Engineering, which will be conducted by Achieve but is currently on hold*)

- Facilitated and closed discussions among early adopters of the CCTC, including the two states that have adopted the Career Ready Practices and the 16 Career Clusters standards and those states that just adopted the Career Ready Practices to share implementation practices, and elevate the most necessary resources
- Short case studies on how states are implementing the CCTC, with an initial focus on aligning current standards and engaging educators in the process.
- Practitioner-focused professional development and/or resources, such as guidance on how to align current standards, curricula, lesson plans and/or assessments to the CCTC (with ACTE, as identified in our joint work plan)
- Update the Career Cluster Plans of Study in alignment with the CCTC (rather than the 2006 Knowledge & Skills Statements), which could break the CCTC down into the specific courses that make up a program of study with aligned credentials
- Development of a rubric for state leaders and practitioners to know if lesson plans, curricula and/or assessments are aligned to the CCTC
- Expand the set of industry-based standards alignments
- Individualized technical assistance, using the CCTC continuum to evaluate the best strategy for a state to approach in adopting, implementing and/or endorsement the CCTC
- Sample language for legislation/regulation, local articulation agreements, program approval, etc.
- Additional communications resources (talking points, statements of support, etc.)

**Questions for Board Discussion:**

- Given the greater interest in the Career Ready Practices (with four states adopting the CRPs and another three or more states using them in their standards revision process), should we focus our efforts and resources to support the implementation of the CRPs?
- What should be done by NASDCTEc/NCTEF independently and what should be done with organizations that have standards completely or very well aligned the CCTC, such as the new NCAE/FFA standards and the MSSC standards?
- One barrier to adoption that has been raised by State CTE Directors and other partners is CCTC's politically charged name, now associated with the CCSS. Should we consider revising the name or even reverting to the Career Cluster Knowledge & Skills Statements? Would that make it more likely for states to adopt, implement and/or endorse the CCTC?
- Do any of the resources listed above stand out as particularly of use?
- What other resources or technical assistance have we not considered or mentioned?

<b>CCTC Continuum</b>				
	<b>NOTE: WHICH CAREER CLUSTER(S) AND/OR CAREER READY PRACTICES</b>	<b>Is/will this happen?</b>	<b>Is this possible?</b>	<b>What do you need from NASDCTEc to facilitate this activity?</b>
<b>FULL ADOPTION</b>				
	Formal adoption at the secondary and postsecondary level			
	Formal adoption at the secondary level			
	Formal adoption at the postsecondary level			
	Formal adoption as requirement for state-developed programs of study			
	Formal adoption as requirement for state-approved programs of study			
<b>IMPLEMENTATION</b>				
	Embedded in local program approval process			
	<i>Locals must provide evidence of alignment to CCTC</i>			
	<i>Locals may provide evidence of alignment to CCTC</i>			
	Embedded in local articulation agreement approval process			
	<i>Locals must provide evidence of alignment to CCTC</i>			
	<i>Locals may provide evidence of alignment to CCTC</i>			
<b>ENDORSEMENT</b>				
	Use of CCTC in standards revision process (among other standards)			
	Use of CCTC in program of study development process (among other standards)			
	Use of CCTC in program of study approval process (among other standards)			
	Use of CCTC in course approval process (among other standards)			
	Use of CCTC in technical skills assessment revision, development, and/or approval process			
	Conduct a crosswalk of CCTC and state standards			
	Offer professional development on use of CCTC to educators/administrators			
	Offer guidance on use of CCTC to educators/administrators through resources, tools			
	Use of CCTC to help analyze secondary-postsecondary alignment of standards, courses, systems			

Since launching in October 2014, the Career Clusters<sup>®</sup> Leadership Pilot (CCLP) has been working to develop resources that are designed to ultimately support state efforts to update and implement the Career Clusters, as well as engage key state-level stakeholders across the participating states.

### **Update on the Work Thus Far**

Consortia of nine states comprise the one-year pilot, and are focusing on issues facing the Manufacturing and Agriculture, Food & Natural Resources (AG) Career Clusters. The consortia members self-selected into two groups to tackle either Manufacturing or AG. Since the October kickoff meeting in Baltimore, Maryland, each pilot has met virtually via conference calls and webinars.

The October kickoff allowed the groups to form consensus around the main issues facing each Career Cluster. During their December calls, the groups prioritized the issues and formed the following subcommittees:

- AG: Work-based Learning (joint effort with Manufacturing); Agriculture-related Labor Market Information; Career Ladders in Agriculture
- Manufacturing: Work-based Learning (joint effort with AG); Course Sequences; Industry-recognized Credentials; Employer Engagement

In January, all of the subcommittees met to discuss how best to support the challenges facing their issue area, and determined the range of potential deliverables that could be developed including case studies, position papers, and a policy framework, as well as a variety of resources for students and teachers. Where possible, deliverable leads were identified for each subcommittee to help drive the work and manage the progress. A brief description follows of each subcommittee's deliverables as well as the related lead person, where applicable (progress of deliverables listed as either "completed", "in progress" or as "potential"):

### **Joint Career Cluster Effort**

#### *Subcommittee on Work-based Learning*

- (In progress) Work-based Learning Policy Framework for Secondary Education: To address the purposes of work-based learning, types of quality experiences, access/barrier policies and regulations, engagement of employers/partners, preparation of teachers, oversight/administration and more. (Lead: Anne Freeman of New Jersey)
- (Potential) Database or Resource for Postsecondary Education: Would offer guidance/rules/best practices for postsecondary institutions looking to create or implement work-based learning programs.

