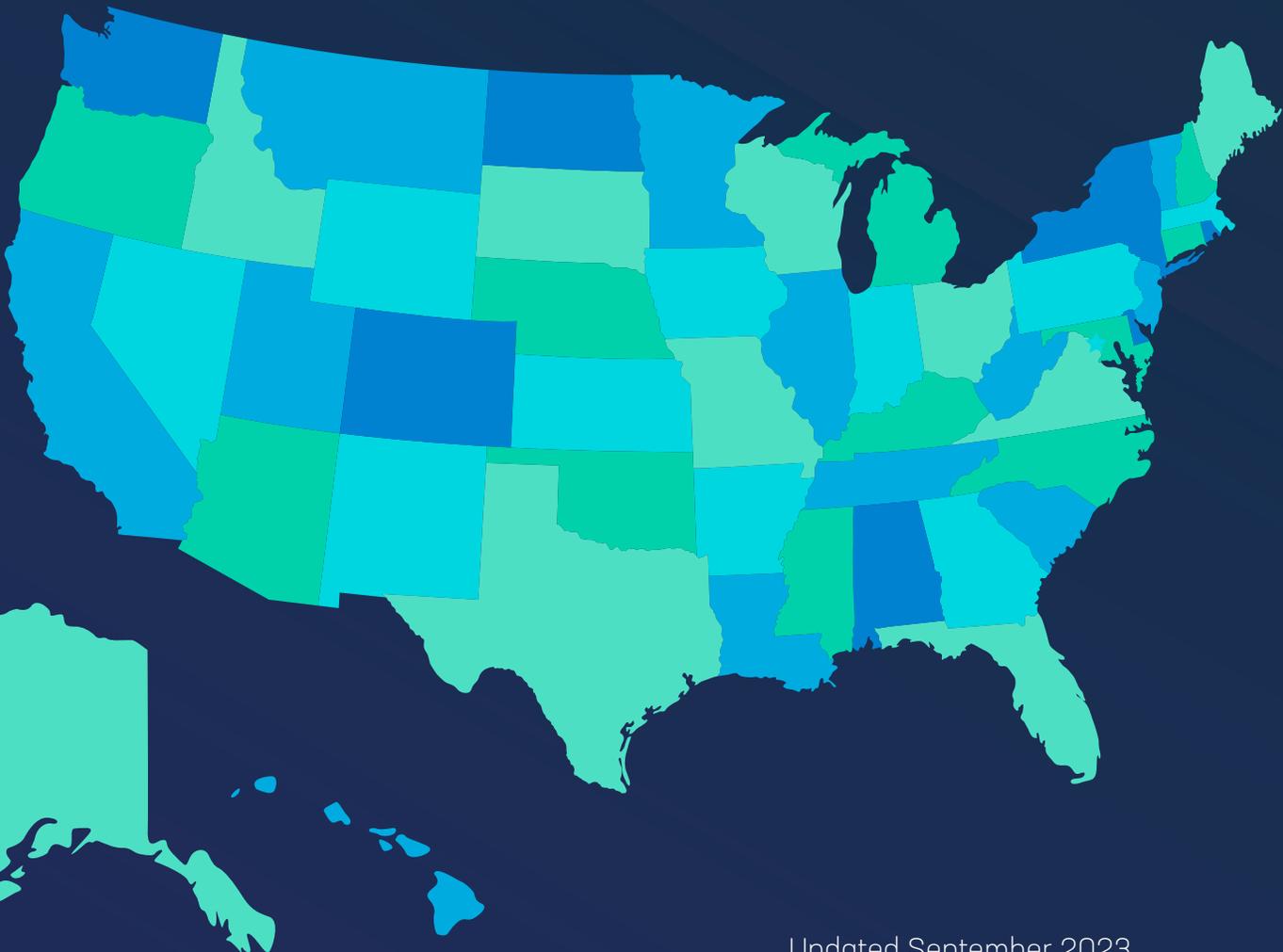




The Association for Career and Technical Education

STATE ASSOCIATION MANAGEMENT MANUAL



Updated September 2023

The information contained in this manual should not be considered legal or tax advice on any of the issues discussed herein. Rather, the manual provides general information concerning industry practices. Accordingly, state associations should not rely on any legal or tax opinion, analysis, or advice contained herein and are encouraged to seek legal and tax advice from their own legal counsel and tax professional.

Dear State Association Leader:

The state associations are integral partners with ACTE. The goals, activities, and successes of each state association are critical to the overall achievement of ACTE's goals and objectives. As a state leader, you are a valuable participant in the journey toward the realization of our mission and core purpose.

ACTE has developed this manual to assist state associations in the governance and operations of their organizations. Our hope is that the in-depth information, resources, and tools included in the manual will lead to an effective organization that meets and enhances member value. This manual is designed to be used in close conjunction with the [ACTE New State Leader Guide](#), as well as the [ACTE State Association Leaders' Resource webpage](#), both of which contain more frequently updated practical tools and links for the day-to-day operations of your association.

Associations are constantly innovating and evolving as the internal and external environments change. The manual is designed to be a living document. While no one publication can answer every question or address every situation, we will add to the manual through periodic updates. We hope that state associations will also contribute relevant information and samples that will enrich the content of the manual to continually elevate the usefulness of the material.

As you advance in the development and progress of your state association, you may encounter needs not yet included in the manual. You are encouraged to contact the ACTE Headquarters Office, your Region vice President, or the ACTE President in your quest for help.

It is the hope of all concerned that the content of this manual will serve as a valuable resource and will help you become more effective as a leader. We wish you great success and the satisfaction of a job well done.

Sincerely,

A handwritten signature in black ink that reads "LeAnn Curry". The signature is written in a cursive, flowing style.

LeAnn Curry
Executive Director

HOW TO USE THIS MANUAL

Dear State Association Leader:

As chair of the ACTE State Association Management Manual Revision Committee, along with committee members Dazsa Carter of Oklahoma ACTE, John Kirkman of North Carolina ACTE, Sandy Miller of Iowa ACTE, and Debbie Nelson of Colorado ACTE, I am gratified to see these new updates to the Association Management Manual come to pass.

The committee was formed in response to the ongoing relationship with NEDA and state association leaders as well as the ACTE Strategic Theme:

ACTE's success is reliant on the success of its divisions, state associations and educators. Strengthening and supporting leadership and alignment throughout this infrastructure will increase both capacity and member value.

The committee discussions focused on strengthening the relationship between ACTE and state associations. The primary goal of the committee, ACTE Board, and staff was to update this comprehensive, contextual resource for state association leaders so that they could more effectively and efficiently carry out their overarching responsibilities as a companion to other state leader resources, such as the [New State Leader Guide](#) and [State Association Leaders' Resources webpage](#).

ACTE staff worked diligently to make the manual user-friendly for volunteer leaders and paid/unpaid state association staff. The committee reviewed the manual in September 2023; their comments and suggestions were incorporated into this revised document. The manual is a living document that will continue to evolve and change as leaders provide input and feedback on items to expand upon, add, or change.

Significant changes to the manual include:

- Clarification of the overall purpose and intent of the document, including its relationship to other state leaders' resources.
- Updates to current information in all sections.

- Revised Strategic Plan themes and objectives.
- Updated insurance coverage issues.
- Current Division and Committee information.
- Updated Annual Report and QAS criteria and processes.
- New tools and processes explained in the Membership section.
- Revamped Public Policy and Grassroots Advocacy section, now including Media Tours.
- New section on Fellowships and Mentorships.
- New Sample Annual Officer Calendar.
- Updated document references in the Appendix.
- Links to approximately 100 topic-specific resources to provide additional information and examples.

Review the manual to assist you in making your state association stronger. Consider how ACTE policies may be reflected in your state association activities. Utilize this as you would a technical manual, similar to the owner's manual for your vehicle. Read/click the section with the information you are seeking. Distribute the manual among your state association leadership team, thus providing each with a broader perspective on state association issues. Utilize and adapt the examples provided to ensure your organization's form is appropriate, promote your state association, plan your conference, develop a website or newsletter, etc. We encourage you to share examples of what works for your association as well; this makes all associations stronger. Do not hesitate to contact ACTE staff if you need further information/clarification.

The State Association Management Manual Revision Committee and ACTE are proud to offer this comprehensive resource for your use. We hope the document will strengthen your state leaders and association by providing tools and tips for greater effectiveness and increasing member value at both the state and national levels.

Diane L. Walker

Chair, ACTE State Association Management Handbook Revision Committee

ACTE Region V Policy Committee 2014–2019

California ACTE Executive Director 2021–2023 and President 2013–2014

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FORMATION FORMALITIES



PRINCIPLES OF ASSOCIATION MANAGEMENT

The Unique Nature of Associations

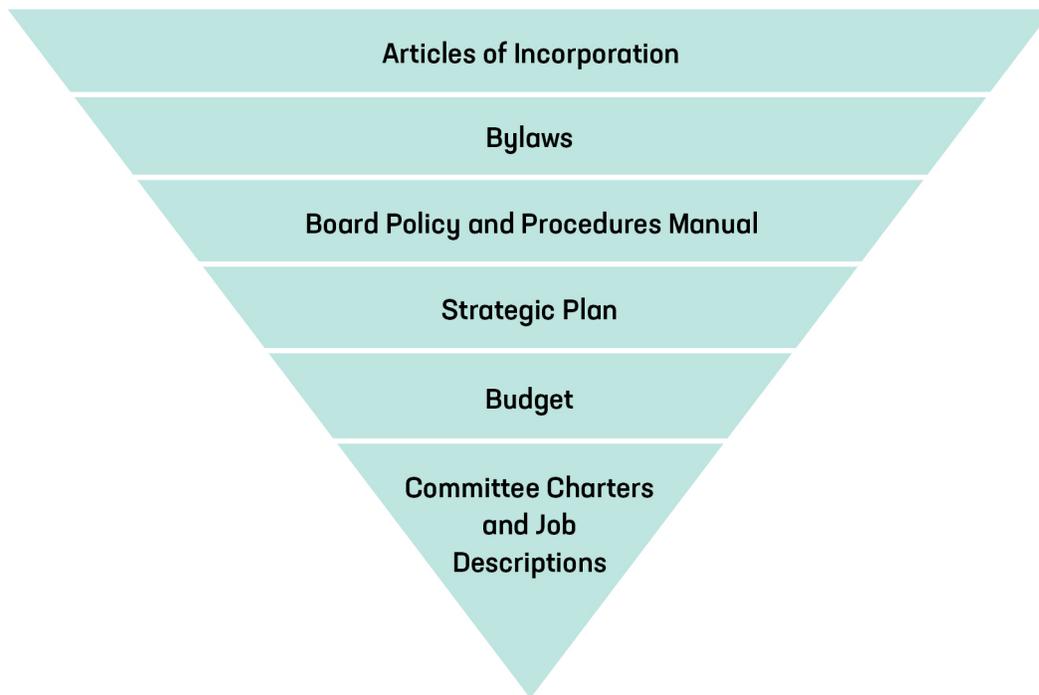
No other country has an association sector as active and fully developed as that of the United States. There are two primary types of associations. **Trade associations** have companies or businesses as members, while **professional associations or societies** have individuals as members. **Federations** have associations as members. ACTE and state associations are organized as professional associations with individual members.

An association is a group of people who voluntarily come together for a common purpose or interest.

The uniqueness of associations rests in their members' strong feelings of ownership and involvement in decision-making. Members believe they can make themselves heard and effect change within and through their associations. Associations are unique in their DNA in that the members are simultaneously owners, customers, and the workforce of the organization.

The enlightened common self-interest of members is a critical challenge for leaders. Associations must create a rich community that benefits the larger purpose, while also providing a comfortable home for different groups, recognizing that membership segments are a moving target.

HIERARCHY OF GOVERNING DOCUMENTS



Articles of Incorporation

ACTE is a not-for-profit corporation [established in 1926](#) and incorporated in the state of Indiana in 1929. Articles of Incorporation include the name of the corporation, the 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 association's Articles of Incorporation is retained in the ACTE Headquarters. Each of the following types of documents is an important piece for state associations to consider and create for their own governance. Examples from the national association set out below may be instructive; **please consult with your legal professional for specifics.**

Bylaws

The Bylaws of an incorporated not-for-profit organization usually include provisions to guide and direct the actions of its members, including purpose, duties, membership, and meeting formalities, among others. 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's 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

ACTE's Policy and Procedures Manual includes those rules that are set by the association's Board of Directors and can only be changed by the Board. The Board establishes policies 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.

Generally included in the Policies and Procedures Manual are the standing rules for the conduct of the [Board of Directors](#). Also included are those standard operating procedures over which the Board desires to have controlling authority (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.

ACTE's Policy and Procedures Manual is reviewed and approved annually by the Board of Directors. A copy of the Region V Manual can be accessed from the ACTE website [here](#). Each state association is encouraged to have its own Policy and Procedures Manual, and this may serve as a guide.

Strategic Plan

The ACTE [Strategic Plan](#) is developed by the Board of Directors; it represents an expression of the core purpose and values of the national 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. ACTE encourages Regions, Divisions, and state associations to align their goals and objectives with the overall association Strategic Plan as feasible.

Budget

The budget is an expression of how the association determines to spend its resources. It sets the financial parameters and provides a guideline for the implementation components of each activity within the

association. Programs contained within the budget should be aligned with the ACTE Strategic Plan. The ACTE 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 of the committees, as well as of the committee chair. The Board approves committee charters and job descriptions.

Each of these documents will be covered in more detail below.

ARTICLES OF INCORPORATION

What does incorporation mean, and why is it important for state divisions and state affiliates?

Articles of incorporation establish an association as a separate legal entity composed of individual members but considered to have its own existence apart from its members for purposes of organization, operations, liability, longevity, holding property, and other relevant issues. The state grants legal status to the association in return for its commitment to abide by the rules the state has established for corporations. Articles of incorporation include the name of the corporation, the purposes for which it was formed, the fact that it has not been organized for profit, whether there will be association bylaws, and a statement that all rules of the corporation are to be embodied in the bylaws.

Why would any organization want to be incorporated?

Incorporation of a nonprofit association generally eliminates the personal liability of members, establishes continuity, and makes available applicable laws and guidelines concerning forming and administering the organization. By comparison, unincorporated associations have no separate existence of their own, but they may be treated as if they do when it suits the government to do so. Any officer, Director, or leader of an incorporated entity is protected by the entity itself. Incorporation protects leaders as individuals from liabilities in most circumstances. Organizations need a hard shell of corporate protection as it is the first line of legal defense that isn't satisfied with the corporation's assets.

An unincorporated entity offers the individual state leader no such protection, and, therefore, a lien can be put on any member's assets.

Incorporating is a multistep process. Send in the application and renew it as often as your state requires (research the Secretary of State website to tell you if your organization is incorporated). The IRS has a [sample](#) articles of incorporation for nonprofit association use. Only the members of the association can amend the articles of incorporation. Usually, the State Corporate Code sets the minimum vote percentage needed for approval.

BYLAWS

The bylaws of an incorporated nonprofit organization usually include provisions with respect to:

- Purpose of the organization.
- Qualifications of membership.
- Election and duties of Directors.
- Role of the members (if any).
- Meetings of members and Directors, including notice, quorum, and voting.
- Role of executive and other committees.
- Role and relationship of state associations and affiliated organizations.
- The organization's fiscal year.
- How the bylaws are amended.
- Indemnification and dissolution procedures.

Bylaws should not include operational details, such as how many times membership promotional mailings go out or specific locations for Board meetings; those details belong in a policies and procedures manual. The bylaws establish who has the authority to put into place the policies that guide the operation of the association.

A copy of the ACTE Bylaws can be found online [here](#).

DIVISIONS AND AFFILIATES

What is the relationship between the state association and its divisions and affiliates?

Divisions within a state association are incorporated into the organization's structure. States need to decide how they want to protect the division volunteers and assume financial and legal responsibility for them. There are positive and negative points to including protection for divisions:

Positive: Protects the division members from personal liability in most circumstances.

Negative: The state association is responsible for the liabilities of its internal units.

If the association corporate entity determines to form divisions, be sure to state this fact in the bylaws so they are protected. Check your bylaws to make sure the relationship between your state association and the division is clarified financially, legally, and for tax purposes. Your policy manual can further clarify the distinctions.

By comparison, division affiliates are separate legal entities (e.g., corporate partners) that wish to work with state association divisions outside the state organization. They can be incorporated or unincorporated associations. As division affiliates are separate legal entities from the association, they must follow IRS rules for their own organization. Any income or money that comes in is subject to applicable tax laws.

A conscientious decision needs to be made about the relationship between the state association, its divisions, and affiliates of each.

TAX CONSIDERATIONS



TAX EXEMPTION

General information included within this section is not intended to substitute for consulting with your legal and tax professionals for specific guidance.

Being incorporated as a nonprofit association does not automatically give it tax-exempt status. This can only be conveyed by the Internal Revenue Service. The main benefit of exempt status is that the organization does not pay federal income tax on income that is related to its exempt purpose. Additionally, there are other benefits of exempt status, possible exemption from state income, sales, and property taxes, and reduced postal rates offered to certain organizations by the US Postal Service.

What are the different types of tax-exempt status?

Most nonprofit associations qualify for [501\(c\)\(3\)](#) or [501\(c\)\(6\)](#) tax status. This status means that an organization may be exempt from paying corporate federal income tax on income generated from activities that are substantially related to the purposes for which the association was formed.

Generally speaking, a 501(c)(3) is organized for education, research, or charitable purposes and is eligible to receive tax-deductible charitable contributions and private foundation grants, nonprofit postal permits, and some state and local use, real estate, and other tax exemptions. A 501(c)(6) is defined as a “business league,” and its purpose is to promote a common business interest.

Below is a chart summarizing the general differences between a [501\(c\)\(3\)](#) and a [501\(c\)\(6\)](#):

501(C)(3)	501(C)(6)
Organizational requirements.	Less stringent organizational requirements.
Assets must be dedicated to charitable purposes.	Assets must be dedicated to professional association purposes.
Networking activities must be insubstantial.	Networking activity may be anything less than “primary.”
Legislative activity must be insubstantial, or <20 percent if election made.	No limit on legislative activity as long as it furthers the exempt purpose; legislative expenditures may limit the deductibility of dues.
Absolute prohibition against political activity and contributions to candidates.	Political activity permitted, but taxed (any expense for political purpose is taxed at corporate rates).
Must serve public purposes.	Can serve the business purposes of the members.
Donations are deductible as charitable contributions by donors.	Donations not deductible as charitable contributions may be deductible as a business expense.
May be eligible for low-cost nonprofit bulk mailing permit.	Not eligible for lowest bulk mailing rates.
Must take care to generate enough public support to avoid classification as a private foundation.	Not an issue under (c)(6).
Exempt from federal income tax unless the organization has unrelated business income.	Exempt from federal income tax unless the organization has unrelated business income.

Learn more about the benefits, limitations, and expectations of tax-exempt organizations by attending 10 courses at the online [Small to Mid-Size Tax Exempt Organization Workshop](#).

In general, legislative activity involves lobbying the federal government to influence [legislative](#) and regulatory activities, and conversely, political activity is work on political campaigns on behalf of (or in opposition to) any candidate running for elective public office.

501(c)(3) associations **can** [lobby](#) up to a certain percent or extent. One option is to elect the IRS 501(h) form. You can do this by going to the IRS website (www.irs.gov), which allows a nonprofit association to lobby in support or opposition of legislation. 501(c)(6) organizations **can** lobby but must tell their members that a portion of their dues are not deductible and lobbying expenses are taxable.

A chart outlining the differences in restrictions on activities for tax-exempt entities can be found [here](#). For more information, please check the [Federal Lobbying Requirements](#) section and **consult with your association's legal counsel**.

Applying for Tax-Exempt Status

ACTE state associations should apply to the IRS on their own by completing [IRS Form 1023](#) for 501(c)(3) or [1024](#) for 501(c)(6). Alternatively, unified state associations may be able to apply for tax-exempt status from the IRS under ACTE's group tax exemption at no cost by working through a process with the Finance and Operations department. We strongly suggest you check with legal counsel to ensure filing requirements and language are correct to avoid back-and-forth correspondence with the IRS or being out of compliance.

Reapplying for a Federal ID

You must reapply for a federal ID number by referencing your old ID number if it hasn't been used in several years.

After a three-year period of no activity, you will need to reapply.

The 501(h) Election

The 1976 Lobby Law established clear guidelines for lobbying expenditures. The Lobby Law allows nonprofits to choose to be covered by a clearly defined set of lobbying rules. This law clarifies that 501(c)(3) nonprofits that elect to fall under these rules can spend up to a defined percentage of their budget for lobbying without threatening their tax-exempt status. In 1990, the IRS published final rules on implementing the Lobby Law that make it quite clear nonprofits should elect to be covered by the [lobbying-expenditure test](#) and not fall under the vague lobbying test.

What are some of the benefits of taking the 501(h) election versus not electing?

