



The Association for Career and Technical Education

Board of Directors
Leadership Handbook

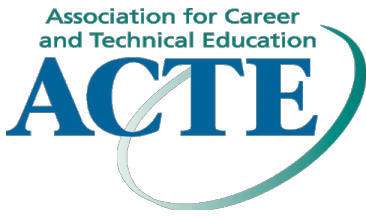
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TABLE OF CONTENTS

Contents

Table of Contents	2
Welcome.....	4
ABOUT THE ORGANIZATION.....	5
ACTE Mission, Vision and Strategic Direction	6
ACTE Board Statement on Diversity and Inclusion.....	6
ACTE Structure	8
ACTE Membership Information.....	13
Hierarchy of Governing Documents.....	17
Strategic Plan.....	19
ABOUT THE BOARD	20
A Guide for Board Members.....	21
ACTE Board Leadership Roles	24
Officers	25
Roles and Responsibilities:.....	26
The Executive Committee.....	30
Roles and Responsibilities:.....	33
Board Responsibilities: Overview & Resources	34
Serving as a Committee/Task Force Liaison	41
End of Term Transition.....	43
ABOUT THE STAFF.....	44
Finance and Operations Department.....	45
Leadership Department.....	47
Programs Department.....	50
Communications Department.....	50
Public Policy Department.....	52
Strategic Partnerships	55
LEADERSHIP TIPS.....	60
Leadership Tips and Resources	61
Four Considerations to Making an Informed Decision.....	63
Successful Volunteer Boards	64
Volunteer/Staff Partnership.....	65
APPENDIX.....	67
A Brief History of ACTE.....	68
Parliamentary Procedure Made Easy	79
Introduction:.....	79
Why use Parliamentary Procedure?.....	79
The Basics – The Main Motion.....	79
Subsidiary Motions.....	81

Incidental Motions 82
Privileged Motions 83
Random Additional Tips 83
Table of Motions 84
Financial Overview..... 86
Monthly Deadlines 86
Three Types of Accounts 86
Operating Accounts..... 86
Designated and Temporarily Restricted Accounts 86
Unlike Operating Accounts..... 86
Developing a Budget..... 87
ACTE Restricted and Designated Funds..... 88
Account Codes 89
Division/Region Meetings 98
VISION Program Sessions..... 98
VISION Billing 99



WELCOME

As a member of the ACTE Board of Directors, you have been elected to one of the highest offices of the Association. The membership of ACTE has instilled in you their trust to deliberate carefully, explore issues fully and make decisions in the best interest of the profession and the Association.

Your position on the ACTE Board of Directors carries extensive responsibilities. Your commitment to the mission and purpose of the Association is critical. You are one of the most visible representatives of the Association and the profession. Your knowledge of the Association must be complete, and your voice must be one of consistency. It is our hope that this Leadership Handbook will give you the information you need to have a successful and rewarding term on the ACTE leadership team.

This handbook has been prepared to provide you a sense of continuity and awareness of all aspects of ACTE, including expectations of leadership, the governance and staff structure, policies and procedures and association programs and services.

It is important to note that this guide only represents *one piece* of the resources available to Board members. Extensive resources that cover the wide multitude of activities you will be engaged in as a Board member are available on the *Board Only* section of the ACTE website: www.acteonline.org/board_only, which can only be accessed by ACTE Board members and will be referred to throughout this guide.

We ask that you share with us any thoughts or suggestions you have to enhance the value of this handbook or other association resources.

About the Organization

ACTE MISSION, VISION AND STRATEGIC DIRECTION

ACTE believes strongly in the integrity of its mission and work. To that end, ACTE adheres to a strict code of ethics and stands firmly by its bylaws.

A. Mission:

The mission of the Association for Career and Technical Education is to provide educational leadership in developing a competitive workforce.

B. Purposes

1. Leadership and Program Improvement. To foster excellence in career and technical education.
2. Policy Development. To advocate national public policy to benefit career and technical education.
3. Knowledge Connectivity. To act as a clearing-house for education and information relating to all aspects of career and technical education, while providing an access for professional development.
4. Awareness. To create public awareness of career and technical education.

ACTE Vision Statement

The vision statement of ACTE is to empower educators to deliver high quality CTE programs that ensure all students are positioned for career success.

ACTE is dedicated to the advancement of career and technical education by:

- a. Providing high quality professional development and instructional resources for members.*
- b. Serving as a primary source of leadership development for members.*
- c. Promoting the value of career and technical education through advocacy and public awareness activities.*

ACTE Board Statement on Diversity and Inclusion

The ACTE Board of Directors is deeply appreciative of the Diversity Task Force's hard work, time and energy in developing recommendations for the Board to consider. Diversity and inclusion are important issues for ACTE. Building upon the work of the Diversity Task Force, the ACTE Board of Directors developed a Board Statement to address diversity and inclusion.

ACTE promotes high quality CTE programs for diverse audiences. We continue to build an inclusive culture that encourages, supports and celebrates the diversity of the CTE community. We are committed to inclusion, access, equity and diversity throughout our organization.

ACTE Strategic Plan

1. Member Value & Engagement
 - a. Build ACTE's organizational capacity through a state, regional, and divisional support framework
Develop a campaign to target new/potential members
 - b. Develop a comprehensive system for identifying and onboarding potential members (all types)
Retain members by communicating value, engaging current members, and delivering an easy, intuitive renewal process (all types)

2. Professional & Leadership Development

- a. Create a continuum of high-quality professional development and leadership development experiences delivered through a diverse, but aligned set of channels
- b. Develop an intuitive member profile that recognizes and encourages professional and leadership development planning and participation

3. Advocacy & Awareness

- a. Develop an action plan to define the critical role of and enhance the public dialogue on CTE with targeted audiences
- b. Educate and mobilize stakeholders for positive legislative impact at the state and federal level

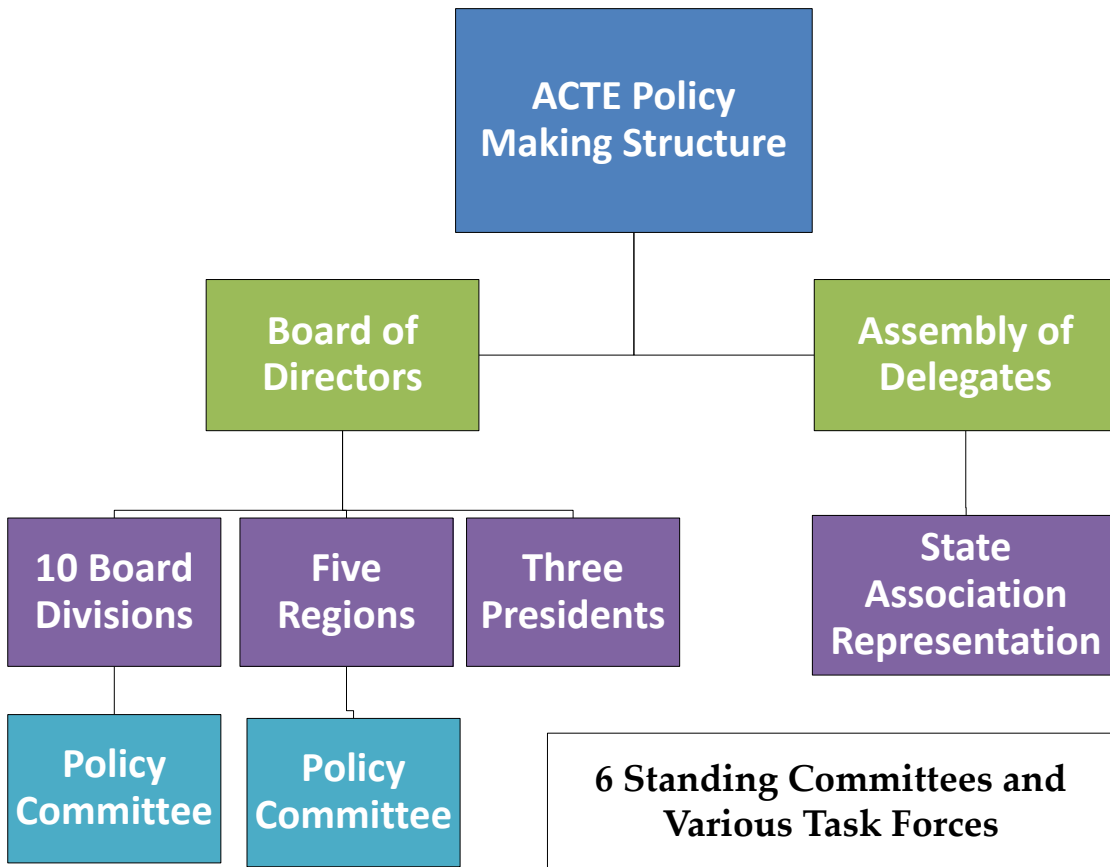
4. Strategic Partnerships

- a. Identify and target businesses, organizations, schools and governmental entities for mutually beneficial partnerships
- b. Align partnerships to member, division and organization needs

5. Innovation

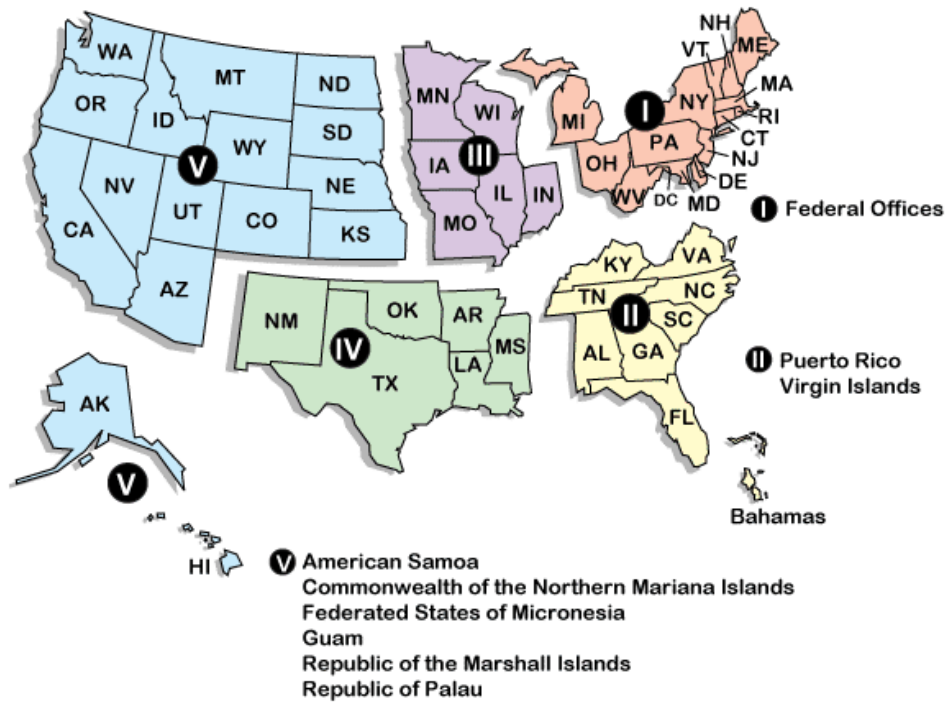
- a. Strengthen ACTE's capacity to identify and source models of innovation and emerging trends impacting CTE
- b. Embed strategies for showcasing, fostering, scaling, and sustaining innovative approaches to CTE through ACTE's delivery systems and partner channels

ACTE STRUCTURE



Regions

When you become an ACTE member, you are automatically a member of one of five geographic regions, depending on the state in which you live.



Region leadership is composed of:



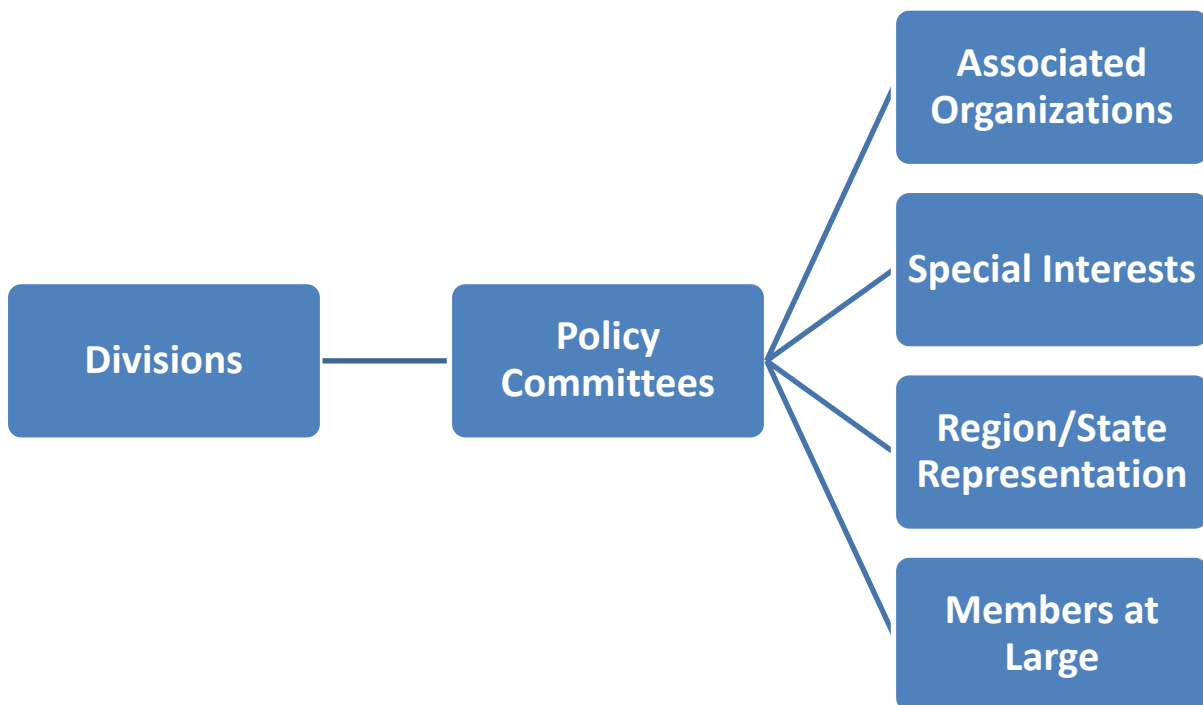
****Some regions have all states represented on policy committees, while others rotate representation among the member states.**

Divisions

When you become an ACTE member, you can choose to be a member of a Division, including:

- Administration
- Agricultural Education
- Business Education
- Engineering and Technology Education
- Family and Consumer Sciences Education
- Counseling and Career Development
- Health Science Education
- New and Related Services
- Postsecondary, Adult and Career Education
- Trade and Industrial Education

Division leadership is composed of:



ACTE Committees/Task Forces

ACTE's standing committees and task forces are the workforce of the Association and play an important role in implementing the Association's strategic plan.

What are the differences between committees and task forces?

	Standing Committees	Task Forces
Composition	Groups of volunteers who work on an ongoing issue for the Association	Groups of volunteers who work on a pressing issue or specific project for the Association
Term	Typically two-year terms Can serve up to two terms	As long as it takes to accomplish the task (anywhere from several months to several years)
Time Commitment	Attend VISION meeting in person, as well as participate in conference calls as needed	Participate in conference calls, Webinars as scheduled. Some task forces meet at VISION or NPS
Appointment	Appointed by Region/Division vice president	Applicants volunteer and are selected based on experience and expertise

Why Committees and Task Forces are Essential

1. Operating systems of an association
2. Involve members in the development and delivery of services
3. Represent member opinion to decision-makers
4. Means to better serve member needs through interaction
5. Opportunity for group problem-solving
6. Forum for the presentation of multiple points of view
7. Training ground for future leadership
8. Proving ground for emerging leaders to test and refine their new skills and abilities

How Committees and Task Forces Support the ACTE Strategic Priorities

1. Identify potential activities to support the priorities
2. Communicate to state/Division/Region members the strategic agenda for ACTE
3. Evaluate, comment and provide feedback to the Board of Directors on the progress of the priorities
4. Provide input on new strategic priorities to be considered by the Board of Directors

Standing Committees

ACTE has the following standing committees:

- Audit
- Awards
- Bylaws
- Nominating

In order to be a part of a committee, a member must be appointed by their Region/Division Vice President. Committee vacancies are filled between April-June every year; new committee terms begin July 1 and last two years. A committee member may serve up to two terms on any committee.

Regions have representatives on all four standing committees. Divisions have representation on three of the standing committees. Below is a list of the ACTE Standing Committees and which committees have Region only representation as opposed to Region and Division representation:

<i>Name</i>	<i>Region representation</i>	<i>Division representation</i>
Audit	X	--
Awards	X	--
Bylaws	X	X
Nomination	X	X

Task Forces

Task Forces are created by the ACTE President and members are recruited based on experience and expertise in the area.

ACTE Membership Options

Individual 5 types

Educational Institutions

Any school district, technical and career center, curriculum center, community college or university.

National Affiliate Organizations

Any national not-for-profit organization that has a professional interest in activities that foster the improvement and expansion of CTE.

Corporate

Available to corporate/ business entities, government agencies and branches of the military.

Professional
Individuals actively employed in or concerned with CTE.

Retired
Individuals retired from active employment, and who have been an ACTE professional member for at least one year.

Life
This category is no longer offered as a membership type, unless already registered. Life members continue to receive most benefits.

Student
Individuals who are enrolled as full-time students but are not working full time in CTE.

International
Individuals concerned with CTE who reside outside of the USA and in a country that is not part of an ACTE Region.

The Value of Membership

- Offer a collective, strong voice for CTE
- Access to relevant and current information
- Recognition of profession
- Provider of professional development
- Access to member expertise and experience

The Benefits of Belonging

- Saves you time and money
- Provides you access to products and services at reduced costs
- Is your voice on issues that are important to you
- Facilitates your networking needs with colleagues across the country on different issues
- Keeps you current professionally

Why Join Your Organization?