### **Manufacturing Career Cluster**

#### *Subcommittee on Course Sequences*

- (Completed) One-pager “Development through the Program of Study Process”: Using links to national resources, this one-pager leads the user through the complicated, multi-layer process of developing a program of study. States could easily replace the national links with state-appropriate resources. (Lead: Andrew Wermes of Iowa) \*See *handout*
- (In progress) Case Study on Wisconsin’s Rigorous Programs of Study (RPOS) Grant in Advanced Manufacturing: To focus on the process and results that three unique school districts experienced while developing a sequence of courses for an advanced manufacturing program of study as part of the state’s federally funded RPOS grant. (Lead: NASDCTEc/Sharon Wendt of Wisconsin)
- (In Progress) Programs of Study 101 On-demand Webinar: To provide users with the foundational understanding of a program of study. (Lead: NASDCTEc)
- (Potential) Narrated Video/PowerPoint for a Manufacturing Program of Study: To contextualize the Programs of Study 101 webinar for the Manufacturing Career Cluster. (Lead: Sharon Wendt of Wisconsin)

#### *Subcommittee on Industry-recognized Credentials*

- (In progress) NASDCTEc’s Credentials List: To provide a much-needed update to NASDCTEc’s existing list of Manufacturing Credentials. (Lead: Ginny Karbowski of Minnesota)
- (Potential) White paper on variety of state processes to approve industry-recognized credentials: To understand the many ways in which states approve industry-recognized credentials with a particular focus on manufacturing credentials. May also include synthesis of processes into a criteria or key questions for consideration.
- (Potential) Position paper on the need for shorter, stackable certifications: To focus on the particular challenges and needs in the current landscape at the secondary and adult learner levels.

#### *Subcommittee on Employer Engagement*

This subcommittee is unique in that its work is intended to be cross-cutting across the three other Manufacturing subcommittees. As such the proposed deliverables are designed to be scaffolded and then will be used in some way by the other subcommittees.

- (In progress) Employer Engagement Tracker: To track state-level engagement with the manufacturing industry and employers from March to June. Results will be analyzed to determine natural and potential engagement points for CCLP-Manufacturing’s work. (Lead: NASDCTEc)
- (Potential) Messaging tools to be used with manufacturing industry: Based on earlier analysis, tools will be developed to help state leaders explain and introduce CCLP and its deliverables.

### **Agriculture, Food & Natural Resources**

As the smaller pilot (three states involved), the AG subcommittees are in a very different place when compared to Manufacturing. Based on the related data elements of the two initial

subcommittees, the groups decided to combine efforts. However, due to challenges obtaining appropriate data, the subcommittees have chosen to split apart until the data issues are resolved.

#### *Subcommittee on Labor Market Information*

- (In progress) Data project: To identify the AG-related careers that lay outside the realm of the traditional AG industry sector. (Lead: NASDCTEc)

#### *Subcommittee on Career Ladders*

- (In progress) Career Ladders: To replicate Colorado's Manufacturing Career Pathways work to better illustrate AG Career Pathways for students. Once replicated, participating states will create similar tools (Lead: Mike Womochil of Colorado)

### **Challenges**

Broadly speaking, the goals of CCLP were three-fold: 1) to provide an update to the National Career Clusters Framework through new resources and guidance to encourage further implementation in the states; 2) to provide new opportunities to engage employers and business partners around the Career Clusters; and 3) to test proof of concept through a pilot structure modeled after the States' Career Clusters Initiative (SCCI).

There are some structural differences, however, between CCLP and SCCI. During the initial development of the Career Clusters, a lead state was determined for each Career Clusters. With the support of federal grant funds, the lead state convened a national advisory committee representing the full array of stakeholders and industries that were part of that Career Cluster. The grant supported the staff time for the lead state, as well as funding being made available to support travel costs lead state and national advisory committee members. Even with this direct support to states and the national advisory committees, the grant provided for four Career Cluster Coordinators who had the responsibility for up to four Career Clusters – ensuring work met the grant timelines, cultivating national employer/industry association engagement and that there was continuity and consistency in the work across the Career Clusters.

As the grant expired, a transition was made to identify Career Cluster Leaders. These organizations would demonstrate a convening capability and an expertise in the content of the Career Cluster. The goal was to ideally have industry associations serving as the Career Cluster Leader for each Career Clusters. Despite significant effort, that goal was never achieved. No more than six Career Clusters had Career Cluster Leaders at any one time. Some industry associations, like CompTIA and the Home Builders Institute – that had education and training resource development as part of their core mission were willing to step up and serve, despite receiving no funding. But many industries were unwilling to lead an effort that extended beyond the scope of their membership (e.g. National Restaurant Association would not lead the Hospitality and Tourism Career Clusters because they saw themselves as having responsibility for one career pathway, not the full Career Cluster) or were unable to serve due to lack of fiscal support.

With the current pilot, we've seen some encouraging developments related to these goals including increased engagement from states – particularly among non-state director staff, and the general adaptability of the two groups as needs changed.

Conversely, several challenges plagued the pilots' progress along the way:

- *NASDCTEc Involvement and Capacity:* Under its current structure, CCLP is intended to let states take the lead and NASDCTEc play a supporting or facilitating role. However, this has not played out thus far, and it is believed that it may have been overambitious to expect already overburdened state staff to take on additional work. For a variety of reasons, NASDCTEc is still playing a very prominent role in both maintaining momentum and creating/managing deliverables. This work is largely being done through the work of two staff members.
- *Full state team involvement:* Although each state signed an MOU that laid out the expectations of participation, these expectations have not always been met equally, including full state team involvement. It should be noted that some participating states have been very involved and key to sustaining momentum and energy in many respects. Due to the shifting nature of the pilot as it evolved, NASDCTEc hasn't reliably held states to these expectations, but believed the MOU-related challenges were worth noting for Board consideration.
- *Involvement of Business and Industry:* The involvement of business and industry has been a challenge from the beginning of the pilot – and continued to be an ongoing challenge for the Manufacturing Pilot in particular. After the October kickoff meeting, the participation of Agriculture's business partners also dropped off.
- *Generic vs. specific:* The deliverables noted above may seem quite generic in nature. This may be seen as a challenge, because the pilot (and NASDCTEc) at times had trouble specifying how the deliverable applied to the Career Cluster versus it being a pervasive, cross-cutting problem present in all of the Career Clusters.