- No limit on lobbying activities that do not require expenditures, such as unreimbursed activities conducted by bona fide volunteers.
- Clear definitions of various kinds of lobbying communications, enabling electing charities to control whether they are lobbying.
- Higher lobbying dollar limits and fewer items that count toward the exhaustion of those limits.

- Less likely to lose exemption because the IRS may only revoke exempt status from electing organizations that exceed their lobbying limits by at least 50 percent averaged over a four-year period.
- No personal penalty for individual managers of an electing charity that exceeds its lobbying expenditure limits.

In order to be covered by the rules, your organization must file [IRS Form 5768](#). This simple one-page form can be filed at any time. The IRS has provided clear documentation to nonprofit organizations that filing this form will not trigger an audit. You can download the form from the IRS website (this is a PDF document). For more information on the (h) election, please check the [Federal Lobbying Requirements](#) section.

Tax Filing Requirements-Federal

Every tax-exempt organization MUST file each year. [Form 990](#) is the primary form for tax-exempt organizations. There are different variations of Form 990 based on *gross* annual receipts of the organization. A list of the various 990 Forms with directions for each can be found [here](#).

Consult with your tax professional regarding your needs. Requirements are summarized below, but here are some exceptions:

FORM	990-N (E-POSTCARD)	990	990-EZ
Who Must File	Small exempt organizations with gross receipts that are normally \$50,000 or less must file Form 990N (e-Postcard).	Exempt organizations with \$200,000 or more in gross receipts must file Form 990.	Organizations with gross receipts less than \$200,000 and gross assets less than \$500,000 can choose to file 990EZ rather than 990.
What You Need to File	See Form on irs.gov.	See Form on irs.gov.	See Form on irs.gov.
When to File	The due date is the 15th day of the fifth month after the close of your fiscal year.	The due date is the 15th day of the fifth month after the end of your fiscal year.	The due date is the 15th day of the fifth month after the end of your fiscal year.
Where to File	File at E-File for Charities and Non-Profits .	E-file** or mail to Department of the Treasury Internal Revenue Service Center Ogden, UT 84201-0027.	E-file** or mail to Department of the Treasury Internal Revenue Service Center Ogden, UT 84201-0027.

* Each state has varying tax filing requirements. Please check your state Department of Taxation website for detailed information and requirements.

Please note that 990 requirements are **subject to change**; please check with the IRS **annually** for the most up-to-date regulations.

Your organization should have a [whistleblower policy](#), a [conflict of interest policy](#), and a [document retention policy](#) (samples of ACTE's policies are available on the ACTE website or in the [Appendix](#)).

There is a [penalty](#) for failing to file Form 990 in a timely manner.

GENERAL LIABILITY INSURANCE

It is recommended that all state associations have the following coverage included in their commercial insurance package:

<p style="text-align: center;">PROPERTY COVERAGE</p>	<p style="text-align: center;">INCOME INTERRUPTION COVERAGE <i>(if a catastrophe closes your office, income interruption should be provided for)</i></p>
<ul style="list-style-type: none"> • All-risk coverage • Replacement cost basis for building and contents 	<ul style="list-style-type: none"> • Actual loss of income for up to 12 months • Extra expense coverage to restore and continue your association's business for up to 12 months
<p style="text-align: center;">CRIME AND THEFT COVERAGE <i>(coverage up to your contents' limit for)</i></p>	<p style="text-align: center;">COMPREHENSIVE GENERAL LIABILITY</p>
<ul style="list-style-type: none"> • Employee dishonesty • Depositors' forgery • Extortion • Loss of monies and securities (inside and outside your premises) • Cyberattack • Counterfeit currency • Burglary and robbery 	<ul style="list-style-type: none"> • \$1,000,000 for Comprehensive General Liability and Personal Injury coverage • Should pay legal fees and settlements agreed to in or out of court • Higher limits should be available with umbrella liability coverage

Workers' Compensation: If your association has employees, you will also need to have workers' compensation coverage added to your policy.

[Forrest T. Jones's](#) (FTJ) General Liability and Property Package is specifically designed for not-for-profit organizations; the Package Policy provides comprehensive liability coverage for your association/business, including general liability, business personal property, monetary losses, and building expenses.

General Liability includes:

- Bodily injury.
- Property damage.
- Personal & advertising Injury.
- Medical expenses.
- Non-owned/rented automobile liability.
- Automatic additional insured: coverage is automatically provided when required in written contracts, agreements, or permits (e.g., convention centers).
- Premises and operation liability: provides coverage for bodily injury and property damage sustained by others on your premises or as a result of your business operations. This would include hotels and convention centers where your conference or conventions are held.

Property Package includes (if applicable):

- Building replacement coverage.
- Business personal property.
- Valuable papers and accounts receivable.
- Business income loss.
- Employee dishonesty (theft) coverage.
- Business computers & media (data) equipment coverage.
- Rental car physical damage coverage.
- Fine arts.
- Choice extra endorsement automatically included in all quotes.

In addition, Errors & Omissions coverage is also available, covering possible risks that are normally not part of a general liability policy. E&O insurance protects against negligence claims of financial losses to another person or firm, as well as covering the legal costs to contest those claims. FTJ can provide protection up to \$20 million.

Cyber Protection Package:

FTJ's cyber liability insurance for associations and nonprofit agencies offers a comprehensive package that covers potential losses and liability for customer data breaches with limits up to \$10 million. Here's a summary of what's covered:

- First-party Coverages—Insured for restoration costs when a breach damages data assets. Other expenses covered include legal, forensics, notification, and identity theft prevention. Also included in the coverage are PCI (Payment Card Industry) violations, network disruptions that

lead to lost profits and extra costs, reputational harm that leads to lost profits, and protection from cybercriminal activity, such as extortion and fraudulent electronic fund transfers.

- Liability Coverages—The organization is insured against privacy-related and network security lawsuits, which range from malicious code transmissions to inaccessible systems and business impersonations. Also covered are defense costs related to regulatory fines and consumer restitution, as well as media lawsuits that include defamation and copyright infringement.
- Public Relations Coverages—FTJ takes a proactive approach to covered data breaches or claims made against the organization. With the help of PR consultants, FTJ helps mitigate damage to the brand due to hackers or phishing attacks.
- FTJ also offers a menu of optional coverages that you can pick and choose from based on your organization's needs.

A full list of coverage options and limits will be provided with an instant online quotation.

Please contact [Forrest T. Jones](#) or your insurance agent regarding your needs for additional information.

D&O INSURANCE

The Association Professional Liability Insurance (APLI) is designed specifically for associations. Through FTJ, it provides broader protection in several important areas when compared with traditional Directors & Officers (D&O) policies. APLI covers:

- An association's Directors, officers, employees, volunteers, and committee members. That's particularly important in the nonprofit environment, where administrative decisions can extend throughout an organization.
- The association itself as a legal entity when named as a defendant, which is a current trend in litigation. Traditional D&O policies may only cover legal actions against individuals.
- Wrongful termination and employment-related lawsuits, including defense costs.
- Other policy features include first-dollar defense for qualifying accounts; prior acts coverage; third-party coverage; broad definition of employees (volunteers, leased, seasonal, and part time) as Insured Persons; nonmonetary relief as part of the definition of a claim; and up to \$500,000 in sublimit coverage for defense of claims under the Fair Labor Standards Act.

These are just a few of the APLI Plan features that benefit associations. Ask your FTJ agent about others.

This description of coverage is intended as a general overview and does not represent how the Association Professional Liability Plan will respond in every situation. Please read all policy language carefully for coverage terms and conditions.

ACTE Insurance Adviser

Forrest T. Jones & Co.
13800 Coppermine Road
Herndon, VA 20171
(703) 318-8189

GOVERNANCE AND STRUCTURE



EFFECTIVE BOARD OF DIRECTORS

Effective Boards of Directors

The hallmark of a preeminent association is its governing Board. Through its work, an association's governing Board defines the organization. The responsibilities of the association's Board of Directors may be small in number, but they are large in importance. It is critical that the state association take the necessary steps to form its Board and select members to ensure its future success. A state association Board may be comprised of officers such as the President, President-elect, Past President, Secretary, and Treasurer, each with defined and specific roles and responsibilities set forth in more detail below, along with other representatives such as division or committee chairs. Additionally, the state association may have an Executive Director, who may or may not be a voting member of the Board. An odd number of voting members will minimize the risk of a tie vote.

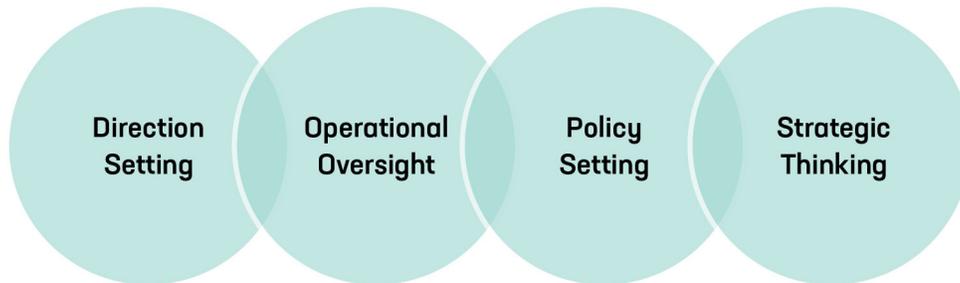
The Board must act in the best interests of **all** members.

An effective Board does the following:

- **Determines measurements for success.** The Board defines what success looks like for the association. It determines the evaluation criteria for measuring whether or not the association has achieved success.
- **Establishes policy.** The Board creates and maintains a decision-making structure for association policy development.
- **Defines the association's vision for the future.** The Board articulates the organization's vision and strategic objectives and translates both into action through the planning process.
- **Fulfills fiduciary obligations.** The Board works to meet the established legal requirements regarding legal and regulatory compliance and financial oversight. It ensures the resources necessary for achievement are available and used efficiently.

- **Serves as a champion of the association.** Board members are advocates of the association, its membership, and purpose.

The Board should focus its time on:



Board Leadership Roles

Role of the Director

Directors are elected by their respective constituencies to provide a voice to the deliberation process. Each Director brings to the decision-making process valuable information and insight. Individual Directors on the Board have five major responsibilities:

1. Actively participating in the strategic planning process by continuously monitoring the membership and the external environment and embracing dialogue and deliberation before decision-making.
2. Communicating the goals and objectives of the association to members and external stakeholders.
3. Bringing forth the needs and positions of the constituencies represented, yet making decisions for the organization based upon good faith.
4. Fulfilling the role of liaison to committees.
5. Serving as mentors to each other and to potential leaders.

Roles of the Spokesperson

The official spokesperson of the association is usually the President. In their 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 the Executive Committee

State associations may elect to have an executive committee in addition to their Board. 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.

Role of Officers

Each officer within the association has a specific task. The officers are most effective when they 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 as a representative of the President at meetings, events, and social functions. The immediate past-President provides continuity, insight, and wisdom to the association. Specifically, this officer, through their institutional knowledge, assists the other officers with the implementation of their tasks.

Role of the Staff

The ACTE headquarters staff serves as a resource for the national Board; similarly, if the state association has staff, they support the activities of the Board and association as directed. 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.

THE LIAISON ROLE

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.

One of the responsibilities assigned to each Director on the ACTE Board is to serve as a liaison to the Division, Region, or standing committee they represent. 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. Within your state association, you may wish to appoint an officer or Director to act as liaison to a state division or committee. Example duties are as follows:

Responsibilities of the Liaison

1. Division Liaisons:

- The Board liaison is the principal link to the Board and provides an open communication channel between the Division and the Board.

- The Board liaison serves as a feedback loop on national programs and services to the Division.
- The Board liaison provides assistance to the Division on areas of concern or where information and/or guidance are needed.
- The Board liaison brings to the Board and the staff a compilation of issues and concerns.
- The Board liaison assists the association office in maintaining current and complete files on Division leadership, governance, and activities.

2. Committee Liaisons:

- The Board liaison is the principal link between the committee and the Board.
- The Board liaison assists in ensuring 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.
- The Board liaison will make committee requests and presentations to the Board, except when the President requests the presence of the committee chair.
- 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 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.
4. Participate in the meetings and discussions of the Division policy committees.
5. Share insights and information on Board actions with the committee leadership. A written memo (via email) following each Board meeting is an effective means of 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. A delay in communication will likely only increase the magnitude of the problem.
8. Use judgment in your communication circle. Not all problems need to be broadcast outside the Board.
9. Share insights and concerns with the Board of Directors.
10. LISTEN, EMPATHIZE, ADVISE, COMMUNICATE!

BOARD RELATIONS

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 to 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.	

KEYS TO SUCCESSFUL VOLUNTEER BOARDS			
Effective Board Member Traits	Key Attitudes for Effective Performance	Board Member Guidelines	Partnerships With Fellow Board Members/ Volunteer Leaders
		Dissent and question respectfully when it is proper and constructive.	
		Remember that how you do something is often as important as what you do.	
		Remember that your primary responsibility is to the future.	



BOARD MEETING PROCEDURES

The Consent Agenda

The ACTE Board of Directors follows the “Consent Agenda” format for its meetings. This format allows the Board to properly review and accept the delegated work of the committees and focus its attention on the broader philosophical and policy issues challenging the CTE profession and the association. Your state association may choose to adopt a similar format.

What can be included in a Consent Agenda?

There is no limitation as to what can be included in a consent agenda. Realistically, only those items that do not require Board discussion (as described above) should be included. Items that are routinely included by associations are approval of minutes, officer reports, staff reports, and committee reports. Items that require approval of motions by the Board but are routine (i.e., approval of Division reports) can be included.

How does the Consent Agenda work?

One of the first items of business at the Board of Directors meeting is the approval of the consent agenda. Those items that have been included in the consent agenda will be listed in the overall meeting agenda. Approval of the consent agenda implies approval of all items included. For example, a committee has submitted a new purpose description for Board approval, and this request is part of the committee report placed on the consent agenda. The approval of the consent agenda carries with it the approval of the new purpose. In *Robert’s Rules of Order*, this is referred to as “general consent.” Under these conditions, the method of general consent can be used either to adopt a motion without the steps of stating the question and putting the motion to a formal vote, or it can be used to take action without even the formality of a motion.

What if a Board member does not agree with an item on the Consent Agenda?

Any item can be taken off the consent agenda and placed as a separate item on the meeting agenda. Prior to approval of the consent agenda, the President will ask if there is any item that a Board member wishes to discuss. If so, that item will be moved to the regular agenda.

Why use a Consent Agenda?

By grouping routine and delegated items together for quick approval, the Board can spend its time discussing policy and strategic issues that demand its attention. It allows the Board to have ample time to thoroughly discuss those issues that are sensitive or controversial in nature. The consent agenda also facilitates the organization's desire to streamline the decision-making process and include a greater number of members in the planning and implementation of programs and services.

Board of Directors Meeting Packets

The ACTE Board of Directors has limited time to focus and deliberate on critical issues facing the association and the profession. To facilitate smooth and efficient Board meetings, materials are placed on the ACTE website at least one week prior to the Board meeting. The information contains status reports on ongoing programs and background materials on all issues requiring the Board's attention and action. Board materials are located in a secure area for Board access only. The Board will receive email notification and instructions on how to download the information once it is placed on the ACTE website. Depending upon your resources and web capabilities, your state association may wish to follow a similar procedure or provide materials in some other way.

It is imperative that each Board member review the packet of meeting materials as soon as they are available. This will allow time for questions to be answered or additional information to be compiled, if necessary, before the meeting. Holding questions or requests for additional information until the Board meeting does not allow time for the gathering of information that might be critical to the Board's discussions.

Review of the Board information prior to the meeting and the use of the consent agenda allow a Board of Directors to spend its time and attention on the broader issues facing the association.

Board Strategic Issues Discussion

The ACTE Board of Directors operates on the knowledge-based decision-making principle. ACTE has moved from a political model of decision-making to a more rational model based on information and insight. The knowledge-based philosophy of governance enables the Board to fulfill its role of setting the strategic direction for the association and remaining focused on the future.

To be a knowledge-based organization, the Board must continuously address four essential bases:

1. Sensitivity to member needs and views.
2. Foresight about the profession.
3. Insight into capacity and strategic position.
4. Awareness of ethical implications.

The ACTE Board of Directors spends a considerable portion of its meeting time exploring issues of strategic importance to the association and the CTE profession. Through the use of dialogue and deliberation, the Board explores the four essential knowledge-based questions before taking any action.

A strategic issue can be explored over several meetings without action being taken. The discussions look at the issues from a number of perspectives and often raise more questions than answers. Questions are researched, and additional data is provided to the Board as the discussion continues. Decisions are based on information and insights. Decisions are made when they evolve naturally by discussion and have been reached through Board consensus.

Parliamentary Procedures

OBJECTIVES	PRINCIPLES	PARLIAMENTARY AUTHORITY
<ul style="list-style-type: none"> • Expedite business. • Maintain order. • Ensure justice and equality for all. • Accomplish the group's objectives. 	<ul style="list-style-type: none"> • Courtesy to all, partiality to none. • Justice for all. • Protection of the absentee. • Rule of majority. • One thing at a time. • Right of minority. 	<p>It is important for associations to specify a parliamentary authority. Most use <i>Robert's Rules of Order, Newly Revised</i>. Other authorities are <i>Demeter's</i> and <i>Sturgis</i>. A paperback you may find useful as a handbook is Alice Pohl's <i>Parliamentary points for the president and the members</i>.</p>

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Duties of Presiding Officer

1. Open meeting on time, having ascertained that a quorum is present.
2. Announce in sequence the business before assembly.

3. Recognize members entitled to speak.
4. State clearly all questions.
5. Direct impartial discussion on a question.
6. Put the question to a fair vote.
7. Announce the results of the vote.
8. Protect the assembly from frivolous or dilatory motions.
9. Assist in expediting business.
10. Restrain members within the rules of order.
11. Decide all questions of order.
12. Inform the assembly.
13. Authenticate by signature (when necessary) all acts, orders, and proceedings of the assembly.
14. Declare the meeting adjourned when the assembly so votes, at the time prescribed, or at any time of emergency affecting the safety of those present.

About Motions

THOSE THAT REQUIRE NO SECOND	THOSE NOT DEBATABLE	THOSE NOT AMENDABLE
Call for orders of the day	The previous question	To adjourn
A question of order	To fix the time of adjournment	To reconsider a debatable motion
Objection to consideration of a question	To adjourn, lay on, or take from the table	To postpone indefinitely an amendment of an amendment
A division of the assembly	An appeal to reconsider a question that is not debatable	Orders of the day
Those that require 2/3 vote: Close, limit, extend debate, proper order	For orders of the day	Lay on the table
To suspend the rules	Objection to consideration of a question	All incidental questions
To close nominations	To suspend the rules	The previous question
To make a special order of the previous question	To limit/extend debate	
To amend the rules to take up a question out of order		

PARLIAMENTARY MOTIONS GUIDE:

Based on *Robert's Rules of Order, Newly Revised* (10th Edition), from ASAE January 2007
 Volunteer Leadership Issue, *Parliamentary Procedure Made Simple* by Jim Slaughter.
 Consult the most current version of *Robert's Rules*.

The motions below are listed in order of precedence.
 Any motion can be introduced if it is higher on the chart than the pending motion.

You Want To:	You Say:	Interrupt?	Second?	Debate?	Amend?	Vote?
Close meeting	I move to adjourn.	No	Yes	No	No	Majority
Take break	I move to recess for ...	No	Yes	No	Yes	Majority
Register complaint	I rise to a question of privilege.	Yes	No	No	No	None
Make follow agenda	I call for the orders of the day.	Yes	No	No	No	None
Lay aside temporarily	I move to lay aside the question on the table.	No	Yes	No	No	Majority
Close debate	I move the previous question.	No	Yes	No	No	2/3
Limit or extend debate	I move that debate be limited to ...	No	Yes	No	Yes	2/3
Postpone to a certain time	I move to postpone the motion to ...	No	Yes	Yes	Yes	Majority
Refer to committee	I move to refer the motion to ...	No	Yes	Yes	Yes	Majority
Modify wording of motion	I move to amend the motion by ...	No	Yes	Yes	Yes	Majority
Kill main motion	I move that the motion be postponed indefinitely.	No	Yes	Yes	No	Majority
Bring business before assembly (a main motion)	I move that [or "to"] ...	No	Yes	Yes	Yes	Majority

Board Policy and Procedures Manual

Board policies are established or changed by vote of the Board of Directors. It is recommended that every policy be reviewed every one to two years to reaffirm its applicability. A policy that is no longer relevant should be deleted by motion of the Board. Every Board member should have a copy of the Board policy and procedures manual.

The policy and procedures manual is reviewed and approved annually by the Board of Directors. A copy of the Region V Policy and Procedures Manual can be accessed [here](#) as an example.