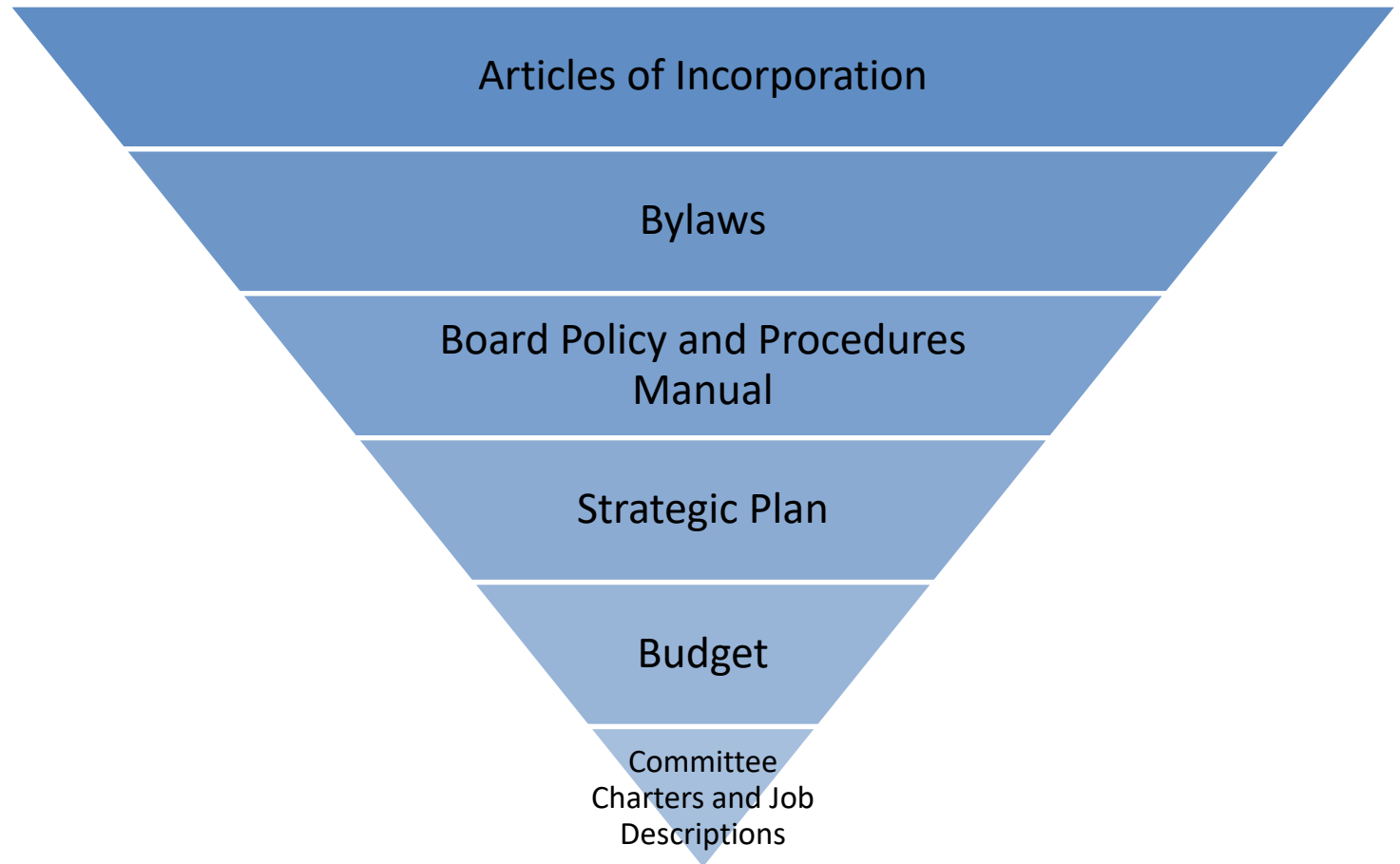
- Advance your career
- Expand your CTE knowledge and keep current on the latest information and techniques
- Save money on products and services you need
- Network with experts across the country
- Be part of your professional group

<i>Membership Types</i>	<i>Description</i>	<i>Dues</i>	<i>Products</i>	<i>Eligibility for ACTE Activities</i>
Professional	Individuals actively employed in or concerned with CTE.	\$80	<ul style="list-style-type: none"> • <i>Techniques</i> • Electronic CTE Newsletters • Travel AD&D Insurance • Member discounts* 	<ul style="list-style-type: none"> • Eligible for award recognition • Eligible to vote in the Board of Directors election
Retired	Individuals who are retired from active employment and have been an ACTE Professional Member for one year.	\$31	<ul style="list-style-type: none"> • <i>Techniques</i> • Electronic CTE Newsletters • Travel AD&D Insurance • Member discounts* 	<ul style="list-style-type: none"> • Eligible for award recognition • Eligible to vote in the Board of Directors election
Life	No longer offered as a membership type unless already registered. Life Members continue to receive most benefits.	N/A	<ul style="list-style-type: none"> • <i>Techniques</i> • Electronic CTE Newsletters • No Insurance • Member discounts* 	<ul style="list-style-type: none"> • Eligible for award recognition • Eligible to vote in the Board of Directors election
Student	Individuals who are enrolled as full-time students but not employed full-time in CTE.	Free	<ul style="list-style-type: none"> • Electronic <i>Techniques</i> • Electronic CTE Newsletters • No Insurance • Member discounts* 	<ul style="list-style-type: none"> • Ineligible for award recognition (must be full time in the classroom) • Ineligible to vote in the Board of Directors election
International	Individuals concerned with CTE who reside outside of the USA and in a country that is	\$60	<ul style="list-style-type: none"> • Electronic <i>Techniques</i> • Electronic CTE Newsletters • No Insurance 	<ul style="list-style-type: none"> • Ineligible for award recognition (must in a Region)

	not part of an ACTE Region.	<ul style="list-style-type: none"> • Member discounts* 	<ul style="list-style-type: none"> • Ineligible to vote in the Board of Directors election
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*Member discounts on CareerTech VISION, Regional Conferences, NPS, Best Practices and other ACTE event registrations and bookstore purchases.

HIERARCHY OF GOVERNING DOCUMENTS



Articles of Incorporation

ACTE is a not-for-profit corporation established in the state of Indiana in 1929. The Articles of Incorporation include the name of the corporation, purposes for which it was formed and a statement that all rules of the corporation are to be embodied in the bylaws. A copy of the Articles of Incorporation is retained in the ACTE Headquarters.

Bylaws

The Bylaws of an incorporated not-for-profit organization usually include provisions with respect to:

- * The purpose of the organization
 - * Qualifications of membership
 - * The election and the duties of its directors
 - * The role of the members (if any)
 - * Meetings of members and directors, including notice, quorum and voting
 - * The role of executive and other committees
 - * The role and relationship of the state associations and affiliated organizations
 - * The organization's fiscal year
 - * How the Bylaws are amended
- * Indemnification and dissolution procedures

Bylaws are living documents subject to change as organizational needs change, but there should be relatively few substantive changes. Operational details belong in the Board Policy and Procedures Manual.

NOTE: Only the members of the Association can change the Articles of Incorporation and the Bylaws.

Board Policy and Procedures Manual

The Policy and Procedures Manual includes those rules that are set by the Board of Directors and can only be changed by the Board. Policies are established by the Board to guide the Association so that it runs effectively, efficiently, legally and ethically. Policy decisions affect the organization as a whole and establish the framework within which volunteers and staff can lead and manage the programs and services of the Association.

Included in the Manual are the standing rules for the conduct of the Board of Directors. Also included are those standard operating procedures that the Board desires to have controlling authority over (i.e. investment guidelines, creation of divisions, election procedures, expense reimbursement, etc.) Specific action items or annual decisions are generally not part of the Manual.

The Policy and Procedures Manual is reviewed and approved annually by the Board of Directors. A copy of the Manual can be downloaded from the ACTE website on the [Board Only page](#).

Strategic Plan

The Strategic Plan is developed by the Board of Directors and represents an expression of the core purpose and values of the Association and serves as a blueprint for the future direction of the organization. The Plan serves as a map for the priority allocation of resources and determines the annual objectives and work plan for the volunteers and staff.

The status of the ACTE Strategic Plan is to be reviewed annually by the Board of Directors. The current strategic plan is referred to as the Strategic Direction.

Budget

The budget is an expression of how the Association has determined it will spend its resources. It sets the financial parameters and provides a guideline for the implementation components of each activity within the Association. The programs contained within the budget should be aligned with the ACTE Strategic Plan. The Board approves the budget in July of each year.

Committee Charters and Job Descriptions

The charters establish the goals and parameters for all committees within the Association. These documents outline the authority and responsibility for the committees, as well as for the committee chair. The Board approves committee charters and job descriptions.

STRATEGIC PLAN

The Strategic Plan is developed by the Board of Directors and represents an expression of the core purpose and values of the Association and serves as a blueprint for the future direction of the organization. The Plan serves as a map for the priority allocation of resources and determines the annual objectives and work plan for the volunteers and staff.

Tips for Developing Strategy:

- The strategic plan and its intent become a living reality as it is implemented by the organization on an annual basis.
- The strategic plan helps the organization clarify and acts as a guide, as the organization constantly reviews and updates its current portfolio of programs, products and services including:
 - What new programs, products and services need to be developed and implemented in order for the organization to remain relevant?
 - What current programs, products and services need to be updated or eliminated in order for the portfolio to be the highest quality?
- There are effective and efficient processes to connect the elements of the strategic plan with the organization's annual operational plan.
- The strategic plan drives and directs the annual budget.
- The infrastructure of the organization is reviewed continuously to ensure that it is well linked to and effectively supports the ongoing implementation of the strategic plan.
- The organization has in place procedures and processes to formatively evaluate its strategic plan and ongoing implementation on an annual basis.

About the Board

A GUIDE FOR BOARD MEMBERS

Prepared by Paula Cozzi Goedert, Barnes & Thornburg

INTRODUCTION

Serving on the Board of Directors of an association or other non-profit organization is a significant commitment. It entails important responsibilities. Some of these responsibilities are imposed by state law; others are the result of years of court decisions which have imposed various “fiduciary duties” on Directors.

A. FIDUCIARY DUTIES

The ultimate authority for managing the affairs of the organization is vested in the Board of Directors. Because the law grants Directors such authority, the law also imposes on Directors an obligation to act in the best interests of the organization. The law requires Directors to act:

1. in good faith;
2. with the care an ordinary prudent person in a like position would exercise under similar circumstances; and
3. in a manner the Director reasonably believes to be in the best interests of the organization.

B. DUTY OF CARE

The duty of care contains several elements. Its violation is the most frequent source of liability for Directors.

1. Attendance
 - (a) Directors must attend Board meetings. Court will have no sympathy for Directors who claim as a defense to any legal action that they did not know of a particular issue or did not participate in a particular action because of failure to attend Board meetings.
 - (b) Directors who do not attend Board meetings are nevertheless bound by actions taken at those meetings and will be held responsible if any such actions are deemed negligent.
 - (c) The act of failing to attend Board meetings may itself be deemed to be negligent behavior. Board meetings should be missed only for unavoidable emergencies. A Board member who repeatedly misses meetings should consider resignation.
2. Delegation vs. Abdication
 - (a) While the Board of Directors makes the important policy decisions that guide and determine the activities of the organization, it must rely on others to carry out the decisions. Such delegation is necessary and legal.
 - (b) Boards also delegate their duties to committees and other outside parties, such as accountants and attorneys.
 - (c) A Board must monitor those to whom it has delegated authority to make sure such persons are acting responsibly.
 - (d) Delegation does not relieve a Board of liability.

C. DUTY OF LOYALTY

By assuming office, the Director commits allegiance to the organization and acknowledges that the best interests of the organization must prevail over any individual interest of the Director, the Director’s employer, and the Director’s family and associates. Actions and decisions of the Director, while he or

she is serving as a Director, must promote the organization's purpose and well-being rather than any private interest.

1. The duty of loyalty is transgressed when a Director uses his or her office to promote, advance or effectuate a transaction between the organization and such person or his or her relatives or associates, and that transaction is not substantively fair to the organization.
2. Full disclosure and refraining from discussion and voting are required when a Director may be influenced by a private interest.

D. INFORMATION FLOW

The essence of the duty of care is the duty to be informed. Courts will not tolerate Directors who are not sufficiently informed about the activities of their association. On the other hand, courts will not generally second-guess decisions of Boards based on thorough research and business judgment.

1. Directors must assure themselves that information and reporting systems exist in the organization that are reasonably designed to provide to senior management and to the Board itself timely, accurate information, sufficient to allow management and the Board to reach an informed judgment.
2. Board's decisions not only must be informed, but also be reasoned and deliberate.
 - (a) Decisions should be made by the Board deliberately and without due haste or pressure.
 - (b) The Board should be as thoroughly and completely prepared in its decision-making process as possible. Materials concerning decisions should be sent out for review in advance and the Board should read and understand those materials.
 - (c) The Board members should be actively involved in deliberation in the Board meeting. Written materials should be read, digested and commented on by Board members.
 - (d) Written records of Board preparation and deliberation should be maintained.
 - (e) In the case of any major transaction, the Board should review the basic documents and analysis by experts in connection with the transaction.
 - (f) Independent evaluations and appraisals, as necessary, should be prepared by experts and presented to the Board.

E. DUTIES OF OBEDIENCE

Directors have a duty to follow the organization's global governing documents (such as Articles of Incorporation and Bylaws) to carry out the organization's mission and to ensure that funds are used for lawful purposes. Directors must also comply with state and federal laws relating to the organization.

F. FINANCIAL CONTROLS

One of the Board's responsibilities is to oversee the organization's financial affairs, including making sure that the organization has adequate internal accounting systems and controls.

1. The Board should be responsible for approving the organization's annual budget.

2. Board members should expect the staff to produce timely and adequate income and expense statements, balance sheets, and budget status reports.

3. The Board should employ independent accounting professionals and review the annual report of such professionals.

G. SAFEGUARDING ASSETS

The Board should oversee the effective use of the resources of the organization. Internal policies should be adopted, and large transactions reviewed to ensure that the organization's assets are not misapplied or wasted.

1. The Board is not an insurer of the adequate performance of the organization's funds. There is no implied guarantee by a Board that its investment decisions will be profitable. The decisions must, however, be reasonable and defensible.

2. Directors are not expected or legally required to be experts in investment matters. Retention and reliance on advisors with good reputations are considered the exercise of prudence.

3. Intangible assets, such as the organization's goodwill, must also be safeguarded by the Board. The Board should evaluate the organization's activities and proposed activities with the overriding goal of protecting the organization's brand.

ACTE BOARD LEADERSHIP ROLES

Role of the Board

The ACTE Board of Directors is responsible for establishing the direction of the Association. In fulfilling this obligation, the Board must keep its focus on the horizon. It must always be aware of the needs of the members, prospective members and external stakeholders. Decisions made by the Board should be made based on information about the internal and external environment. The Board of Directors is also responsible for allocating the resources of the Association in alignment with the strategic direction. The Board of Directors must act in the best interest of all members.

Role of the Director

The Division and Region vice presidents are elected by their respective constituencies to provide a voice to the deliberation process. Each vice president brings to the decision-making process valuable information and insight.

Individual directors on the Board have five major responsibilities:

1. Actively participate in the strategic planning process by continuous monitoring of the membership and the external environment and embracing dialogue and deliberation before decision making.
2. Communicating the goals and the objectives of the Association to members and external stakeholders.
3. Bring forth the needs and positions of the constituencies represented yet make decisions for the organization.
4. Fulfill the liaison role to Committees.
5. Serve as a mentor to each other and to potential leaders.

Roles of the ACTE Spokesperson

The official spokesperson of ACTE is the president. In his or her absence, either one of the officers or the executive director may speak on behalf of the Association.

The Board of Directors represents the leadership of the Association and determines the positions and policies for the organization. In this role, directors are often asked to comment or state an opinion to members, the media and external stakeholders. Directors are no longer “ordinary” members, and every statement made is perceived in a different context. Even when placed on personal stationery, comments expressed by directors are taken as official positions.

Directors must exercise caution when publicly expressing an opinion or commenting on any issue. Any statement made on official stationery requires the president’s approval. Always be mindful of current official positions and policies, and be careful not to stray from them, regardless of personal thought.

Role of Staff

The Headquarters staff serves as a resource for the Board. The staff, working with volunteers, is responsible for the management and implementation of the direction established by the Board. The staff provides daily oversight and, as a result, brings a unique perspective to the Board’s decision-making process. The relationship between the staff and the Board is one of partnership and collaboration.

OFFICERS

Roles & Responsibilities

Each officer within ACTE has a specific task. The three “presidents” act as a team to provide continuity to the Board and staff.

The president has the responsibility to lead the Association and manage its affairs. The president is also the key liaison with the executive director.

The president-elect must be ready to assume the office of president if necessary. This officer also acts in the place of the president at meetings, events and social functions.

The immediate past president provides continuity, insight and wisdom to the Association. Specifically, this officer assists the others with implementation of their tasks through his or her institutional knowledge.



President-Elect, President, Past President Position Description

Title: ACTE President-Elect, President and Past President

Duration: One three-year term; July 1 – June 30; one year as President-Elect, one year as President, and one year as Past President

Work Location: The President-Elect, President and Past President serve as a member of the Board of Directors and performs additional duties. As a board member, the President-Elect, President and Past President will conduct their work remotely by communicating via email and conference call. The Board meets in person at ACTE's CareerTech VISION, the National Policy Seminar, and during the summer at the ACTE offices in Alexandria, VA. Attendance at the entire VISION and NPS events is required. The President-Elect, President, Past President is also a member of the Executive Committee and is expected to attend three Executive Committee meetings throughout the year; two of the meetings occur prior to ACTE meetings: National Policy Seminar and CareerTech VISION, and the other meeting is conducted in June via Zoom. The President-Elect, President and Past President is also expected to travel to state and region conferences, which occur primarily during the summer. Travel and meal expenses are covered by ACTE for these meetings. Additional travel to other meetings may also be required.

Impact of Work: As a member of the Board, the President is also primarily responsible for overseeing and providing direction for the Association. Specifically, the Board works to approve outcomes to be accomplished, to make sure the desired outcomes are being achieved, and to ensure that resources necessary for achievement are available and used efficiently. The Executive Director of the Association reports to the Board of Directors.

Commitment: Serving as President-Elect, President and Past President requires a fairly substantial time commitment (roughly 200 hours throughout the year).

Roles and Responsibilities:

Throughout the term:

- Read and respond to emails
- Review any materials provided in advance of calls/meetings
- Participate in scheduled conference calls and meetings
- Attend VISION, NPS and all three Board of Directors meetings
- Be visible at ACTE events
- Attend state and region conferences as assigned; provide updates/presentations as requested and complete travel reports
- Provide Board reports
- Fulfill responsibilities as an authorized signatory for ACTE's financial accounts

President-Elect

As stated in the ACTE Bylaws, the President-elect “shall serve for a period of one year prior to assuming the duties of the president. The president-elect shall perform such duties as directed by the Board of Directors or the Executive Committee.”

- Serve as an officer of the Association
 - Assist the President as needed on special projects
 - Learn and understand the intangible aspects of the position of President
- Assist with the State Association Recognition Event (breakfast/luncheon etc.) at the Annual Convention.
 - Preside at selected sessions at NPS as requested.
- Serve on or Chair task forces as requested by the President.
- Represent ACTE at state, region and other meetings as requested by the President.
- Assignment of Mentors to new Board Members by all Officers

July Board Meeting

- Prepare an Officer Board Report
- Preside over activities as President Elect
- Take minutes in Executive Sessions and email directly to legal council

VISION Board Meeting

- Prepare board report
- Assist with the State Association Breakfast at the Annual Convention.
- Take minutes in Executive Sessions and file with legal council

NPS Board Meeting

- Prepare board report
- Preside at selected sessions at NPS.
- Assignment of Mentors to new Board Members (all Officers tasked with this responsibility)
- Take minutes in Executive Sessions and file with legal council

President

According to the ACTE Bylaws, “the President shall perform all of the duties assigned to that office.... shall preside at all meetings of the association, Board of Directors and Executive Committee.”

- Provide vision and guidance to the ACTE leadership team.
- Serve as a partner and sound board to the Executive Director.
- Resolve conflict.
- Establish with Executive Director the agenda for the Board and Executive Committee meetings
- Determine officer visits to State Association Conferences
- With the Executive Director, act as a spokesperson for the Association to the press, public, legislative bodies and related organizations.
- Write Leading Edge for *Techniques* as asked. Staff will send you a reminder.
- Review VISION schedules and general session scripts and provide input as appropriate.
- With the Executive Director, see that the Board of Directors is kept fully informed on the conditions and operations of the Association. Send reminders to the Board, as needed, on activities and tasks.

- Review Annual Report as written by staff prior to publication.
- Chair of the Assembly of Delegates
- Approve of Executive Director’s expenses; checks and ACH payments over the amount of \$50,000 requires at least one electronic approval from the president, president-elect or past president.

July Board Meeting

- Prepare board report
- Establish with Executive Director the agenda for the Board and Executive Committee meetings
- Conduct board meeting
- Assignment of Board liaisons to committees

VISION Board Meeting

- Prepare board report
- Establish with Executive Director the agenda for the Board and Executive Committee meetings
- Prepare the introduction for the Annual Report
- Review VISION schedules and general session scripts and provide input as appropriate 2-4 weeks prior to Vision.
- Review Annual Report as written by staff prior to publication.
- Conduct board meeting
- Conduct general sessions
- Chair the Assembly of Delegates
- Determine officer visits to State Association Conferences

NPS Board Meeting

- Prepare board report
- Establish with Executive Director the agenda for the Board and Executive Committee meetings
- Review NPS schedules and general session scripts and provide input as appropriate 2-4 weeks prior to NPS.
- Conduct board meeting
- Conduct general sessions
- Assignment of Board liaisons to committees

Past President

The Bylaws state that the “Past President shall serve in an advisory capacity to the president.”

- Provide institutional knowledge to the officers and the Board.
- Be the eyes and ears of the president.
- Be a voice of reason and resolve conflict.
- Provide guidance and advice to President
- Serve as Board liaison to Nominating Committee

July Board Meeting

- Prepare board report
- Oversee Executive Director evaluation process and contract with concurrence of President and President Elect

Vision Board Meeting

- Prepare board report

NPS Board Meeting

- Prepare board report

Qualifications: All Presidents must maintain active membership in ACTE.

ACTE Board of Directors has established the following criteria for candidates for President-Elect of ACTE. The Nominating Committee may add other criteria that they feel are appropriate but shall notify the Board of any additional criteria applied.

- a. The nominee shall be a person who is recognized as a leader of ACTE and who will be fair to all components of career and technical education.
- b. The nominee shall be an ACTE member in good standing.
- c. The nominee shall be a person who will use the office of President-Elect to promote ACTE and its programs instead of an individual who will use the office solely for the purpose of promoting his/her own professional interests. The office of President-Elect, President and Past President of ACTE shall go only to those who have a sincere and genuine interest in furthering the development and improvement of career and technical education through ACTE activities.
- d. It is a requirement that applicants for President-Elect to have served for at least one year at the time of nomination as a National ACTE Board Member (as Region or Division Vice President) in order to be eligible for nomination for President-Elect.