### **Potential Opportunities**

The last challenge cited above could also be considered more optimistically. The issues identified by both pilots tended to be more generic in nature – perhaps indicating that these deliverables could be contextualized for the remaining 14 Career Clusters and still be relevant. The opportunity here is clear: once the initial work will already be completed, the deliverable only needs to be contextualized to the Career Cluster of choice. These ready-made deliverables would have the ability to become usable resources very quickly. With the reinvention of NCTEF and its strategic focus related to the Career Clusters, this could be a natural activity for the foundation.

Also, there are many potential resources that could be developed from CCLP deliverables such as the work-based learning framework. The framework is being designed to capture the successes and barriers to work-based learning by collecting high-quality examples across the states as well as their challenges. New Jersey, which has some of the most strict child labor laws

in the country, has stepped up to lead this work, and as such will be creating a very strong, far-reaching baseline that could serve as the foundation for many “spin-off” resources.

### **Next Steps**

As mentioned earlier, the pilot is also testing proof of concept, and with the pilot reaching its halfway point, we believe the time is right to begin considering next steps. As with some of the challenges cited above, considerations may include structure, capacity and expectations.

### **Guiding Questions**

1. *Structure/capacity*: Though modeled off the States’ Career Cluster Initiative (SCCI) as noted earlier, employer engagement was also a struggle at times for SCCI. From the beginning of CCLP’s work, states have been hesitant to engage employers for a variety of reasons – that they felt they could represent employers’ views and needs, they wanted to be sensitive to how many requests they ask of their existing partners, or that there was not enough perceived value for employers to be engaged at this time.

As for why CCLP employer participation has dropped, there has been discussion about whether employers were brought into the process too early. At the same time, certain states chose to delay engaging employers, which is now making it challenging to engage them in the work. While there is a subcommittee focused on employer engagement – and each deliverable is expected to be reviewed and/or validated by states’ manufacturing industry partners – it is unclear how effective this will be and unlikely that employer partners will feel any additional “ownership” over the Career Clusters.

- a. **What other strategies should be considered to share and/or validate the work of CCLP with employers and key partners?**
2. *State expectations*: Participating states signed an MOU agreeing to meet certain levels of activity. However, this has not always been met, including the employer participation element. Considerations should be made regarding whether the MOU was too prescriptive, or perhaps the CCLP charge and mission was too nebulous, thus making the expectations unclear.

The CCLP MOU was crafted based on the model used for the SCCI. The MOU expectations included, among others:

- Recruit at least one business/industry partner to participate;
- Recruit State Director’s secondary/postsecondary counterpart to participate;
- Identify a key staff member to help execute the work (which can be the State CTE Director); and
- Invite, as appropriate, other key state and national stakeholders to participate in the Leadership Team’s work.

For perspective, while all nine states returned their MOUs indicating willingness to participate, three states returned signed MOUs including their full state teams (for recruiting purposes, states were allowed to submit the complete team at a later date). Of those three, only one appears to be fulfilling the full terms of the MOU.

- a. Should the CCLP objectives be refined or adjusted? If so, how and in what ways? What is the urgency that needs to be addressed here? Is that reflected in the charge as was approved by the Board last year?**

## Development through the Program of Study Process

### Program Advisory Committee

Program planning requires a committee made up of stakeholders who examine local, regional, and state occupational information while also considering data from government employment, instructional, and classification systems to make recommendations. Technical advisory committees are organized by schools and community colleges for each program area. Career and Technical Education programs aligned with the National Career Cluster Framework.

### National Career Clusters Framework

#### Common Career Technical Core

16 Clusters and 79 Pathways

### Program of Study (POS)

#### Design Framework

### Secondary Program

### Postsecondary Program

### Industry Standards

- [Industry Skill Standards](#)
- [Competency Models](#)
- [Standards Development Using Incumbent Worker Experts](#)

### Implementation Rubric

### Labor Market Data Sources

[Census Industry/Occupation Classification](#)

[Occupational Employment Statistics System](#)

[Career OneStop](#)  
Pathways for Success

[Standard Occupational Classification \(SOC\)](#)  
Office of Management & Budget

[North American Industry Classification System \(NAICS\)](#)  
Office of Management & Budget

[Economic Development and Employer Planning Sys. \(EDEPS\)](#)

[Classification of Instructional Programs \(CIP\)](#)  
National Center for Educational Statistics (NCES)

[National Career Clusters Framework Crosswalks](#)  
Project of National Research Center for CTE and NASDCTEc

### Exploring Occupations/ Training

[Occupational Outlook Handbook](#)

[O\\*NET OnLine](#)

[National Wages and Demand](#)

[Laborshed](#) and [Skillshed](#) Studies

[Employability Skills Framework](#)

[Industry Competency Models](#)

[Career Clusters](#)

[Career Exploration](#)

[Work-based Learning](#)

[Education and Training](#)

[Skill Certification](#)

and [Licensing](#)

[U.S. Department of Education](#)

[Database of Accredited Postsecondary Institutions and Programs](#)

[National Alliance of Concurrent Enrollment Partnerships](#)

[Investing in America's Future – A Blueprint for Transforming CTE](#)

## Maintenance of Effort

*Submitted by Steve Voytek, Government Relations Manager  
and Kimberly Green, Executive Director*

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As Congress continues its consideration of the reauthorization of several major pieces of education legislation, most notably the Elementary and Secondary Education Act (ESEA) and the Carl D. Perkins Career and Technical Education Act (Perkins), “Maintenance of Effort” (MOE) provisions have become part of the debate.

To date, NASDCTEc has refrained from taking a formal position on Perkins MOE due to lack of agreement among our membership on the issue. During the input sessions held to guide the development of the association’s Perkins reauthorization priorities and in ongoing Board discussions, the following perspectives have been raised:

- Current MOE provisions protect existing state investments in CTE;
- Current MOU provisions provide a disincentive for greater levels of state investment in CTE; and
- Current MOE provisions are too rigid (requiring 100% MOE) and should be provide some flexibility/be aligned with MOE provisions of other laws (some other laws require than less 100% MOE).