STRATEGIC PRIORITIES/PLANS

The Strategic Plan is developed by the Board of Directors, 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 direction and its intent become a living reality as it is implemented by the organization on an annual basis.
- The strategic direction 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 direction with the organization's annual operational plan.
- The strategic direction 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 direction.
- The organization has procedures and processes in place to formatively evaluate its strategic direction and ongoing implementation on an annual basis.

The status of the [ACTE Strategic Plan](#) is reviewed annually by its Board of Directors. The goals and objectives are reviewed every two to three years. Committees and [staff](#) identify and implement strategies and tactics for achieving the goals and objectives at the national level. As noted above, state associations are encouraged to align with the national association strategic plan as feasible. Please reference the [Strategic Plan External Planning Worksheet](#).

Sample Strategic Priorities/Plans

- Increase in the clarity and visibility of the value of professional membership in ACTE.
- Increase in the opportunities for member engagement in ACTE mission and implementation of the strategic plan.
- Increase in the diversity and inclusion of historically underrepresented populations in ACTE leadership programs.

(ACTE Strategic Themes 2022-2027)

COMMITTEES/TASK FORCES

Why Committees Are Essential

1. They are the operating system of an association.
2. They are a vehicle to involve members in the development and delivery of services.
3. They are a method to represent member opinions to decision-makers.
4. They are a means to better serve member needs through interaction.
5. They are an opportunity for group problem-solving.
6. They are a forum for the presentation of multiple points of view.
7. They are a training ground for future leadership.
8. They are a proving ground for emerging leaders to test and refine their new skills and abilities.

How Committees Support the ACTE Strategic Priorities

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

What Are the Differences Between ACTE Committees and Task Forces?

	ACTE STANDING COMMITTEES	ACTE 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	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 Conference in person, as well as participate in conference calls as needed.	Participate in conference calls and webinars as scheduled. Some task forces meet at VISION Conference or NPS.
Appointment	Appointed by Region/Division Vice President.	Applicants volunteer and are selected based on experience and expertise.

More information about ACTE committees can be found on the ACTE website [here](#). Your state association's committees may align with this structure as well.

COMMITTEE/TASK FORCE MEETINGS

Qualities of the Effective Chair

Communication skills

- Demonstrates ability to communicate with committee members, staff, and other groups.
- Demonstrates willingness to listen (communication is not solely speaking).

Participation

- Demonstrates active participation and interest in the association.
- Commands prestige and respect from within the industry or profession.
- Has knowledge of the subject in which the committee/task force is involved.
- Thinks in terms of association goals.

Leadership

- Commands attention and inspires others.
- Demonstrates ability to create a positive work atmosphere.
- Controls without dominating.
- Understands how the committee fits into the large work of the association.

Administrative skills

- Demonstrates willingness to take the initiative.
- Demonstrates ability and willingness to carry out responsibilities.
- Supports orderly procedures for conducting work.
- Understands the role of the staff.

Making Early Contact With Committee/Task Force Members

- Send a welcome/orientation letter, cosigned by the committee/task force staff liaison or at least identify this person.
- Provide the committee with its charges and goals in the context of the association's strategic plan.
- Provide the date and location of the first meeting, even if tentative, and a calendar of future meeting dates, even if tentative.
- Review recent accomplishments of the committee/task force so that the work to be done can be put into context.
- Ask for confirmation of meeting attendance. Some chairs may wish to solicit agenda items. If this is done, the first requirement of the committee/task force is to fulfill the charge provided to them by the association and the chair of the Board of Directors.

The Chair's Role as Facilitator

- Be a facilitator of meetings; don't "hold court." The committee/task force belongs to the association, not to the chair.
- Guide, mediate, probe, and stimulate discussion. Let *others* thrash out ideas; committees/task forces are not formed to validate the thinking of the chair or staff.
- Set meeting norms in advance and conduct meetings according to protocols that encourage respectful freedom of dialogue but not clashes of personalities. Good decisions are made when committees/task forces examine all sides of an issue but don't let members personalize the debate. Emotional discussion of an idea is good, but an emotional reaction to a person is bad. When emotions are too high, return the floor to a neutral person, seek a purely factual answer, or take a break.
- Prevent one-sided discussions.
- Deal with dysfunctional behaviors. Don't let a person who is blocking constructive discussion ruin the committee/task force meeting for everyone else. Strategies for dealing with this behavior include confronting the person privately in a caring manner, pointing out the effects of the behavior, and suggesting alternative behaviors.
- Keep discussions on track; periodically restate the issue and the goal of the discussion.
- Monitor participation: guide talkative members and draw out silent members.
- Use well-placed questions, seek points of information and clarification, and periodically summarize to keep the discussion focused.
- Be sensitive to the feelings of members. Look for visual and verbal cues to determine if a member is not happy with the discussion and then deal with this.
- Keep the group focused on the central question and moving toward a decision. Call on the least senior members first to express their views; discussions tend to close down after senior members express strong views.

- Seek consensus, but unanimity is not required. Sometimes an idea is compromised by trying to get every single person to completely agree.
- Close the meeting by noting achievements and reinforcing action items, including deadlines.

Developing and Structuring the Meeting Agenda

- Provide an agenda sheet with beginning and ending times for the meeting in advance, the meeting room number, and the agenda of topics to be discussed and/or acted on for clarity.
- Sequence agenda items thoughtfully. Start the meeting with agenda topics that will unify the committee/task force; this sets the stage for working together. Early in the meeting is a good time to discuss topics that require mental energy, creativity, and clear thinking. Do not put difficult topics back-to-back—people need a break. Make the first few topics after lunch quick-action items. End the meeting with topics that will unify the committee/task force; people like to leave meetings feeling that they are part of a productive team.
- Do not over-schedule the meeting. Provide sufficient but not too much time for each topic. Some chairs like timed agendas; others do not. A good approach is to show key times on the agenda, such as breaks and lunch. Having these “markers” lets members know the general pace of discussion the chair anticipates for the meeting.
- Provide at least minimal written background information for each agenda item.
- Indicate whether the item is for discussion only or if action is expected.
- Identify the person who is presenting each item.

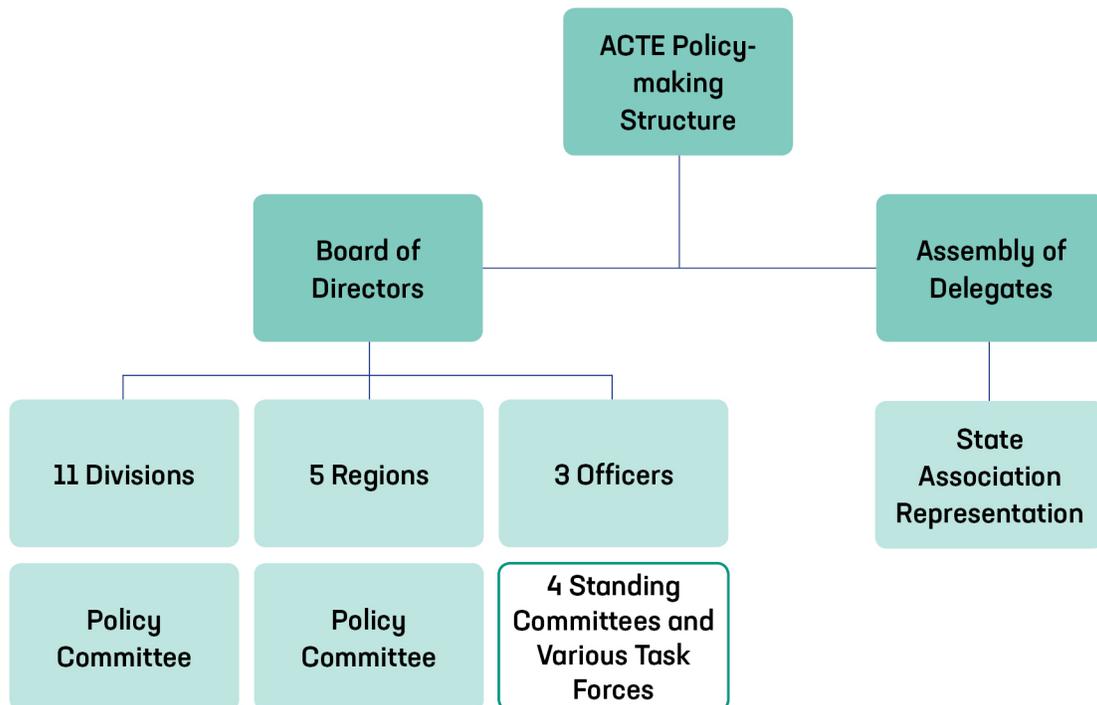
Tips for Presiding over a Meeting

- Open the meeting on time.
- Announce the business to be conducted.
- Recognize members who are entitled to talk; discourage interruptions.
- Restate the issue to be voted on before calling for a vote and explain the consequences of the vote.
- Put all issues to a fair vote; don't make assumptions about how committee/task force members feel.
- Announce the results of actions taken and explain the follow-through to be taken, by whom, and when.
- Help expedite business. Don't let discussions drift or go on too long.
- Stay with the agenda as approved. Seek the full committee/task force's agreement to change the agenda once it has been announced.
- Close the meeting on time; seek the committee/task force's agreement regarding extending the time if necessary.

Parliamentary Procedure

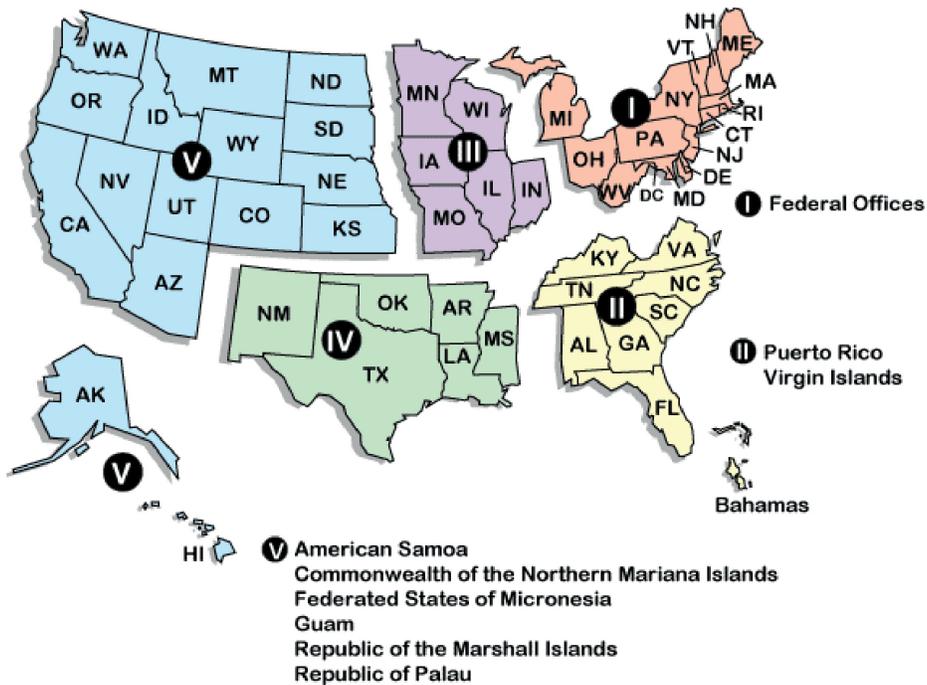
- Committees/task forces are not required to operate using parliamentary procedure; however, the objectives and principles of parliamentary procedure should be employed.
- The objectives of parliamentary procedure include expediting business, maintaining order, ensuring justice and equity for all, and accomplishing the objectives for which the group is organized.
- The principles of parliamentary procedure include courtesy and justice to all, rule of the majority while respecting the rights of the minority, partiality to none, protection of the absentee, and taking one item of business at a time.

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:



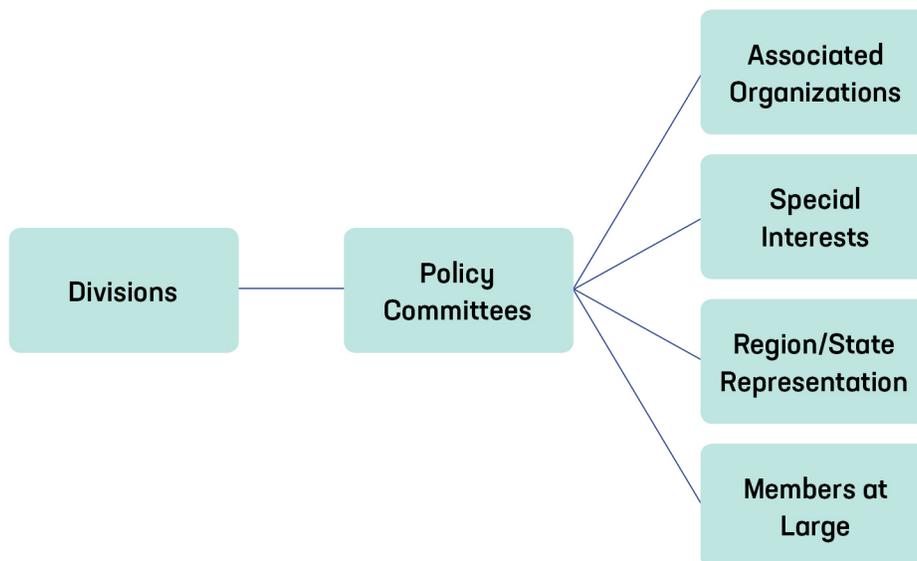
**Some regions have all states represented on policy committees, while others rotate representation among the member states.

Divisions

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

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

Division leadership is composed of:



ACTE AFFILIATION

Affiliated state associations and ACTE work together to fulfill their common primary obligation: serving the lifelong professional needs of their collective memberships by delivering/providing access to high-quality products and services and communicating directly with their respective members. By becoming an affiliated state, a state association is given national support, such as in the areas of public policy expertise, membership support, leadership development, research resources, and communication, to name a few, to meet member needs. In addition, an ACTE-affiliated state association is entitled to voting delegates at the ACTE Assembly of Delegates (AOD), one of ACTE's primary governing structures, to assist in guiding the organization.

As a result of this vital, mutually supportive, and beneficial relationship, affiliation requires that a state association's purposes, activities, and operational procedures are not in conflict with ACTE's mission. For additional information on affiliation, please review the [Statement of Understanding](#). If your state is not currently an affiliated state association, please contact the [Director of Membership](#) at ACTE for a packet detailing the process and steps for affiliation.

Affiliated state associations can be unified or non-unified. Members in unified states are required to belong to both the state and national ACTE; members in non-unified states can belong to the state or national ACTE but are **not** required to belong to both organizations. Unified states receive additional benefits from the national ACTE office. For additional information on the difference, please review the section on [unified and non-unified states](#).

Affiliated state associations are organizations created for the purpose of providing leadership and services to promote, improve, and maintain the quality of CTE in that state.

ANNUAL REPORT/QUALITY ASSOCIATION STANDARDS AWARD

ACTE's affiliated state associations are required to submit an annual report. In addition to the annual report, state associations have the option to complete an application for the Quality Association Standards (QAS). The annual report is required for all states; the QAS is optional.

All state associations are required to complete the report in order to retain their affiliation/recognition with ACTE. The annual report requires every state to reaffirm its existence and commitment to ACTE every year. If a state does not complete the report, it is placed on probation and given a year to complete the report. If, after the probationary period, no report is received, the state association is disaffiliated with ACTE.

The purpose of the Quality Association Standards Award is to provide benchmarks for state associations to determine levels of performance and satisfactory service to their members and prospective members. QAS should be useful to states in evaluating their basic organization and whether their leadership is providing minimum, average, or superior programs for the membership. Likewise, QAS helps to build member interest and pride in association participation and to help volunteer leaders appreciate the true meaning and value of their roles. State associations are recognized at the VISION Conference annually for attaining this award.

The Quality Association Standard Award outlines the key criteria of association organization and operations. Several guidelines are included within each of the nine criteria:

1. Mission, Goals, and Objectives.
2. Governing Body, Officers, and Directors (including uploading current roster of officers with terms).
3. Organizational Structure and Documents (including uploading articles of incorporation and bylaws).
4. Programs, Services, and Activities.
5. Financial Planning and Reporting.
6. Membership Development and Retention (including link or uploading to membership application).

7. Communications.
8. Public Policy.
9. Association Operations.

All states must submit one of the two reports by October 15 of each year through the online [portal](#).

UNIFIED VS. NON-UNIFIED STATE ASSOCIATIONS

Unified State Association Benefits

ACTE makes a variety of cost-saving benefits available to unified state associations, including membership processing, website hosting and maintenance, shared royalties from the CTE Learn online professional development portal, membership marketing, awards program portal, staff support, and more. Please review the Unification Benefits document in the [Appendix](#) for more details.

MANAGEMENT



ASSOCIATION MANAGEMENT

Managing an association is similar to managing a business. Once the Board articulates the core purpose, vision, and strategic priorities, a workforce needs to be put into place to identify strategies/tactics and implement the program of work.

The association workforce can be composed of volunteers, paid staff, or a combination of both.

Possible functions that would be included in your work plan include:

- Membership processing—collection of dues, renewals, membership rosters, change of address.
- Financial management—invoice payment, billing, maintenance of checking account, preparation of monthly financial statements, investment management, tax preparation.
- Meeting planning—hotel logistics, registration processing, program development, marketing.
- Newsletter editor (print or electronic).
- Marketing—programs, membership.
- Grassroots advocacy activities.
- Website—development, maintenance.
- Media relations.
- Awards.
- Advertising/marketing.

It is important that the association make and maintain assignments for these functions if it is to operate efficiently and effectively. Provide a written description, including responsibilities and parameters of decision-making, to the person responsible for the function(s).

If the state association's workforce consists of member volunteers, job descriptions and expectations should be tempered by the knowledge that they have full-time jobs. See information under Governance on working with volunteers.

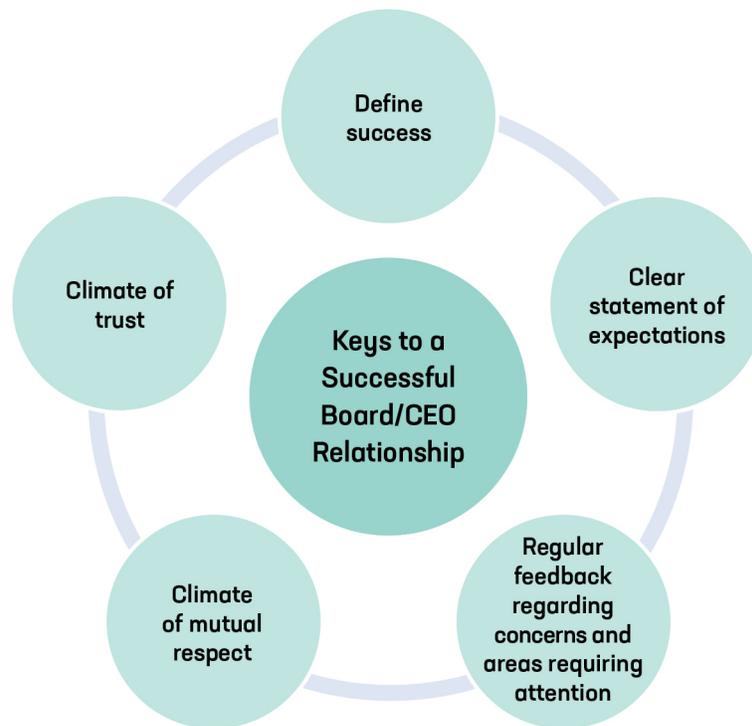
Deciding If You Need Paid Staff

There are several factors a state association needs to consider in taking the step to contract with a paid Executive Director:

1. Why does the Board think a paid Executive Director is needed? What specific tasks will the person be asked to undertake? Who is doing these tasks now? How will the transition occur between these two people?
2. What are the expectations (outcomes) of the Board for this new staff person? How will you determine if the expectations have been met? Who will determine this?
3. Where will the funding for this new position come from? Is additional revenue expected to be generated due to this person being hired? How soon will this revenue realistically be realized? Will there be any savings?
4. What characteristics/qualities, knowledge, and experience does the Board believe this person needs to possess?
5. What other resources will be needed for this position (i.e., computer, phone, office space, printing, postage, benefits)?
6. Will this position be part time (and what is meant by “part time”?) or full time? Can the expectations be achieved via a part-time position?
7. To whom will this person report, and who will evaluate the person?

The writing of the job description and the budget for this person should not be developed until the above questions are satisfactorily answered. All the questions are interrelated and will determine the type of person you need to hire and the job description. For example, if the primary task for this person is membership processing, you need to focus on someone with good organizational and technical skills. A person with only strong strategic planning or CTE knowledge may not help the Board meet their expectations.

[Sample job descriptions for Executive Directors](#) are provided in the [Appendix](#).



Evaluating Paid Staff

It is critical that paid staff be evaluated annually. An Executive Director is usually evaluated by the Board of Directors (or sometimes the executive committee). If there are multiple staff members, the Executive Director should evaluate their employees.