Applicants must also complete the election application through the ACTE Awards Portal by June 15. All applications will be reviewed and vetted by the ACTE nominating committee.

Training/Orientation: All incoming Board members are required to participate in orientation sessions; one prior to the start of their term prior to the start of NPS and a second prior to the start of the summer Board meeting once their term officially starts. All Board members participate in an additional annual Board Training during the summer Board meeting.

Supervisor and Contact Information: All ACTE Board members work with ACTE Staff, although the Executive Director and the Leadership and Awards Director serve as the primary contacts.

THE EXECUTIVE COMMITTEE

Roles & Responsibilities

The executive committee is not a quasi-board. It is established to act between Board meetings in case of emergency or when an issue of a critical nature arises and must be addressed before the next Board meeting. The executive committee should always take care to make decisions within the parameters of the Board's official positions and policies with an understanding of the Board's culture. When there is trust between members of the Board, the executive committee is a practical and efficient method for maintaining the fluidity and responsiveness of the Association.

The executive committee is authorized by the ACTE Bylaws (Article V.C.) to manage the Association when the Board of Directors is not in session. In addition, the executive committee will carry out specific duties as delegated by the Board of Directors. The Executive Committee is made up of:

- Three Officers (the 'Presidents')
- One Region representative and one Division representative, elected by the Region and Division VPs through an electronic election
- A Finance Chair is selected by the Executive Committee after applying for the position.

Serving on the Executive Committee is a one-year commitment.

General Responsibilities

1. Review and provide preliminary approval of the annual budget.
2. Raise issues of concern that require discussion and/or Board attention.
3. Conduct annual performance review of executive director and recommend goals and salary increase to the Board.
4. Approve requests for increases to any major budget cost center outside the normal budget cycle.
5. Approve expenditure of reserve funds for the replacement of fixed assets.
6. Approve special projects requiring ACTE funds in the absence of the Board of Directors.
7. Oversee the adherence to election policies and mediate any disputes.
8. Serve as a sounding board for the executive director.

Specific Responsibilities of an Executive Committee Member

Executive Committee members are required to attend four (4) meetings in addition to the Board meetings. Currently the schedule of meetings is as follows:

1. July Executive Committee meeting one day prior to the July Board Meeting
2. VISION Executive Committee meeting the morning before the start of the VISION Board Meeting
3. NPS Executive Committee meeting (the morning before the start of the NPS Board Meeting)
4. June Executive Committee meeting (to be held via conference call)

The Division/Region Representatives have the following responsibilities:

1. Determining the agenda and presiding at the region/division breakout sessions during the Board meetings.
2. Reporting the action items and discussions of the breakout sessions at the full Board meeting.

3. Submitting the minutes of the breakout sessions for inclusion with the minutes of the ACTE Board of Directors meeting (Board Policy VI.29).
4. Correspond regularly with the Region/Division Vice Presidents to determine follow through on requested actions, ascertain concerns and share information.
5. Provide written reports on Region/Division activities and concerns for the Executive Committee packets.
6. Participate in Executive Committee conference calls as scheduled and needed between Board meetings.
7. Participate and lead conference calls with Region/Divisions Vice Presidents.

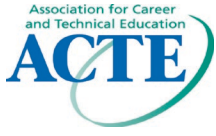
The Finance Chair is responsible for oversight of the financial affairs of ACTE under direction and control of the Board of Directors. The Finance Chair has the following specific responsibilities:

- Monitor that Board approved policies and procedures related to the financial operations of the association are followed.
- Review draft operating budget and make recommendations to the Executive Committee
- Review draft capital budget and make recommendations to the Executive Committee
- Review monthly financial statements and variance reports
- Evaluate the budget and financial performance of the association on a monthly basis and be prepared to provide analysis at each Board meeting
- Recommend to the Board any changes to the budget if needed during the year
- Attend all Executive Committee meetings and Board meetings
- Review status of all ACTE investments and make recommendations to the Board on actions to be taken, if any
- Review status of capital expenditures against budget on a quarterly basis
- Serve ex-officio on the Audit Committee and Executive Committee

In addition to the meetings listed above, the Finance Chair also has the following commitments:

- Conference Call with Audit Committee – 2-3 hours
- Monthly review of financial statements with Chief Financial Officer – 1-2 hrs./month
- Quarterly meetings with investment firms – 1 hour per quarter

More information about the role of Finance Chair and application requirements can be found on the *Board Only* section of the website.



Board of Directors *Member Position Description*

Title: ACTE Board of Directors Vice President

Duration: One three-year term; July 1 – June 30

Work Location: Board members conduct their work remotely by communicating via email and conference call. The Board meets in person at ACTE’s CareerTech VISION, the National Policy Seminar, and during the summer at the ACTE offices in Alexandria, VA. Attendance at the entire VISION and NPS events is required. Travel and meal expenses are covered by ACTE for these Board meetings. Additional travel to affiliate/region meetings may also be required.

Impact of Work: Board members are primarily responsible for overseeing and providing direction for the Association. Specifically, the Board works to approve outcomes to be accomplished, to make sure the desired outcomes are being achieved, and to ensure that resources necessary for achievement are available and used efficiently. The ACTE Board manages the Executive Director of the Association.

Commitment: Serving on the ACTE Board requires a fairly substantial time commitment (roughly 100 hours throughout the year).

Qualifications: All Board members must maintain active membership in ACTE. In addition, the following qualifications are required:

- A willingness to promote the discipline area and ACTE Strategic plan.
- Authorization to make time available to effectively execute the responsibilities of the office.
- Sustained membership in ACTE
- Evidence of leadership in ACTE
- Must be able to make time available and have sufficient clerical and secretarial help to effectively execute the responsibilities of the Region/Division Vice President.
- It is recommended that the individual should have served on one or more ACTE committees to develop competencies and understanding of the general policies and activities of ACTE, have a good attendance record at annual meetings of ACTE and participated in the program of his/her group.

In order to apply for a specific region/division vice president position, you must be an active member of that region/division. Applicants must also complete the election application through the ACTE Awards Portal by June 15. All applications will be reviewed and vetted by the appropriate nominating committee.

Training/Orientation: All incoming Board members are required to participate in two one-day orientation sessions; one prior to the start of their term prior to the start of NPS and a second prior to the start of the summer Board meeting once their term officially starts. In addition, the incoming Board member will receive training and correspondence from the outgoing Vice President. All Board members participate in an additional annual Board Training during the summer Board meeting.

Supervisor and Contact Information: All ACTE Board members work with ACTE Staff, although the Executive Director and the Director of Leadership & Awards serve as the primary contacts. Board members

receive information throughout the year from the Executive Director and the Leadership and Awards Manager and other ACTE Staff as needed.

Roles and Responsibilities:

Board members serve the organization in three distinct roles- as a Board member, a leader for their Region/Division, and as the Chair of their Policy Committee. Additional duties vary depending on the specific Board seat; please see the *Board Only* section of the website for more information.

As a Vice President on the ACTE Board of Directors:

- Read and respond to emails
- Review any materials provided in advance of calls/meetings
- Participate in quarterly Region/Division conference calls and Board meetings
- Attend VISION and NPS in their entirety
- Provide Board reports for your Region/Division
- Serve as a Board liaison on a committee or task force
- Adhere to the Board Code of Conduct and Board Policy Manual
- Be familiar with ACTE's governance documents and the fiduciary responsibilities of the Board.

As a Vice President for your Region/Division:

- Be visible at ACTE events
- Check and update the Region/Division webpage
- Draft quarterly e-newsletters for your members and send meaningful e-blasts as needed
- Fill Committee vacancies in a timely manner
- Mentor up and coming leaders to serve in your Region/Division or at the national level
- Plan meaningful conference events
 - Divisions plan VISION conference sessions & assist in thanking exhibitors at VISION
 - Regions plan the Region conferences
- Respond to inquiries from members
- Work with ACTE staff to promote and increase membership
 - Participate in a filmed interview with ACTE to share on your Region/Division webpage
 - Assist with sending out monthly lapsed member notifications as requested

As Chair of your Policy Committee:

- Update and maintain the policies and procedures manual
- Lead policy committee and business meetings at VISION (and Region conferences)
- Develop a budget for the Region/Division
- Correspond regularly with the policy committee (at least quarterly)
- Send your meeting minutes and other updates to ACTE staff on a timely basis

BOARD RESPONSIBILITIES: OVERVIEW & RESOURCES

This section provides an overview of different areas touched upon in the Board Member Position Description. More resources in each of these areas are available on the *Board Only* section of the website.

GOVERNANCE & ASSOCIATION POLICIES

As a member of the Board, it is important that you are aware of and familiar with the ACTE Bylaws, Board Policy Manual, and Strategic Plan. You will also be expected to understand and adhere to the Board Code of Conduct. These documents, as well as the Personnel Handbook, are available on the *Board Only* section of the website for your reference.

MEETINGS

Attendance at all scheduled Board meetings as well as VISION and NPS is mandatory. While emergencies will arise, your attendance at every scheduled Board event ensures you are making informed decisions in the best interest of ACTE and its members. Great care should be taken not to schedule family or work events over the top of scheduled Board meetings. As an elected representative for your division/region, you have an obligation to be an informed participant. Absence from a Board meeting does not abdicate responsibility to the membership and organization.

Reports

Prior to each Board meeting, a **report** needs to be submitted by each Region and Division Vice President by the deadline, which is normally five weeks prior to the Board meeting. A report template is available in the *Board Only* section of the ACTE website. The report should address the actions the Vice President and their policy committee have taken since the last Board meeting to support ACTE's strategic direction. The reports also provide Board members with an opportunity to voice their concerns for their Region/Division and propose any agenda items they would like the Board to address during the meeting. Upon receipt of these reports, they are reviewed by staff, added to the Board Book, and posted on the Region and Division webpages.

Board Meeting Materials

The Board book is typically sent out electronically two weeks prior to the meeting and attachments for the book are posted on the *Board Only* section of the website. While lengthy, take time to read the entire book and all attachments. The Board book provides background on the issue to be discussed. It is a Board member's responsibility to be prepared to participate in the discussion. Board time should not be used for background information. If you have questions, contact the ACTE Leadership staff. Once at the Board meeting, be prepared to discuss and share concerns on how items will impact your division/region. Actively listen to all discussions; vote for what is in the best interest of the organization. Once a decision has been made, support that decision and, when asked, explain why it is in the best interest of the entire membership.

Expense Reports

Members of the Board of Directors, staff and others who are on an ACTE expense account shall be reimbursed reasonable and necessary hotel expenses while attending meetings on behalf of ACTE. Per the Board Policy Manual, expense reports need to be submitted within 45 days after travel along with original receipts for any expenses over \$5. More information about travel reimbursement policies can be found in the Board Policies & Procedures Manual.

Visit the *Board Only* section for more information about Board Meeting procedure, logistics, parliamentary procedure, allowable travel expenses, expense report forms and the report to the Board form.

FINANCE

ACTE's fiscal year runs from July 1-June 30. The Chief Financial Officer sends Region and Division Financials out to each VP no later than the 20th of each month. You are responsible for approving expenses. It is important to review these financial statements carefully and to compare them to what has been submitted.

Development/Monitoring of the Budget

As a Region/Division Vice President, you are in charge of developing and monitoring your budget. ACTE operates on an accrual basis of accounting meaning revenue is recorded when it is earned and realized, regardless of when actual payment is received. Similarly, expenses are "matched" to revenue regardless of when they are actually paid. ACTE's budget goal is to, at minimum, break even each fiscal year. ACTE staff have a budget overview at National Policy Seminar. During this review, ACTE staff shares the entire budgeting process including how division and region budget allocations are determined, a review of past history of each division/region spending, and the process and deadline for submitting the next fiscal year's budget proposal.

Each division and region receive an **operating budget** based upon membership in that division/region. The budget templates are emailed to each VP by March 1. Prior to submitting the operating budget, future activities should be planned for and incorporated through discussions and approval of the supporting committees. Budget formulas can be found in Section X.9 of the Board Policy Manual. The proposed operating budget must be submitted by April 20. Additionally, some divisions and regions have **designated funds**. These funds typically have been raised through division/region conferences, donations, or other such activities. While expenditures from these funds do not need to be included in the operating budget, policy committee approval is required prior to accessing the funds. Furthermore, a few divisions also have **temporarily (donor) restricted funds**. These funds may only be used for purposes outlined by the donors.

Ideally, the outgoing Division/Region vice president includes the incoming vice president as well as the policy committee in the development of the budget. It is imperative that great care be taken in the development of the budget. Historically, Divisions and Regions do not spend approximately \$25,000 of their budget. While a Division/Region can, and should, spend their budgeted allocation to meet the goals of each respective Division/Region as well as the strategic priorities of the association, money that is allocated in a Division/Region budget but not spent during the fiscal year, is money that is tied up and unavailable for other ACTE activities and needs. Moreover, those funds cannot be carried over to the next fiscal year. Careful review of past budgets is critical to accurate budget development. Budgeted operating expenses may not exceed the total approved budgeted amount. Division/Region vice presidents and their respective policy committees should review the quarterly financial statements. If changes are deemed necessary to meet the needs of the Association and its members, a written statement outlining the recommended changes should be submitted to the finance chair and executive director. The finance chair then makes recommendations for action to the Board of Directors. If a Division/Region overspends their operating budget, the shortfall must be made up either through a designated fund or the next fiscal year's budget.

Check Requests

When requesting payment for expenses for your Region/Division, a request for check form (available in the *Board Only* section of the website) and supporting documentation should be completed and sent to ACTE. To ensure accuracy, be sure to identify which fund – operating, designated, or temporarily (donor) restricted – the payment is to be made from, and include the code if possible. A sample check request is also available on the *Board Only* page.

Visit the *Board Only* section of the website to download the check request form, the budget template, a listing of account codes, and more information about finances, restricted & designated fund policies, and the budgeting process (including a video tutorial).

COMMUNICATION

As you are well aware, communication is essential to the success of any organization. The Division/Region website and e-blasts to members play a critical role in keeping the membership informed on upcoming events, committee discussions, advocacy issues, and other important information impacting CTE and your Division or Region.

E-Blasts & Quarterly Newsletters

Quarterly e-newsletters from Region/Division VPs to their members are scheduled over the year to keep you in touch with your membership. Regular communications are an opportunity to share critical information, professional development opportunities, ACTE updates, and information relevant to CTE and/or a specific content area. ACTE staff are equipped to handle the dissemination of Board e-blasts to members, so the majority of your communications to members will be sent via ACTE's e-blast platforms. In addition to the quarterly newsletters, VPs are encouraged to send meaningful e-blasts to members as needed (there may be greater need around events such as VISION or Region conferences). Again, reach out to your policy committee members for suggestions and input. Sample newsletters and the link to the [e-blast request form](#) are available on the *Board Only* section of the website.

Lapsed Member Communications

ACTE's Membership Director distributes a monthly lapsed membership notification via ACTE's eblast platform and requests the assistance of the Board VPs in creating fresh content for this notification annually each July. Trends have shown that personal notes from the Board have greatly increased renewal and retention rates. A sample lapsed membership message can be found on the *Board Only* section of the website.

Region/Division calls

The Regions and Divisions typically hold quarterly calls before quarterly newsletters are due to share ideas, discuss concerns and touch base. The calls are scheduled and led by the Region and Division representatives on the Executive Committee.

Dashboards

The Dashboards were developed to keep the Board advised on the overall status of their Division/Region and are developed and sent out by staff once a month. The Dashboards summarize the membership within the Division/Region, the expenses, Committee vacancies, status of policy committee manual and minutes, website updates needed and the number of Division/Region members at events in a quick, easy to read format. Board members are asked to review the Dashboards and address any vacancies or deficiencies.

Communications between Staff/Board

In addition to communicating with your respective region/division members and fellow Board members, it is crucial to stay in contact with ACTE headquarters and the officers and executive director. Share feedback and concerns from membership, ideas for membership initiatives, issues occurring within your state or division, and other pertinent information. Read and respond to all communications in a timely manner. It is easy to say “I’ll take care of it later” when back at home fulfilling work and family obligations; however, some communications have a very short turnaround time due to circumstances beyond ACTE’s control. If you have any concerns or questions about communicating with ACTE staff, please reach out to Leadership department staff; the Leadership Director is your main point of contact for Board activities/questions. Board and staff contact rosters are available on the *Board Only* section of the website, as is an updated State Leadership Directory for the Region Vice Presidents.

WEBPAGES

In addition to e-blasts, your Region/Division webpages are a key vehicle for communicating with your members. First impressions from a webpage/e-blast play an important role in attracting and keeping new members. *ACTE staff cannot make any changes or updates to your webpages without your request to do so.* Look at your Region/Division webpage and determine what needs to be updated or changed. Many VPs put policy committee minutes and committee assignments on the webpage; be sure to send this information in a timely manner to staff for updates. Reach out to your policy committee members and ask for feedback on what should be available on the Region/Division website. Utilize standing committee chairs as well. To request changes to your webpage, contact the Digital Content Manager. More information about how to request changes to your webpage and recommended items for webpages is available on the *Board Only* section of the website.

PLANNING EVENTS

ACTE hosts several in-person meetings for members each year, such as ACTE’s CareerTech VISION, National Policy Seminar and others. In addition to these meetings, the ACTE Regions work with their states to host Region conferences.

Region Conferences

Region Vice Presidents have the added responsibility of working with the host state and policy committee in planning/hosting a regional conference. Communicate dates and locations of conferences as soon as possible to ACTE headquarters for placement on the master schedule and website. ACTE has extensive resources regarding the planning of Region conferences; please take the time to review these resources on the *Board Only* section of the website.

VISION Programming

Division Vice Presidents work with staff to oversee the VISION session proposal review process. VPs are asked to recruit reviewers to review proposals that are received and select the sessions that they feel would best meet the needs and interests of Division members. This process is conducted in the spring. A review panelist member position description is available on the *Board Only* section of the website.

Business & Policy Committee Meetings

At VISION and NPS, Divisions and Regions have the opportunity to conduct business meetings, policy committee meetings or other meetings. It is your responsibility as the Region/Division vice president to work with the ACTE Director of Meetings & Events to plan the logistics of these events. When planning meetings for VISION, please take into consideration the multitude of other activities that are planned at VISION and consult the schedule at a glance to ensure that your meetings will not conflict with other events you will need to attend as a Board member. The VISION schedule at a glance and sample schedules for Board members at VISION and NPS are available on the *Board Only* section of the website.

The ACTE Senior Director of Programs will be in contact with you at various times throughout the year to ensure that the proper paperwork/planning is completed by the necessary deadlines.

Each Region/Division vice president will receive a meeting request link that asks for detailed information regarding any meetings/sessions you wish to conduct at VISION or NPS. Please complete this information by the deadline set by the ACTE Senior Director of Programs to ensure space is available. Possible meetings/sessions you may wish to conduct include a business meeting, an opening session, a luncheon, an awards program, or division-specific breakout sessions. Consider your budget for food & beverage, printing needs and any other meeting essentials when planning, as these will be billed to your Division/Region accounts. Division affiliates may wish to conduct meetings/sessions at VISION as well. Affiliates must also complete the meeting requests link, and, if food/beverage will be served, provide a contact for billing purposes. Please contact the ACTE Senior Director of Programs with any questions or concerns regarding VISION and NPS meetings.

RECRUITING LEADERS

As the VP of your Division/Region, an additional responsibility includes encouraging and mentoring new leaders. Encourage members to step into leadership roles. Actively look for members expressing an interest in leadership and/or demonstrating leadership traits. Consider how you became involved in leadership. Did someone encourage you to become involved? Mentor you while you worked your way through division, state, regional, or national involvement? If you answered yes to either question, it is time to pay it forward and mentor and encourage others.

Committee Assignments

The beginning of ACTE's fiscal and governance year (July 1) also marks the start of new committee terms. Leadership Department staff will contact VPs with upcoming vacancies. It is the responsibility of Region/Division VPs to recruit members to represent their Region/Division on national committees. Ideally, the outgoing Vice President includes the incoming Vice President and policy committee in filling division, region, and ACTE committee vacancies. Serving on a national committee is an excellent opportunity to provide prospective leaders in your Region/Division with national leadership experience. You can advertise committee vacancies through e-blasts, on your website, via word of mouth. Once a VP has secured a willing representative to fill a vacancy on a committee, they should notify the Leadership Director so the official appointment can be processed. Position descriptions for committee members are available online and may be a useful tool in recruiting new representatives; visit the Standing Committees page for more information: www.acteonline.org/about/get-involved/standing-committees-and-task-forces/.