Given that the current House ESEA proposal includes a recommendation to eliminate that program’s federal MOE requirements, the federal policy context on this issue has changed. Staff recommended to the Executive Committee that it might be time to reconsider taking a formal position on Perkins MOE. During the March Executive Committee call, staff were directed to develop a recommendation that NASDCTEc updates the Perkins reauthorization priorities to include a formal position in support of maintaining current Perkins MOE provisions with the expectation that as Perkins reauthorization nears, State CTE Directors be surveyed to explore and determine the viability and priority of multiple MOE options.

Potential MOE options that could be explored via the survey include:

- Maintain all current Perkins MOE requirements
- Maintain current Perkins MOE requirements but strengthen the waiver options and process (ensuring a more formal and accessible process for states to apply for waivers)
- Allow states to reset their MOE baseline at the start of a new law
- Create flexibility in the MOE provisions to allow states to maintain MOE at a level other than 100% (other federal laws require 90% or 95%)
- Eliminate the MOE requirement entirely

### Board Action:

- Vote to add a provision to the formal NASDCTEc Perkins reauthorization priorities that supports maintaining current Perkins MOE provisions.
- Provide input/brainstorm the array of MOE options.

**Updates:** We are please to share that we have secured an amazing set of **co-conveners**:

- Association for Career and Technical Education
- Council of Chief State School Officers
- Council of State Governments
- National Governors Association
- National State Boards of Education
- National Skills Coalition
- U.S. Chamber of Commerce

We are still working to secure either or both the American Association of Community Colleges and the National Council of State Directors of Community Colleges.

**Location:** The summit will take place at the Gaylord Palms Resort outside of Orlando, Florida October 6 – 8, 2015. A save the date was sent out the membership. The goal is to have Summit registration go live in April due to the pre-event communications work that will take place starting in May. Due to staff negotiations, we were able to reduce direct costs by over \$50,000.

**PwC:** Staff is close to finalizing the contract with PwC. The current estimated fee is \$115,000, down from the initial estimate of \$175,00. A timeline for the pre-event communications, planning, etc. has been started and will kick into high gear after the spring meeting.

**Planning Team:** A planning team will be used by PwC to guide the development of the scenarios that will form the basis of the Summit. Each co- convener will select on individual to serve on this team. Also on the team are the NASDCTEc/NCTEF officers and NASDCTEc’s Executive Director and Associate Executive Director. We are seeking recommendations for two more individuals to serve on this team - individuals who are innovators, who see the big picture and are forward thinking but also have enough awareness about CTE that their contributions can be thoughtful. The team will meet virtually (with the potential for one in –person meeting). The team needs to be finalized in April.

**State “Team” Membership Pilot:** The staff and Executive Committee discussed the strategic plan priority about post secondary engagement, as well as potential governance and membership implications. It was agreed that this work should be informed by the outcomes of the Summit. However, it was recommended that as a pilot, for FY16, each paying state be given an additional associate membership, to accompany the state membership, to be assign to a “counterpart.” This pilot would reflect the organization’s commitment to having both secondary and post secondary leadership engaged in the Summit and may provide useful information to guide a more formal policy going forward.

It is recommended that the complimentary membership be given to the person who would accompany the State CTE Director to the Fall Summit and would be limited to state-level employees who are in leadership/decision-making roles related to Career Technical Education. Essentially, this would be someone who has ‘equivalent’ leadership responsibilities as the State Director but works in another state agency. This could not be assigned to an employee of the State Director, a vendor or a contractor. The

membership would be transferrable. The maximum potential loss of income due to this recommendation is \$4,125 or the cost of a state-level associate membership (\$75) for each state/territory. This recommendation has implications for invoicing and budgeting for FY16 and as such a decision needs to be made on this pilot at the April 2015 Board meeting.

**Board Input needed:**

- Brainstorm suggestions for Summit Planning Team members
- Consider the state “team” membership pilot proposal.
  - What are the benefits and downsides of this proposal?
  - What additional criteria should be put in place for the complimentary associate membership?
  - What criteria should be removed for the complimentary associate membership?
  - Are there other considerations, ideas or concerns that need to be discussed on this proposal?
  - Do we move forward with this pilot for FY16?

In Fall 2015, The National Association of State Directors of Career Technical Education Consortium (NASDCTEc) will host a Summit on the “*Future of Career Technical Education*,” with key partner organizations, to spark consensus and action on how CTE can be strengthened across the country to transform teaching, learning and career readiness for all students.

**Background:** In 2010, NASDCTEc convened a seminal event that resulted in all 50 states and many partners committing to the principles and action steps defined in Reflect, Transform, Lead: A New Vision for Career Technical Education, specifically that, for CTE to reach its full promise, it must:

- Ensure that the U.S. leads in global competitiveness;
- Actively partner with employers to design and provide high-quality, dynamic programs;
- Prepare students to succeed in further education and careers;
- Be delivered through comprehensive programs of study aligned to The National Career Clusters<sup>®</sup> Framework; and
- Be a results-driven system that demonstrates a positive return on investment.

This vision has been impactful, resulting in tangible advances like the Common Career Technical Core and the *CTE: Learning that works for America* communications and branding campaign, both taken up by many states across the country. It has also had many intangible benefits, most importantly signaling to the CTE community clarity in the direction we are moving collectively and to those interested in CTE, that we are committed to high-quality programs.

Now five years later, with more interest and activity around CTE and career readiness than ever before, it is time to revisit this vision. Rather than primarily guiding the CTE community to advance its own work, the new vision will be set by from a broader set of partners who, in turn, will then be truly invested in the process, principles and actions. It is through this shared vision that CTE will meet its full promise.

**The Summit’s Goals:** The Summit will not be a typical conference. Rather, it will be an innovative and interactive year-long effort, beginning with a series of briefing papers and webinars to lay the groundwork, followed by a three-day, hands-on meeting where participants will brainstorm and begin to lay out a new vision for CTE, and culminate in the release of a new “vision” for the future of CTE in Spring 2016.

Over the course of the year, our goals are to:

- Challenge current beliefs and assumptions about what CTE is – and what it can be
- Build and affirm consensus and commitment to the vision for high-quality CTE
- Inform the debate with provocative thought leaders
- Prioritize action steps to achieving the vision, including steps taken at the national level by organizations and associations, as well as within and across states
- Catalyze investments toward a common vision, thus accelerating accomplishment of the vision
- Bring visibility to CTE and our internal commitment to quality

**Partners:** Key to our strategy is having Summit co-conveners. These organizations will not only co-host and actively participate in the in-person Summit meeting, they will also serve as full partners in developing the final “vision for the future of CTE” document and strategy, which they will then co-own.