Three good reasons for conducting an evaluation:

1. **For the Board:** Determining criteria for an evaluation gets everyone working on the same set of assumptions about the association's direction and priorities.
2. **For the Executive Director:** A good evaluation process protects them from being "judged" (even fired) based on personality differences rather than accomplishments.
3. **For other staff:** When the Board and Executive Director are clear on priorities, it usually means clearer directions for their work and their own performance evaluations.

Keep in mind:

- Performance is a shared responsibility between the Board and the Executive Director.
- The performance review process is part of fulfilling the Board's fiduciary duty.

- The performance review process is a means of ensuring enriching communication between the Board and Executive Director.
- The performance review is tied to the organization's strategic plan.
- The performance review gives the Executive Director a clear understanding of expectations for performance and results, with priorities determined in advance.
- The performance review process provides early warning if something is going off track in the relationship with the Executive Director or if expectations are changing.

A good performance evaluation process focuses on the Board's expectations. There are many kinds of evaluations, ranging from a short "sit down" with the officers to a full-blown assessment that uses outside consultants. The Board should choose a process that makes everyone involved comfortable. Here are a few tips:

1. The Board and Executive Director should develop the process and timing together.
2. The evaluation process should be separate from salary negotiations.
3. It must be determined if the evaluation will be done through the use of written instruments or conducted in-person. If a face-to-face evaluation is used, select an *ad hoc* group of Board members to conduct the evaluation.
4. The evaluation should focus on the broad roles as identified in the job description and the achievement of mutually agreed-upon goals *only*.
5. The entire Board must be allowed to provide input.
6. The Executive Director must be allowed to write up a self-evaluation as part of the process.
7. Time should be included for the Executive Director to discuss items to be sure of accurate interpretation of the Board's conclusions.
8. Time should be provided at the end to write mutually agreed-upon performance criteria to be used in the next evaluation.

[Sample Executive Director goals and evaluation surveys](#) can be found in the [Appendix](#).

Here is the address for an informative website that offers free resources for associations, including sample job descriptions and evaluation forms: <https://www.asaecenter.org/association-careerhq/career/articles/recruitment-strategies/job-descriptions>.

FINANCE



BUDGET PREPARATION

So you're ready to chart the future of your association; you have conceptualized your vision, and you are now ready to plan the budget for your association. This is a big step and an integral part of business planning that will serve as a very important catalyst toward achieving the goals you have set. The first step you want to take in preparing your budget is to label and identify your objectives behind the budget. Your budget will help you assess the risks and rewards associated with running your association. A budget indicates where your money will be going and how this money will be raised if your association does not currently have the cash flow to meet those objectives. The main objective of a budget is to make your total income for a given period greater than or equal to (the "break-even" point) your losses. It can also be seen as improving profitability.

WHAT IS A BUDGET?	<p>A budget is a plan to:</p> <ul style="list-style-type: none">• ensure that you have the money for future activity• control finances• make confident financial decisions <p>... by relying on solid figures that would otherwise have been based around guesswork and instincts. At any time, you should never confuse a budget with a forecast. A forecast is a prediction of the future, whereas a budget is a planned outcome of the future that the business wants to achieve.</p>
WHEN SHOULD I BUDGET?	<p>Arguably, if you are budgeting on a one-year cycle, you should plan the next budget at least three months prior to the end of the current budget.</p> <p>The timing is very debatable, but you should plan your next budget in good time so your objectives and proposed income and payments are clear for the next budgeted period.</p>
HOW DO I GET STARTED?	<p>One good place to start is to list all your accounts, that is, each expense category and how much you will spend on that category for the allotted time frame of your budget. Depending on the software you use, you may want to set up a chart of accounts for programs. Contact ACTE for assistance, guidance, and more information.</p>

WHY SHOULD I BUDGET?	Budgets are made to help meet objectives. For example, are you trying to minimize costs, increase revenue, or gain a higher market share (through increased sales)? It is therefore important that you identify your objectives so you can coordinate the budget to help achieve them.
WHO SHOULD PREPARE THE BUDGET?	<p>Program planning is often viewed as the domain of the Executive Director, Program Director(s), and the Board. Fiscal management is assigned to the bookkeeper and, perhaps, the Board Treasurer. Both program staff and financial staff should work with the Executive Director and Board to develop budgets that truly reflect organizational priorities and act as a guide for spending and decision-making.</p> <p>Include both program and financial staff in discussions of programmatic costs to make sure that all resources required by programs are considered. Management staff should be included in discussions for their own departmental budgets and how these relate to program objectives. You can rely on past experience, as reflected in budget to actual reports, to determine some of this information for continuing programs.</p> <p>Staff and Board members must participate in each phase of the budgeting process that affects the line items for which they will later be responsible.</p>
WHO SHOULD CHANGE BUDGET?	<p>Should any changes arise during the fiscal year, it is the responsibility of the Executive Director to communicate and justify any modifications to the Board.</p> <p>Staff and Board members must participate in each phase of the budgeting process that affects the line items for which they will later be responsible.</p>
WHY SHOULD APPROVE BUDGET?	<p>Once you have changed your plans and updated your budget so that revenues and expenses are expected to be in the proper relationship, the full Board, in its governance role, must approve the plan for the year and the budget.</p> <p>Staff and Board members must participate in each phase of the budgeting process that affects the line items for which they will later be responsible.</p>

Using Budgets—The Variances

When putting budgets into practice, it is more than likely that your budgeted figures will not be the same as the actual figures that you obtain. This may be due to calculation errors, changes in plan, or purely down to external factors out of your control, such as interest rates and fluctuations in demand. These differences are known as “variances.”

When following the budget, it is important that you keep it in your control at all times; therefore, these variances are not to be ignored but should be acted upon straight away, even if they are favorable.

These variances are calculated as follows:

- If the actual figure is significantly more favorable than the budgeted figure, a full and rational explanation should follow. Likewise, if the actual figure is significantly worse than the budgeted figure, it is reported by stating the detailed explanation.
- For those variances that are significant, especially if they are having some negative impact on cash flow, it is important that a full explanation be provided. It may be too late to recover the difference, but if you figure out the probable cause of the issue, it will help prevent the problem from occurring again in the future. It may be that demand has fallen, creating lower income than expected and therefore a step up in marketing or a change in pricing strategy could be the solution.

ACCRUAL ACCOUNTING	CASH ACCOUNTING
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.	Revenue is recognized when cash is received, and expense is recognized when cash is paid.

The moral of this section is that the budget should never be put to one side once written; it needs to be closely followed and maintained. Any issues need to be acted upon as quickly as possible, whether favorable or adverse.

- Develop explicit contingency plans.
 - Develop varying budget scenarios based on multiple situations for declines in revenue with corresponding expenses and share this with your Board. These contingency plans serve as a road map that helps keep the organization from floundering or making rash decisions during crises.
- Insist on real-life budgeting.
 - Associations need to have a budget that is grounded in reality, not just wishful thinking—a budget that will allow them to continue to provide the services that members need.
- Make quick but strategic changes in the association’s budget.
 - Surgical budget cuts may be more prudent than across-the-board reductions
- Understand the association’s underlying finances.
 - An association leader must have a comprehensive, detailed understanding of the organization’s finances at all times.
 - Volunteer leaders need to make sure they are getting enough details in the financial reports to make well-informed decisions.
 - The State Financial Detail ACH Report (ACH) is available to SCM users to see the details of the monthly ACH deposits to state associations.

- Communication is key.
 - Volunteer leaders and staff, if any, need to make sure they completely understand one another when discussing budget matters.

Steps to Ensure Accurate Budgeting

1. Review current year-to-date (YTD) figures.
2. Compare YTD figures with the established annual budget.
3. Determine fiscal year-end projection.
4. Be conservative on revenue and liberal with expenses in tough economic times.
5. Build the next fiscal year's budget in a timely fashion to allow for future planning.

Preparing and Using a Cash Flow Forecast

A cash flow forecast can provide a clear picture of when you can expect to receive cash, from where it will come, when you will need to spend cash, and what you will spend it on. Using actual commitments and making estimates based on solid data will help to make your cash forecast more realistic and useful.

Accounting Control/Checks and Balances Activities

Stay involved in the accounting process on an ongoing basis.

Set up an appropriate system for authoring and approving transactions.

Sign the quarterly payroll tax returns and review their contents.

Open and review all monthly bank statement and/or conduct spontaneous reviews online.

Back up computer files at least daily.

Designate proper separation of duties.

Do not limit check-signing authority to one person.

Do not return checks to the preparer after signing.

Review all supporting data attached to check requests.

Vary involvement in the accounting process.

ACTE ACCOUNTING CONTROLS

What Is an Internal Control?

Internal control, in its broader sense, is defined as a process affected by the organization's Board of Directors, management, and other personnel, designed to provide reasonable assurance regarding the achievement of objectives in the following categories:

- Effectiveness and efficiency of operations.
- Reliability of reporting.

**Internal control components include control environment, risk assessment, control activities, information and communication, and monitoring.
Emphasis on common control activities include the following:**

Segregation of functional responsibilities to create a system of checks and balances.

A system of authorization and record procedures adequate to provide reasonable accounting control over assets, liabilities, revenues, and expenditures.

**Development of policies and procedures for prescribing and documenting the business and control processes.
These policies are reviewed and adjusted periodically to reflect changes in the business and control environment.**

Guiding Principles of ACTE Financial Management

Scope: ACTE is committed to conducting business in a fiscally responsible manner under the highest ethical standards. These are best practices used by ACTE and which may be a good example for your state association. Similarly, state associations must operate as fiduciaries with their funds.

Principles of Financial Management

Maintain accounting records in accordance with generally accepted accounting principles, which provide full disclosure of compliance with stewardship responsibilities of the association.

Maintain an internal control environment that enhances sound business practices and clearly defines roles, responsibilities, and accountability.

Provide accurate financial reports; standardized and departmental-specific reports will be available as management tools for employees with delegated budgetary responsibilities.

Utilize appropriate budgetary controls applicable to fund sources to monitor variances and provide explanations of deviations.

Maintain appropriate levels of financial transaction reviews and approvals by association personnel responsible for budgetary transactions.

Involve both internal and external parties to provide periodic independent oversight of association financial activities.

Finance and Operations employees with direct responsibilities for the General Ledger must have been appropriately trained in the use of the accounting system software, including the chart of accounts and reporting tools.

All Finance and Operations employees with accounting responsibilities must possess basic accounting skills and have the knowledge necessary to adequately perform their responsibilities.

A copy of the [ACTE Accounting Controls](#) is available in the [Appendix](#).

AUDITS

An audit is the examination of the financial report of an organization by someone independent of that organization. The financial report includes a balance sheet, an income statement, a statement of changes in equity, a cash flow statement, and footnotes comprising a summary of significant accounting policies and other explanatory notes. When examining the financial report, auditors must follow generally accepted auditing standards. Once auditors have completed their work, they write an audit report explaining what they have done and giving an opinion drawn from their work. An annual audit is the key to fiscal checks and balances.

Different types of financial records review are available. Several options are outlined [here](#).

Consult with a tax or legal professional in your state for specific audit requirements for your association.

The purpose of an audit is to form a view on whether the information presented in the financial report, taken as a whole, reflects the financial position of the organization at a given date. For example:

- Are details of what is owned and what the organization owes properly recorded in the balance sheet?
- Are profits or losses properly assessed?

What Don't Auditors Do?

- Audit other information provided to the members of the organization.
- Check every figure in the financial report—audits are based on selective testing only.
- Judge the appropriateness of the organization's business activities or strategies or decisions made by the Directors.

- Look at every transaction carried out by the organization.
- Test the adequacy of all the organization's internal controls.
- Comment to members on the quality of Directors and management, the quality of corporate governance, or the quality of the organization's risk management procedures and controls.

What Can't Auditors Do?

- Predict the future—The audit relates to a specific past accounting period. It does not judge what may happen in the future and so cannot provide assurance that the organization will continue in business indefinitely.
- Be there all the time—The audit is carried out during a defined time frame and auditors are not at the organization all the time. The prime purpose of the audit is to form an opinion on the information in the financial report taken as a whole and not to identify all possible irregularities. This means that, although auditors are on the lookout for signs of potential material fraud, it is not certain that frauds will be identified.

How Is the Audit Conducted?

- The organization's management prepares the financial report. It must be prepared in accordance with legal requirements and financial reporting standards.
- The organization's Directors approve the financial report.
- Auditors start their examination by gaining an understanding of the organization's activities and considering the economic and industry issues that might have affected the business during the reporting period.
- For each major activity listed in the financial report, auditors identify and assess any risks that could have a significant impact on the financial position or financial performance, as well as some of the measures (called internal controls) that the organization has put in place to mitigate those risks.
- Based on the risks and controls identified, auditors consider what management has done to ensure the financial report is accurate and examine supporting evidence.
- Auditors then make a judgment as to whether the financial report taken as a whole presents a true and fair view of the financial results and position of the organization and its cash flows and is in compliance with financial reporting standards.
- Finally, auditors prepare an audit report for the organization's shareholders or members.

What Do Auditors Do, Specifically?

Auditors discuss the scope of the audit work with the organization—the Directors or management may request that additional procedures be performed. Auditors maintain independence from management and Directors, so tests and judgments are made objectively. Auditors determine the type and extent of the audit procedures they will perform, depending on the risks and controls they have identified. The procedures may include:

- Asking a range of questions—from formal written questions to informal oral questions—of a range of individuals at the organization.
- Examining financial and accounting records, other documents, and tangible items, such as physical plant and equipment.
- Making judgments on significant estimates or assumptions that management made when they prepared the financial report.
- Obtaining written confirmations of certain matters—for example, asking a debtor to confirm the amount of their debt with the organization.
- Testing some of the organization’s internal controls.
- Watching certain processes or procedures being performed.

ACTE recommends each state association have an annual [fiscal review](#) performed, with results distributed to the Audit Committee (if applicable) and the Board of Directors.

MEMBERSHIP



MEMBERSHIP RECRUITMENT AND RETENTION

There is nothing more important to a membership organization than the recruitment and retention of members. Here are some tips when dealing with recruitment.

- **Gather data**—How much do you know about your current members? How long have they been members? What’s the average amount of time they stay members? Where are they from (i.e., geographic, discipline area, type of school)? The more you know about your current members, the more you will be able to craft and successfully launch a recruitment campaign.
- **Find your opportunity**—After you have more knowledge about your current members, you should be able to see where you have opportunities. If all your members are in comprehensive high schools, look to career centers, community colleges, and trade/technical schools. If your members tend to be focused on just a few disciplines, how might you expand into other areas?
- **Define your audience**—Once you have located your opportunities, you must define your audience. Who are you approaching for membership? What do they need? What is missing for them?
- **Develop a plan/resources**—For example, if you know you have a big opportunity in postsecondary, you have to develop a plan on how to recruit these potential members and what you may need to develop or deliver to sell them on your association. At this point you should also set a goal—e.g., a 10 percent growth, or nine new members, or every Division will increase its membership. With a goal, you have something against which you can measure your progress.
- **Execute the plan**—Your recruitment plan should include a timeline and a list of activities that will help you realize your goal. It should be as detailed as possible so that you are following the overall plan. If people don’t know the “why” of what you are doing, they won’t get behind you. This goes for internal leaders, as well as potential recruits. Keep in mind the other activities that you are already doing and how they might integrate into what you are doing. If you have a publication, how might you use that in the campaign? If you have a meeting, what might you do there? Try to keep the activities coherent and understandable—don’t jump all over the place.

- **Look for resources**—Look for any and all resources you can to help with your membership recruitment. A quick search on Amazon or at the [American Society of Association Executives](#) will yield a plethora of resources and ideas to use to help in your recruitment efforts.

Now let's take a quick look into retention. Most people believe that retention starts after someone becomes a member. The fact is that retention begins *before* someone joins your association. It happens through your website, the recruitment materials you have shared, or your presence at a meeting or event. These resonate with people long before they decide to join. Here are some pointers and ideas related to retention:

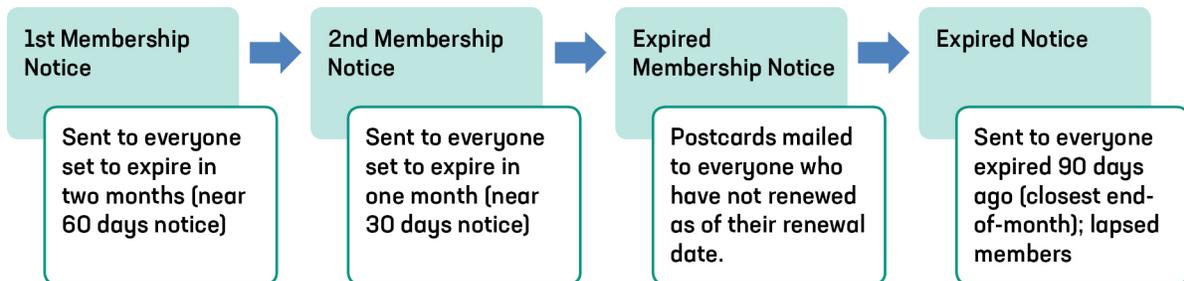
- **Collect the data**—If you don't know who is leaving or why, it's hard to address those who are leaving. As an idea, ACTE sends a quick survey to its non-renewed members. We get a number of people who reply that they simply forgot to renew. This is one of the most effective retention tools we have.
- **Gather feedback**—One of the questions on any renewal survey should be related to needs and wants. Or, better yet, what keeps you up at night as an educator? If you can get the answers to these types of questions, you will be on your way to developing and/or providing for your potential members.
- **Keep communicating**—Always communicate with your members. Let them know what is happening in the association and in the industry. When you survey your members, let them know the results. An open-door communication policy will go a long way in keeping your members engaged.
- **Provide involvement**—How can members [get involved](#)? If you have a complicated and hierarchical system, you will lose a lot of new members right away. Are there long applications or steps to go through to volunteer? If so, you might want to rethink your process to come up with ways people can easily get involved.

MEMBERSHIP PROCESSING

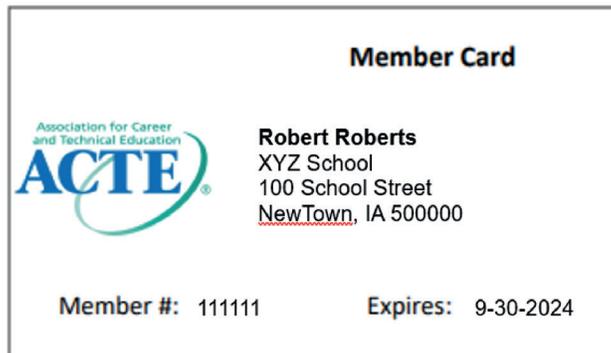
In processing memberships, it is imperative to create a defined schedule according to renewal terms to optimize the potential for renewals. Set these business rules in conjunction with the structure as defined in the organization's bylaws. Business rules should also be established to ensure consistency and accuracy.

Dues Invoicing Timetable Sample

Prior to the 10th of every month, a sample process for membership notices is as follows:



Membership cards are available in the member's portal immediately following the completion of entering the payment information. An example of a member card is shown here:



If your organization utilizes electronic means for invoicing, it is prudent to test that method prior to implementation to ensure either the invoices reach the full audience successfully or there is an alternative method in place to ensure all information is received by the intended recipients.

ACTE uses *iMIS* as its association management software. *iMIS* is a widely used, complete, upgradeable, cloud-based, nonprofit business software system. Custom web enhancements have been created to simplify the transmission of state dues information directly into the ACTE database.

- [SCM \(State Chapter Module\)](#)—Log in and view all your state member records! This information can be exported, updated, and transmitted directly into the ACTE database over the website. Typically a state's leaders are given access to the state's membership records in the SCM.
 - [State Chapter Module Manual](#)
 - State Chapter Module website—[SCM Admin Homepage](#)
- The State Financial Detail ACH Report (ACH) shows a member's ID, first name, last name, email, school/business, full address, phone number, product code, description (chapter or division), transaction date, and amount. This report is available to SCM users to see the details of the monthly ACH deposits to state associations. An example is in the [Appendix](#).

For more information, contact Kelli Diemer at kdiemer@acteonline.org.

MEMBERSHIP DATABASE STRUCTURE

ACTE's membership record database is structured by relationship and type: Dues, Event Registration, Orders, Exhibits, and Accounts Receivable. The relationship of dues is most commonly used to determine the pricing type for registrations, orders, exhibits, and accounts receivable. The database also provides the source data for online transactions and, again, utilizes the structured relationship and type.

Demographic information collected includes gender, race/ethnicity, degree/credentials, teaching history and method of certification, and career cluster affiliation.

ACTE MEMBERSHIP INFORMATION

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.

Associate

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 ACTE professional members 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 the USA and in a country that is not part of an ACTE Region.

Organization

Institutions may purchase professional memberships for positional staff.

ACTE Organizational Memberships provide an institution with the opportunity to purchase professional memberships for their staff, which are positional. The organization’s designated staff will have full individual professional member benefits as long as they remain in their position at the institution. If the organization is located in one of the ACTE unified states, state chapter dues and applicable state division dues will be charged along with ACTE dues. Group discounts are available for those with more than 100 members.