Engaging Prospective Leaders

In addition to serving on a national committee or task force, there are various other opportunities for members to get involved in volunteer/leadership capacities in ACTE. Visit www.acteonline.org/about/get-involved/ for more information on ACTE's Educators in Action and opportunities to engage members in national activities. The Leadership Department also coordinates a number of leadership development programs; more information can be found in the department overview in this book.

PROMOTING ACTE & MARKETING MEMBERSHIP

The official spokesperson of ACTE is the president. In his or her absence, either one of the officers or the executive director may speak on behalf of the Association.

As a Region/Division leader, you may find yourself in a position where you will be asked to speak about activities, accomplishments or membership benefits at the national level. To assist you in these situations, resources, such as the ACTE institutional PowerPoint slide deck and messaging document, are available on the *Board Only* section of the ACTE website.

If you are attending a state or affiliate conference, ACTE staff will happily ship printed marketing materials and/or the ACTE Tablecloth or Pop-up Booth to you to help promote ACTE. A materials request form, downloadable marketing materials and a guide to marketing your Region/Division are available on the *Board Only* section of the website.

POLICY COMMITTEE

The policy committee is your advisory board as a Division/Region Vice President. Look to them for guidance and advice; keep them informed of ACTE activities, budgeting, VISION and Region Conference planning, and other important events; and utilize their knowledge and skills by delegating tasks and responsibilities when possible.

If you have not already, take the time to read and understand your Region/Division policy manual. Division/Region operating policies should be reviewed and updated by the VP and his/her policy committee annually as well. The division/region operating policies guide the decisions and actions of the VP and his/her policy committee. Keep in mind that Board action, as well as inaction, sets policy; so review, update, and follow your division/region policy handbook.

Below is an overview of your responsibilities as Chair of your policy committee:

Policies and Procedures Manual

- Review the policies & procedures manual
 - Make necessary updates at the VISION meeting
 - Submit the revised/updated copy to ACTE by April 1
 - Post on the Division/Region webpage
- Policies and procedures guide your actions

Budgeting

- Develop a division/region budget in cooperation with the policy committee
 - Review previous budgets - identify trends, areas of need

- Utilize funds to meet member needs and strategic priorities
- Be realistic – once allocated that money is unavailable for other uses unless the policy committee and you amend the budget

Communicating with your Policy Committee

Several strategies have been utilized by past vice-presidents to maintain open lines of communication with policy committees. They include:

- Conference Calls
 - **At a minimum**, these calls should be held quarterly. ACTE has a conference line that you can use; the contact for using this line is the Leadership & Awards Manager. For scheduling your calls, doodle.com allows you to create free polls to help schedule your calls. Call expenses will be billed to your Region/Division.
 - Develop an agenda for each call and distribute it to the policy committee ahead of time
 - Calls may become more frequent as national or regional conferences approach
 - Build the associated cost into your division/region budget
- Forward legislative updates that are sent by the Public Policy Department
- Send summaries of Board meeting activities/decisions
- Make personal contacts via e-mail or phone when following up on delegated responsibilities/tasks
- Investigate utilizing Skype or other such programs for video-conferencing

Minutes

It's important to make sure someone takes minutes during your policy committee meetings and business meetings to document any actions made and keep a record of the discussion. Minutes should be sent to staff in the Leadership Department to be archived and can be posted on your Region/Division webpage.

Various resources are available on the *Board Only* section of the website, including sample policy committee agendas, Region/Division policy manual templates, a sample policy committee member description, and a handbook for policy committee members.

SERVING AS A COMMITTEE/TASK FORCE LIAISON

Liaison: *noun*

1. a close bond or connection
2. a communication for establishing and maintaining mutual understanding and cooperation (as between parts of an armed force) b. one that establishes and maintains liaison

Purpose of Liaison Role

It is the responsibility of the Board of Directors to set the direction and priorities for the Association. The Board then delegates and empowers others within the Association to implement the objectives and strategies that will enable the organization to meet its strategic goals.

In addition to appointing members to committees, each Region/Division vice president serves as a liaison to an ACTE standing committee or task force. Traditionally, the President-Elect asks Board members if they have a preference as to which committee they serve. The Immediate Past-President is always the liaison to the nominating committee while the Finance Chair is the liaison to the audit committee. The purpose of being a liaison is to serve as the link between the committee/task force and the Board. More detailed information can be found in the *Board of Directors Leadership Handbook*.

One of the responsibilities assigned to each director on the ACTE Board is to serve as a liaison to those to whom the work has been delegated. This liaison role is continual throughout the governance year. In this role as liaison, the director serves as a bridge of communication and understanding between the Board and the committee, Division or Region.

Responsibilities of a Committee/Task Force Liaison

Each board member is assigned to a committee or task force to serve as the Board liaison. Below is a listing of the responsibilities of the Board member in this liaison role:

- The Board liaison is the principal linkage between the committee and the Board.
- The Board liaison assists in insuring coordination and lack of duplication among the work of the committees, as well as assisting in resolving disputes that might arise between committees.
- The Board liaison is a non-voting, ex-officio member of the committee.
- The Board liaison attends and participates in all meetings and conference calls of the committee.
- Except when the president requests the presence of the committee chair, the Board liaison will make committee requests and presentations to the Board.
- The Board liaison takes Board-raised questions to the committee and brings information back to the Board.

- The Board liaison guides the committee in achieving the successful implementation of its annual objectives.

Being an Effective Liaison

1. Communicate early and often with Division or Region leaders and committee chairs. Explain your role as liaison and let them know you are available for any questions or concerns at any time.
2. Become familiar with background information on the charter and objectives for the committee.
3. Become familiar with programs, services and issues of the Division or the state associations within the Region.
4. Participate in the meetings and discussions of the Division or Region policy committees.
5. Share insights and information on Board actions with the committee leadership. A written memo (via e-mail) following each Board meeting is an effective means for keeping your groups informed.
6. Communicate with the staff liaison to gain greater understanding of issues and to share concerns and ideas.
7. Contact relevant individuals immediately upon hearing of a problem or concern that can be resolved by appropriate action. Delay in communication will only increase the magnitude of the problem.
8. Not all problems need to be broadcast. Use judgment in your communication circle.
9. Share insights and concerns with the Board of Directors.
10. LISTEN, EMPATHIZE, ADVISE, COMMUNICATE!

END OF TERM TRANSITION

The last six months of your term as vice president, you will have the opportunity to interact with and train the incoming vice president who will replace you. ACTE recommends that you communicate regularly with the new vice president to ensure a smooth transition. Specifically, please include the new vice president in communication regarding the following items as well as distributing the necessary background information so they can begin their term fully prepared:

- Region/Division budget
- Upcoming expenses that will be realized during their term
- VISION meeting request forms and planning
- VISION speakers
- Policy Committee Appointments
- Committee/Task Force Appointments
- Your Region/Division vital documents (i.e.- policy committee minutes, business committee minutes, policy manual)
- Information on any ongoing projects/discussions

About the Staff

FINANCE AND OPERATIONS DEPARTMENT

The Finance and Operations Department is responsible for the preparation, reporting and monitoring of the annual budget, investments and cash flows, and preparing monthly financial reports and quarterly Board reports on the financial position of the Association. ACTE has a print shop that can produce both black & white and color print jobs and a mailroom that is responsible for product fulfillment. Product sales and inventory, as well as subscriptions, are functions that fall under Finance and Operations. The department is also responsible for tenant relations and the operations and maintenance of the ACTE building, as well as the management of all database and IT (outsourced) functions. The Finance and Operations Department is responsible for all membership and registration processing, state association roster processing, and membership call center.

Financials

On a monthly basis, department managers receive detailed general ledgers to review and all adjustments are made to individual accounts. Department managers are then provided an opportunity to complete variance statements for their monthly finances. Ultimately, the Finance Chair receives variance statements for review.

The Region and Division Vice Presidents receive an electronic copy of their financial statements, monthly dashboard, and Division by Region report each month. Quarterly variance reports are sent to the entire Board of Directors. If there are any questions regarding the monthly processing of the financial statements, please contact the Chief Financial Officer.

Operations

The Operations Department is responsible for building maintenance, building equipment, utilities, mailing/shipping, and overseeing the parking lot responsibilities.

Tenants

Tenant lease contracts and tenant requests for services are a responsibility of this department.

Print Shop/Mailroom

ACTE prints its own letterhead, business cards and membership forms and envelopes. The print shop also handles several small newsletters and publications. ACTE handles its own product fulfillment, housing inventory on site and mailing out orders within 48 hours of any publication that is in stock.

Product Development and Sales

The objective of the ACTE products program is to produce revenue for the Association while also providing members and non-members with access to a range of quality books, videos, software, instructional aides and promotional items to assist them in carrying out their professional responsibilities. ACTE offers more than 100 products for sale at non-member and lower member prices. We also process subscriptions to *Techniques* magazine for non-members.

Membership and Registration Processing

The responsibilities for this include the invoicing and processing of membership dues and VISION, NPS, Best Practices and several other national and state conference registrations. This is ACTE's primary link with members and state associations.

MEMBERSHIP DEPARTMENT

The Membership Department is responsible for defining value for individual members by building out benefits and developing programs and initiatives. An important role is the regular review of membership data which is used to refine strategies for ongoing work. The Membership Department works to establish and build relationships with the state associations, Educational Institution members, Corporate and National affiliate members. The Director of Membership works closely with state leaders on unification efforts.

State Associations

Maintaining close contact with ACTE's state associations is vital to membership success. A strong and healthy relationship between ACTE and the states fosters better communication with members and potential members and helps them understand the role each organization plays. More than half of the state associations are unified, which means career and technical educators must belong to both the state and national organizations. ACTE works closely with these states on membership promotion. The non-unified states also receive and have access to services from ACTE that they may or may not decide to take advantage of.

Educational Institution Membership

In 2004, ACTE established the Educational Institution Partnership. At the 2005 Convention, that partnership became membership. Through this program, the leadership of schools, colleges and universities can become involved in helping drive the Association as it works on advocacy and product development. This program is geared specifically toward the CEOs, CFOs and Boards of Directors of educational institutions.

Corporate Membership

Corporate membership allows ACTE to be the bridge to connect our business partners with our members. It provides our members with opportunities to be aware of industry and career opportunities so that curriculum and program alignment can occur.

National Affiliate Organization Membership

With the establishment of the ACTE National Affiliate Organization membership program, not-for-profit organizations that have a professional interest in activities that foster the improvement and expansion of career and technical education now can be actively involved with ACTE and its mission to provide leadership in developing an educated, prepared, and competitive workforce.

LEADERSHIP DEPARTMENT

The Leadership Department is responsible for management of Board activities, headquarters office operations and staff, budget, and development of strategic planning. The executive director oversees membership development, formulation and implementation of all Association public policy positions and legislative agenda, production and marketing of all Association publications and products, planning and implementation of the ACTE's CareerTech VISION, trade show and other conferences, and management of Association investments. The executive director also acts as a spokesperson before Congress, the Administration and other groups for career and technical education. The executive director oversees development of position statements and legislation for Board approval regarding career and technical education programs and funding. The office also provides oversight of the Board of Directors, State Associations, Committees/Task Forces, Bylaws, Elections, the Assembly of Delegates (AoD), Awards, and all leadership development initiatives of the Association.

Board

The executive director is the chief executive officer of the Association and serves as an ex-officio member of the Board of Directors. The Board of Directors constitutes the policy body of ACTE. The executive director has the authority and responsibility for carrying out Board policy and such other duties as assigned by the Board and in the Bylaws and policies of ACTE. The executive director will have frequent communications with the president of the Association, as well as the entire Board.

Headquarters

The executive director has complete responsibility for the day-to-day operations of the ACTE Headquarters office and staff. Under the direct supervision of the executive director are the deputy executive director, associate deputy executive director – outreach and partnership development, the chief financial officer the director of operations, the senior director of communications, and the director of leadership and awards.

Budget

The executive director manages an annual budget of approximately \$4.5 - \$5.5 million dollars. This includes the ACTE Board of Directors budget along with the Region/Division vice presidents operating and VISION budgets. Any questions concerning these budgets should be addressed to the executive director's office.

Association Partnerships

The executive director has established relationships with other education-based associations, as well as with business/industry partnerships that will assist in the advancement of career and technical education. These partnerships have been beneficial in communicating the needs of career and technical education.

Strategic Planning

The executive director in conjunction with the ACTE Board has established a Strategic Plan that contains the ACTE goals and strategies, along with the planned activities of ACTE that will achieve our goals.

Leadership Development

ACTE's core purpose is to "provide leadership in developing an educated, prepared, adaptable and competitive workforce." Leadership development is a crucial part of fulfilling that purpose. ACTE's leadership development programs seek to build strong leaders to lead ACTE, our state associations and the CTE field at

large into the future to meet this critical purpose. ACTE's leadership development programs are divided into three areas of influence to best meet member's areas of interest:

NATIONAL ACTE LEADERSHIP

*Educators in Action

Committees/Task Forces

ACTE Board of Directors

STATE ACTE LEADERSHIP

State Leader Support Activities and [Resources](#)

State Leadership Training Program (currently paused due to COVID-19)

PROFESSIONAL LEADERSHIP

[Fellowship Program](#)

ACTE LEAD (currently paused due to COVID-19)

ACTE Connect (currently paused due to COVID-19)

[IAED Mentorship Program](#)

Although each program has its own specific focus, ACTE recognizes that the principles learned in one program may also be applicable to other contexts. The national ACTE leadership development programs get members involved in the leadership of the national association. If they are a state leader, you can get connected to ACTE through its state leadership programs, providing them with the resources they need to succeed. The professional leadership programs supply the training they need to get equipped for taking a leadership role in their professional setting. In addition, all participants have the option to join sessions centered on essential leadership principles to further build their leadership capacity. More information about leadership development programs can be found at www.acteonline.org/professional-development/leadership-development/.

*Educators in Action is an initiative to engage more ACTE members in meaningful volunteer activities and retain volunteers who might not have any openings to serve on formal volunteer positions (ex. committee or Board positions). Members join this group by completing an online form about their volunteer interests here: www.acteonline.org/about/get-involved/. For first-time volunteers who are interested in getting involved, this is a great place to start. Volunteers are tapped throughout the year for their assistance with grassroots advocacy/awareness efforts, input on ACTE's professional development offerings and events, and asked to serve on ACTE's task forces and advisory groups as needed. In addition, a sub-group of volunteers with an interest in writing contribute regularly to the Educators in Action Blog, a blog for educators by educators that focuses on monthly rotating topics that relate to trending issues in the CTE field. The blog can be accessed here: www.acteonline.org/publications/blogs/educators-in-action-blog/. Staff also produce and disseminate a quarterly e-newsletter that goes out to the whole group containing upcoming volunteer opportunities and recognition for outstanding volunteers.

State Association Support

The Leadership Department also provides support to ACTE's state associations and state leaders. Activities include monthly conference calls, monthly memos, monthly reminder emails regarding events, quarterly leadership electronic newsletter, leadership workshops at events, state leadership luncheon, QAS awards, and online resources. Additional information about these activities and extensive resources for state leaders can be found at www.acteonline.org/acte-state-association-leaders-resources/.

Awards

The ACTE Excellence Awards program promotes excellence in career and technical education by recognizing individuals who have made extraordinary contributions to the field, programs that exemplify the highest standards and organizations that have conducted activities to promote and expand career and technical education programs. Within the Excellence Awards program are ten awards that fall into two different award categories: the Member Awards and the Impact Awards. The Member Awards recognize teachers, administrators, guidance professionals, and other CTE professionals within the ACTE membership for their contributions at the state, Region and national levels. The Impact Awards recognize groups and individuals from the business and industry community for their support of the field of career and technical education. Nominees and winners in these categories are recognized at the Awards Gala during ACTE's CareerTech VISION. More information about the awards program is available at www.acteonline.org/professional-development/acte-awards/.

Committees and Task Forces

The Leadership Department oversees the administration of the Committees and Task Forces.

PROGRAMS DEPARTMENT

The Programs Department is responsible for setting the programmatic framework for meetings to ensure the best possible professional development and meeting outcome for Association business and activity. This department manages the production of all ACTE events including CareerTech VISION, National Policy Seminar, Best Practices and Innovations Conference, Region Conferences and other miscellaneous events. Together these events provide CTE professionals with high-quality professional development and a knowledgeable network of CTE professionals for sharing and exchanging the latest information in CTE.

CareerTech VISION

ACTE's Career Tech VISION is the premier event for CTE professionals to participate in some of the most relevant and engaging professional development. VISION joins together thousands of individuals with the common goal of advancing their career and the field of CTE, and provides inspiring keynote speakers, a CareerTech Expo and Career Pavilion, pre-conference workshops and tours on focused CTE topics and thriving programs, the ACTE Awards Banquet and a variety of networking opportunities. Concurrent sessions are tailored to suit the needs of each Division and provide opportunities to learn and share. The CareerTech Expo features exhibitor workshops, live demonstrations and the largest and latest collection of new products and services that can serve as great resources for both you and your students. ACTE promises to provide a memorable experience for all who attend. Additional information can be found at www.careertechvision.com

National Policy Seminar

Congressional decisions and federal initiatives have the potential to significantly impact CTE programs in either positive or negative ways. NPS provides an opportunity to influence the national debate by helping attendees become more effective advocates. The conference includes a full program focused on current policy issues and time for visiting Members of Congress on Capitol Hill. Make sure your CTE voice is heard by attending the National Policy Seminar! More information on NPS can be found at www.acteonline.org/nps/.

Best Practices and Innovations Conference

Co-hosted by ACTE and NCLA, Best Practices and Innovations in CTE is the signature event for CTE administrators. Featuring compelling keynote speakers, several breakout sessions, workshops, tours and a special networking event, this conference typically takes place in September. Learn more at www.acteonline.org/bestpractices.

COMMUNICATIONS DEPARTMENT

The Communications Department is responsible for the development and distribution of materials and messages promoting ACTE's programs, products and services that meet the needs of members, enhance the value of membership and raise awareness on the importance of CTE to the general education community.

Techniques Magazine

Techniques is the Association's magazine and premier member benefit, published in digital and printed formats from September through May. All members receive *Techniques* as part of their dues-funded benefits. In addition, ACTE also sells subscriptions to the magazine, mostly to libraries. Magazine staff also solicits and publishes ads from the CTE and vendor community.

Career Tech Update Electronic Newsletter

CTU is published every day and covers a variety of topics focused on CTE and advertises the most current Association offerings. Members receive this newsletter as a part of their benefits package; Non-members are allowed to subscribe, and ACTE uses this publication as a vehicle to promote awareness of and interest in CTE and the Association.

STEM SmartBrief Electronic Newsletter

STEM SmartBrief is published twice weekly, and accumulates the latest CTE news related to STEM initiatives and programming. Members receive this newsletter as a part of their benefits package; Non-members are allowed to subscribe, and ACTE uses this publication as a vehicle to promote awareness of and interest in CTE and the Association.

ACTE News Electronic Newsletter

ACTE News is a member-only weekly newsletter dedicated to informing members of the Association's member, public policy and research initiatives, events, products, services and national CTE opportunities.

ShopACTE

ShopACTE provides members and non-members with access to a range of quality books, resources, instructional aides and CTE Month® products that will assist them in their work and promoting CTE awareness. ACTE members also receive special discounts on ShopACTE's products and resources. ShopACTE also offers its products and resources along with book signings at CareerTech VISION and to partner organizations to offer their customers and attendees an expanded line of publications and resources.

Social Media and Online Seminars

ACTE is active on several social media channels to communicate the latest association news and encourage members and non-members alike to interact and connect with the Association. These channels include Twitter, Facebook, YouTube, LinkedIn, and Instagram. ACTE produces online seminars for members and non-members alike on various topics related to CTE. Video content and production are also the responsibility of the Communications Department, whether for promotion or education.

Design Services

ACTE offers creatives services to accommodate ACTE's myriad design needs, including the design of *Techniques*, digital media (including web, eblast sliders, social media and digital media graphics), and printed pieces to support membership recruitment and retention, event marketing, public policy work, and other Association communications.