Specifically, all of our partners will have a vested interest in laying out a comprehensive, coordinated and forward-looking strategy for strengthening CTE. We are currently in the process of securing the partners and plan to have all co-conveners in place by early 2015.

**Summit Structure & Participants:** To ensure that the Summit is truly innovative, engaging and hands-on, we will be limiting participation to no more than 200 individuals. The participants will include:

- The State CTE Directors and their secondary or postsecondary counterparts;
- Leadership/staff from each of the co-convening organizations;
- Selected members from each of the co-convening organizations, such as governors' education policy advisers, state commissioners of education and their delegates, state board of education members, and state business leaders; and
- Invited thought leaders from national organizations representing CTE, education, workforce development, business and industry, and the philanthropic community.

The Summit will be organized to encourage participants to be provocative, open-minded and creative in their ideas, strategies and solutions. It will draw on the expertise in the room, but the facilitation will also push participants to stray from their comfort zone to help envision a bold and progressive future for CTE across the nation.

### **Timeline:**

*Winter 2014/2015: Planning Stage* – Secure co-conveners, facilitator and sponsors; launch planning task force; finalize date, location and invitation.

*April 2015* – Host an input session at NASDCTEc's annual spring meeting to gather feedback on key topics, themes or issues that our membership and key partners believe are influencers or 'on the horizon' and may impact the next vision statement.

*Spring/Summer 2015: Context Phase* – Host webinars on key advances and challenges in CTE, as well as the relevant efforts and initiatives the co-conveners are leading in this area to ready participants for active and full participation in the summit; release short papers to offer useful and diverse insights, considerations and perspectives; survey participants to determine their biases, perspectives, beliefs and priorities around the vision of CTE, future directions, challenges, opportunities and needs.

*Fall 2015* – Host Summit

*Winter 2015/16: Reflection/Development Phase* – Planning task force reflects on Summit and drafts "Future of CTE" vision document, with opportunities for feedback and review from broader community throughout the process.

*April 2016* – Release final "Future of CTE" vision document at NASDCTEc's annual Spring meeting; identify next steps for delivering on the principles and strategies laid out in the vision document by both NASDCTEc and the co-conveners, including re-directing existing work to ensure alignment with the vision and new areas of focus to ensure its implementation across and within states.

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<https://pwc-spark.com/groups/catalyst-us>

# *The art of rapidly designing solutions together*



Catalyst Introduction  
FY15

# *Catalyst delivers Speed.*

*The **visibility** to see the landscape,  
the **flexibility** to recombine capabilities and  
the **velocity** to leverage opportunities in real time.*



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## ***Catalyst delivers Speed***

***Today's business markets are unlike any other.***

Organizations must navigate a constantly changing landscape and make more complex decisions more rapidly, creatively and flexibly than ever before.

***Speed is the key to competitive advantage in this environment.***

Catalyst delivers the tools, methods, ideas and capabilities to enable people and organizations to thrive in an always on, real time, anywhere environment.



## ***From strategy to execution***

*Leverage Catalyst to overcome the challenges of business transformation.*

***“From strategy to execution,  
Catalyst is a creative and engaging  
methodology for solving the complex.”***

From creating a vision and strategy to developing a new product, re-engineering business processes, generating business requirements or designing an IT architecture.

*Catalyst is an instant way to create ownership and a room full of change-enablers and drive lasting change.*

*Catalyst collapses Months into days.*



## ***Creating results by design***

*Apply Catalyst from strategy through execution to increase acceleration and alignment around innovative solutions.*



*Engage diverse stakeholders from your organization with the right experience, analytics and research from PwC.*

*Develop innovative solutions to critical challenges using the Catalyst methodology.*

*Adopt that methodology to build the agility of your organization to address future challenges.*

## ***Designed collaboration creates acceleration***

Catalyst uncovers the ability to crystalize your vision and bring it swiftly into reality. Catalyst creates a breakthrough where previous efforts have failed or an issue is too urgent, complex or political to apply traditional methods.

### ***Catalyst Empowers Organizations***

We begin with the ideal combination of your thought leaders and knowledge. Then we augment and extend their value with our own expertise. We converge all of this into a collaborative environment with the right tools and processes to achieve success. We explore ideas and rapidly simulate solutions to capitalize on opportunities in unique and powerful ways.

Facilitated to fast-track idea generation and decision-making, we compress months of effort into days – gaining fresh insights and inspiring better business outcomes.



***Learn about Catalyst by experiencing it.***



# *Catalyst - The art of the possible*

## ***Accelerate***

Engage large groups of people in complex design and development of solutions. Invest days for what would typically take months.

## ***Collaborate***

Bring together and actively involve 10-100+ participants in the development of the solution to achieve alignment and ownership.

## ***Change***

Creative and engaging approach to solving complex problems creates excitement and interest due to its unique approach. An instant way to create a room full of change-enablers.

## ***Align***

People own what they help create. Catalyst enables buy-in when people champion their ideas and approaches that they help author.

## ***Adapt***

Used for anything from creating a vision and strategy to developing a new product, re-engineering business processes, generating business requirements or designing an IT architecture.