THE VALUE OF MEMBERSHIP	THE BENEFITS OF BELONGING	WHY JOIN YOUR ORGANIZATION?
<ul style="list-style-type: none"> • Offer a collective, strong voice. • Access to relevant and current information. • Recognition of profession. • Provider of professional development. • Trusted access to wisdom. 	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • Protect your livelihood. • 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.

	DESCRIPTION	DUES	PRODUCTS	ELIGIBILITY FOR ACTE ACTIVITIES
Professional	Individuals actively employed in or concerned with CTE.	\$80	<ul style="list-style-type: none"> Techniques. 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. Eligible to run for a Board of Directors position.
Retired	Individuals who are retired from active employment and have been ACTE Professional members for one year.	\$31	<ul style="list-style-type: none"> Techniques. 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"> Techniques. 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 Techniques 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 the USA and in a country that is not part of an ACTE Region.	\$60	<ul style="list-style-type: none"> Electronic Techniques. Electronic CTE newsletters. No insurance. Member discounts*. 	<ul style="list-style-type: none"> Ineligible for award recognition (must be in a Region). Ineligible to vote in the Board of Directors election.
Organizational	Individuals actively employed in or concerned with CTE; positional as long as with the institution.	\$80	<ul style="list-style-type: none"> Techniques. 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. Eligible to run for a Board of Directors position.

*Member discounts on ACTE VISION, Region and NPS Registrations, and ShopACTE! Bookstore purchases.

CONNECTING WITH MEMBERS

As stated above, communication is the key element to any membership organization. If members and potential members don't know about your association, how do you expect them to join or renew? The most effective way to let them know about you is to communicate. Over the last 10 years, communication methods have gotten very diverse. Fifteen years ago, how much did anyone know about social media? Now, these are all regular ways people communicate. Discussing these options could take a very long time, but suffice it to say that the most important aspect of any new communication vehicle is to really look at it and determine how it will fit into your communication mix and how well it will resonate with your members.

- 1. Newsletters**—Most associations have some sort of regular digital newsletter or communication. The key element when looking at newsletters is that they be published on a regular basis—whether that is daily, weekly, monthly, quarterly, or yearly. When designing the content for any newsletter or communication, the driving force should be what your members want or need (hence the need for surveying, which will be discussed below). You also want the content to be catchy and appealing so people will read what you have to share. Typically (and this is more informational than gospel), here is what is in most newsletters:
 - a. Opening**—Either from the President or Executive Director, this piece sets the tone for the publication.
 - b. Legislative Update**—For the CTE community, this is a very important piece, as it gives members an update on what is happening or what needs action.
 - c. Calendar**—What events are happening now or will be happening soon that members need to be aware of?
 - d. Compelling Content**— These are issues your members are dealing with. Provide them with an article or, at the very least, some resources they can use.
 - e. Reports**—Many newsletters offer some sort of report, maybe from a meeting or event, maybe from a section, Division, committee, or Board.
 - f. Awards**—Who got what award, or what deadlines are coming up?

2. **Digital Communication**—By hyperlinking your newsletter text, you can send readers directly to the resources without them having to type in a URL. Here are a couple of additional tips for effective digital communication:
- a. **Blocking**—There are many firewalls that block content. Make sure your members know where the messages will be coming from and how to allow your messages to get through.
 - b. **Size Matters**—There are many servers and systems that don't allow huge files to get through, so be mindful of how large a file or message you are sending.
 - c. **Don't Attach**—If you are sending material out to a large group, don't attach any documents or PDFs. This often triggers spam filters. Instead, post the information to a website and send the URL.
 - d. **ACTE E-Blast**—Your digital newsletter can be formatted and sent to your state association members through the [E-Blast Request Form](#).

Additional information is available in the [Social Media](#) section.

3. **Surveys**—Other than talking face-to-face with your members, there is probably no better way to learn what they need and want than through surveying. There are two important things you need to know about surveying:
- a. **Surveying Is a Science**—There is a science behind surveying and survey question writing. That being said, you don't have to be a scientist or a professional question writer to get valuable information from your members. The first step would be to do a quick Google search on survey question writing. This will pull up a whole host of resources for you. The second step would be to write out your questions and then do a small test. This will let you know if the questions you are asking will result in the information you seek. Lastly, be aware of the data. Just because members say they want something does not mean they will pay for it if you offer it. Be aware of the questions, how you are asking them, and what the results tell you or fail to tell you.
 - b. **Don't Survey for Surveying's Sake**—While it is great to survey members, remember that they are taking time out of their day to respond to your questionnaire. As such, remember to close the loop with them by reporting the results of the survey and what you plan to do with the information. As for how to survey, that can be done in a number of ways, including in person, in print, and electronically. If you are going electronic, a quick Google search of "online survey" will yield a number of resources. A few of the more popular ones are Survey Monkey, Google Forms, and Constant Contact.

ACTE also provides a survey option through Survey Monkey. For more information about utilizing ACTE's survey service, please contact ACTE headquarters.

4. State Annual Report—Most people understand and expect Wall Street and publicly traded companies to issue an annual report. For obviously different reasons, associations should also issue an annual report. An annual report is an excellent way to remind your members of the benefits they received over the course of the previous year. It can also pave the way for the future by explaining to members what the association's priorities are and in what activities the association will engage over the next 12 months. An annual report is also an excellent time to let the members know about the association's financial picture. ACTE at the national level has an independent audit done each year and publishes the auditor's final report in the magazine and on the website. In addition, ACTE provides copies of the annual report during the Association's Assembly of Delegates. As a nonprofit association, it is important to let your members know how their dues are being spent and how well the association is being managed financially.

Annual reports can take any number of forms. ACTE has traditionally developed a theme and showcased the association's activities around that theme with bulleted lists. Other associations have four-color, glossy paper publications that contain more dialogue. And, of course, there is everything in between. To check out some other annual reports and to give you an idea of what they can be, visit <http://www.nonprofitmarketingguide.com/resources/#>.

A copy of [ACTE's Annual Report](#) is also posted on the website and included in *Techniques* magazine each year, and state examples are included in the [Appendix](#).

STATE MARKETING MATERIALS

Working together, ACTE and the state associations can have a tremendous effect on the CTE community. In addition to the marketing services and unification benefits/services that can help state associations market their conferences and events, ACTE has a number of resources that it can send to state associations, including:

- Customized membership forms.
- Copies of ACTE's *Techniques* magazine; also available digitally to members on ACTE's website.
- Membership brochures.
- Speakers.

The most effective action the state association can take is to keep ACTE informed of conference and event dates, as well as other needs for marketing collateral. As those dates approach, the state association can request information and resources from ACTE by completing a [request form](#). Completing this form will ensure that you receive the materials you need in a timely fashion.

PUBLIC POLICY AND GRASSROOTS ADVOCACY

KEY ISSUES AND POLICY AGENDA

As a leader in your state's CTE organization, it is important that you identify key issues and develop a policy agenda. Just as fiduciary responsibilities and professional development services are important, so too is promoting and advocating for legislative, regulatory, and other policies that support the issues important to your membership and CTE as a whole. Members often cite advocacy as a key reason they join, and a well-crafted policy agenda will help to define and brand your organization as a necessary component in the legislative process.

If you do not have a policy agenda, you can develop one in a systematic manner:

1. Research the issues—Examine the education and workforce development issues that are being discussed in your state. The following are suggestions for activities you might consider:

- Read the education and business sections of important newspapers in your state.
- Perform some searches for education and workforce news online, using your state as a search key word.
- Research proposed legislation through your state's online legislative website and track its progress.
- Review the legislative schedule to determine if there are important hearings or meetings you can attend.
- Peruse the websites of, or contact leaders in, other education and workforce organizations to identify the issues that are important to their constituencies. Often, these will be important to your membership as well.
- Ask your membership what is important to address and what challenges they are facing.

2. Prioritize the issues—Once you have identified a list of key issues, you should prioritize the most important. Consider the following:

- What is most important to your membership? You might want to survey the full membership to help identify the highest priority issues.

- How do the policy issues relate to the other goals of your organization? (It is important to include policy goals as part of the organization's overall goals.)
- What issues are important to your membership that are not being addressed by other organizations? Such issues will make your organization distinctive and should be a selling point related to membership.
- Are the issues related to short-term or long-term goals? The short-term goals may be a higher priority since they require a shorter timeline (e.g., if a teacher pay increase bill is expected to move in the legislature this year and a school construction bill is expected to move next year, you should probably prioritize CTE teacher pay increases over any facilities funding increases for year one).

The following is a sample of a prioritized issue list:

- a. Improving linkages between secondary and postsecondary education.
- b. Getting more students of color, students with disabilities, and other diverse groups through high school and on to work and/or postsecondary education.
- c. Developing “green” initiatives to support emerging career fields in this area.
- d. Raising the pay of career and technical educators.
- e. Expanding access to and increasing the number of CTE programs statewide.

3. Develop a policy agenda—Once you have identified and prioritized the issues important to your organization, it is time to build your policy agenda. The national association develops an annual federal policy agenda that could be used as an example to structure your agenda. The agenda begins with the prioritized list of issues, but that is only the beginning of your advocacy.

- Ask leaders in your organization to discuss the priority issues you have outlined. You will want to consider if there are any existing governance structures, such as your Board of Directors or a policy committee that you should use to vet the issues.
- Develop a set of policy goals based on the issue priorities. Each goal should be linked to the issues to help you reach the goal. Some of the goals may incorporate more than one issue area (e.g., ensure legislators understand the value of CTE), but there should be goals corresponding to each issue on your list. Examples include [Virginia Policy Issues and Solutions](#) and [Colorado Legislative Priorities](#).
- Consider all the various ways that policy is implemented and discussed in your state (e.g., legislation, executive order, agency regulation, etc.). Your goals should be broad enough to incorporate all these factors.
- After you have developed the goals, identify specific tasks and activities that will help you reach the goals by the end of the year.

4. Promote the policy agenda—Now that you have identified the key issues and developed a policy agenda, it is time to promote the agenda.

- Ensure that all members are made aware of the policy agenda so they understand it and can promote it. You can use Microsoft Word or a service such as Canva to create a professional-looking policy agenda. You could print copies or send them via email to your members.
- Identify the key legislators in your state who sit on education and workforce legislative committees, particularly outspoken legislators who are CTE advocates, and any other potentially important contacts in achieving your policy agenda goals.
- Meet with key policymakers and their staff, such as legislators and staff on education- and workforce-related committees in the legislature or the governor’s education policy adviser.
- Identify ways to build coalitions with key third parties (i.e., business partners, other education and workforce development organizations, parent groups) who can help carry your message.
- If you have a website, post the agenda in a spot that is easily seen when stakeholders visit your website.
- Remind members and others throughout the year why the agenda is important.

5. Evaluate success—Once the year ends, make sure to review and evaluate your success.

- If a goal did not get completed, consider if it should be on the list for the following year, modified, or removed.
- Report to your membership and other key constituencies the success you attained on the policy agenda.

GRASSROOTS ADVOCACY

It is up to you to know when and where your members will be most influential and direct them to participate in advocacy at these times to support your policy agenda. Your members are the most important resource you have as you begin to influence policy. Membership organizations derive their influence from the fact that they represent concentrations of voters, also known as constituents. Constituent pressure is a very effective tool. Legislators listen to what their constituents have to say, especially if they are visible and persistent in communicating their cause. After all, these are the people who voted the legislators into office and will vote again in the next election!

- Keep informed of what is happening in your state capital! Your members will look to you for guidance on legislation that affects CTE. Legislation can move quickly, so be sure to obtain and review frequent updates. You may want to designate a legislative/policy committee to help with this task.
- Advocacy also occurs at the local level—school boards, city councils, county commissioners, etc. Remember to include these groups as you consider advocacy goals.
- It is critically important to build relationships with your local policymakers by attending town halls, offering to host a town hall, inviting legislators/staff to visit/speak at/tour your program, using them to judge CTSO events, etc. Ensure that you are adhering to any parameters set by your district or workplace.
- It is important that you and your membership develop a relationship with policymakers; when you have a relationship established, it is much easier to ask for their support on CTE issues.
- Organize a “state legislature day.” An event like this will give your members an excuse to rally at your state’s capital. Pick a time during the legislative calendar that is most timely to meet your legislators and educate them on CTE issues.
- Keep your membership informed. Send weekly/monthly updates on what is happening in CTE legislative action or other policy developments. If you keep everyone informed, then it will be easier to mobilize everyone when the time comes for action.
- When you need your membership to contact policymakers on a specific issue, consider sending out an email with a separate heading from the ones you use for your newsletters or legislative

updates. You want something catchy, intriguing, and straightforward. In the email, give background information, action needed, and specific information on how to act. National ACTE's Action Alerts, which all members receive, are a helpful example of formatting.

- Provide your membership with the necessary tools to be successful advocates. Provide advocacy guides, information on legislative processes, information about key state CTE advocates and stakeholders, an up-to-date issue sheet, and the legislative calendar. You may also want to conduct advocacy training with your members to raise their comfort level with participating in advocacy tasks. Remember that there is strength in numbers, and it is up to you to motivate your membership to make a difference. An example of how to contact legislators can be found in the [Appendix](#).
- Consider available technology and digital media, such as social media channels, message boards, online social networks, and blogs, to convey information to your membership. Many of these technologies are free and can help promote your messages to large groups more easily.
- A key part of ACTE membership is advocacy. On ACTE's website, there is an [Advocacy Resources section](#) that provides helpful tips for advocates. Use these resources to help you develop an advocacy plan.

FEDERAL LOBBYING REQUIREMENTS

Lobbying Disclosure Act Requirements

If you or individuals from your organization have contact with a federal office in the House of Representatives, Senate, or executive branch of government, you will want to make sure that you follow federal lobbying requirements legislated in the Lobbying Disclosure Act. **These rules require specific disclosure and filing procedures for some federal lobbying activities. Check with your legal professional for the requirements related to your association.**

Most state associations and employees are **not** considered lobbyists under this law and will **not** be required to file a disclosure or take any specific action. Currently, organizations must only register if they employ a federal lobbyist and if their total expenses for federal lobbying activities exceed \$14,000 during a quarterly period. For the purposes of registration, a lobbyist is someone who makes more than one lobbying contact and spends at least 20 percent of their time in federal lobbying activities over any three-month period. Lobby law requirements are updated frequently, so association leadership should regularly consult with an expert to determine if state or federal registration is required.

The federal lobbying disclosure required by the federal government is different from the IRS lobbying requirements discussed in this document. The federal government has become more diligent about ensuring individuals and organizations follow the law. Disobeying the rules, even if unintentionally or by neglect, has the potential to be a legal problem that could have long-term effects.

If you feel like you may be required to register, visit the below links and touch base with ACTE's Policy, Research, and Content Department for further information. ACTE is happy to provide guidance related to these issues, but the best source of information comes from the House Legislative Resource Center and Senate Office of Public Records (see contact information below). Organizations may also want to consult legal counsel.

House Legislative Resource Center

Web Information: https://lobbyingdisclosure.house.gov/amended_lda_guide.html

Phone: 202-226-5200

E-mail: lobbyinfo@mail.house.gov

Senate Office of Public Records

Web Information: <https://lda.senate.gov/system/public/>

Phone: 202-224-0758

E-mail: lobby@sec.senate.gov

State Lobbying Registration

Similar to the federal level, lobbying disclosure may be required at the state level. Please research your individual state requirements to ensure compliance with your lobbying and advocacy efforts.

IRS LOBBYING REQUIREMENTS

What does not count as lobbying?

There are five activity categories that are *excluded* from the term “influencing legislation.” They are:

1. **Self-defense**—Communication on any legislation that would affect an organization’s existence, powers and duties, tax-exempt status, or deductibility of contributions.
2. **Technical advice**—Providing technical advice to a governmental body in response to a written communication.
3. **Nonpartisan analysis or research**—Studying community problems and their potential solutions is considered nonpartisan if it is “an independent and objective exposition of a particular subject matter ... (that) may advocate a particular position or viewpoint so long as there is a sufficiently full and fair exposition of pertinent facts to enable the public or an individual to form an independent opinion or conclusion.”
4. **Examinations and discussions of broad social, economic, and similar problems**—Communication with the organization’s own members with respect to legislation that is of direct interest to them, so long as the discussion does not address the merits of a specific legislative proposal and makes no call for action, does not count as lobbying.
5. **Regulatory and administrative issues**—Communication with governmental officials or employees on nonlegislative (i.e., administrative) matters, such as rule-making, does not count as lobbying.

Lobbying is defined by federal tax law as any attempt to influence specific legislation. Legislation means a bill that has been introduced, or a draft bill that may be introduced in any legislative body, such as a city council, state legislature, or Congress.

The **total** lobbying expenditure limits under the 501(h) election are:

- 20 percent of the first \$500,000 of exempt purpose expenditures, plus
- 15 percent of the next \$500,000 of exempt purpose expenditures, plus
- 10 percent of the next \$500,000 of exempt purpose expenditures, plus
- 5 percent of the remaining exempt purpose expenditures up to a total cap of \$1 million. (*Exempt purpose expenditures are all payments you make in a year except investment management, unrelated businesses, and certain fundraising costs.*)

Direct vs. Grassroots Lobbying

Under the 501(h) election, the IRS distinguishes between direct and grassroots lobbying:

DIRECT LOBBYING	GRASSROOTS LOBBYING
This is when you state your position on specific legislation to legislators or other government employees who participate in the formulation of legislation or urge your members to do so. In order to count as direct lobbying, it must refer to specific legislation and express a view on it.	This is when you state your position on specific legislation to the general public AND ask the general public to contact legislators or other government employees who participate in the formulation of legislation. If you do not include a call to action in your communication to the general public, it is not lobbying. Remember, urging your members to lobby counts as <i>direct lobbying</i> , not <i>grassroots lobbying</i> .

The distinction between direct and grassroots lobbying is important under the 501(h) election because the Lobby Law specifies different expenditure limits for grassroots and direct lobbying activity. An organization may spend only one-fourth as much on grassroots lobbying as on direct lobbying. For example, if an organization’s annual permissible lobbying expenditures were \$100,000, it could spend only \$25,000 on grassroots lobbying. But it could spend the remaining \$75,000 on direct lobbying.

Reporting Lobbying Expenditures

All 501(c)(3) organizations (except churches, associations of churches, and integrated auxiliaries) must report lobbying expenditures to the IRS. For those nonprofits that do not elect to fall under the 1976 Lobby Law (for information on the 501(h) election, [see above](#)), the IRS requires detailed descriptions of a wide range of activities related to lobbying. For organizations that take the 501(h) election, the only requirement is to report how much was spent on lobbying and how much of the total amount for the year was spent on grassroots lobbying.

Use [IRS Form 5768 Election/Revocation of Election](#) by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation to Apply for 501(h).

IRS Form 5768 and 501(h) and Lobbying Restrictions

Nonprofits that are involved in advocacy and lobbying should investigate making the federal 501(h) election. The *h* election is an expenditure test that answers the question of whether your organization is doing too much lobbying by examining how much you spend on lobbying (lobbying expenditures). Thus, the *h* election provides a simple and clear quantitative test of program expenditures. Helpful rules provide guidelines on what constitutes “lobbying expenditures” and how much may be spent on such activities.

In fact, there is virtually no reason not to consider making the *h* election. If an organization expects to spend so much money on lobbying that it would go above the limits, it should spin off a separate 501(c)(4) organization (another type of exempt organization for political purposes).

The 501(h) election is filed once and can be retroactive to the previous year. It entails no additional recordkeeping and can be rescinded should the nonprofit decide to do so.

The 501(h) election relates to an organization’s status as a tax-exempt organization. Lobbying activities may also give rise to registration and reporting requirements under state and local law.

Consult with your association’s legal counsel and tax professional for specific information.

WEBSITE RESOURCES

ACTE provides information available on the ACTE website (www.acteonline.org) that can help you stay up to date on policy issues and better understand federal actions related to education, workforce development, and other issues important to CTE. It is helpful to familiarize yourself with all of the resources offered on the website. There are a wide variety of publications designed to help you inform others about the benefits of CTE, learn more about CTE, and share information among the CTE community.

The [Advocacy](#) section of the website is the place you will find most information pertaining to public policy and advocacy issues. The following are some of the key resources in this section:

RESOURCE	DESCRIPTION
Advocacy Policy Agenda	Content pertaining to the specific public policy issues of importance to CTE.
Receive ACTE Legislative Alerts	Frequent updates on the latest happenings in Washington affecting CTE.
Take Action	Tools with step-by-step directions to help CTE members with their advocacy and to take action in support of CTE.
Congressional CTE Caucus	Information on the bipartisan caucus of members of Congress created to enhance CTE awareness in Congress.
CTE Policy Watch Blog	Read this blog daily, or as often as possible, to identify the latest CTE-related happenings in Washington, often in real time.
Policy & Advocacy Publications	Advocacy and policy publications focused on CTE's role in education/workforce, benefits of CTE, and much more.