Marketing

ACTE actively markets multiple annual events, including ACTE's CareerTech VISION, National Policy Seminar and Best Practices and Innovations in CTE Conference, co-hosted with NCLA, and others to drive attendance as well as interest in and awareness of CTE and ultimately membership and involvement in the Association. ACTE also markets ACTE-hosted state and region conferences and diligently promotes membership to provide a unified voice for the CTE profession and partners with affiliated state associations to advance CTE at local, regional and national levels.

PUBLIC POLICY DEPARTMENT

The Public Policy Department is responsible for initiating and maintaining contact with the United States Congress, White House, federal agencies, the media and the research community in order to advocate positions favorable to career and technical education nationally. In addition, the department plays a key role in the development of research publications, fact sheets, and policy-related tools for use by members, both in advocacy and policy implementation, and has led the organization's high-quality CTE initiative and Perkins technical assistance work. The department depends heavily upon the involvement of a grassroots network of ACTE members and coalitions with the business community and other organizations to achieve the Association's legislative, policy, advocacy and research goals. Major activities include:

Appropriations

Each year, ACTE recommends federal appropriations goals for career and technical education to ensure that funding levels are adequate to meet program objectives and federal expectations. The ACTE positions are advocated through activities including meetings with congressional and Administration leaders, contact with the media, development of advocacy campaigns, the preparation and submission of written requests, and testimony developed for the U.S. House of Representatives and the U.S. Senate. Throughout the appropriations process, the Public Policy Department keeps the field informed of the progress through the ACTE Website, CTE Policy Watch Blog, ACTE News, legislative alerts and other communications. This enables members to know when actions on their part are most essential to reinforce ACTE positions with Congress.

Authorizing Legislation

During each reauthorization of federal education and workforce development legislation, the Public Policy Department gathers opinions and recommendations from career and technical educators across the country regarding the effectiveness of the current law and the potential impact of proposed changes. This enables the Association to draft legislative proposals and positions that favor CTE. Throughout the usually lengthy authorization process of a piece of legislation, particularly with the Carl D. Perkins Act, ACTE maintains a highly visible stance, providing written and oral testimony and comments and meeting in person with congressional leaders to ensure that ACTE positions are well known. Media and public awareness activities accompany ACTE's legislative actions to promote policy positions.

After reauthorization, extensive efforts are undertaken to educate the career and technical community about changes to the various laws. When pertinent, the Association also takes a leadership role in advocating interpretations of the law through the implementation process that are favorable to CTE nationwide.

While a focus is often placed on the Perkins Act, great energy is put into expanding the scope of CTE through other authorizing legislation. Any education or workforce development bill that makes its way through Congress is considered a potential vehicle for expanding opportunities for those involved in the career and technical education field. Examples of this concept at work are the Every Student Succeeds Act, the Workforce Innovation and Opportunity Act, the Individuals with Disabilities Education Act and the Higher Education Act. ACTE also identifies opportunities for CTE via legislation outside the jurisdiction of the education committees, such as in the areas of agriculture, STEM and energy.

Policy-related Technical Assistance

Since Perkins V was signed into law in 2018, staff of the Public Policy Department have taken on a broader role in providing direct technical assistance to states and local providers to help them implement the federal law.

Some of this technical assistance has been in the form of tools and resources (such as the Perkins Guide and resources on the comprehensive local needs assessment); other assistance has been delivered in the form of providing presentations, facilitating trainings or stakeholder meetings, or direct facilitation of state plan development through contracted services.

Broadening CTE's Reach

One of the goals of the Public Policy Department is to leverage greater visibility and understanding about CTE from audiences external to the CTE community. Connecting CTE and workforce development to other issues that are not necessarily CTE-specific, but important to the nation, helps to positively position CTE and ACTE members. This is accomplished primarily through participation in meetings and events and the development of position statements, policy papers and issue briefs on areas that may not be unique to a particular piece of authorizing legislation. Examples of these issues include career academies, sustainable energy, workforce readiness and career development. At times, ACTE produces products that support this work such as ACTE's Issue Briefs and a "career ready" definition. The department also reacts to significant policy positions and proposals released by other groups or organizations.

Liaisons with Other National Organizations

The Public Policy Department promotes support for CTE from other education, business and labor organizations and serves as a resource on national CTE issues. Relationships with organizations beyond the traditional CTE community provide support for ACTE's advocacy efforts, including the call for a strong role for career and technical education in current legislative initiatives. ACTE also participates in broad coalitions focusing on education funding, elementary and secondary education legislation and workforce development legislation.

Communications with the Field

The Public Policy Department uses a legislative network of ACTE members and grassroots volunteers to initiate local and state advocacy efforts with federal legislators. Efforts also include a focus on expanding outreach to state-level leaders and involving them in the advocacy process. As needed, ACTE task forces focused on specific policy issues and legislation facilitate networking and the two-way flow of information. Training and updates are carried out through regular participation of staff in state and affiliate meetings and in state association leadership conference calls. This enables staff to keep members up-to-date on legislative issues, to provide advocacy and media training and to gain feedback from the field on legislative initiatives.

Through the CTE Policy Watch blog, Legislative Alerts sent via e-mail to all ACTE members, targeted alerts highlighting key congressional districts, regular legislative updates in ACTE News, columns and articles in *Techniques* magazine and regularly updated information on the Public Policy page of ACTE's website, the Public Policy Department is able to direct members' attention to the most critical issues facing the field at any time to keep them informed and to activate them when grassroots action is required. ACTE members are encouraged to take action through the Legislative Action Center on ACTE's website.

Providing Research & Information

The Public Policy Department is a source of research and information about CTE for ACTE members, the CTE field, policymakers, media and the general public. The Public Policy Department is engaged in gathering, analyzing and communicating research regarding CTE, education and workforce development in concert with ACTE's public policy efforts. Resources available to members and the general public on ACTE's website include

numerous fact sheets, infographics and research papers. The Public Policy Department continues to work to find and create new research and resources for use in advocacy efforts.

In addition to research to support advocacy efforts, policy staff also gather information on other key topics or areas of interest and serve as content experts on CTE and in several forums. For example, in response to the COVID-19 pandemic, the department surveyed members, collected information and prepared a guide of key considerations for planning for a COVID-19 impacted year, then followed the next year with a report on the impact of COVID-19 on CTE.

Media Relations

Media activities are closely aligned with advocacy efforts. ACTE communicates frequently with the media concerning key issues in CTE. The Association develops press materials and media plans, responds to media inquiries on a regular basis and seeks opportunities to promote CTE through tactics such as op-eds, letters to the editor and editorial board meetings. ACTE has created and continuously updates consumer and trade media lists, to which we send news and information as appropriate. On occasion, association leaders will be called upon to initiate contact with the media in their area to bring to light issues of importance to the profession and the Association. In addition, ACTE is involved in national public awareness activities to address CTE image perception.

High-quality CTE Initiative

To bring clarity to the burgeoning conversation around high-quality CTE and help CTE educators and administrators develop and improve the quality of their CTE programs of study, ACTE has created an evidence-based framework defining high-quality CTE across 12 elements: The ACTE [*Quality CTE Program of Study Framework*](#) (2018 version) and a companion program self-evaluation instrument. The program self-evaluation can be completed in [print](#) or [online](#). If filled out online, users can receive automatically calculated scores, save and print their results, and be connected to resources for areas identified as needing improvement. A host of resources around the elements have been or are in the process of being created, and the Framework is being integrated across ACTE professional development and recognition platforms, such as VISION and the awards program. More details can be found at <https://www.acteonline.org/professional-development/high-quality-cte-tools/>.

STRATEGIC PARTNERSHIPS

ACTE's focus on strategic partnerships is an important aspect of the Association's work. The Strategic Partnerships Department seeks to develop formal partnerships with many businesses, industries, trade organizations, foundations and other entities that can either provide revenue, content, services or some other tangible support to ACTE and its members. It is important that these partnerships also contribute to the goals and priorities of the partnering organizations.

The deputy executive director works on a strategy to implement the Strategic Partnerships work, programmatic planning and related content strategies. The work is conducted in close collaboration with the associate deputy executive director. Collaboration with other departments is important to regularly to prioritize, discuss coordination of activities, targets and other implementation strategies related to the work.

Coalition for Workforce Development Through CTE

The SPD manages the work of the Workforce Development Through CTE Coalition, which is an entity of over 50 trade associations focused on addressing skills gaps and challenges common across many sectors. Goals of the Coalition include increasing the number of CTE students, better aligning CTE with employer needs and improving the understanding and perception of CTE, especially related to parents and students.

CTE Learn

The SPD currently supports the operation and promotion of ACTE's online learning portal, CTE Learn (www.ctelearn.org). The portal provides access to more than 150 full courses on developing strong instructional practices, CTE administration and guidance and career development. In addition to the full courses, there are dozens of free learning modules and resources that provide important information specifically for CTE professionals. The full-courses are fee-based, typically take 4-5 hours to complete, require 70% proficiency to receive continuing education credit.

CTE Learn is designed to be offered through ACTE unified states, with each having their own customized portal for their members and state professionals to access through.

ACTE Staff Help Index

Who to call at Headquarters for answers to your questions?

Phone: 703-683-3111

Toll Free: 800-826-9972

Fax: 703-683-7424

Contact information for all staff is available at **www.acteonline.org/contact**

ACTE NEWS (electronic newsletter)	Editor & Graphic Designer EXT 337
ADVERTISING SALES	Sales & Exhibits Manager EXT 332
AFFILIATE, ASSOCIATE AND EDUCATIONAL INSTITUTION	Membership Director EXT 333
ASSOCIATION POLICY	Executive Director EXT 347
AWARDS	Leadership & Awards Director EXT 305
BILLING & PROCESSING Accounting Management	Chief Financial Officer EXT 328 or Executive Director EXT 347
BOARD/VP SUPPORT	Leadership & Awards Director EXT 305
BOOKSTORE ORDERS	Customer Service Associate EXT 300
BUDGET & FINANCE	Chief Financial Officer EXT 328 Executive Director EXT 347
CareerTech UPDATE SmartBrief/ STEM SmartBrief	Editor & Graphic Designer EXT 337
CHANGE OF ADDRESS	Customer Service Associate EXT 300
CHECK/CREDIT CARDS PROCESSING	Accounting Manager EXT 307
COMMITTEE ROSTERS	Leadership & Awards Director EXT 305
CTE LEARN	Associate Deputy Executive Director, EXT 341
CTE MONTH & AWARENESS	Senior Director, Communications EXT 377

CTE SUPPORT FUND	Senior Director, Communications EXT 377
E-BLAST SERVICES	Editor & Graphic Designer EXT 337
EDUCATORS IN ACTION	Leadership & Awards Director EXT 305
FACT SHEETS	Research and Policy Associate EXT 327
GOVERNANCE	Executive Director EXT 347
Divisions, Regions, Committees	Leadership & Awards Director EXT 305
Nominations and Elections	Manager of Leadership Programs EXT 321
GRAPHIC DESIGN	Senior Graphic Designer EXT 346
HIGH-QUALITY CTE INITIATIVE	Research Director EXT 324
JOB BANK	Membership Director EXT 349
LEGISLATIVE and REGULATORY POLICY	Senior Director of Public Policy EXT 331/ Government Relations Manager EXT 316
LIST RENTAL	Sales & Exhibits Manager EXT 332
MARKETING & COMMUNICATIONS	Senior Director, Communications EXT 377
MEDIA RELATIONS	Advocacy and Media Relations Manager EXT 303 Customer Service Associate EXT 300
MEMBERSHIP RECORDS & PROCESSING	Customer Service Associate EXT 300
MEMBER RECRUITMENT	Senior Director, Communications EXT 377
MEMBERSHIP REPORTING	Director, Operations EXT 351 Customer Service Associate EXT 300
MEMBERSHIP INQUIRIES	Customer Service Associate EXT 300
MEMBER SERVICES	Customer Service Associate EXT 300

NATIONAL POLICY SEMINAR	
Program Information/Hill Visits	Senior Director of Public Policy EXT 331
Registration	Accounting Manager EXT 307
Housing	Senior Director of Programs EXT 338
NEW MEMBER APPLICATIONS	Customer Service Associate EXT 300
ONLINE SEMINARS/ACTE VIDEO CONTENT	Digital Content Manager EXT 337
PROFESSIONAL DEVELOPMENT	Executive Director EXT 347
PUBLICATIONS	Managing Editor (<i>Techniques</i>) EXT 339
RESEARCH	Research Director EXT 324
RESOLUTIONS	Leadership & Awards Director EXT 305
SOCIAL MEDIA	Digital Content Manager EXT 333
STATE ASSOCIATIONS	
Leadership	Member Services Coordinator EXT 318
Membership	Member Services Coordinator EXT 318
Rosters	Member Services Coordinator EXT 318
STRATEGIC PLANNING	Executive Director EXT 347
SUBSCRIPTIONS	Member Services Associate EXT 317
TECHNIQUES MAGAZINE	
Advertising	Managing Editor EXT 339
Editorial	Sales & Exhibits Manager EXT 332
Subscriptions	Managing Editor EXT 339
Article Submission	Member Services Associate EXT 317
	Managing Editor EXT 339
ACTE's CareerTech VISION	
Program Information	Executive Director EXT 347
Registration	Senior Director of Programs EXT 338
Exhibits	Customer Service Associate EXT 300
Product Showcase	Sales & Exhibits Manager EXT 332
Housing	Sales & Exhibits Manager EXT 332
Meeting Logistics	Senior Director of Programs EXT 338
	Senior Director of Programs EXT 338

WEBSITE/CONTENT

Digital Content Manager EXT 349

Workforce Development Through CTE Coalition

Senior Manager of Strategic
Partnerships EXT 312

Leadership Tips

LEADERSHIP TIPS AND RESOURCES

It is no secret that leading an association in today's environment has never been more challenging. Increasing expectations by members and stakeholders, rising competition for limited resources, significant shifts in nearly all professions and industries, stress caused by increasing demands on the personal time of volunteer leaders—all create a critical need for effective planning in an association.

The message is clear for all association leaders:

Lead them with a plan that clearly establishes direction and priorities or take great risk of survival—yours as a leader and the association's.

The demand for mutual understanding, clarity of roles and responsibilities and to share leadership strategies among all the association leaders has never been greater.

Effective leadership in associations is shared leadership pursuing a vision through ongoing strategic planning.

Guidelines and Tips for Making the Most of Your Time on the Board

1. Always keep in mind the ACTE purpose and goals. Serve the needs of the entire membership, not just the constituency that elected you. Your responsibility as a Board member is to look out for the good of the organization as a whole.
2. Make a fresh commitment to member involvement and communication.
3. Don't take our past successes for granted.
4. Seek member feedback before, during and after each activity.
5. Read and respond to e-mails from the president, executive director and other Board members in a timely manner.
6. Read and understand the policies and procedures governing the Board.
7. Adhere to deadlines and respect the time of your colleagues and staff.
8. Play fair.
9. Give members empathy and hope, not support for their criticisms.
10. Be visible.
11. Share what we have by recruiting at least two new potential leaders.
12. Know where to find information on the ACTE Website.
13. Do not surprise the president or your colleagues.
14. If you are unsure of something, contact the president or executive director.
15. Once an item is decided by the Board, you must support the decision regardless of how you voted on the issue.
16. Communicate, communicate and communicate more!

Leadership is the privilege to have the responsibility to direct the actions of others in carrying out the purposes of the organization, at varying levels of authority and with accountability for both successful and failed endeavors.

—Wes Roberts

FOUR CONSIDERATIONS TO MAKING AN INFORMED DECISION

	What I Know	What I Need to Know	What I Learned
1. Do I know the needs/wants/desires of the members?			
2. What is the external environment that impacts this decision?			
3. What is the capacity of the organization?			
4. What ethical considerations do I need to consider?			

Keys to Successful Volunteer Boards			
Effective Board Member Traits	Key Attitudes for Effective Performance	Board Member Guidelines	Partnerships With Fellow Board Members/Volunteer Leaders
Knowledge of the governance of the Association	Learn and respect the organization's chain of command	Defend the Association in public; criticize in private, when needed	Common expectations
Dedication to cooperation	Do your homework at all stages	Remember that your understanding of the Association is greater than the average member.	Cooperative planning
Future vision	Keep an open mind	Invest your time and effort wisely	Good communication and information
Commitment to fair play	Work with other Board members	Avoid placing unrealistic demands on volunteers and help volunteers avoid placing unrealistic demands on elected officers	Honest evaluation of progress
	Be realistic about what you can achieve	Empower the volunteers to do the job they need to do	Common understanding
	Admit mistakes and ask for more information if needed	Communicate results and successes	
	Always act in the best interests of the Association	Recognize and reward competence and commitment	
		Dissent and question when it is proper and constructive	
		Remember that how you do it is often as important as what you do	
		Remember that your primary responsibility is to the future	

VOLUNTEER/STAFF PARTNERSHIP

The Formula for Success

Goal: Building an association culture constructed on trust, mutual respect and shared responsibility and accountability.

Key to Success: Building and nurturing a strong partnership between the volunteer leadership and the Association staff.

The Formula:

1. Clarity and consensus on roles and responsibilities of both volunteers and staff.
2. Value and respect the knowledge, expertise and skills of both volunteers and staff.
3. Maximize the unique talent and skills of volunteers and staff in implementing the strategic direction of the Association.
4. Understand and embrace the difference between the work of a *policy* board and the *operational* responsibilities of staff as well as their interdependence.
5. Shared vision and clarity on what constitutes success.
6. Ongoing communication between volunteers and staff—no surprises.
7. Involvement of both volunteers and staff in the planning process.
8. Recognition and appreciation for volunteer and staff time and efforts.
9. Availability of appropriate resources and information to achieve success.
10. Volunteers provide passion and a unique knowledge of the Association members; staff provides objectivity, continuity and unique skills in necessary functional areas.
11. Value the diversity of styles and consider all ideas equally.
12. Understand that it takes the full commitment of both volunteers and staff to achieve the association's desired success.

Some Tips:

1. Agree there will be surprises, good or bad.
2. Agree to criticize in private and constructively.
3. Clearly articulate realistic expectations and then go out of the way—there is always more than one way to accomplish a task.
4. Figure out how much information should be exchanged and how often, to keep everyone comfortable.
5. Develop a system of checks and balances to keep the association on its strategic path.
6. Provide ongoing evaluation and direct and honest feedback.
7. Discuss issues of concern with the appropriate individuals—president for volunteers and executive director for staff.
8. Don't complain to someone who can't do anything about it.
9. Establish measures of effectiveness.

Being selected as Vice President of a Region or Division is an honor and privilege. With honor and privilege come responsibilities to the members you represent and ACTE, the organization as a whole. Division/Region vice-presidents are elected to represent the voice of members within their geographic boundaries or specific divisions; as a Board member, one also needs to step back, look at the big picture, and consider what is best for the association as a whole. That being said, serving on the Board is also an opportunity for professional and personal growth. Take advantage of this time to stretch beyond your comfort zone and learn all you can in regards to advocacy, leadership, and all components of career and technical education and how each is an integral component of educating a highly skilled workforce.

To summarize the role of leadership, consider this description from *The Secret: What Great Leaders Know -- and Do* by Ken Blanchard and Mark Miller © 2004.

See the Future

Envision ACTE's and your division's/region's future and communicate that vision.

Engage and Develop Others

Create buy-in by engaging the heads and hearts of others

Reinvent Continuously

Learning is critical to survival so be a life-long learner, and,

Review organizational structure to insure fluidity and flexibility

Value Results and Relationships

Challenge others to succeed while providing support and encouragement

Embody the Values

Walk the Talk to gain trust

The Secret: What Great Leaders Know – And Do K. Blanchard and M. Miller © 2004

Thank you for your service and dedication to the members of ACTE and career and technical education. May your term be one of personal and professional growth, rewarding experiences, and new and renewed friendships.

Appendix

A BRIEF HISTORY OF ACTE

A New Association Is Born

When the National Society for Vocational Education and the Vocational Education Association of the Middle West came together in 1926 to form the American Vocational Association (AVA), a strong new voice was created. Seventy-five years later, the AVA became the Association for Career and Technical Education (ACTE) and the programs that were once called vocational are now called career and technical. Although our name has changed, our commitment to providing opportunities for success for all of our nation's students has never wavered throughout our long history.