*Catalyst is a large group collaborative design process operating in a customized working environment enabled by a unique set of facilitation techniques to create value from strategy through execution.*



## *For a sense of the Catalyst experience*

[www.pwc.com/us/catalyst](http://www.pwc.com/us/catalyst)

### **Catalyst Methodology in 60 seconds**

<http://www.youtube.com/watch?v=0pOBG82Gti8>

### **The Catalyst Environment**

<http://www.youtube.com/watch?v=m2hnaODt3-0>

### **Catalyst Tools & Technology**

<http://www.youtube.com/watch?v=MXD2-dbFB5g>

### **Catalyst Experience**

<https://www.youtube.com/watch?v=LDsl2yiImvM&feature=youtu.be>

### **Catalyst Collaboration Consulting**

<http://www.youtube.com/watch?v=rpl6Q6SiNSE>

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**Catalyst**

Two-Year NASDCTEc/NCTEF Strategic Plan  
For Period of 2014-2015

Target	Goal	Strategy	Aligned Project Plan	Lead Organization
<b>1. Build and maintain strong and effective partnerships with key education, workforce and economic development, and philanthropy organizations to advance NASDCTEc/NCTEF's</b>				
	1.1 - Develop, maintain and grow partnerships in support of NASDCTEc's federal legislative priorities.			
		1.1.1 - Strengthen and expand partnerships with Congress, federal agencies, education associations, post secondary associations, workforce/economic development, employer-focused organizations, companies and labor unions. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Partnership matrix/advocacy	NASDCTEc
		1.1.2 - Support the ongoing efforts of the Workforce Data Quality Campaign and contribute to its advocacy efforts to support collection of nationally comparable, valid and reliable data.	Partnership matrix/advocacy	NASDCTEc
		1.1.3 - Convene CCSSO, NGA and NASBE to develop a common policy platform to for the state role in Perkins.	Advocacy	NASDCTEc
	1.2 - Develop, maintain and grow partnerships in support of NASDCTEc's state policy initiatives/support.			
		1.2.1 - Develop a state policy work plan, to include the identification of priority partner organizations to collaborate with in support of increasing access to high-quality CTE and state adoption/implementation of CCTC.	State policy strategy	NASDCTEc and NCTEF

		1.2.2 - Partner with key organizations on state policy initiatives (e.g. competency-based education, CCSS, CCTC, post secondary alignment). Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	State policy strategy	NASDCTEc and NCTEF
		1.2.3 - Engage and support the National Governors Association "America Works" campaign, ensuring positive positioning for CTE.	Partnership matrix	NCTEF
	1.3 - Engage in strategic partnerships with business-led organizations to strengthen business (including or and workforce development) involvement in the Career Technical Education enterprise.			
		1.3.1 - Strengthen and expand partnerships with employer-focused organizations. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Partnership matrix	NASDCTEc and NCTEF
		1.3.2 - Highlight strong employer-education partnerships through multiple communications strategies (e.g. Friends of CTE blog series, papers, case studies, resources, etc.).	Case-Making	NASDCTEc and NCTEF
		1.3.3 - Develop case-making resources, targeted to the business community, designed to promote awareness of and seek support for CTE.	Case-Making	NASDCTEc and NCTEF
		1.3.4 - Conduct Career Clusters governance pilot.	CC Governance	NCTEF
		1.3.5 - Identify employer champions (one for each Career Cluster) to feature in the roll out the business resolution campaign results.	Business Resolution	NCTEF
		1.3.6 - Partner with the CTSOs to leverage their employer partnerships for advocacy and advancement of high-quality CTE.	Advocacy	NASDCTEc
	1.4. - Engage in strategic partnerships that raise the visibility of Career Technical Education and NASDCTEc/NCTEF as a leader in the field (e.g., Advisory Boards)			

		1.4.1 - Utilize and manage the partnership matrix to expand and strengthen relationships with external organizations.	Partnership matrix	NASDCTEc and NCTEF
		1.4.2 - Create and utilize criteria to guide decision-making around partnerships.	Partnership matrix	NASDCTEc and NCTEF
		1.4.3 - Determine feasibility of CRPC continuation and focus.		NCTEF
		1.4.4 - Engage DOL, DHHS and other federal agencies to support the alignment and understanding of "career pathways" and other related initiatives	Partnership matrix	NASDCTEc and NCTEF
	1.5 - Develop, leverage and maintain partnerships that support NASDCTEc efforts to provide professional development to our members, their staff and other key CTE stakeholders			
		1.5.1 - Conduct and support the CORD and NASDCTEc CP workshops/webinars.	CP Workshops	NCTEF
		1.5.2 - Strengthen and expand partnerships with key education/workforce development organizations, institutions, etc. to support effective PD opportunities. Utilize the partnership matrix to target, manage and monitor partnership effectiveness.	Partnership matrix	NCTEF
	1.6 - Collaborate and coordinate with ACTE on key initiatives and advocacy efforts in support expanded access to and quality of CTE.			
		1.6.1 - Co-convene a joint Executive Committee meeting between ACTE and NASDCTEc/NCTEF.	ACTE/NASDCTEc	NASDCTEc and NCTEF
		1.6.2 - Develop a plan to implement the recommendations and outcomes from the joint ACTE/NASDCTEc Executive Committee.	ACTE/NASDCTEc	NASDCTEc and NCTEF
		1.6.3 - Jointly develop an operational definition of and criteria for "high-quality CTE programs" to inform legislative priorities, professional development, etc.	ACTE/NASDCTEc	NASDCTEc and NCTEF
2. Engage in the formation and dissemination of legislation and public policy that impacts education, economic, and workforce development in support of expanded access to and				
	2.1 - Develop federal and state legislative priorities that support, promote and increase access to high-quality Career Technical Education.			

		2.1.1 - Solicit information from membership about reauthorization priorities through surveys, working groups, and other means.	Advocacy	NASDCTEc and NCTEF
		2.1.2- Develop and disseminate legislative language to Congressional and federal policymakers, as well as other stakeholder associations, to influence the reauthorization process.	Advocacy	NASDCTEc
		2.1.3 - Engage members of Congress and staff during reauthorization through briefings, school visits, and other advocacy activities.	Advocacy	NASDCTEc
		2.1.4 - Host regular Perkins coalition conference calls to support organizational priorities and unify advocacy efforts during reauthorization.	Advocacy	NASDCTEc
		2.1.5 - Develop a state policy work plan, that may include the creation of sample state legislation and policies in support of increasing access to high-quality CTE and adoption/implementation of CCTC and Career Clusters	State Policy Strategy	NASDCTEc and NCTEF
	2.2 - Support NASDCTEc's members to advance and implement federal and state policies and legislation that promote and increase access to high-quality Career Technical Education.			
		2.2.1 - Host quarterly advocacy calls for State Directors and staff.	Advocacy	NASDCTEc
		2.2.2 - Develop and host resources and workshops related to Perkins implementation following reauthorization.	Advocacy	NASDCTEc