The [CTE Publications](#) section of the website contains important information that can help to support your advocacy activities:

INFORMATION	DESCRIPTION
State Fact Sheets	Comprehensive information on the robust CTE systems of each state.
CTE Research Network	The CTE Research Network works to conduct and promote the use of high-quality studies examining the impact of CTE. Other resources include https://cte.ed.gov/initiatives/cte-research-network .
What is CTE? Fact Sheets	Information highlighting CTE's effectiveness that can be used for advocacy purposes.

MEDIA RELATIONS



MEDIA RELATIONS

A great way to gain positive coverage of CTE is through the media. Print, online, and television outlets rely on people sending them information regarding upcoming events, celebrations, feature stories, and breaking news. The media are interested in stories that impact the general community, are timely, have local appeal, and are interesting. One of the best facets of media coverage is that it is free! It provides you the opportunity to educate a wide variety of communities and potential stakeholders about the critical need for CTE in every community, its benefits, and the positive impacts it provides for each community.

There are many different ways to communicate your message to the media, including one-on-one meetings, press releases, media briefings, media tours, and opinion pieces, and there are pros and cons for each:

- 1. One-on-One meetings**—Pros include developing a deeper relationship with the reporter/editor and the ability to go in-depth on different topics, potentially yielding a higher volume of coverage. This is also known as “pitching” reporters. A con is the travel cost and time if the publication is in another city. You can potentially negate this by offering a virtual one-on-one meeting, which may allow you to complete more meetings with far less expense. Another challenge can be getting time on the reporter’s schedule, as newsrooms are stretched thin from a staffing standpoint.
- 2. Press releases**—Pros include information being distributed quickly to media across the state and country, organizations being able to communicate and control the message, releases providing content for the media for stories, and organizations including quotes from other organizations and businesses. Cons include the media being overwhelmed by the number of releases they receive daily and possibly overlooking yours. Your releases may not be read immediately, and a release could be labeled as spam in some email filters.
- 3. Events with media invited**—Pros are that a newsworthy event will bring local and potentially national exposure, organizations can communicate and control the message that they are sending to the media, and these kinds of events provide helpful information and resources to the media that may make it more likely that they will produce a story. Cons are how hard it is to get reporters to tune into events and the potential costs and logistics involved with holding an event. Examples of these kinds of events may include school visits, program tours, competitions, award

presentations, receptions and more. Sometimes, events can be done virtually through video conferencing software, and some kinds of events, such as webinars, may be more successful because they eliminate expenses and logistical challenges and make it easier for media to attend.

4. **Op-eds/letters to the editor**—This outreach method involves drafting an editorial article in support/opposition of a particular issue, expressing an opinion, etc. Pros include the ability to speak on behalf of issues of importance to your state and state association members directly in your own words. Cons include the challenge of finding a willing outlet to publish and the time commitment required of placing an op-ed, especially if working with more than one author.

Media Tours

A media tour is a series of school visits held with members of the media, policymakers, and other stakeholders. Media tours are relatively brief (less than a week) and are focused on a specific geographic area, sometimes including a central theme. Here are several steps to ensure a successful media tour:

1. Identify the dates you are interested in hosting the tour and the targeted area. Fall and spring are optimal, but timing depends on your state legislative and association calendar and additional factors. Keep in mind any impediments to reporter and stakeholder attendance.
2. If you plan to invite a representative from ACTE's national headquarters, be sure to provide advance notice and bear in mind other major ACTE events, such as CareerTech VISION or the National Policy Seminar.
3. Work with others in your state, ACTE staff, and CTE leaders in your community to identify the target programs that will be included in the tour. Tour sites should be within a reasonable distance of one another and should demonstrate best practices and innovation that are representative of excellence in CTE. As you are planning, consider a variety of programs, topics, and settings. Try to provide as much balance as possible between secondary and postsecondary CTE programs. You may want to develop a connecting element for programs across the tour (e.g., high-quality CTE programs, CTE programs that emphasize STEM skills, etc.).
4. Once you have planned the tour locations and dates, map out a comprehensive agenda for the tour, including the general discussion topics, time, and meeting location for each tour stop.
5. It is important to ensure that video and photo release forms are on file and up to date for all individuals who will be present.
6. Inviting local, state, or national policymakers is an important component of a media tour. It may be helpful to refer to ACTE's guide to [Hosting Site Visits for Policymakers](#) in planning the visits.
7. Establish your targeted media list. Use connections within your community and resources like ACTE's [Targeting the Media](#) to establish a broad list of publications that you are interested in inviting to participate in your tour.

8. Write and send a media advisory for targeted reporters to distribute about two weeks ahead of your tour's start date.
9. Send the advisory to your targeted reporters about a week before the tour begins. It is best to send these by 11:00 a.m. on Tuesday, Wednesday, or Thursday. As always, be cognizant of other major news events or other challenges to getting a reporter's attention.
10. Two days after you send your media advisory, follow up by personal invite, email, or phone with outlets that you are especially interested in having them attend.
11. Tours should include stops in any relevant CTE classrooms or laboratories, as well as the participation of relevant spokespersons for the school district or administration.
12. Conduct the tour and be sure to take careful notes on everything that you see, whether or not reporters are able to join. Share information about the tour in real time on social media.
13. Send follow-up materials (including press releases and photos) to reporters in the distribution areas of any sites that did not have a media presence. A press release should provide enough information to pique their interest so they might produce a story after the fact.
14. Once the tour ends, tell others about it! If an ACTE staff member joined you for the tour, remember that they may be a resource to you in developing a follow-up plan.
15. Track the coverage of publications that did join you for the tour to see if you had a long-term effect on their reporting or if their article received any reader feedback.

For more information and details on planning for media tours, visit ACTE's [HITTING THE ROAD: A BEGINNER'S GUIDE TO MEDIA TOURS](#) document.

Local Press Contacts

When developing a list of local media contacts, start by visiting the websites or calling all the area newspapers, television, and radio stations to identify the reporters who cover the education beat and workforce beat. If you are initiating a regional or statewide media campaign, you should consult a media directory, which can be found in the [ACTE Action Center](#). Local organizations, such as the chamber of commerce, may have developed a media directory as well.

Once you have compiled a list of contacts, send an email introducing yourself to the reporter or editor. Be sure to include information about your organization, your background, and areas of expertise. Media appreciate having a variety of experts they can contact when working on stories. After introducing yourself, you should extend an open invitation for the media to tour a CTE program or school. You can also offer to take the reporter out for lunch or coffee to discuss an important issue or possible story ideas. Ask the reporter how they like to receive information (email, text, or phone call) and make a note for future reference.

Press Releases

When you are putting together a major event, new data is being released about CTE, or a CTE program or educator is being recognized, develop a short press release. Include who, what, where, when, and details of why and how the issue is relevant and important. When possible, relate it to a timely policy issue or include information about its impact on your community. For example, if a CTE program is successful in graduating 90 percent of its class, then include that statistic and highlight how CTE reduces the dropout rate.

When you send the news release, send it on your organization's letterhead or provide your professional contact information. If possible, include color photos of students engaging with their CTE coursework, attending events, etc. Keep in mind that the newsrooms of America are inundated with news releases. Your news release must be written as skillfully as possible and directed to the appropriate person.

When you host a major event, it's best to send information to the reporter as soon as possible, preferably two weeks ahead of time, so they can place it on their calendar. A written notice, often referred to as a "media advisory," provides the reporter an opportunity to plan ahead. For more information on how to write a release or contact the media, please visit the [Action Center](#) in the Advocacy section of ACTE's website or view samples of press releases from ACTE at <https://www.acteonline.org/press-center/press-releases/>.

HOW TO BRIEF THE MEDIA

The first step in setting up an event with media in attendance, whether you choose to host a virtual or in-person event, is to make sure you have a news angle that will attract press to the event. Once you have decided on the news angle, here are a few steps to host a successful media briefing:

1. Find an appropriate location that has the capacity to host media personnel and other guests. A few places to look are local chambers of commerce, libraries, other local organizations that have space, or a school. Make sure the location has a podium and an area where you can display signage with your organization's name.
2. Once you have picked a location, it's important to choose a date. The best days to host an event with media in attendance are Tuesdays, Wednesdays, or Thursdays. Mondays and Fridays are busy news days, and it may be difficult to attract reporters to an event.
3. The next step is to choose a time. The best times to hold events with media are prior to noon or ending shortly after. This provides daily newspapers with enough time to attend the event and write a story, and it also provides television and radio stations time to conduct interviews and put together timely coverage of the event.
4. Once you have chosen a location, date, and time, it's important to send information to the media as soon as possible. If you are scheduling an event several weeks ahead of time, it's important to send a media advisory to the media. The media advisory should have the attendees, date, location, and time of the event. The media advisory should also include who, what, where, when, and why. If you don't have all the details lined up, you need to include in your invitation that more information will become available closer to the event, and ensure that you follow up with the media as promised by sending out the details.
5. One week before the event, re-send the media advisory to the press. It's important to include reasons why media should attend the event. If the general public or any VIPs are invited to attend, please include this information in the advisory. ACTE has a sample media advisory [here](#).
6. As an organization, you need to develop talking points. Develop a list of possible questions you may be asked by the media and answer them ahead of time. This will help prepare you and other members of your organization to handle questions .

7. A couple of days before the event, you need to follow up with newspapers, TV, radio stations, and digital media writers about the event. Email and call the media (if necessary) to encourage them to attend the event. Usually, television stations decide what to cover during a morning meeting. It's important to remember that getting television coverage of an event is difficult.
8. On the day of the event, it's important to have copies of a media kit (information about your organization, key contacts that reporters can interview, information about the program, or news announced at the event). Place this information on a table near the entrance of the event. You should also have a sign-in sheet for the media, including their contact information, so you can follow up with them afterward.
9. Have a brief introductory agenda, such as introducing participants and attendees at the visit, welcoming and thanking them, and explaining what will take place during the event. You may opt to do a Q&A session, depending on the format of your event.
10. Have any staff present available to coordinate and participate in post-event follow-up interviews.
11. After the event is over, send follow-up materials, such as a recap press release, photos, and thank-you notes to all the reporters who attended and see if they need more information. Sometimes, reporters will gain enough information from these follow-up materials to produce a story after the fact, even if they didn't join you for the event.
12. Keep track of the media coverage your organization receives after the event. Don't forget to share your stories and media placements with ACTE's national office.

HOW TO MONITOR PLACEMENTS

There are a number of different ways to track placements, including free and paid options. Here are a few ways to track coverage for your organization:

1. Set up free Google or Yahoo! news alerts using key words of your organization. For example, Association for Career and Technical Education, career and technical education, names of people in your organization. Note: make sure these terms are in quotation marks, or the search engine won't return the exact phrase results.
2. When you talk with members of the media, ask the reporter/editor when they expect the story to run.
3. You can pay a fee/subscription for a company to track media coverage using key word searches. The subscriptions are usually for one year. There are a number of different companies that offer this service. A few examples are [Meltwater](#) or [Cision](#). You can also use these services to send a daily digest report of media mentions to your inbox.

As you receive media coverage, it's important to keep track of where your organization is being mentioned. One way to keep track is to develop an Excel spreadsheet for media calls and media coverage.

The Excel spreadsheet that keeps track of media calls should include five columns:

1. Date
2. Publication
3. Reporter name
4. Inquiry from the reporter
5. Staff who handled the request

The press coverage Excel spreadsheet should have seven columns:

1. Date
2. Publication name

3. Title (headline of the article or slug of the story)
4. Outlet
5. Reporter name
6. Person that quoted or provided research
7. The type of coverage
 - a. Placed article—You contacted the press, and they interviewed you or someone in your organization. You provided a resource and/or scheduled an interview or provided research information for the story.
 - b. Press release—Coverage was a result of a release you sent out to the media.
 - c. Industry coverage—Your name or organization is mentioned in the story, but you had no influence in getting it published.

PROGRAMS AND SERVICES



ROLE OF PROFESSIONAL ORGANIZATIONS

The value of professional organizations overall is their ability to offer a collective, strong voice for their members, provide access to relevant and current information and trusted wisdom in their field of expertise, bring recognition of the profession, and provide professional learning opportunities. ACTE and its affiliated state associations fulfill these roles for their members. It is important to emphasize the added value of the association to current and prospective members and to continually evaluate their needs with respect to the programs and services being offered. A list of considerations for that analysis is below, with additional detail on the overarching categories following thereafter:

The Benefits of Belonging to a Professional Organization

- 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.

Ask Yourself

- What is the cost to do this yourself?
- What is the cost to do this without your association?

How Professional Organizations Identify Program Initiatives

- Internal Factors
 - Member expectations and needs.
 - Resources available.

- External Factors
 - Trends in the profession.
 - Legislative and regulatory activities.
 - Economic trends.
 - New technology advancements.

Advocacy

- Legislative priorities and funding (federal and state).
- Your voice to federal and state administrative and regulatory agencies.
- Your liaison with education policy organizations.

Professional Development

- Conferences and VISION offering a broad range of topics.
- Workshops, including webinars on topics of member need and interest.
- Distance learning, including CTE Learn and its state association portals.
- Internships and apprenticeships.
- Mentoring programs.
- Certification/accreditation.

Research and Information

- Access to research databases.
- Surveys.
- Latest techniques and trends in CTE.
- Information center/library.
- Lesson plans.
- Customized research.
- Teaching materials.

Publications

- Books.
- Periodicals/newsletters.
- Buyers' guide and card packs.
- Reports—industry statistics and market analyses.
- Directories.
- Informational brochures and promotional materials.

Networking

- Peer group meetings.
- Online chat rooms.
- Videoconferencing.
- Webcasts/podcasts.
- Peer directories.
- Special interest groups.

Group Purchasing Programs

- One-time purchases (equipment).
- Ongoing purchases—insurance, supplies, credit cards.

Why Join a Professional Organization

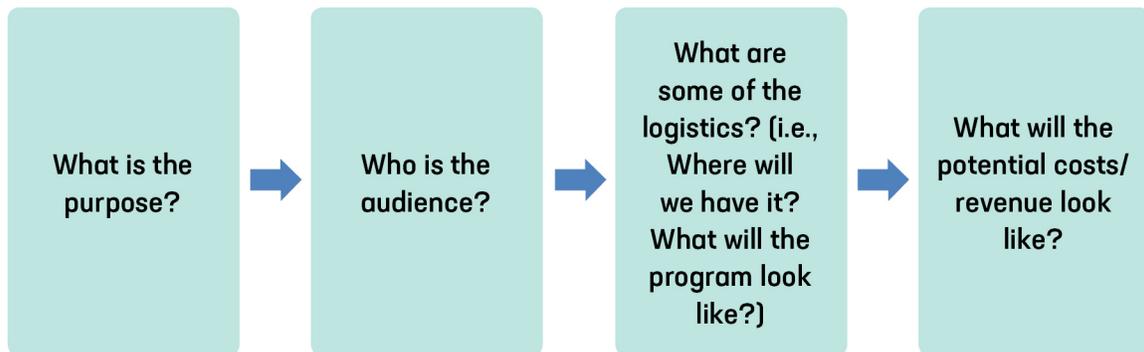
- Protect your livelihood.
- Keep current on the latest information and techniques.
- Save money on products and services you need.
- Network with experts across the country.
- Be part of your professional group.

Why Become Involved in Your Professional Organization

- Monitor and tend to your investment.
- Make sure your expectations are understood and addressed.
- Gain leadership knowledge and skills.
- Give back to your profession.
- Make a difference!

CONFERENCES

There are many aspects that need to be addressed when it comes to putting together a conference. Some of the initial questions that need to be asked include:



There are probably dozens more questions that will need to be asked, but these simple ones will give you a start. Conference planning resources are available both from [ACTE](#) and [Region V](#). A virtual conference planning guide is also available from ACTE [here](#). We highly recommend that you review these documents during the initial stages of conference planning. A few additional areas to address follow:

EVENT INSURANCE

There are a number of items to consider when looking at event insurance, and that can seem overwhelming. The best advice would be to contact an insurance specialist and discuss the options and needs of your association or event. ACTE uses Forrest T. Jones, whose contact information is given in the [Insurance](#) section. To provide a bit more information, here are some definitions:

1. **Event liability and property damage insurance** is designed to indemnify the host/honoree from certain types of claims arising from accidents that take place during the event. It offers protection for the host/honoree for damage to the facility caused by a guest or vendor, bodily injury to guests if they are found liable, and alcohol-related accidents for which guests or vendors are found liable.
2. **Cancellation insurance** covers events that are out of a planner's control—inclement weather, a principal speaker dropping out, strikes, and outbreaks of disease. It generally does not cover the event if the association decides to cancel, but may allow for rescheduling in certain instances.
3. **Attrition** is related to the conference or event's hotel room night pick-up. An attrition clause basically says that if you do not pick up a certain number of room nights, you will be responsible for paying the hotel the difference between your pick up and the contracted number of rooms. Whenever possible, do not agree to an attrition clause. If the hotel insists, make sure the clause gives you as much flexibility as possible. For example, if the hotel wants you to pick up 80 percent of your rooms, try to negotiate that to a lower percent. If the hotel won't budge from the percentage, ask if you can reduce your room block at a predetermined time—say 90 or 120 days before your event. This gives you some flexibility and helps protect you from paying any damages. If a hotel won't move on any attrition provisions, consider using another property.

[Forrest T. Jones's](#) Convention Cancellation Plan protects against losses due to weather, natural disasters, terrorism, labor disputes, or threats that result in convention cancellation, interruption, postponement, or reduced attendance.

In addition, this plan covers:

- Collapse of roof or flooding at a convention facility (including costs to reschedule).
- Costs incurred to avoid or minimize loss.
- Unscheduled workshops, seminars, and planning meetings under \$50,000.
- Physical loss of business personal property at the venue or while in transit.
- Non-appearance of a principal speaker or entertainer.
- Failure to vacate the event facility on time.
- Claims for damages, costs, or compensation by the owners or management of the convention facility.

This description of coverage is intended as a general overview and does not represent how the Convention Cancellation Plan will respond in every situation. Please read all policy language carefully for coverage terms and conditions.

WORKING WITH ACTE

ACTE has a dedicated staff that is ready and willing to help state associations as they plan and market their conferences and events. There are three main ways in which ACTE can help state associations:

- 1. Consulting/Marketing**—ACTE can work with state associations during all phases of the conference or event, including, but not limited to:
 - *Design*—ACTE has design staff that can assist with the layout and design of materials, including program books, advertisements, and web banners.
 - *Marketing*—ACTE can help with the marketing of a state event or conference through print and/or email. ACTE can send [e-blasts](#), include information on the ACTE website calendar, place advertisements, send direct mail, and more.
 - *Registration*—ACTE can provide a referral to manage the registration and collect fees for your state conference or event, such as through [eShow Event Management](#).
 - *Event Space* —For many of the large chain hotels, ACTE has a national sales manager. While in most cases, a local contact or relationship yields better results, ACTE can assist with locating and securing meeting or event space.
 - *Printing Services*—ACTE's Print Shop may be able to assist with some of your printing needs.
 - *Association Representation*—ACTE welcomes the opportunity to send national staff to attend your conference and present, as desired. Please complete and submit the State Conference Request Form.
- 2. Contract Review** (in an advisory capacity)—While having contracts reviewed by an attorney is always recommended (and good association management practice), ACTE can and will review contracts and offer suggestions on ways to improve or alter the contract that will help the association.
- 3. Membership**—ACTE can work with state associations to assist with various membership activities:
 - *Design*—ACTE has design staff that can assist with the layout and design of logos and assist with a website.

- *Marketing*—ACTE can help with membership marketing, including [joint membership brochures](#). Printing and design work are available.
- *Renewals*—ACTE will send electronic reminders, invoices, and surveys.
- *Membership Processing*—ACTE can process state membership payments by check and credit card and provide you access to a report at the end of each month through the SCM. ACTE can also provide online credit card processing capabilities.
- *Data Reports*—ACTE can provide you access to reports detailing membership trends.

PUBLICATIONS

There are many different types of digital communications or publications you can produce for your members, and there are pros and cons for each:

1. **Digital:** Pros include an inexpensive communication method, which is extremely timely and easy for members to forward and share. Cons include the lead time for gathering relevant content and production, and the message could be dumped in spam filters in some email services.
2. **State Fact Sheet:** ACTE annually produces a State Fact Sheet for its affiliated associations with state input, which is posted on the website; you may wish to supplement this with additional information that you produce directly.
3. **Other publications:** For example, a conference program might be produced (see conference planning materials).

Regardless of the type of communications you produce, you need to ask a number of questions:

1. How often will we produce it?
2. What content should we include? ACTE recommends that you survey your members on a regular basis to determine what content they are looking for.
3. Who will produce it? For any communication, you need writers, editors, possibly graphic designers, and tech people.
4. What digital platform or tool should you use?