Federal Funding and a Federal Board

When President Woodrow Wilson signed the Smith-Hughes Vocational Education Act into law in 1917, it was the beginning of federal funding for vocational education in the United States. In addition to the \$1.7 million appropriation for 1917-18, the act also created the Federal Board for Vocational Education to administer the provisions of the new law and to work on program planning and resolution of disputes. States were required to create state boards for vocational education and states and local communities were required to match federal appropriations. The Federal Board approved the plans that were prepared by the state boards. As federal funding under the Smith-Hughes Act increased at intervals that reached \$7.2 million for 1925-26, the Federal Board began to look at the differences in the ways the states were utilizing these funds and carrying out their state vocational programs. Recognizing that their union would give them greater power on Capitol Hill and in dealing with the Federal Board, the National Society for Vocational Education and the Vocational Association of the Middle West completed their merger in 1926.

Building the Foundation

The constitution of the new American Vocational Association was developed by committees representing both of the merging associations and the officers and executive committee were nominated by a committee chosen from the membership of both associations. Members of both of the old associations automatically became members of the new one. The committees representing the different sections in 1926 were agricultural education, vocational guidance, trade and industry education, commercial education, home economics education, part-time education and rehabilitation education. Within six months of the founding of AVA, 27 state vocational education associations became affiliated with the new association. By 1926, enrollment in the vocational education programs of agriculture, home economics and trade and industrial had grown to almost 900,000 and in 1929, Congress passed the George-Reed Act, authorizing an increase of \$1 million annually from 1930 to 1934 to expand vocational education in agriculture and home economics. In 1931, AVA president Charles M. Miller said, "Vocational education in this country has grown from a number of small isolated beginnings into a great national education institution." The early 1930s were difficult times for our country and vocational education had to work to keep its federal funding in the midst of the Great Depression. In 1932, an attempt to repeal the Smith-Hughes Act was defeated and an AVA study on changing conditions in industry, commerce, agriculture and the home was made a major project in the Federal Board for Vocational Education research program for that year. However, in 1933, President Roosevelt transferred the functions of the weakened Federal Board for Vocational Education to the U.S. Office of Education. On January 1, 1934, the AVA established its national headquarters in Washington, D.C., where it could maintain an active national leadership role in advocacy of vocational education and Lindley H. (L.H.) Dennis assumed his position as the association's first full-time executive secretary. A temporary measure passed in 1934, the George-Ellzey Act, authorized \$3 million annually for three years to be apportioned equally in agriculture, home economics and

trades and industry. Then, in 1936, the George-Deen Act authorized \$14 million a year for agriculture, home economics, trades and industry and distributive occupations. This marked the first time that marketing occupations were recognized under federal vocational education legislation. The George-Deen Act, however, permitted Congress to re-determine the amount appropriated each year, which made the need for a vocational education presence in Washington even more apparent.

Helping in Hard Times

President Roosevelt's New Deal encouraged "leisure time training" for self-improvement and enrichment in addition to controlled industry and planned agriculture, but Ray Fife, the president of AVA from 1932 to 1934, noted, "Vocational education has had much experience in adult education. Nearly two-thirds of the vocational education students of the nation are enrolled in adult classes. It can contribute much in organization and method to other forms of adult education." Even in the difficult times of the Depression, our programs proved their worth, as those with the greatest levels of skills and training were the last to lose their jobs and sometimes remained employed. Farmers who had studied in our classes were better prepared to adapt to new conditions and, therefore, had better chances to keep their farms. Vocational education for youths, apprenticeship training and adult education during the Depression helped maintain a prepared workforce as our nation recovered economically. Instructors in vocational courses sometimes took salary reductions, but few vocational classes were discontinued. And the AVA was there to help facilitate nationwide discussion and the exchange of ideas to help solve the problems of the Depression and to help with a return to normal employment and productivity. As the decade drew to a close, there were new difficulties looming on the horizon and in September 1939, L.H. Dennis, AVA's executive secretary, wrote, "...because of the national emergency growing out of the international situation, the vocational education leadership of the country stands ready to definitely and promptly make such expansion in the program as will meet the needs of the hour. We speak for a united vocational education leadership in assuring the president of the United States of our willingness to cordially cooperate with him and the various governmental agencies in the further and prompt expansion of our vocational education program in the training of an adequate supply of skilled workers for essential industries."

Answering the Call of Duty

The attack on Pearl Harbor brought the United States into World War II and brought the call to arms that included a call to duty in service of our nation for all Americans. It was a call that vocational education was ready to answer and had been preparing for in the previous months.

AVA and the Wartime Commission

When the United States Office of Education's Wartime Commission was established on December 23, 1941, the American Vocational Association was represented by its president, John J. Seidel and its executive secretary, L.H. Dennis. The Wartime Commission was organized to provide a united voice for all education in the war emergency, to develop sound policies and procedures for the mobilization of all American educational agencies in working toward victory and to eliminate the duplication of effort. Recognizing that victory in battle depended upon training and skill as well as courage, the membership of the AVA was prepared to assist the military in preparing our soldiers. The U.S. Army called upon the educational institutions of America to assist in pre-induction training and vocational education resolved to meet that call with training in automotive and airplane engine mechanics; radio, telephone and telegraph operation; and tool design and manufacturing.

AVA War Work Training Conference

Conducted as the annual AVA convention, the War Work Training Conference was held in Toledo, Ohio, December 2- 5, 1942. The conference was directed toward the winning of the war and planning for the peacetime to follow. Representatives of the U.S. Army, the U.S. Navy, the War Manpower Commission, war industries and federal and state governments participated in sessions at the conference. Topics included increased efficiency for the federal program of Vocational Training for War Production Workers, teacher shortages, food production, food distribution and utilization and the post-war needs for vocational education. At the Toledo War Work Training Conference, the AVA became the first major educational group to advocate a 12-month basis of wartime operation for a division of the public schools with a resolution requesting the U.S. Office of Education "to assist the vocational schools of the Nation in operating to the fullest extent possible for twelve months of the year." The AVA executive committee appointed an AVA Pre- Induction Training Committee to work with Merwin M. Peake, the chief of the Pre-Induction Training Section of the U.S. War Department. The determination of the AVA and its members to help win World War II is expressed in AVA President Fred Smith's February 1943 editorial. "Our vocational schools have trained more than three million workers since the summer of 1940 and have reason to feel proud; but there must be no let-up in this respect. We must continue to train replacements for men called into the armed services; we must redouble our efforts."

Women in War Industries

As more and more men were needed for military service in World War II, more and more women became needed in war industries at home. Under the terms of the law providing training for the war effort, women were to be accepted on an equal footing with men. But that doesn't mean they were always accepted with open arms. Some Congressmen saw it as the death knell for the American home if women went to work in factories. Some men feared for their own jobs and others believed that women simply did not have the mechanical ability required for the tasks. But necessity won out over doubts and by the end of 1942, women were working in shipyards, aircraft assembly plants, factories and foundries. They were helping to run railroads, airlines, streetcars and buses. They were doing welding, operating cranes, assembling detonators and operating lathes. "Rosie the Riveter" became an American icon. She could also be considered a symbol of the training women received during the war in vocational education programs across the country. The number of women trained for the war effort up to December 1, 1941 was 11,552, but by April 1943, 741,322 women were enrolled in training programs. And, according to a study done by the U.S. Office of Education from July 1, 1942 to December 31, 1942, 81 percent of all employed women trained for war production work were working in war production industries. Employment opportunities were opening up for older women, married women and women of color. In some plants, women doing the same work as men were even being paid the same wages as the men. Throughout World War II, vocational education served the country well by maintaining a well-trained war industry workforce and by assisting in pre-induction training. The nation's farmers and homemakers also aided the war effort at home through their dedication to producing the most goods and services possible with the smallest amount of our precious resources. But when the war was won, there were new challenges for vocational education on the home front.

Post-war Training

With veterans returning from the war and war industry workers changing over to peacetime occupations, the nation was faced with the possibility of training or retraining more than 30,000,000 individuals. In 1945, an AVA committee was working in cooperation with officials of the U.S. Office of Education to help develop material showing the vocational retraining services available for veterans in the public vocational schools. Industrial arts education, apprenticeship training and veterans' on-the-farm training were among the

education programs that would prepare the new peacetime workforce. M.D. Mobley, 1944 AVA president, said, "Next to winning the war and securing a lasting peace, the paramount objective of the American people is to provide peacetime jobs for all employable workers ... Vocational education will and must, play an important role in this undertaking."

Federal Legislation in the 40s

Appropriations initiated by Congress in 1940 to train defense production workers started at \$15 million and increased each year until they exceeded \$100 million. The program was discontinued in 1945 as the war ended, but by then vocational education had proved its worth. New legislation providing federal appropriations for vocational education was passed by Congress then signed into law by President Harry S. Truman on August 1, 1946. The George-Barden Act superseded the George-Deen Act and increased funding from \$14 million to \$29 million annually. In 1944, President Franklin D. Roosevelt signed the G.I. Bill of Rights, which provided benefits for veterans and in 1947, legislation was passed making vocational training available to veterans through institutional-on-the-farm training. The AVA was active in the late 1940s in arranging conferences with the Veterans Administrations of various state and regional vocational groups to deal with the securing of proper support for vocational training programs for veterans.

A Change at the Top

L.H. Dennis, who had been executive secretary of the AVA since the association's Washington, D.C., office was established on January 1, 1934, retired from his position on December 31, 1950. Dennis had been a member of the original group that drafted the Smith-Hughes law and, at the time of his retirement, had been associated with every federal vocational act. He was succeeded by Mayor Dennis (M.D.) Mobley, who had served as AVA president in 1944. Mobley described his predecessor as, "the man who made the AVA, who for 17 years devoted his every thought to its betterment." Following his retirement, Dennis worked as a consultant and lecturer on vocational education and traveled to countries around the world. He died in 1955 at the age of 74.

New Wars to Fight

In 1952, both presidential candidates, Dwight D. Eisenhower and Adlai E. Stevenson, wrote to AVA expressing support for vocational education. Only one of their party platforms—the National Democratic Platform—specifically mentioned vocational education. This marked the first time one of the major political parties had included an item in its platform pledging support to vocational education, but the early 1950s found the AVA fighting harder than ever to keep that support. In 1951, the AVA was successful in diverting the Bureau of the Budget's recommendations to set aside millions of dollars of George-Barden appropriations for defense training, which would have seriously threatened vocational education programs. All but \$900,000 was restored to the final vocational appropriations. The tide appeared to be turning when, for fiscal year 1956, Congress approved a record-breaking amount for vocational education appropriations. In hearings before the House and Senate committees and on the floor of the House, 102 Congressmen (including 14 Senators) spoke on behalf of vocational education and many more sought floor recognition in order to express their support. There was a new kind of war being fought in the world and this Cold War was also fought on the education front. In December 1955, M.D. Mobley noted that Russia was continuing to expand her vocational and technical training program and cautioned that, through this increased training, the communist state was trying to increase and improve production in order to become a competitor in the world marketplace. In response to these concerns, vocational and industrial arts leaders representing several AVA divisions met in Washington in January 1956 to consider ways to expand and improve vocational education in our country. The Association had another battle of its own to wage in 1958 when the Joint Federal State Action Committee and president

Eisenhower recommended the transfer of full financial support for vocational education to the states, with the elimination of federal funds to begin in 1960. In March 1958, Mobley testified before the Subcommittee on Intergovernmental Relations in opposition to the recommendations and in September the House and Senate approved a total of \$40,888,412 in federal funding for vocational education for fiscal 1959—ending the decade with one more victory for the AVA and its members.

The Times They Are A-changing

The dawn of the 1960s found the American Vocational Association actively involved in both the national and the international arenas. A cultural agreement between Russia and the United States resulted in an exchange of visits between Russian and American vocational educators. At the request of the U.S. Department of State, the AVA sponsored a two week tour of U.S. vocational schools in February 1960. In May of that same year, three American educators, including AVA past President H.H. London, visited vocational schools in Russia. They returned to report their concerns to the nation regarding the expanding vocational education plans of the Soviets in the economic phase of the Cold War. In the domestic arena, AVA officers worked with the Senate Special Committee on Unemployment Problems on a report that recommended a considerable expansion of vocational education for both youth and adults. The final report recognized the AVA and included quotes from the *AVA Bulletin*.

A National Power

The largest peacetime vocational education appropriations funding up to that date was passed for fiscal year 1961, despite President Eisenhower's recommendation for a \$2 million cut in funds. But there was soon to be a new administration in the White House, so the AVA wrote to both presidential candidates to obtain their views on vocational education. The Democratic Party's candidate, John F. Kennedy, responded on August 17, 1960, with a letter stating that, "The continuation of federal funds for vocational education at the full amounts authorized by existing law is vital to the security and economic health of our nation." He reaffirmed his party's platform to, "further federal support for all phases of vocational education." The Republican candidate, Richard Nixon, did not send his response until October 7, 1960, but he too expressed support for strengthening vocational education. The American Vocational Association played a major role in the passage of the Manpower Development and Training Act of 1962, a three-year program that authorized additional funds for the training of unemployed and underemployed workers. As a result of an argument fought and won by the AVA, this training would be handled by existing vocational education authorities at the federal, state and local levels. The Association helped establish President Kennedy's Panel of Consultants on Vocational Education and worked cooperatively with the panel in 1962. Members of the panel included two past presidents of the AVA. That same year, the First National Seminar on Research in Vocational Education was held at Purdue University and the AVA Research Committee was one of the sponsors.

The Perkins Act

When the Vocational Education Act of 1963 (The Perkins Act) was signed into law by President Lyndon Johnson, it became the most comprehensive vocational education measure that had ever become law in the history of our nation. It authorized a new permanent program of federal assistance for vocational education amounting to \$60 million for fiscal year 1964. After rising to \$177.5 million for fiscal 1966, funding would become \$225 million in subsequent years. The act provided that vocational programs be available for persons in high schools, for those out of high school available for full-time study, for unemployed or underemployed persons and for those who have academic or socioeconomic handicaps that prevent them from succeeding in regular vocational education programs. For the first time, federal funds would also become available to

construct new vocational schools. Eight AVA representatives, including Executive Secretary Mobley, were present at the historic signing.

The Space Age

The exploration of space helped define the 1960s. It symbolized our ongoing competitiveness with the Soviet Union and it symbolized the new technical skills needed by our workers. We were not only exploring the new frontier of space, but we were also exploring new frontiers in science and technology. The changing needs of industry and science were creating a greater need for technical personnel to supplement engineering and scientific staffs. "Rockets and satellites must be conceived and planned in every detail, but that alone would never get them off the launching pad," AVA president E.M. Claude wrote in 1960. "The general public has rarely been advised and the mass of our educational leaders have so far failed to realize that the great multitude needed to solve our future manpower needs will be skilled technical workers."

Some Major Shifts at AVA

In 1964, AVA moved its headquarters into its own building at 1510 H Street, N.W., but they were soon forced to move out of the building when excavation for a government building on an adjacent site seriously damaged the foundation of the AVA building. The damage was so bad that the building was then condemned. The final settlement from the government made it possible for the Association to pay off all of its liabilities and receive clear title to the property. Another major shift for the Association occurred on December 31, 1965, when M.D. Mobley retired as executive secretary. From his beginning as a vocational agriculture teacher in Georgia, Mobley had risen to a place where he was called by *Harper's Magazine*, "Washington's most successful lobbyist." Melvin L. Barlow, AVA historian, wrote of Mobley, "Four presidents and a decade-and-a-half of Senators and Representatives have learned that when they get the word from Dr. Mobley, it is the truth." Mobley was succeeded by Lowell A. Burkett, but the title was changed to executive director, which was what M.D. Mobley had always thought it should have been. When he died in 1967, Mobley's family requested that in lieu of flowers, contributions be made to a memorial at AVA. Today, the M.D. Mobley Memorial Library at ACTE's headquarters houses historical documents, research materials and other information regarding career and technical education. There were two major events for AVA in 1968. In July, the association moved into its newly rebuilt headquarters at 1510 H Street, N.W. and in October, President Lyndon Johnson signed the Vocational Education Amendments of 1968. This landmark, far-reaching legislation was the result of a three-year effort by Congress and included funds for research, residential vocational education and cooperative education. AVA provided Congress with data and testimony that helped to determine the needs for expansion and improvement of vocational education. It passed both the House and the Senate by unanimous votes.

New Challenges in the 70s

With the war in Vietnam still being waged, Lowell Burkett, AVA executive director, was invited along with 28 other educators to join the annual Bob Hope Christmas tour. The group's mission was to motivate servicemen toward utilizing GI Bill benefits to continue their educations after being discharged. Burkett returned from Vietnam with appreciation for the dedication of our troops there and with hope for the future of the country. "We in vocational education have a great responsibility to the veterans who will be returning to civilian life," Burkett wrote in the March 1970 *American Vocational Journal*. "As a profession, we are obligated to fight for the resources that will make it possible for these young men and women to return to and become an integral part of our social and economic life." The Association continued its prominent national role as the new decade began by sponsoring a National Study on Accreditation of Vocational-Technical Education that was funded by the U.S. Office of Education, but there was a new administration in the White House and a new philosophy

that challenged the concept of federal funding for vocational technical education. President Richard Nixon sent a letter to the 1969 AVA convention, stating, "As you know, I am a great believer in vocational education. In my view, vocational educators bear a very special responsibility, for you are the men and women who help millions attain the skills which keep our complex society moving." Nixon then vetoed the vocational and technical education appropriations that had been passed by Congress for the fiscal year that began July 1, 1970. But the House was able to override the veto with a two-thirds majority and the Senate vote sustained the override. Nixon had resigned from office by the time the Education Amendments Act of 1976 had been passed.

Issues of Society

During the civil rights movement of the 1960s, our nation began to recognize the potential that African American, Hispanic and Native American students had to offer and with that recognition came the realization that greater opportunities in higher education must be made available for those students. The emotionally or physically challenged, displaced homemakers, incarcerated juveniles and adults and the workers whose jobs were being made obsolete by new technology were also being seen as educable individuals who would be able to give something back to society in return. AVA's members had already established a history of educating non-traditional students and students with special needs. The AVA Task Force on Vocational Education in Urban Areas made recommendations for educational improvements in large metropolitan areas in the early 70s and the association studied ways to improve opportunities for women. The AVA Program of Work for 1970-1975 was to address the great challenge of the new decade, which it defined as, "America's deep concern for the manpower needs of the economy and the dignity and worth of each individual."

Accountability

The Education Amendments of 1976 reauthorized the Higher Education Act of 1965 and extended several of its programs, including community services and continuing education programs. It also created a new federal program to support guidance and counseling. The legislation provided for basic state grants for vocational education support, work-study and cooperative education and a portion of the basic state grant was set aside for disadvantaged students and students with disabilities. The new legislation also included an issue that has come to the forefront in recent years—accountability. The Education Amendments Act of 1976 called for the National Assessment of Vocational Education (NAVE). Gene Bottoms, who succeeded Lowell Burkett as executive director, wrote in the April 1978 *American Vocational Journal*, "As an association, we are challenged to show our concern for excellence. Our future credibility and influence with policy makers depends in part on the commitment we make today to have something to say about the quality of vocational programs in this country."

A New Age of Technology

In 1981, IBM sold its first personal computer and the world took another step toward an age in which technology would become a major part of our lives both at home and in the workplace. At a time when career and technical education would seem to be more needed, the Association found itself fighting again to retain federal funding. In May 1981, Gene Bottoms, AVA's executive director, reported that, "The phones rang all day long at AVA headquarters the day after President Reagan presented a budget that would rescind \$200 million in funding for vocational education." Bottoms expressed concern that the prevailing federal budget philosophy in 1982 could eliminate all vocational education. He had often focused attention on the unemployment problem and saw career and technical programs as realistic solutions. In 1983, when the Job Training Partnership Act (JTPA) replaced the Comprehensive Employment and Training Act (CETA), it represented a new era of collaboration between public institutions and the private sector in providing job

training and related services. And, although previous programs provided training to disadvantaged individuals, none had focused on job training as JTPA did in reaching out to special populations. The 1983 report, *A Nation at Risk*, found the nation's K-12 educational system badly in need of improvement in academic areas. This report, along with the Task Force on Education for Economic Growth's report, *Action for Excellence*, referred to the goal of excellence for all programs for all students, but no mention was made of preparation for work—even though the “new basics” it called for included competence in reading, interpreting and using information in the performance of a technical task. Under the directorship of Gene Bottoms, however, AVA had already begun working toward program improvement and an emphasis on excellence in career and technical education. The Association also worked with the National Association of State Directors of Vocational Education, the state vocational associations and the Center for Occupational Research and Development on a series of conferences on high technology.