		2.2.3 - Develop pre-recorded webinars on relevant policy and legislative topics of interest to members.	Pre-recorded webinars	NASDCTEc and NCTEF
		2.2.4 - Connect Congressional staff with their State Director following each Hill visit (focus is primarily on Senate but may also include key House leadership).	Advocacy	NASDCTEc
		2.2.5 - Develop a new section of the website focused on state CTE policy, that includes a state policy database.	State policy strategy	NASDCTEc and NCTEF
		2.2.6 - Create resources to support state adoption and implementation of the CCTC/Career Clusters.	State policy strategy	NCTEF
		2.2.7 - Conduct an initiative to put in place appropriate measurements of the CCTC.	State policy strategy	NCTEF
		2.2.8 - Create resources and supports for states to connect CTE with broader reform efforts (CCSS, NGSS, STEM, competency-based).	State policy strategy	NCTEF
	2.3 - Leverage and expand the use of the CTE: Learning that works for America campaign to support public policy and advocacy efforts.			
		2.3.1 - Launch a "sign-on" resolution campaign to cultivate and demonstrate employer/business for high-quality CTE.	Business Resolution	NASDCTEc
		2.3.2 - Launch a national campaign to get every member of Congress to see a CTE program.	Advocacy	NASDCTEc
		2.3.3 - Develop and maintain state profiles/fact sheets that explain and promote CTE in each state.	Case-making	NASDCTEc and NCTEF
		2.3.4 - Develop a set of federal, state and employer-focused case-making resources that articulate what is high-quality CTE and feature examples of high-quality programs.	Case-making	NASDCTEc and NCTEF

		2.3.5 - Engage in the Industry Workforce Needs Council campaign to promote CTE.	Advocacy	NASDCTEc
		2.3.6 - Launch and manage the Excellence in Action Awards program, utilizing these examples in advocacy and communications initiatives.	Awards; Advocacy	NCTEF
		2.3.7 - Develop a media relations strategy and implementation plan, ensuring connections to our federal/state advocacy work, CCTC and CTE: Learning that Works Campaign.	Communications/Marketing	NASDCTEc
		2.3.8 - Create a communications taskforce of state communications staff. The taskforce will guide the work of NASDCTEc/NCTEF in the development of casemaking tools and resources, as well as expanding state implementation of the CTE: Learning that works for America campaign.	Communications/Marketing	NASDCTEc
		2.3.9 - Launch redesigned website.	Website revision	COMPLETED
		2.3.10 - Maintain and expand social media strategy to engage broader set of stakeholders.	Communications/Marketing	NASDCTEc
<b>3. Provide, encourage and support professional development to expand the skills, content knowledge and leadership of NASDCTEc members.</b>				
	3.1 - Develop, arrange and/or deliver resources to expand the skills, content knowledge and leadership of NASDCTEc members.			
		3.1.1 - Conduct periodic webinars on relevant topics for NASDCTEc members	Webinars	NASDCTEc
		3.1.2 - Build an online library of members-focused resources. (e.g. overview of key initiatives, pieces of legislation, member benefits, etc.)	Communications/Marketing	NASDCTEc and NCTEF

		3.1.3 - Build online library of pre-recorded webinars to educate the public about CTE.	Pre-recorded webinars	NASDCTEc and NCTEF
		3.1.4 - Deliver timely information/resources to NASDCTEc's members and relevant stakeholders (including the blog, social media resources, etc.).	Communications & Marketing/Webinars & Publications	NASDCTEc and NCTEF
		3.1.5 - Develop and implement an annual editorial schedule resulting in a coordinated set of resources to include briefs, webinars, on-demand webinars, resources, etc.	Publications; Webinars; Communications & Marketing	NASDCTEc and NCTEF
	3.2 - Develop, arrange and/or host convenings to expand the skills, content knowledge and leadership of NASDCTEc members.			
		3.2.1 - Conduct Spring 2014 meeting.	Spring 2014	NASDCTEc
		3.2.2 - Conduct 2014 Achieving Excellence Institute.	CCI 2014	COMPLETED
		3.2.3 - Conduct Fall 2014 meeting.	Fall 2014	NASDCTEc
		3.2.4 - Develop a strategy that reconsiders reconvenings of all states for future (Summit, re-conceptualized spring and fall meetings, Institute).	Vision Summit	NASDCTEc and NCTEF
		3.2.5 - Host (virtual or in-person) convening of members to support planning and implementation of next federal CTE legislation.	Reauthorization PD	NASDCTEc
	3.3 - Develop and implement a robust, year-round intensive program to support the on-boarding and leadership development of State CTE Directors.			
		3.3.1 - Develop and implement a plan to a more formalized on boarding process for new members to NASDCTEc.	On boarding, Membership	NASDCTEc
		3.3.2 - Develop and implement a plan to support skills and leadership development of State Directors/state leaders throughout the year.	Leadership Program	NCTEF
	3.4 - Implement a member engagement strategy to ensure NASDCTEc is addressing their needs and provide opportunities for members to inform NASDCTEc's work			
		3.4.1 - Conduct bi-annual member services survey to determine member satisfaction and priorities.	Member services survey (in Membership Project Plan)	NASDCTEc