The key to any publication is consistency. You don't want to produce a communication just whenever you feel the need. Members like to know when to expect material from their association. So, whether it's daily, weekly, monthly, or quarterly, let your members know when they can expect the publications.

MEMBER DISCOUNT PROGRAMS

Wikipedia defines loyalty programs/member discount programs as “structured marketing efforts that reward and therefore encourage loyal buying behavior—behavior which is potentially of benefit to the firm.” For our purposes, we can substitute “association” for the word “firm.”

So, that grocery store card you have in your wallet? That is a member discount program as, when you use it, you get savings. In addition, many of these programs also directly benefit schools, as you can name a school as a benefactor of your purchasing activity.

For associations, member discount programs come in many shapes and sizes. ACTE offers a variety of member discount programs, which state associations may also wish to promote, such as [ShopACTE](#), [CTE Learn](#), or insurance products through [Forrest T. Jones](#). The key for any association is to determine if aligning itself with a program follows the mission and objective of the association.

There are two ways to secure member discount programs:

- **Active**—The association discusses needs and desires and then seeks out companies and industries with which to partner and offer a member discount program.
- **Passive**—A vendor comes to you with an offer.

In either case, the association needs to carefully ponder the pros and cons of any program. Aside from alignment with the association’s mission or objective, associations need to consider the following:

- What is the commitment? Is it a one-year deal or multiple years?
- What is the payoff? What percent of income can the association expect from this program?
- Who will handle the marketing? Sometimes the vendor wants to do this. If that is the case, make sure to consider members’ right to privacy and determine how best to protect it.
- How do we terminate? What are the parameters around termination of the agreement?

These are just some of the questions associations should ask when they are evaluating potential partners. When you do decide to partner with a company or group, make sure you listen to your members. If you get a lot of pushback or negative feedback, step back and re-analyze the partnership. Can it be changed for the good, or should the association step away? The key to any agreement or contract is to have legal counsel review it. ACTE can review contracts for associations, but not in a legal capacity.

RESEARCH

In order to continue to improve or update what the association offers, you will need to conduct research. In fact, in all aspects of the association, you should think about what data or information you need to help make decisions, and then work to put into place ways to conduct and/or collect it. While research can seem like a very daunting task or endeavor, it doesn't have to be. While doing in-depth and scientifically based research might satisfy the hardest of hardcore researchers, most state affiliates of ACTE generally will not need to dive in that deeply. Should you perceive a need for formal, in-depth research, please reach out in advance to ACTE's Research Department for assistance.

Research can take many forms:

- **Informal**—During general conversations, jot down a few notes or points. Bring up certain points during meetings or events to gauge reaction.
- **Surveying**—After an event, solicit feedback from the attendees. What did they like? What would they change?
- **Focus Groups**—Get several members around a table to discuss a certain topic or idea.
- **In-depth Research**—A professional conducts research that will be used to inform future direction or capture the current climate.

The method you use will be determined by what you are trying to discover, and that will be the key question as you get into the research area. If you just want an opinion, a simple survey that you devise might suffice. If you want to uncover perceptions and attitudes, you might have to enlist expert question writers and survey analysts. As you go up the level of importance for the association or the industry, you will probably go up the same number of levels on the research scale.

How can you obtain this research? There are a number of ways:

- 1. In Person**—Having casual conversations about a topic or issue is one way to gather information. This can also occur during dedicated feedback sessions at a meeting or conference or even through focus groups tasked with tackling one issue or idea.
- 2. Surveys**—These can be done either digitally by Google Forms, through services like Zoomerang or Survey Monkey, through webinar poll features in Zoom, Google Meet, PollDaddy, or through mailed surveys.
- 3. The Work of Others**—Take a look at what [others](#) might have done or might be doing in your area. You might be able to add a couple of key questions or use previous work to inform your work or push the envelope a little further.

One of the key aspects of research is to be up front about why you are asking for the information—what is the purpose? Also, share with the participants what you discovered. If you just keep asking people for information and feedback, but you don't share what you learn, your response rate is sure to go down.

ACTE can help you determine what might be the best way to find out the information you are looking for. Call 800-826-9972.

WEBSITE

There are entire sections of bookstores and college degrees related to websites; however, this overview will be brief and contain just a few pointers.

- 1. You Need a Website**—Your association needs a web presence. When people hear about an organization or association, one of the first things they do is search for you online. If you don't have a web presence, you may be forfeiting members. There are online services that make it very easy for anybody to put up and maintain a website for free or at relatively little cost.
If you don't have an existing website, ACTE has a web page available for each state. Please call 800-826-9972 for more information.
- 2. Keep Content Relevant**—If you have a site that includes content, keep it current! Having people access a website that has outdated information will not appear professional or be useful. This does become a more difficult proposition when your association is completely volunteer-run, but it's imperative that you consider it.
- 3. Tap Your Students**—CTE students are designers, IT folks, and webmasters. Tap these people to do the work. A teacher could make a class project out of updating and maintaining the association website.
- 4. Link, Link, Link**—There is a lot of information out there, and you don't need to reinvent the wheel. Link to ACTE material, other associations and organizations, and stories and information you think your members will enjoy. One of the best things about the internet is that you don't necessarily have to create—you can just aggregate!

Again, one could spend days and weeks on website marketing, design, interactivity, and the like. If you would like to discuss your website and what you might be able to do with it, contact ACTE's Digital Media Manager at 800-826-9972.

Quick Website Checklist

ACTE's Digital Media Manager provides state associations support for the hosting and updating of information on a shared web server. If you are a unified state and decide to take advantage of the ACTE web page, they will host and redesign the site for you. Otherwise, you will need to do the following:

1. Domain Name—Before you can build a site, you need to purchase and register a domain name.

This can be done on a number of sites, including:

- GoDaddy.com
- NetworkSolutions.com
- Register.com

Most domain names are relatively inexpensive. However, to protect your web presence, consider purchasing all the domains associated with your association, including .net, .com, .tv, .biz. If possible, you want to own the web space related to your association's name.

2. Secure Hosting—Once you have a domain name, you will need to host your site somewhere.

Basically, this is the physical server on which your information and design will reside and how people will access your site. Using a third-party hosting firm, such as the ones listed above (along with many other private service providers/hosts), provides you with tech support that might be invaluable for a small or volunteer-run association. If you choose to purchase a server and host the site yourself, keep in mind that you will need someone who understands the system in order to service it and keep your website running.

3. Build Your Site—Most domain registry and hosting sites offer web design services that they will maintain for a fee. The advantages here are that you will have tech support should something happen to your site. The disadvantages include that some services are templates, so you have fewer customization options, and you have to actually build the site, although the software is generally user-friendly. You could also have a designer create your site, and a web development company build it. The advantages to this approach include the fact that you can have any look and functionality you want. The disadvantage is that this will cost you more, and may include annual update or renewal fees.

4. Post Your Content—Once you have the site built, now you have to post the content and voila!

You have a website! Again, the association must routinely update content to maintain currency.

SOCIAL MEDIA

Many associations, companies, and even individuals include or share information on their other digital media activities when discussing their websites. These avenues are well-used means of communications, and associations should explore how these technologies best fit with the messaging, marketing, and communications objectives that they establish.

There is consistent discussion around which social media options associations should offer and provide. The quick answer to this is: use whatever your members or potential members are using. That sounds easier said than done; however, a quick survey of your members every year or so will reveal communication and usage trends that will help you make these decisions. If none of your members use Flickr to share photos, then starting a Flickr account might not be the way to go.

The two key questions to ask when looking to explore electronic media are:

Are my members or potential members using or going to use this service/platform?

Do we have the capacity to maintain this service/platform?

The second question is probably more important than the first. While it is easy and relatively cheap to set up these services, the association needs to maintain the content and use of the services/platforms, or they will not be successful. So, before you jump into new social media channels, answer the two key questions above and then proceed accordingly.

When you do decide to pursue social media channels, please keep in mind that many of the hosting services are free or inexpensive. You can google the area you are interested in and find a number of resources, for example:

Photos: www.Flickr.com; www.Picasaweb.com

Videos: www.youtube.com

ACTE currently has the following social media services:

SERVICE	LINK/LOCATION INFORMATION
LinkedIn	Group name: Association for Career and Technical Education
X/Twitter	Feed: https://www.twitter.com/actecareertech
Facebook	Group name: ACTE: Association for Career and Technical Education
YouTube Video Channel	https://www.youtube.com/@actecareertech
Instagram	https://www.instagram.com/actecareertech/
CTE Policy Watch Blog	https://ctepolicywatch.acteonline.org/
Flickr	https://www.flickr.com/actecareertech

Steps to get started:

1. Survey your members on what social media platforms and services they use.
2. Spend the time to review and explore the websites and services you learn about from your members.
3. Analyze your communication strategy and capacity to see what services or platforms you can support and offer your members. Remember that the key is sustainability. Don't just start something if you don't have the capacity to sustain and integrate it.
4. Review. After a defined period of time (say three months or six months), step back to analyze whether or not this new service or platform is performing. Some questions to ask include how much traffic you are generating, how many followers you have, and how your content is performing.
5. Make necessary adjustments to those that are working and stop using those that are not working.
6. Continue the process routinely.

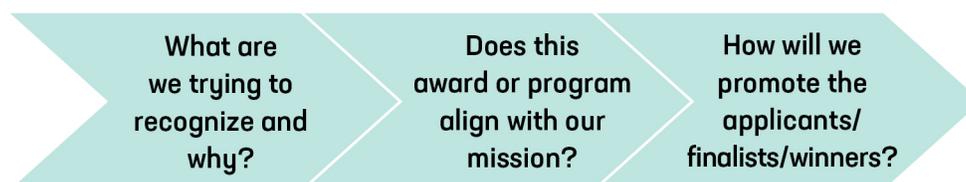
FELLOWSHIPS AND MENTORSHIPS

ACTE offers a variety of fellowship and mentorship programs to assist members in developing their leadership skills. Included among them are the [National Leadership Fellowship](#), the [NextLevel Postsecondary CTE Leadership Program](#), and the [Inclusion Access Equity and Diversity Mentorship Program](#). Additionally, your [Region](#) may offer fellowship programs, about which you can inquire. You may wish to offer a state-level program as well. Each of these examples can provide excellent information to use as a model for your efforts.

AWARDS AND RECOGNITION

Educators are not very good at giving themselves pats on the back, so it is up to entities like professional associations to recognize and celebrate the brightest of the bright and help promote the value of CTE. One way to do this is through an awards program.

If you already have an awards program, or you are looking to start one separate from the existing ACTE Member Excellence Awards structure, keep these key questions in mind:



In beginning any awards program, the first step would be to create evaluation criteria. And the best way to do that is to work with a group of stakeholders or advisers. Some questions to consider:

1. Who is eligible?
2. What information needs to be submitted?
3. How will we establish a scoring rubric to evaluate applications?

While you are developing your criteria, keep in mind how you might use the material submitted. Will you use photos or videos as promotional or evaluative pieces? If so, you need to include language in your submission/application process that states the association has the right to use any submitted material for promotional purposes. It is recommended that associations seek the advice of legal counsel on the use of submitted materials.

For sample information, please check out [ACTE's Awards Program](#) web page.

For additional application samples, simply google “awards applications,” and you will find many examples to help you build your application process.

As your Awards Committee members and chair change, remember to pass along relevant information, including lists of past winners, application materials and their location, Region requirements, and judging portal access, among others, to their successors.

SAMPLE ANNUAL OFFICER CALENDAR

This calendar is a sample; please adjust the timelines to your specific association needs (e.g., conferences, awards, elections, etc.).

January

- Schedule legal, fiscal review, and tax appointments and filings for the year.
- Update state association strategic plan.
- Set annual state association budget.
- Review state association bylaws for updates.
- Review state association policy and procedures manual for updates.
- Set annual state association publication and social media calendars (weekly, monthly, quarterly, as appropriate).
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.
- Schedule and attend monthly ACTE State Leaders calls.
- Prepare for [CTE Month](#) activities.
- Prepare for state legislative advocacy day.
- Begin preparing for [National Policy Seminar](#) (NPS) Hill visits, including connecting with attendees from your state (review/download report from SCM).
- Do a newsletter e-blast with follow-up from [VISION](#) conference.
- Prepare for state association conference.
- Review [Region conference](#) Call for Presenters; submit proposal as appropriate.

February

- Submit state award winners to Region for consideration.
- Celebrate CTE Month.
- Register for Region conference.
- Prepare for state association conference.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

March

- Attend NPS and send follow-up communications to representatives and staff.
- Review Call for Presenters for upcoming CareerTech VISION Conference; submit proposal as appropriate.
- Do a newsletter e-blast with follow-up from NPS.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

April

- Attend Region conference.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

May

- Do a newsletter e-blast with follow-up from Region conference.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

June

- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Notify ACTE Membership Director of new officer and Executive Director appointments for the coming year.
- Hold a Board meeting.
- Recognize outgoing officers.

July

- Finalize arrangements and coordinate/attend state conference.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting; transition and on-Boarding.
- Calendar ACTE state leaders' and NEDA calls for the year.
- Follow up with state association members about VISION registration (review/download report from SCM) before early bird deadline.

August

- Do a newsletter e-blast with follow-up from state conference and reminder about awards submissions.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

September

- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.
- Do annual membership drive.
- Speak at teacher Back-to-School and pre-service teacher events.
- Begin work on ACTE annual report/QAS.

October

- Submit list of delegates for annual Assembly of Delegates by October 1.
- Submit list of attendees to State Leadership Breakfast at VISION.
- Set state association meeting at VISION.
- Complete ACTE annual report/QAS for state associations in online portal by October 15.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

November

- Attend VISION Conference.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.

December

- Finalize State Association awards winners; close portal and assign judges.
- Update association website.
- Review/download and reconcile monthly state financial detail ACH and membership reports from SCM.
- Hold a Board meeting.
- Process donation receipts.
- Send thank you letters to exhibitors and state leaders.

FAQS



1. What are the differences between a 501(c)(3) as opposed to a 501(c)(6)?

501(c)(3)s receive several advantages, including a postage discount, easier funding from grants and foundations, and tax-deductible contributions. More information about the differences between 501(c)(3)s and 501(c)(6)s can be found in the [Tax Exemption](#) section. Consult with your tax or legal professional about specific requirements.

2. What is the difference between a financial review and a full audit?

There are [three levels](#) of attestation from a CPA:

- a. Audit—CPA offers an opinion on the financial statement in accordance with GAAP.
- b. Review—CPA performs some procedures and doesn't note any material misstatements but offers no opinion (limited assurance).
- c. Compilation—CPA states financial statements are in the right format in accordance with GAAP but offers no assurance of any kind.

3. What should state associations know about ACTE's Board of Directors' electronic voting process?

ACTE uses electronic voting for the Board of Directors election. Each eligible member (in order to vote, you must be an active member as of 30 days prior to the start of voting, which begins at VISION Conference) will receive an email with their member ID and passcode to use to vote on a website. Voting will last for 30 days. If a member does not have an email address on file with ACTE, their voting information will be mailed to their preferred address. The most common election issue ACTE members experience is not receiving the passcode email because it was labeled as spam by their email server. Please advise your state to add actevote@directvote.net to their white list so they can receive the email. If anyone in your state encounters issues with the voting process, please have them [contact](#) Dominique Frascoia at dfrascoia@acteonline.org. Please assist ACTE by encouraging your state to exercise its right to vote!

4. What should state associations do if they can't find the original forms that they used to apply for the IRS designation?

Please see the [Tax Exemption](#) section for information on applying/reapplying for a federal ID number and obtaining copies of your letter of determination.

5. What should state associations know about the Board reviewing the IRS return? Many only know to have their President sign and turn it in after the accountant does it. What is the procedure?

Please see the section on [Form 990](#) for additional information on the form.

6. How does a state association divide up financial responsibilities when there might only be one or two people in an office and the officers only meet every three months?

In terms of internal controls and segregation of duties, put compensating controls in place, such as a review by someone in charge of governance not involved in the area being reviewed.

7. When do bylaw changes need to go to the IRS?

Unless the bylaws changes alter the purpose of your organization, the new bylaws do not need to be reported to the IRS.

8. Who should state associations contact if they want to do a short column for state newsletters each month on current issues?

ACTE can assist state associations with electronic newsletters and e-blasts to the members of their state. Contact the ACTE office at 800-826-9972 and ask to speak to someone in the Communications Department. Please check the [Newsletter](#) section for additional information on ideas for what to include in a newsletter.

APPENDIX



SAMPLE ARTICLES OF INCORPORATION

<https://www.irs.gov/charities-non-profits/suggested-language-for-corporations-and-associations>

Articles of Incorporation of _____. The undersigned, a majority of whom are citizens of the United States, desiring to form a Non-Profit Corporation under the Nonprofit Corporation Law of _____, do hereby certify:

First: The name of the Corporation shall be _____.

Second: The place in this state where the principal office of the Corporation is to be located is the City of _____, _____ County.

Third: Said corporation is organized exclusively for charitable, religious, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

Fourth: The names and addresses of the persons who are the initial trustees of the corporation are as follows:

Name _____ Address _____

Fifth: No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article Third hereof. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence

legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

(If reference to federal law in articles of incorporation imposes a limitation that is invalid in your state, you may wish to substitute the following for the last sentence of the preceding paragraph:

“Notwithstanding any other provision of these articles, this corporation shall not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of the purposes of this corporation.”)

Sixth: Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

In witness whereof, we have hereunto subscribed our names this ____ day of ____, 20__.

STATEMENT OF UNDERSTANDING AND AFFILIATION PROCESS

Statement of Understanding

The Association for Career and Technical Education (ACTE) is a duly constituted legal entity providing services and benefits on behalf of Career and Technical Education (CTE) professionals within the United States and internationally. ACTE invites affiliation with duly constituted legal entities providing ACTE-aligned services and programs on behalf of CTE professionals within a specific state of the United States, a commonwealth or territory of the United States, or a sovereign nation or any of its political subdivisions.

Affiliation requires that a state association's purposes, activities, and operational procedures not be in conflict with ACTE's mission. ACTE recognizes state associations' necessity to adopt bylaws, missions, and organizational structures specific to their jurisdictions and responsive to their members.

An ACTE-affiliated state association shall be entitled to voting delegates at the ACTE Assembly of Delegates as specified in the ACTE Bylaws. ACTE and affiliated state associations further agree to the following principles and operational elements.

Principles of Affiliation

1. ACTE and its affiliated state associations share a primary obligation to serve the lifelong professional needs of their collective memberships by delivering or providing access to products and services of the highest quality and communicating directly with their respective members.
2. ACTE and its affiliated state associations will cultivate operating environments of mutual trust and respect towards one another and their members and stakeholders, foster open communication and transparency, and exercise transparent governance and decision-making responsibilities.

3. ACTE, in consultation with its affiliated state associations, will establish and communicate advocacy principles that enhance the value of the profession, serve its stakeholders, and inform the education system.
4. ACTE and its affiliated state associations will strive to protect, develop, and enhance the reputation, value, and preeminence of career and technical education, as well as their own brands.
5. ACTE and its affiliated state associations will each operate in a financially prudent manner and in fulfillment of their respective fiduciary responsibilities and will do so in a manner that is open and transparent to their members.
6. ACTE and its affiliated state associations both will seek out, foster, and train effective leaders that advance the vision and goals of the respective organizations and the profession.

Operating Framework

1. ACTE has the responsibility for developing and communicating positions on federal legislation and regulatory agency actions. Affiliated state associations will align their activities, where feasible, with the ACTE positions and assist ACTE by communicating the positions to members and stakeholders.
2. ACTE and its affiliated state associations will work in partnership to deliver consistent messages that advance the career and technical education profession and the respective associations. Volunteers are one of ACTE's and the affiliated state associations' most valuable resources.
3. Volunteers shall be recognized, supported, and encouraged when acting on behalf of ACTE and its affiliated state associations.
4. The affiliated state associations will ensure that all delegates to the ACTE Assembly of Delegates are familiar with the ACTE governing documents, [Strategic Priorities](#), and issues facing the association and members.
5. ACTE and its affiliated state associations will work in partnership to identify, train, and motivate effective leaders on the national and state level.
6. ACTE and its affiliated state associations recognize and accept that it is in both parties' best interest to complement and support, not duplicate and compete. To this end, the following activities are considered important:
 - a. ACTE will provide recognition of affiliated state association activities in its publications and on its website.
 - b. ACTE will communicate on a regular basis with the affiliated state associations on its activities and upcoming events, which may be distributed to the state membership.
 - c. Affiliated state associations will include ACTE, where feasible, in their conference programming.
 - d. Affiliated state associations will provide, and ACTE will maintain, current information and leadership rosters for each affiliated state association.