An Expanded Perkins Act

In the early 1980s, Carl Perkins continued his fight for career and technical education and as a result, he achieved the passage of a new bill by the 98th Congress. The legislation provided for modernization and program improvement in vocational education and addressed the needs of special populations by ensuring access to quality programs for “individuals who are disadvantaged, handicapped, entering non-traditional occupations for their sex, adults in need of training or retraining, single parents or homemakers, individuals with limited proficiency in English and individuals who are incarcerated.” Shortly after Perkins died in 1984, President Reagan signed the bill into law and it was named the Carl D. Perkins Vocational Education Act. His son, Chris Perkins, calls it “a fitting testament to a man who believed in the primacy of education and the dignity of work.”

A Permanent Home

Today, the Association for Career and Technical Education is headquartered in Alexandria, Va., just across the Potomac River from Washington, D.C. The four-story brick building at 1410 King Street became the Association's home in January 1986 and established a permanent presence for career and technical education in the nation's capital. A building fund established in 1987 that was active until 1994 raised more than \$600,000 to help pay the mortgage. Visitors who come to ACTE headquarters can see many plaques recognizing large state donations.

More Battles to Fight

Among the difficult issues of the 1980s were unemployment, school dropouts, more welfare cases and higher crime rates. Career and technical education should have been seen as an important part of the strategy in dealing with these issues, but in 1987 the Reagan administration proposed cutting all new federal funding for vocational education in addition to a 50 percent cut in the appropriations that had already been approved. However, Members of Congress rallied to our cause. Sen. Pete Domenici (R-N.M.) said, “When you give up on [vocational education programs], you also give up on people who are searching for a chance to do better and add to the economic power of our nation.” AVA continued its leadership role by developing a legislative proposal for reauthorization of Perkins. Through its mobilization of support and with testimony by AVA's president, Francis Tuttle, before the House Subcommittee on Appropriations and president-elect Edmunds before the corresponding Senate subcommittee, AVA helped secure a \$30 million increase in funding for fiscal year 1988. The Association continued to work on public awareness of career and technical education with a newsletter from the AVA Public Information Network called *Image*. And when postsecondary vocational and technical institutes were barred from participation in the Bicentennial Campus program sponsored by the

Commission on the Bicentennial of the U.S. Constitution, AVA intervened and the exclusion was eliminated. The field received some positive publicity in 1989, when *Fortune* magazine devoted five pages of its June 19 issue to an article titled “The New, Improved Vocational School.” Author Nancy Perry emphasized vocational education’s role in alleviating skill shortages and dropout rates. “For industry, vocational education could be a godsend,” Perry wrote. “Here’s what vocational education can do: make academics more relevant, keep kids in school, encourage postsecondary education, provide jobs and retrain older workers.”

1990 Legislation

On September 25, 1990, the Carl D. Perkins Vocational and Applied Technology Act was signed into law by President George Bush with appropriations of \$1.6 billion a year through 1995 for state and local programs that teach the “skill competencies necessary to work in a technologically advanced society.” In addition to amending and extending Perkins, the legislation initiated support for the concept known as “tech prep” – the cooperative arrangement that combines academic and technical courses at the secondary and postsecondary levels. Also in 1990, President Bush signed the Americans with Disabilities Act barring discrimination against people with disabilities at work and school. When the major study on the status of vocational education by NAVE was concluded, it found that vocational education courses taken in high-skill occupations were growing and that vocational education was playing a major role in serving special populations.

Skills Needed

Two reports in the early 1990s emphasized the need for new skills in the high-tech workplace. *America’s Choice: High Skills or Low Wages* outlined a plan for making Americans more competitive for high wages by increasing high skills. The Labor Secretary’s Commission on Achieving Necessary Skills (SCANS) issued a report, *Learning a Living: A Blueprint for High Performance*, which defined work-readiness skills and workplace competencies.

School-to-Work

The National School-to-Work Opportunities Act (NSTWOA) was signed into law in May 1994. Using seed money from JTPA and Perkins, it was designed to address the nation’s serious skills shortage through partnerships between educators and employers. The program components of School-to-Work included school-based learning, work-based learning and activities connecting the two. The internships and apprenticeships of school-to-work have long been aspects of career tech, so many career and technical educators were involved in school-to-career programs in their districts. And since the federal funding was only seed money, they are now working to maintain the programs. President Bill Clinton’s endorsement of the school-to-work concept dates back to his days as governor of Arkansas when his apprenticeship program was passed by the state legislature. In an article in the October 1991 issue of the *Vocational Education Journal*, Clinton wrote, “Today we are failing, miserably, our non-college-bound young people, because we don’t have a real school-to-work system in America. We are laboring under the belief that our kids can get a high school education that is internationally competitive without working as hard as students in competitor nations.” As president, he continued his support when he called for the creation of a National Task Force on Preparing Youth for 21st Century College and Careers at the culmination of a three-day education conference on NSTWOA. “School-to-Work helps students see the relevance of their studies for their futures, motivating them to attend classes and study hard and has created thousands of new partnerships between businesses and schools,” Clinton told the October 2001 conference.

A New Perkins

After four years of working on reauthorization of Perkins, Congress finally passed a new bill, which President Clinton signed into law on October 31, 1998. The legislation had been delayed numerous times while the higher education programs were being reauthorized and the nation's job training system was being reworked. The new Perkins contained increased accountability with the need for states to adjust to new data collection and reporting requirements. There were also new funding formulas, with 85 percent of basic state grants distributed to local programs. Tech prep was strengthened through an emphasis on using technology in classroom instruction and the creation of a pilot program to open a number of tech prep learning sites at community colleges. Nancy O'Brien, the AVA's assistant executive director for government relations, said that the new law met all of the Association's highest priorities by giving career and technical education separate authorizing legislation, ensuring that educational authorities would oversee career and technical education, including a separate authorization for tech prep and creating a 10 percent reserve of local funding that could serve rural or urban areas adversely affected by changes to the secondary within-state formula. Our world was on the threshold of the new millennium and it was time for vocational education to take big step to prove that it would truly be education for the 21st century.

An Association Is Reborn

Throughout the history of our Association, periodic debates have arisen regarding our name. We began as "vocational" education. Then, as our society became more highly technical, our training programs also evolved. Vocational education more frequently was referred to as vocational-technical education. Still there was the occasional argument for changing the name. Should it be occupational education? Should it be career education? In 1970, when "career education" was proposed by President Nixon as a new term, there were concerns that it might be looked upon as a reform for vocational education. Nixon said that, "Too often, vocational education is foolishly stigmatized as being less desirable than academic preparation and too often the academic curriculum offers very little preparation for viable careers." The term vocational may have unfairly developed a certain stigma, but what it actually accomplished could be clearly seen by those who worked in the field. Some feared that the proposal to establish a new program of "career education" was really an attempt to divide the forces of vocational education and confuse our purpose. In 1989, the House of Representatives wanted to change the name to applied technology education, but AVA again worked to keep vocational education. As the 1990s drew to a close and with the new millennium on the horizon, it became more apparent to an increasing number of members of the American Vocational Association that it was time for a change. Our courses have become more academic, more challenging and more technical and we needed a name that accurately reflected those changes. At the December 1998 convention, the members voted to change the organization's name to the Association for Career and Technical Education (ACTE). Following the adoption of the new name by the national Association, state associations began making the change from vocational to career and technical.

Today, career and technical education is strong both in name and in practice. Our programs teach some of our most challenged students, but they also teach some of our most gifted students. Career and technical courses are training both young students and adults for careers in the real-world workplace. There is still work to be done in improving our image and ACTE is developing plans for a major public awareness campaign to do just that.

We must all work together to increase our membership, because that is our true power. ACTE has served its members well since 1929 and will continue to champion the cause of career and technical education by keeping our numbers strong. The Association has a proud history, as is clear from the story told on these pages and we will continue to make history throughout this millennium by changing when change is called for and by standing firm when appropriate. One thing that will not change is our belief in the importance of the work done by our members. That belief gives strength to the voice of ACTE—the voice that has spoken out for the students and educators of career and technical education since 1929.

PARLIAMENTARY PROCEDURE MADE EASY

Introduction:

Some people think parliamentary procedure is like voodoo. They do not understand it and think it is complicated and mystical. Nothing could be further from the truth. It is sort of like learning to tie shoelaces or a necktie. If you do not know how to do these simple tasks, it might seem to be a daunting, but once you learn a few basics, it really is very simple. The same is true of parliamentary procedure.

The goal of this section of the guide is to enable you to effectively conduct a meeting using proper parliamentary procedure.

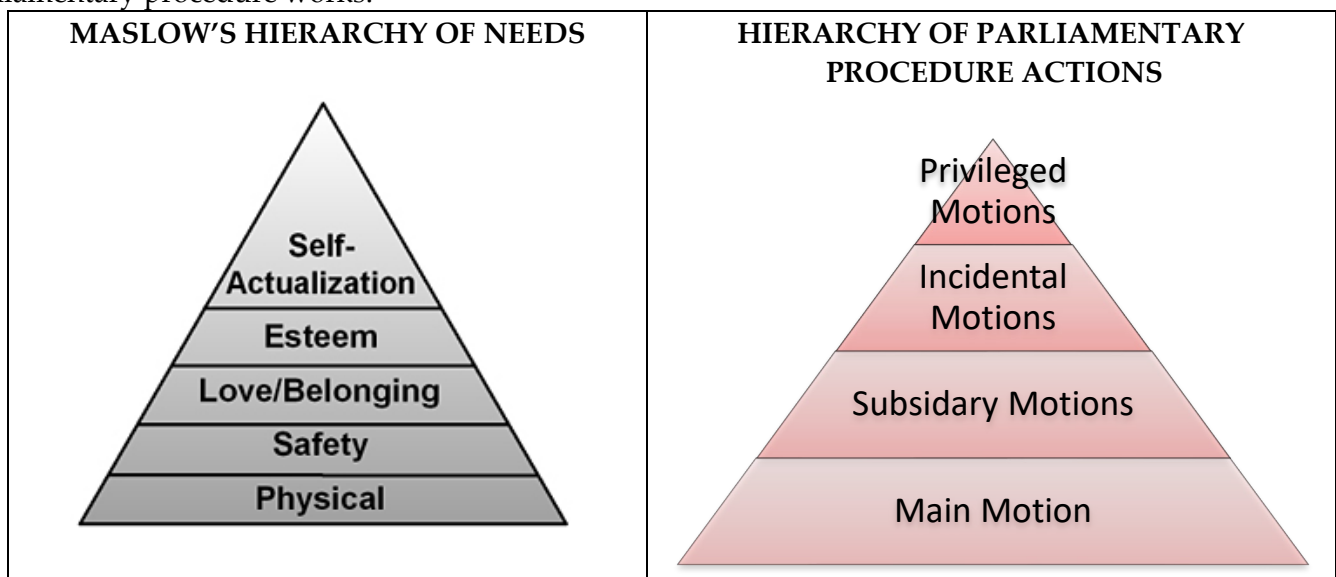
Why use Parliamentary Procedure?

There are three basic reasons why we use Parliamentary Procedure:

1. Prevent chaos – the use of proper parliamentary procedure should ensure that meetings are conducted in a professional, orderly manner. This should prevent confusion and bedlam. Decisions are made in a fair, orderly manner and time is used efficiently.
2. Ensures that the wishes of the majority prevail. Parliamentary procedure is a democratic process that assures that the desires and wishes of the majority of the people are recognized and accepted. In Robert’s Rules of Order it is stated, “The application of parliamentary law is the best method yet devised to enable assemblies of any size, with due regard for every member's opinion, to arrive at the general will...”
3. Protects the rights of the minority to be heard. Even if your stance or views are not supported by the majority of the group, you will know that your voice has been heard and the decision has been made in a democratic manner.

The Basics – The Main Motion

Many people are familiar with Maslow’s Hierarchy of Needs. The original had five levels of needs. One had to satisfy the lower level needs before they could progress up to the higher levels. This is very similar to how parliamentary procedure works.



The basic starting point in parliamentary procedure is the main motion. All new business to be considered by a body is introduced through a main motion. There are four basic steps in bringing a main motion before the assembly:

1. A member desiring to make a motion is recognized by the presiding officer
2. The member states the motion.
3. Another member seconds the motion
4. The chair restates the motion so that everyone clearly understands the motion.

The proper way to state a motion is “I move that...”. It is poor form to offer a motion by stating “I make a motion that...” or “I would like to...” or “I want to...” To a person who practices proper parliamentary procedure the three examples of poor form in the previous sentence sound like chalk screeching on a chalkboard. So, an example of a properly stated motion is:

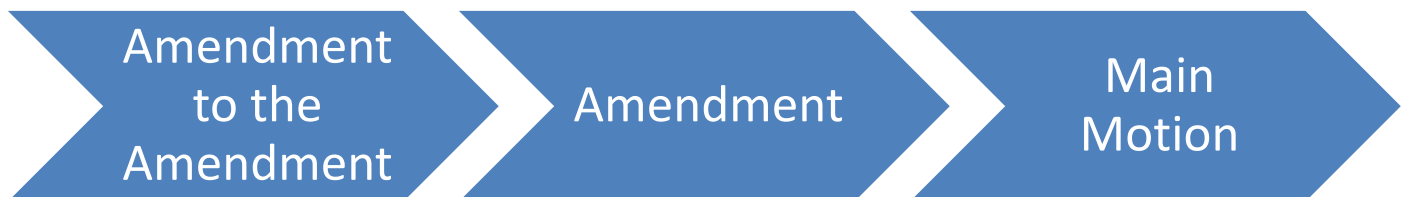
“I move that we buy a new sign.”

After the motion receives a second, it is then open for discussion. A main motion can be amended. This means a member would like to make a change to the original motion. Basically, there are three ways to amend a motion.

1. By striking out words – (i.e. *I move to amend the motion by striking out the word “new”*).
2. By inserting words – (i.e. *I move to amend the motion by adding the words “not to exceed \$750” at the end of the motion.*)
3. By striking out and inserting words – (i.e. *I move to amend by striking out the word “sign” and inserting the word “billboard”*.)

After the amendment receives a second, the discussion then focuses on the amendment. After adequate discussion a vote is then taken on whether or not to amend the motion. It should be clear you are not voting on the main motion but whether or not to amend the main motion. If the amendment is approved, then you can discuss the motion as amended and will then vote on that. If the amendment fails, then you will vote on the original main motion.

Where parliamentary procedure sometimes gets sticky, is that there can be one amendment to an amendment. So before a proposed amendment can be voted on, it can be amended in the same three ways mentioned above. For example, there could be a main motion on the floor “I move that we buy a new sign”. There could be an amendment “I move to amend the motion by adding the words “not to exceed \$750”. Then a person could move to amend the amendment by striking \$750 and inserting \$1,000. So when there is a motion on the floor, an amendment, and an amendment to the amendment one has to simply remember to discuss and vote on them in reverse order – vote on the amendment to the amendment, then the amendment as amended or in its original form, then vote on the motion in the original or amended form. While it is rare for this to happen, it can happen. The critical thing to remember is that only one main motion is allowed on the floor at one time, there can be only one amendment at a time, and only one amendment to an amendment.



A main motion (and any amendments) require a simple majority vote to pass and can be discussed.

Subsidiary Motions

When there is a main motion on the floor (including amendments) there are a series of motions that can be made that have a direct impact on the main motion. At any time during the discussion of the main motion the following motions can be made:

To lay on the table. There may be times when additional information is needed before a vote can be taken; or you may need to set a motion aside to act on another matter that is of greater importance. The proper motion to make is "I move to lay this motion (or motion and amendments) on the table." If this motion passes, the current motion is temporarily set aside and other business can be handled. When the body is ready to resume discussion of the motion, a motion is made to remove the original motion from the table. Sometimes, a motion is laid on the table and never removed which effectively kills the motion.

To postpone definitely. When a motion is laid on the table, it remains on the table until a motion is made to remove it from the table and that might never happen. So the motion to postpone definitely sets a motion aside but also specifies a time when it will again be brought before the body. An example would be "I move to postpone action on this motion until the next regularly scheduled meeting." If this passes, then the original motion would be classified as old business at the next meeting.

To postpone indefinitely. This is basically a way to kill a main motion without voting on it. This may be done to avoid an uncomfortable decision. Basically the body decides not to decide. If there is a controversial decision that might split the body or a motion has not been carefully thought out, this motion effectively stops action on the main motion. This allows people time to rethink the issue and perhaps introduce a better motion.

To refer to a committee. If it is obvious that more thought needs to occur in regards to a motion, additional details need to be formulated, or additional work is needed then the motion is often referred to a committee. The committee then investigates the relevant issues and then reports back to the body with their recommendations.

An interesting example is that during World War II national patriotism was at an all time-high. A motion was made at the national FFA convention to buy a bomber (an airplane that drops bombs) for the war effort. A motion was made to refer this to a committee to gather more information. The committee reported back that the idea was not feasible for a number of reasons. So the decision was made not to buy a bomber. However, in the fervor of the moment, the motion might have passed if it had been brought to a vote.

To move the previous question. One of the most misunderstood and widely blatant errors in parliamentary procedure has to do with "calling for the question." When a member thinks there has been enough discussion on a main motion and is ready to vote, the member often shouts out "question." This merely means that one member is ready to vote. That does not automatically stop discussion, but some presiding officers will mistakenly state "The question has been called for and we will proceed to vote." This violates the rights of others to express their opinions.

To properly stop discussion on a main motion, one would be recognized by the chair and state, "I move the previous question." In plain talk, this means I am ready to vote. There has to be a 2nd and then a vote is taken on this motion. Since this motion would limit the rights of the members, it requires a 2/3 vote to pass. If it passes,

then a vote on the main motion (or amendment being discussed) is immediately taken. To be clear, you must first vote on the previous question motion. And if this passes, you then vote on the main motion.



This issue is often informally handled. If a member hollers out question, then the presiding officer could say, are you ready to vote and if no member has an objection, then a vote can be taken and you do not have to go through the formality of moving the previous question.

Limit Time of Debate. If a meeting is dragging on, one can move to limit time of debate. This could be a time limit for each person who wants to discuss or could be a total time limit for the motion under consideration.

Incidental Motions

There are a variety of incidental motions that can be made at any time. They are basically used for clarification purposes or to keep the meeting running correctly.

Call for a Division of the House. If a voice vote is held and the outcome is unclear, any member may call for a division of the house. This means there will be a revote where members either stand, raise their hands, have a roll call vote, cast ballots, etc. When a division of the house is called for, there is no 2nd required and a revote is immediately taken.

Rise to a Point of Order. If a member thinks a parliamentary mistake has been made, then he or she stands and states, "I rise to a point of order." This is done immediately after the possible error. The presiding officer then instructs the member to state his or her point. For example, the person could state the previous question vote requires a 2/3 majority vote, not a simple majority. The presiding officer would then state "Your point is well taken" or "Your point is not well taken." If the point is well taken, then the parliamentary error is corrected.

Appeal the decision of the chair. If a member disagrees with the ruling of the presiding officer, he or she can appeal the decision of the chair. For example, if a point of order was not well taken and the member is certain that he or she is correct, the person would state "I appeal from the decision of the chair." The person states why he or she thinks the ruling is incorrect and the presiding officer then states why he or she thinks the ruling is correct. Then the members of the assembly vote on whether or not to sustain (agree with) the decision of the chair. This is rarely done in the real world but now you know the process.

Move to divide the question. If a motion has two distinct parts, then a person could move to divide the motion into two parts. For example, if there was a motion "to hold a car wash and to have a bake sale" then one could move to divide the question. If the motion receives a 2nd and then passes, the main motion would be split into two – one motion being to hold a car wash and the second motion being to have a bake sale.

There are other incidental motions such as rise to a parliamentary inquiry, suspend the rules, withdraw a motion, and object to consideration of a question but it would be rare that a person in your position would have to handle them. As this is supposed to be a somewhat concise guide they will not be discussed.

Privileged Motions

There are a handful of motions that are classified as privileged motions. This means they can be made at any time and take precedence over any motion on the floor.

Recess. If a person perceives the group needs a break (or wants to strategize with colleagues), he or she would move to take a recess. A second is needed; the motion is not debatable and requires a simple majority vote. Unless the motion specified a length of time for the recess the presiding officer sets the length of time for the recess.

Adjourn. Any member can move to adjourn the meeting at any time. The motion requires a 2nd, is not debatable and requires a majority vote to pass. If the motion passes, the meeting is adjourned.