		3.4.2 - Conduct a quarterly assessment of staff interaction/support/member engagement.	None needed	NASDCTEc
		3.4.3 - Develop an annual report to the members identifying accomplishments and progress toward accomplishment of goals.	Annual report	NASDCTEc
		3.4.4 - Annually identify member task forces to accomplish priority goals.	None needed - embedded in others	NASDCTEc
		3.4.5 - Develop an electronic newsletter that shares NASDCTEc and state accomplishments, as well as articulates how members can use NASDCTEc resources.	Communications/marketing	NASDCTEc
	3.5 - Actively encourage alignment and collaboration between secondary and post secondary leaders within and beyond NASDCTEc's members			
		3.5.1 - Convene a post secondary engagement task force to advise NASDCTEc on how to better engage post secondary CTE stakeholders, what resources and PD should be offered to support secondary-post secondary alignment, and what key partnerships need to be made.	Post secondary task force	NASDCTEc
<b>4. Develop and implement actions that address NASDCTEc's organizational governance and fiscal security that ensures successful accomplishment of NASDCTEc/NCTEF's</b>				
	4.1 - Review NASDCTEc/NCTEF Board of Directors' governing structure, policies and bylaws to ensure alignment with strategic goals.			
		4.1.1 - Convene a task force to analyze the existing Board governance model and develop recommendations on issues such as composition, role and commitment of public members, etc. (note: may include organizational name change).	Board task force	NASDCTEc and NCTEF
		4.1.2 - Conduct a comparative analysis of NASDCTEc/NCTEF's income sources and distribution to like-sized and -minded organizations and determine components and feasibility of fee-for-service model.	Board task force	NASDCTEc
	4.2 - Review NASDCTEc/NCTEF membership structure to strengthen the organization's fiscal security and membership base			
		4.2.1 - Convene a task force to develop a set of recommendations for an updated state team membership model that supports both secondary and post secondary state Career Technical Education leadership.	Board task force	NASDCTEc
	4.3 - Develop and implement a fundraising plan to support public policy, partnerships, and professional development priorities.			
		4.3.1 - Develop and implement a Year-Round Sponsorship plan (pending approval from the Board)	Sponsorship Program	NASDCTEc

		4.3.2 - Develop a fundraising plan, to include identifying priority fund-able projects, cultivate relationships with key funders, etc.	Fundraising	NCTEF
<b>5. Implement Ongoing Core Work of NASDCTEc/NCTEF</b>				
	5.1 Ensure effective, accurate, legally compliant and efficient management of NASDCTEc/NCTEF.			
		5.1.1 - Ensure membership contact information is accurate and up to date - listservs, database of website, constant contact.	Core services	NASDCTEc
		5.1.2 - Ensure that all Board approved policies are implemented properly and completely.	Core services	NASDCTEc and NCTEF
		5.1.3 - Standard operations manual (SOP) is maintained and reflective of current policy and practice.	Core services	NASDCTEc and NCTEF
		5.1.4 - Effective use of Basecamp/Backpack as project management and communications tools.	Core services	NASDCTEc and NCTEF
		5.1.5 - Establish and implement an effective formal on boarding process for Board members and officers.	Core services	NASDCTEc and NCTEF
		5.1.6 - Manage the annual nominations and elections process in a fair and compliant manner.	Core services	NASDCTEc and NCTEF
		5.1.7 - Maintain the standard operations manual, ensuring it is regularly updated to reflect current content, passwords and relevant files. This should include project planning/meeting procedures.	Core services	NASDCTEc and NCTEF
	5.2 Ensure that the finances of the organization are accurate and in compliance with all legal requirements.			
		5.2.1 Financial tools and documents are used in accordance with Board-approved policies, including the investment policy statement, and ensure all transactions are legally compliant, accurate and ensure necessary separate of duties (checks/balances).	Core services	NASDCTEc and NCTEF
		5.2.3 - Conduct an annual audit and implement any recommendations or management notes.	Core services	NASDCTEc and NCTEF
		5.2.3 - Maintain an effective grants management system.	Core services	NASDCTEc and NCTEF
		5.2.4 - Maintain appropriate security measures to ensure passwords, employee privacy, etc. are protected.	Core services	NASDCTEc and NCTEF
		5.2.5 - Implement measures to ensure appropriate back up of all financial information, resources, etc.	Core services	NASDCTEc and NCTEF
	5.3 Ensure that all human resource functions are handled in a timely, accurate and legal manner.			

		5.3.1 - Human resource tools and documents are used in accordance with policies/legal requirements.	Core services	NASDCTEc and NCTEF
		5.3.2 - Establish an implement a formalized staff on boarding process.	Core services	NASDCTEc and NCTEF
		5.3.3 - Annually conduct a human resources briefing to review any personnel policy or benefits changes.	Core services	NASDCTEc and NCTEF
		5.3.4 - Accurate and timely benefits management - retirement, transportation subsidy, payroll, etc.	Core services	NASDCTEc and NCTEF
		5.3.5 - Implement an annual performance evaluation system.	Core services	NASDCTEc and NCTEF
		5.3.6 - Annually review personnel policies and ensure they are legally compliant.	Core services	NASDCTEc and NCTEF
		5.3.7 - Ensure staff are implementing the necessary computer back ups to protect the content and intellectual property of the organizations.	Core services	NASDCTEc and NCTEF
		5.3.8 - Maintain an online, accessible standard operations manual. Coordinate updates with staff on a regular basis.	Core services	NASDCTEc and NCTEF
	5.4 Effectively manage the Career Cluster Products			
		5.4.1 - Ensure inventory controls are properly implemented.	Core services	NASDCTEc and NCTEF
		5.4.2 - Provide customer service and support that ensures high levels of satisfaction.	Core services	NASDCTEc and NCTEF
		5.4.3 - Conduct annual physical inventory.	Core services	NASDCTEc and NCTEF
		5.4.3. - Develop a plan for phasing out the Career Cluster product inventory.	Core services	NASDCTEc and NCTEF
		5.4.4 - Pilot test the Cafe Press online store.	Core services	DISCONTINUED
	5.5 - Ensure resources, communications and tools developed are high-quality, error-free, support the brand and consistent with the style guide.			
		5.5.1 - Put in place a formal editing process for all written resources, communications and tools.	Communications/Marketing	NASDCTEc and NCTEF
		5.5.2 - Maintain a style guide and ensure staff are properly briefed on the use of the guide.	Communications/Marketing	NASDCTEc and NCTEF

		5.5.3 - Maintain and manage the CC and CTE style guides (signed by users), including managing user agreements.	Communications/Marketing	NASDCTEc and NCTEF
		5.5.4 - Put in place a content management/maintenance schedule/ system for the website.	Communications/Marketing	NASDCTEc and NCTEF