Two other privileged motions are to fix time to adjourn and to rise to a question of privilege. Since this document is not designed to be a compendium of all possible motions, they are not described here.

Random Additional Tips

- Most assemblies use Robert's Rules of Order, Newly Revised as their official parliamentary procedure reference, so it might be good to obtain a copy and peruse it.
- Voice votes are common unless a motion requires a 2/3 vote. In these instances people should raise their hands.
- Committee reports do not need a 2nd for their acceptance. Since the report comes from a committee, there is an implied 2nd.
- Only one person should have the floor at a time.

TABLE OF MOTIONS

MOTION (by order of precedence)	Can the speaker be interrupted?	Is a second needed?	Is this debatable (can there be discussion)?	Can this be amended?	What type of vote is needed for passage?
To Adjourn	No	Yes	No	No	Majority
To Take a Recess	No	Yes	Sometimes	Yes	Majority
Rise to a Question of Privilege	Yes	No	No	No	Chair Decides
Rise to a Parliamentary Inquiry	Yes	No	No	No	Chair Decides
To Lay on the table	No	Yes	No	No	Majority
To Call for the Previous Question	No	Yes	No	No	2/3
To Limit or extend debate	No	Yes	No	Yes	2/3
To Postpone to a certain time	No	Yes	Yes	Yes	Majority
To Refer to committee	No	Yes	Yes	Yes	Majority
To Amend	No	Yes	If motion is	Yes	Majority
To Postpone Indefinitely	No	Yes	Yes	No	Majority
MAIN MOTION	No	Yes	Yes	Yes	Majority
Incidental Motions – No Order of Precedence					
Appeal from the Decision of the Chair	Yes	Yes	Sometimes	No	Majority
Rise to a Point of Order	Yes	No	No	No	Chair decides

Call for a Division of the House	Yes	No	No	No	Majority
To Divide the Question	No	Yes	No	Yes	Majority

FINANCIAL OVERVIEW

ACTE Fiscal Year: July 1 thru June 30

Monthly Deadlines

Region and Division Financials are emailed no later than the 20th of each month. Please be sure to check balances monthly compared to items submitted.

Three Types of Accounts

Operating (budgeted and is expenditures only)

Designated

Temporarily Restricted (donor restrictions)

Operating Accounts

Annual Budget Process

- Only operating accounts are budgeted.
- Operating accounts are for expenditures only (i.e. not for revenue)
- The budget parameters are defined in Board policy.
- Each Region and Division operating budget maximum threshold is based on formulas as defined by Board policy.
- You are able to budget lower than the budgeted maximum but not more.
- The budget must include notes/descriptions for the budgeted expenditures for each line item.
- You are able to spend more or less than budgeted within line items as long as the bottom line budget is not exceeded.
- Any expenses over the budgeted amount will be automatically deducted from the corresponding designated account as stipulated in Board policy.
- Operating funds do not roll over from fiscal year to fiscal year (i.e. use or lose).
- Once the annual budget process begins:
 - You will receive a budget template with fiscal year-to-date expense figures and a column to enter your new fiscal year budget.
 - You will be provided with a history of expenses for historical information purposes.
 - You will receive a chart of accounts and may decide to use different accounts than the previous fiscal year.

Designated and Temporarily Restricted Accounts

All Board Designated and Temporarily Restricted Accounts have defined policies.

Unlike Operating Accounts

Designated and Temporarily Restricted funds do roll over from fiscal year to fiscal year.

Designated and Temporarily Restricted accounts can receive revenue.

Designated and Temporarily Restricted accounts earn investment revenue.

DEVELOPING A BUDGET

Division/Region Vice-Presidents are responsible for submitting a budget by April 20 outlining the programs and activities for the year. ACTE's budget year is from July 1 to June 30. Ideally, the outgoing vice-president consulted with you, the incoming VP, when developing the budget you will be working with; and, in turn, you will work with the incoming vice president in the final year of your term. The division/region budget allocation is based upon a formula which can be found on page 34 of the *Policies and Procedures Manual*. An electronic copy is available under the *For Board Members Only* section of the ACTE website.

When developing the budget, review the history of previous expenditures as well as the goals and strategic priorities of ACTE and your respective division/region. Share this information with the policy committee as the ultimate goal is to provide the most benefit to members with the limited resources available. If your division has affiliates, communication with the affiliates and its officers is critical to a successful working relationship. Greg Pierce, past vice president of the Administration Division and ACTE Finance Chair, attended the board meetings of the Administration division affiliates to report on ACTE activities; he also asked for input and suggestions. Additionally, he states it is important to have affiliate representation on the division policy committee as well. Once the budget is developed, share it with the policy committee members and get their approval prior to submitting the proposed budget to ACTE headquarters. The proposed budget is then incorporated into the overall ACTE budget and reviewed and approved at the July Board meeting.

The Division/Region Vice President is responsible and accountable to both ACTE and the policy committee for the budget; therefore, all expenditures must be approved by the vice president. ACTE staff sends financial reports on a regular basis. Review the reports, contact ACTE staff with questions, and forward the reports onto the policy committee. Monies cannot be carried over to the next budget year; furthermore, over-budget expenditures are not acceptable. Over-expenditures are either covered by taking monies out of the division/region designated fund if one is available or are subtracted from the next fiscal year's allocation. Plan accordingly and monitor your operating fund balance.

Greg Pierce writes, "The key to successful budgeting is communication between the outgoing and incoming vice president. The outgoing vice president can educate the new vice president on the budget expenditure history. In turn, the new vice president can take this history and work with the policy committee to make necessary or desired adjustments to move the Division/Region forward with the effective and efficient use of operating funds and designated funds." He also states, "Budget amounts are small. There is not enough money to solve all the division needs. Therefore, establish what the funds can be used for that will help with one to three issues within the division."

ACTE RESTRICTED AND DESIGNATED FUNDS

Board Policy Regarding the Use of Designated Funds:

1. The Policy Committee of each Region and Division is required to review the purposes and information regarding their designated fund(s) annually. All approved uses must conform to applicable laws and regulations regarding 501(c)(3) organizations and specifically designate that political contributions are prohibited.
2. All expenditures of designated funds must be approved by the policy committee of the Division or Region. Check requests for \$250 or more must contain the approval of two policy committee members, one of which is the vice president of the Division or the Region. Approvals may be electronic.

Suggested Guidelines for Use of Designated Funds:

1. The primary purpose of the designated funds is to support activities that benefit and enhance the membership experience and/or professional development of the members of a Division or Region. Activities that promote and advance Career and Technical Education in general would also be considered appropriate use of funds. Accordingly, the following types of expenditures are deemed appropriate (this is not an all-inclusive list but are examples):
 - Awards for members
 - Shipping/ mailing/ postage expenses for awards and conference materials
 - Scholarship programs
 - Speaker fees for division meetings at the VISION summit or at regional conferences
 - Food & Beverage Expenses for division meetings at VISION
 - Registration fees and travel expenses to send members to external affiliate meetings for purposes of collaborating, cooperating and promoting career and technical education.
 - Division specific supplies (such as folios and bags) to use during division meetings at VISION or at regional meetings.
 - Promotional materials for Regional conferences
 - Travel expenses/ stipends for those (other than the VPs) to attend Regional conferences, VISION and NPS
2. Expenditure of designated funds for the following types of activities are highly discouraged:
 - Payment of ACTE dues
3. Expenditure of designated funds for the following activities are not allowable:
 - Contributions to political candidates or parties

If there are questions about the use of restricted or designated funds, please direct those questions to the ACTE Executive Director or the Chief Financial Officer.

ACCOUNT CODES

Region/Division Most Frequently Used Chart of Accounts

Operating

Region I-Operating

- 5100-300 Professional Services
- 5150-300 Speaker Fees
- 5230-300 Dues/Subscriptions/Registrations
- 5240-300 Travel Expense
- 5500-300 Meeting Expense
- 5510-300 Equipment Rental-Meetings
- 5580-300 Food & Beverage
- 5800-300 Shipping/Mailing Expenses
- 5810-300 Printing Expense
- 5900-300 Supplies
- 6120-300 Communications
- 6300-300 Awards & Grants
- 6900-300 Miscellaneous Expense

Region II-Operating

- 5240-301 Travel Expense
- 5500-301 Meeting Expense
- 5580-301 Food & Beverage
- 5800-301 Shipping/Mailing Expenses
- 5810-301 Printing Expense
- 5900-301 Supplies
- 6300-301 Awards & Grants

Region III-Operating

- 5240-302 Travel Expense
- 5500-302 Meeting Expense
- 5580-302 Food & Beverage
- 5800-302 Shipping/Mailing Expenses
- 5810-302 Printing Expense
- 5900-302 Supplies
- 6300-302 Awards & Grants

Region IV-Operating

- 5100-303 Professional Services
- 5150-303 Speaker Fees
- 5230-303 Dues/Subscriptions/Registrations
- 5240-303 Travel Expense

5500-303 Meeting Expense
5505-303 Audio Visual Expense
5580-303 Food & Beverage
5800-303 Shipping/Mailing Expenses
5810-303 Printing Expense
5900-303 Supplies
5910-303 Printing Expense
6120-303 Communications
6300-303 Awards & Grants
6310-303 Scholarships

Region V-Operating

5230-304 Dues/Subscriptions/Registrations
5240-304 Travel Expense
5500-304 Meeting Expense
5580-304 Food & Beverage
5800-304 Shipping/Mailing Expenses
5810-304 Printing Expense
5900-304 Supplies
6120-304 Communications
6300-304 Awards & Grants

Regional Conference-Operating

5240-305 Travel Expense
5510-305 Equipment Rental-Meetings
5580-305 Food & Beverage
6900-305 Miscellaneous Expense

Administration Division-Operating

5100-401 Professional Services
5150-401 Speaker Fees
5230-401 Dues/Subscriptions/Registrations
5240-401 Travel Expense
5500-401 Meeting Expense
5505-401 Audio Visual Expense
5510-401 Equipment Rental-Meetings
5580-401 Food & Beverage
5800-401 Shipping/Mailing Expenses
5810-401 Printing Expense
5900-401 Supplies
6120-401 Communications
6300-401 Awards & Grants

6900-401 Miscellaneous

Agricultural Education Division-Operating

5100-402 Professional Services
5230-402 Dues/Subscriptions/Registrations
5240-402 Travel Expense
5500-402 Meeting Expense
5510-402 Equipment Rental-Meetings
5580-402 Food & Beverage
5800-402 Shipping/Mailing Expenses
5810-402 Printing Expense
5900-402 Supplies
6120-402 Communications
6300-402 Awards & Grants
6900-402 Miscellaneous Expense

Business Education Division-Operating

5230-403 Dues/Subscriptions/Registrations
5240-403 Travel Expense
5500-403 Meeting Expense
5505-403 Audio Visual Expense
5510-403 Equipment Rental-Meetings
5580-403 Food & Beverage
5800-403 Shipping/Mailing Expenses
5810-403 Printing Expense
5900-403 Supplies
6120-403 Communications
6300-403 Awards & Grants
6900-403 Miscellaneous

Counseling and Career Development Division-Operating

5100-405 Professional Services
5230-405 Dues/Subscriptions/Registrations
5240-405 Travel Expense
5500-405 Meeting Expense
5510-405 Equipment Rental-Meetings
5580-405 Food & Beverage
5800-405 Shipping/Mailing Expenses
5810-405 Printing Expense
5900-405 Supplies
6120-405 Communications
6300-405 Awards & Grants

6900-405 Miscellaneous

Health Science Education Division-Operating

5100-406 Professional Services
5230-406 Dues/Subscriptions/Registrations
5240-406 Travel Expense
5510-406 Equipment Rental-Meetings
5580-406 Food & Beverage
5800-406 Shipping/Mailing Expenses
5810-406 Printing Expense
5900-406 Supplies
6120-406 Communications
6300-406 Awards & Grants

Family & Consumer Sciences Division-Operating

5150-407 Speaker Fees
5230-407 Dues/Subscriptions/Registrations
5240-407 Travel Expense
5510-407 Equipment Rental-Meetings
5580-407 Food & Beverage
5800-407 Shipping/Mailing Expenses
5810-407 Printing Expense
5900-407 Supplies
6120-407 Communications
6300-407 Awards & Grants
6900-407 Miscellaneous

Engineering and Technology Education Division-Operating

5100-408 Professional Services
5230-408 Dues/Subscriptions/Registrations
5240-408 Travel Expense
5500-408 Meeting Expense
5510-408 Equipment Rental-Meetings
5580-408 Food & Beverage
5800-408 Shipping/Mailing Expenses
5810-408 Printing Expense
5900-408 Supplies
6120-408 Communications
6300-408 Awards & Grants
6900-408 Miscellaneous

Postsecondary, Adult and Career Education Division-Operating

5100-409 Professional Services
5230-409 Dues/Subscriptions/Registrations
5240-409 Travel Expense
5500-409 Meeting Expense
5510-409 Equipment Rental-Meetings
5580-409 Food & Beverage
5800-409 Shipping/Mailing Expenses
5810-409 Printing Expense
5900-409 Supplies
6120-409 Communications
6300-409 Awards & Grants
6900-409 Miscellaneous

New & Related Services Division-Operating

5150-410 Speaker Fees
5230-410 Dues/Subscriptions/Registrations
5240-410 Travel Expense
5510-410 Equipment Rental-Meetings
5580-410 Food & Beverage
5800-410 Shipping/Mailing Expenses
5810-410 Printing Expense
5900-410 Supplies
6120-410 Communications
6300-410 Awards & Grants
6900-410 Miscellaneous

Trade & Industrial Division-Operating

4110-411 Trade and Industrial Sponsor
5100-411 Professional Services
5230-411 Dues/Subscriptions/Registrations
5240-411 Travel Expense
5500-411 Meeting Expense
5505-411 Audio Visual Expense
5580-411 Food & Beverage
5800-411 Shipping/Mailing Expenses
5810-411 Printing Expense
5900-411 Supplies
6120-411 Communications
6300-411 Awards & Grants
6900-411 Miscellaneous

Board Designated

Region I-Designated

- 4100-500 Public Support
- 4810-500 Investment Revenue
- 5230-500 Dues/Subscription/Registrations
- 6900-500 Miscellaneous

Region II-Designated

- 4100-501 Public Support
- 4810-501 Investment Revenue
- 5100-501 Professional Services
- 5500-501 Meeting Expense
- 6300-501 Awards & Grants
- 6930-501 Board Designated Reserve Expenses Account

Region III-Designated

- 4100-502 Public Support
- 4810-502 Investment Revenue
- 5100-502 Professional Services
- 5240-502 Travel Expense
- 5580-502 Food & Beverage
- 5800-502 Shipping/Mailing Expenses
- 5810-502 Printing Expense
- 5900-502 Supplies

Region IV-Designated

- 4100-503 Public Support
- 4810-503 Investment Revenue
- 4900-503 Other Income
- 5100-503 Professional Services
- 5230-503 Dues/Subscriptions/Registrations
- 5240-503 Travel Expense
- 5500-503 Meeting Expense
- 5900-503 Supplies
- 6300-503 Awards & Grants
- 6900-503 Miscellaneous

Region V-Designated

- 4100-504 Public Support
- 4810-504 Investment Income
- 4900-504 Other Income
- 5100-504 Professional Services

5230-504 Dues/Subscriptions/Registrations
5240-504 Travel Expense
5500-504 Meeting Expense
5810-504 Printing Expense
5900-504 Supplies
6300-504 Awards & Grants
6310-504 Scholarships
6900-504 Miscellaneous

Agricultural Education Division-Designated

4100-507 Public Support
4810-507 Investment Revenue
5100-507 Professional Services
5240-507 Travel Expense
6300-507 Awards and Grants

Business Education Division-Designated

4100-508 Public Support
4810-508 Investment Revenue
5230-508 Dues/Subscriptions/Registrations
5580-508 Food & Beverage
5900-508 Supplies

Counseling and Career Development Division-Designated

4100-510 Public Support
4810-510 Investment Revenue
5100-510 Professional Services
5230-510 Dues/Subscriptions/Registrations
5240-510 Travel Expense
5510-510 Equipment Rental-Meetings
5580-510 Food & Beverage
5800-510 Shipping/Mailing Expenses
5810-510 Printing Expense
5900-510 Supplies
6300-510 Awards & Grants

Health Science Education Division Designated

4100-511 Public Support
4810-511 Investment Revenue
5100-511 Professional Services
5240-511 Travel Expense
5580-511 Food & Beverage

5800-511 Shipping/Mailing Expenses
5810-511 Printing Expense

Family & Consumer Sciences Division-Designated

4100-512 Public Support
4810-512 Investment Revenue
5100-512 Professional Services
5230-512 Dues/Subscriptions/Registrations
5240-512 Travel Expense
5580-512 Food & Beverage
5800-512 Shipping/Mailing Expenses
5810-512 Printing Expenses
5900-512 Supplies
6300-512 Awards & Grants
6310-512 Scholarships

Technology Education Division-Designated

4100-513 Public Support
4810-513 Investment Revenue
5800-513 Shipping/Mailing Expenses
5810-513 Printing Expenses
5900-513 Supplies

Postsecondary, Adult and Career Education Division-Designated

4100-514 Public Support
4810-514 Investment Revenue
5240-514 Travel Expense
5580-514 Food & Beverage

Trade & Industrial Division-Designated

4100-516 Public Support
4810-516 Investment Revenue
5240-516 Travel Expense
5900-516 Supplies

Graduate Leadership Development-Designated

4100-517 Public Support
4810-517 Investment Revenue

Delmar Awards Program-Designated

4100-518 Public Support
4810-518 Investment Revenue
5230-518 Dues/Subscriptions/Registrations

6300-518 Awards and Grants

Carla Phillipi New Professional-Designated

4100-519 Public Support

4810-519 Investment Revenue

6310-519 Scholarships

6900-519 Miscellaneous

New Professionals Fund-Designated

4100-520 Public Support

4810-520 Investment Revenue

5240-520 Travel Expense

5800-520 Shipping/Mailing Expenses

5900-520 Supplies

6120-520 Communications

6300-520 Awards and Grants

DIVISION/REGION MEETINGS

Division vice-presidents have the responsibility of working with ACTE staff to plan the policy committee and business meetings. Region vice-presidents, in general, work with staff to plan their policy committee meeting and business meeting.

Each division/region vice president will receive a link for meetings requests that asks for detailed information regarding any meetings/sessions you wish to conduct at VISION or NPS. Possible meetings/sessions you may wish to conduct include policy/business meetings, an opening session, a luncheon, an awards program, division-specific breakout sessions, or reception. If you are an outgoing Board member and will complete the forms, please be sure to send a copy of all of your forms to the incoming Board member. That will help in the transition process.

Division affiliates may wish to conduct meetings/sessions at VISION as well. Affiliates must also complete the meeting requests form, and, if food/beverage will be served, provide a contact for billing purposes.

VISION PROGRAM SESSIONS

Division vice-presidents also have the responsibility of working with ACTE staff to develop programming for their specific division during VISION. By surveying division membership, you can gain a perspective of topics and information members desire from division programming. Utilize this information to solicit proposals from the membership. Some divisions have a programming committee and chair; the committee should reflect your membership and include representatives from affiliates. Forward the committees' contact information to ACTE staff so the committee members receive the session evaluation information. Becky Cox, former FACS division Vice-President, recommends holding a conference call with the committee when reviewing the call for proposals. While each reviewer scores the presentations individually, the conference call allows the committee to discuss strengths and weaknesses of any proposal and identify gaps in programming. Not all submissions have to be selected; go for quality programming not quantity.

When developing a division program, try combining division activities such as the opening session (if your division plans one) with the awards program or business meeting. Not only does this allow for better use of limited resources, it allows conference attendees to attend more professional development sessions which helps justify conference attendance with their respective administrators. Furthermore, if you have a division, solicit suggestions from members to ensure the speaker's message is timely and relevant.

The key to successful division programming at the VISION summit is to be proactive. Find out what your members really want and go after it. An evaluation tool, which can be sent out electronically after conference, is an excellent tool to reflect upon successes of the past conference and plan for the needs/topics of future events. Remember, your members attend the meeting for professional development so try not to schedule too many business meetings. ACTE, and your division, offer many quality sessions; support the speakers and allow your members time to network and learn from their colleagues.

VISION Billing

After invoices have been received from hotels or convention centers, they will be reviewed, and Division or Region charges will be sent for your approval. After approval, those amounts will be posted to Division and Region accounts.