7. ACTE and its affiliated state associations will collaborate and support each other on membership recruitment and retention efforts. Membership in both associations will be promoted by both parties. New and renewing members in each affiliated state association will be made available at least monthly by ACTE and the affiliated state associations through the State Chapter Module (SCM) system.
8. ACTE and its affiliated state associations recognize the need for ongoing input and feedback from members as to what constitutes member value. ACTE agrees to provide information from national member surveys to its affiliated state associations. The affiliated state associations agree to provide information on member needs to ACTE.
9. ACTE and its affiliated state associations recognize that the most efficient and effective avenue for providing professional development for members is through the state association and its Divisions, if any. As such, each affiliated state association will endeavor to schedule professional development programs throughout the year. ACTE will continue to enhance and improve upon the VISION Conference program to address the needs of all members. ACTE and its affiliated state associations will exercise fiduciary responsibility in regard to the funds that are collected from members and will be good stewards of the funds provided to them by their members in the form of dues and other fees.
10. ACTE and its affiliated state associations will share information on emerging issues in career and technical education and the education and workforce system. ACTE and its affiliated state associations will support each other in utilizing their knowledge of emerging issues to keep their respective associations relevant to members and prospective members.
11. ACTE and its affiliated state associations will continually strive to identify and develop products and services that can be jointly promoted to members and will, where feasible, share in revenue realized as a result of these products and services.

WHISTLEBLOWER POLICY

General

The Association for Career and Technical Education Code of Ethics and Conduct (“Code”) requires directors, officers, and employees to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. This Code sets forth these standards for the purposes of building awareness and thereby enabling each of us to properly conduct ACTE business. As employees and representatives of ACTE, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations.

Reporting Responsibility

It is the responsibility of all directors, officers, and employees to comply with the Code and to report violations or suspected violations in accordance with this Whistleblower Policy.

No Retaliation

No director, officer, or employee who, in good faith, reports a violation of the Code shall suffer harassment, retaliation or adverse employment consequence. An employee who retaliates against someone who has reported a violation in good faith or who has participated in an investigation regarding an alleged violation is subject to discipline up to and including termination of employment. This Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within the Organization prior to seeking resolution outside the Organization.

Reporting Violations

The Code addresses the Organization’s open-door policy and suggests that employees share their questions, concerns, suggestions, or complaints with someone who can address them properly. In most cases, an employee’s supervisor is in the best position to address an area of concern. However, if you are not comfortable speaking with your supervisor or you are not satisfied with your supervisor’s response, you are encouraged to speak with the Chief Financial Officer or anyone in management whom you are comfortable approaching. Supervisors and managers are required to report suspected violations of the Code to the Organization’s Compliance Officer, who has specific and exclusive responsibility to

investigate all reported violations. For suspected fraud, or when you are not satisfied or uncomfortable with following the Organization's open-door policy, individuals should contact the Organization's Compliance Officer directly.

Compliance Officer

The Organization's Compliance Officer is responsible for investigating and resolving all reported complaints and allegations concerning violations of the Code and, at his/her discretion, shall advise the Executive Director and/or the audit committee. The Compliance Officer has direct access to the audit committee of the board of directors and is required to report to the audit committee at least annually on compliance activity. The Organization's Compliance Officer is the chair of the audit committee. The name and contact information of the Compliance Officer will be shared with all staff on an annual basis.

Accounting and Auditing Matters

The audit committee of the board of directors shall address all reported concerns or complaints regarding corporate accounting practices, internal controls, or auditing. The Compliance Officer shall immediately notify the audit committee of any such complaint and work with the committee until the matter is resolved.

Acting in Good Faith

All ACTE employees have an obligation to adhere to the Code and to report, in good faith, any potential or actual violation of the Code. In the event an employee or manager has a question as to the legality or propriety of any action, the employee or manager should report the matter to one of the contacts identified in this Code.

Confidentiality

Violations or suspected violations may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

Handling of Reported Violations

The Compliance Officer will notify the sender and acknowledge receipt of the reported violation or suspected violation within five business days. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.

Investigations

All ACTE employees have the duty to cooperate fully with any internal investigation conducted by ACTE. Such cooperation includes but is not limited to: (1) cooperating with an interview and being truthful and candid; and (2) maintaining any and all information and documents relevant to the investigation. ACTE

employees who fail to cooperate with an ISOC internal investigation or with an investigation conducted by law enforcement officials will be subject to discipline up to and including termination of employment.

Audit Committee Compliance Officer
ACTE Management Staff

Policy Implemented January 2006

Review and Enforcement of the ACTE Whistleblower Policy

ACTE established and implemented a Whistleblower Policy in January 2006. The policy was created to establish and formalize an anti-fraud program and controls with the goal of deterring and detecting potential fraud within the organization.

An annual review of the Whistleblower Policy will occur during the annual audit committee meeting to make suggestions and or request updates. These changes will be updated by the chief financial officer and distributed to the audit committee and the ACTE staff no later than 30 days following the last day of the ACTE Annual Convention.

The whistleblower compliance officer is the chair of the audit committee. In the event a new audit committee chair is elected, the new contact information will be distributed to the ACTE staff no later than one week prior to the beginning of the newly elected chair's term.

Roles of the Compliance Officer

The organization's compliance officer is responsible for investigating and resolving all reported complaints and allegations concerning violations of the Code and, at his/her discretion, shall advise the executive director and/or the audit committee. The compliance officer has direct access to the audit committee of the board of directors and is required to report to the audit committee at least annually on compliance activity.

The compliance officer will notify the sender and acknowledge receipt of the reported violation or suspected violation within five business days.

CONFLICT OF INTEREST POLICY

Article I

Purpose

The purpose of the Conflict of Interest Policy is to protect the interests of this tax-exempt organization (the “Organization”) when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II

Definitions

1. Interested Person

Any director, principal officer, or member of a committee with governing board–delegated powers who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

1. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement.
2. A compensation arrangement with any entity or individual with which the Organization has a transaction or arrangement.
3. A proposal ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Article III

Procedures

1. In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board– delegated powers, considering the proposed transaction or arrangement.
2. The remaining board or committee members shall decide if a conflict of interest exists.
3. After disclosure of the financial interest and all material facts and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon.

Policy Implemented March 2008

RETENTION POLICY

ASSOCIATION FOR CAREER AND TECHNICAL EDUCATION

Retention Policy

ACTE will retain records for the period of their immediate or current use, unless longer retention is necessary for historical reference, or to comply with contractual or legal requirements, or for other purposes as described below. The purpose of this policy is to ensure that necessary records and documents are adequately protected and maintained and to ensure that records that are no longer needed or of no value are discarded at the appropriate time.

Permanent Retention: Records that are permanent or essential shall be retained and preserved indefinitely.

Current Records: Records for which convenience, ready reference or other reasons are retained in the office space and equipment of the association.

INSTITUTIONAL AND LEGAL RECORDS	
Articles of Incorporation	Permanent
By-Laws	Permanent
Minutes	Permanent
Tax Exemption Documents	Permanent

EMPLOYEE PAYROLL FILES	
Wage or Salary History	7 years
Salary or Current Rate of Pay	7 years
Payroll Deductions	7 years
Time Cards or Sheets	7 years
W-2 Forms	7 years
W-4 Forms	7 years
Garnishments	Termination plus 1 year

EMPLOYEE PERSONNEL FILES	
Employment Application or Résumé	Termination plus 1 year
Employment History	Termination plus 1 year
Beneficiary Designation	Until employee termination
Medical Records	Until employee termination
Promotions	Termination plus 1 year
Attendance Records	7 years
Employee Evaluations	7 years
Disciplinary Warnings and Actions	7 years
Layoff or Termination	7 years
I-9 Form	7 years after termination
Employee Injury/Accident Reports	7 years
Retirement Benefits	Life of the employee
Disability Records	Life of the employee
General Files	
Pension/Retirement Plans	7 years after termination of individual plan

FEDERAL TAX RECORDS

Form 990 and 990-T with support	Permanent
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FINANCIAL RECORDS

Account Receivable	7 years
Original A/P Invoices	7 years
Expense Reports	7 years
1099 & Sales and Use Tax Reports	7 years
A/P Check Registers	7 years
Bank Statements	7 years
Deposit Records	7 years
Bank Reconciliations	7 years
Canceled Checks	7 years
General Ledgers	Current plus 7 years
Journal Entries	7 years
Annual Audited Financial Report	Permanent

CAPITAL PROPERTY RECORDS

Property Records	Current plus 7 years
Inventory	Current plus 7 years
Depreciation Schedules	Current plus 7 years
Long-term Debt Records	Current plus 7 years
Property Improvement Records	Current plus 7 years

FACILITIES RECORDS	
Building Permits	Current plus 7 years
Building Plans and Specifications	Permanent
Office Layouts	Current
Zoning and Operating Permits	Current
Maintenance Records	Current

INSURANCE RECORDS	
Property Insurance Policies	7 years
Liability Insurance Policies	Permanent
Insurance Claim Documents	7 years

LITIGATION RECORDS	
Claims/Court Documents	Current

Policy implemented January 2006, renewed July 2007

UNIFICATION BENEFITS TO STATE ASSOCIATIONS

ACTE's unification program is a foundation of how the national organization provides a robust set of services to enhance and support [state associations](#). By using aggregated purchasing power to implement systems and provide support, ACTE alleviates what might otherwise be cost-prohibitive services by individual states. By connecting the dues structures of the state and national organizations, members have a streamlined process to join both entities and receive a richer set of benefits.

ACTE's partnership with unified states is a joint effort to provide a robust set of services that support the state Associations while serving members with an expanded set of benefits. Having a full-time staff at ACTE dedicated to providing exceptional customer service to unified states' members allows states the freedom to focus their operations on the strategic needs of their members. ACTE staff field numerous calls, emails, and other inquiries year-round on behalf of unified states from their members with a commitment to quickly and fully respond to them.

Unified states are provided organizational support services, including the processing of state memberships, that eliminate bank and/or credit card fees that they would otherwise incur. A cornerstone of ACTE's support for unified states is having the staff and systems in place to handle new and renewing memberships. At the center of its service to unified states is ACTE's hosting and management of an association membership database that allows distribution of timed membership reminders and invoices along with information-gathering tools such as nonrenewal surveys. The State Chapter Module (SCM) provides states real-time access to all membership data along with the ability to obtain detailed reports. In handling compensation, ACTE delivers an ACH deposit to unified states each month. New members in unified states receive member welcome packets rich with resources that provide information on benefits and access to member-only online resources.

Unified states benefit from a shared royalty from members' paid subscriptions for courses available through the state's online professional development system, CTE Learn. A variety of other services are

available to unified states, such as receiving support from ACTE's marketing team, which can help with recruitment and retention along with professional development promotion through ACTE's e-blast service, access to the online awards portal, and other cost-savings resources.

Unified STATE ASSOCIATION Services: The Stronger Together Plan
(All Costs Fully Covered by National ACTE)

State Membership Processing: ACTE supports states in serving members by making their online application a one-stop experience and allows processing of state membership payments by credit card and check, which eliminates bank and credit card fees for the state association.

Monthly Membership Payments: ACTE provides states access to a detailed report to accompany payments by an ACH deposit each month.

New Member Welcome Emails: ACTE automatically emails new member welcome packets upon activation, which contain a robust set of national and state activities, resources, and benefits.

Membership Customer Service: Dedicated ACTE staff are available by telephone and email M-F 8:30–5:00 p.m. ET to respond to member and potential member inquiries. ACTE is committed to responding to all electronic messages quickly.

Membership Renewal Services: ACTE creates and sends electronic reminders, invoices, and nonrenewal surveys for state associations at no cost. ACTE Member Services staff will handle all customer service calls.

Member Prospect Services: ACTE routinely obtains and shares information with state associations on prospective new members from a variety of sources, including registrants to national conferences and events and other mailing lists.

Membership Marketing Assistance: ACTE's marketing team helps with state membership recruitment and retention, and professional development promotion. ACTE's professional membership marketing staff consulting is at no charge.

State Chapter Module: Online, real-time access is provided to the association membership database to enable communications and production of reports necessary for the operation of the state association.

E-mail Bulk Services: ACTE promotes state association special events and campaigns as well as sends e-newsletters to members through the Association's bulk email service.

Online Professional Development: CTE Learn provides unified states that opt to host a state-branded portal a 15 percent royalty for state members' subscriptions along with a variety of other services to host and deliver interactive courses and learning modules.

Tax Exemption: The state association is included under ACTE's group tax exemption status at no cost.

ACTE Awards Portal: ACTE licenses on behalf of its member states an awards management software program through OpenWater, a leading provider of this service. Unified states can use the service for no cost to conduct awards or other application-oriented campaigns.

ACTE Web Site Hosting and Maintenance: ACTE's Digital Media Manager provides state associations support for the hosting and updating of information on a shared web server.

Crisis Assistance: ACTE provides free state membership data backups and offers state association support in the event of a crisis.

Benefits for All ACTE Members

As a unified state, your members will receive an expanded set of benefits, which increases the value and appreciation of belonging to two exceptional CTE organizations. These expanded benefits include:

1. National Representation
 - a. ACTE actively lobbies and secures federal funding (Perkins) for state distribution to schools and CTE Centers.
 - b. ACTE staff regularly visit legislators in Washington, DC, on behalf of members on national CTE issues and represents state needs and priorities.
 - c. ACTE Public Policy Staff provide up-to-date resources and tools to assist with their advocacy efforts.
2. Voting and Governance Opportunities
 - a. All ACTE members are eligible and encouraged to vote for ACTE leadership.
 - b. All ACTE members are eligible to become candidates for Board positions.
3. Award Recognition
 - a. All ACTE members are eligible for region and national awards.
 - b. Award winners receive national recognition and media awareness promotions.

4. Access to New Professional Development and Networking Opportunities at Member Discounts.
 - a. ACTE’s CareerTech VISION—The nation’s largest annual gathering of CTE professionals.
 - b. Discounted registration to ACTE’s National Policy Seminar.
 - c. Discounted registration to ACTE/NCLA Best Practices conference for CTE Administrators.
 - d. Discounted registration to ACTE’s Work-based Learning Conference.
 - e. Discounted access to ACTE’s online bookstore (ShopACTE) with CTE-specific content.

5. Timely Information
 - a. Annual print subscription to ACTE’s award-winning *Techniques* magazine (eight issues).
 - b. Subscription to the weekly ACTE News.
 - c. Enrollment in ACTE’s legislative updates and alerts.
 - d. Subscriptions to the daily CareerTech Update SmartBrief and STEM Smartbrief.

6. Policy Support
 - a. Free consultation on how to build relationships with policymakers.
 - b. Free consultation and support for working with local/regional media.

7. Access to New Career Advancement Opportunities
 - a. Free online seminars on the top and emerging issues of relevance to CTE professionals.
 - b. Access to a full set of current ACTE Issue Briefs and other CTE-specific publications.
 - c. Access to ACTE’s Job Bank with a large listing of national job opportunities in CTE.

8. Financial Support
 - a. Travel AD&D insurance (at no cost to members).
 - b. Discounts through Forrest T. Jones Insurance.
 - i. Professional liability insurance.
 - ii. Health insurance.
 - iii. Life insurance.
 - iv. Disability insurance.
 - v. Auto and home insurance and more.

ACTE ACCOUNTING CONTROLS

What is an internal control?

Internal control in its broader sense is defined as a process affected by the organization's Board of Directors, management, and other personnel, designed to provide reasonable assurance regarding the achievement of objectives in the following categories:

- Effectiveness and efficiency of operations.
- Reliability of reporting.

Internal Control components include Control Environment, Risk Assessment, Control Activities, Information and Communication, and Monitoring.

Emphasis on common control activities includes the following:

- Segregation of functional responsibilities to create a system of checks and balances.
- A system of authorization and record procedures adequate to provide reasonable accounting control over assets, liabilities, revenues, and expenditures.
- Development of policies and procedures for prescribing and documenting the business and control processes. These policies are reviewed and adjusted periodically to reflect changes in the business and control environment.

Guiding Principles of ACTE Financial Management

Scope: ACTE is committed to conducting business in a fiscally responsible manner under the highest ethical standards.

Principles of Financial Management

Maintain accounting records in accordance with Generally Accepted Accounting Principles (GAAP), which provide full disclosure of compliance with stewardship responsibilities of the association.

1. Maintain an internal control environment that enhances sound business practices and clearly defines roles, responsibilities, and accountability.
2. Provide accurate financial reports. Standardized and departmental-specific reports will be available as management tools for employees with delegated budgetary responsibilities.
3. Utilize appropriate budgetary controls applicable to fund sources to monitor variances and provide explanations of deviations.
4. Maintain appropriate levels of financial transaction reviews and approvals by association personnel responsible for budgetary transactions.
5. Involve both internal and external parties to provide periodic independent oversight of association financial activities.
6. Ensure all employees are aware of their responsibility to report suspected fraud or other dishonest acts and deviations from the Principles of Financial Management to their supervisor, appropriate administrator, or Compliance Officer.

Finance and Operations employees with direct responsibilities for the General Ledger must have been appropriately trained in the use of the accounting system software, including the chart of accounts.

Finance and Operations employees with direct responsibilities for financial reporting must have been appropriately trained in the use of accounting system software reports and reporting tools.

All Finance and Operations employees with accounting responsibilities must possess basic accounting skills and the knowledge necessary to adequately perform their responsibilities.

System controls included in this document:

1. System for monthly financial reporting process.
2. System for authorizing and approving Accounts Payable transactions.
3. System for authorizing and approving Board Payable transactions.
4. System for authorizing travel advances.
5. System for authorizing and approving investment changes.
6. System for reconciling monthly product inventory.
7. System for reviewing payroll and quarterly payroll tax returns and authorizing and approving payroll changes.

8. Review of the bank balances/monthly statements.
9. System for wire transfer transactions.
10. System for reviewing monthly check register.
11. System for Accounts Receivable (excluding cash transactions).
12. System for the handling and processing of cash transactions.
13. System for backing up network and accounting software, databases, and password protection.
14. System for conducting random internal control studies.
15. PCI Compliance.
16. Audit Committee selection and structure.
17. Finance Committee selection and structure.
18. Standard Operating Procedures.
19. System for reviewing all monthly General Ledger transactions.
20. System for Funds/Cash Flow Management.
21. System for identifying suspected fraud or theft.
22. System for collecting and paying sales tax.
23. System for Asset Management.
24. System for Human Resource Management.
25. System for authorizing corporate credit cards.
26. System for authorizing copies.
27. System for office supplies.
28. Building security.
29. System for budgeting.
30. Signature authority.
31. System for membership accounting.

1. System for monthly financial reporting process

- Actual financial results are compared to the budget monthly, and material variances are recorded by all Senior Staff and program leads. Results are then submitted to the Chief Financial Officer for review and approval. Once finalized, the monthly financial report is distributed to the ACTE Finance Chair of the Board of Directors for review. The report is then discussed by the ACTE Finance Chair and the Chief Financial Officer to provide any additional detail requested. Once approval is obtained by the ACTE Finance Chair, the detailed monthly financial report is submitted to the ACTE Executive Committee.
- In the event unbudgeted deficits are anticipated in any cost center, they are reported to the Executive Committee and full Board of Directors through financial reports and verbally at Board meetings.
- The Chief Financial Officer receives a monthly detailed accounting of the contents of each balance sheet account.

2. System for authorizing and approving Accounts Payable transactions

- All items presented for payment are required to be supported by an original invoice (not a vendor statement) in order to prevent duplicate payment.
- An ACTE Check Request form is required to be attached with all supporting documentation and requires an authorized approval signature. Check requests may be approved by Directors, Senior Directors, or Executive Team members. All requests must be approved by someone other than the original submitter.
- Duties for initiating requisitions, receiving purchased items, processing of invoices for payment, and reconciliation of the departmental ledger are separated between two or more employees.
- All contracts are approved by all appropriate parties prior to the effective date of the contract (Board policy—Finance X.5 and X.6).
- Directors review the departmental ledgers monthly and make inquiries about any unfamiliar charges.
- Vendor payments are processed every week in order to meet timely processing requirements.
- If an invoice inappropriately includes sales taxes, they are deducted prior to payment, and the ACTE Sales Tax Exemption Certificate is submitted to the vendor.
- All vendor invoices and travel reimbursements are controlled in such a manner as to prevent duplicate payments. The accounting software package displays a message in the event an invoice number already exists for a particular vendor. All staff travel reimbursements must receive approval from the supervising Director and include receipts.
- Board Policy: I.8 Reimbursement of the Executive Director's expenses is to be approved by one of the three sitting Presidents prior to payment.
- Blank check stock is stored in a secure location.
- Stale checks are followed up on periodically by individuals independent of accounts payable and cash disbursement functions in adherence to the 90-Day Check Cashing Policy.
- All check requests are required to contain the proper coding for the expenditure(s) in compliance with accounting requirements.
- All accounts payable are paid weekly upon receipt and, therefore, not aged, with the exception of end-of-year A/P accruals.

3. System for authorizing and approving Board Payable transactions

The following are excerpts from the Board Policy Manual:

VI.18 Board Travel Reimbursement (12/03), (7/07), (3/09), (3/10), (7/15), (11/15), (7/17), (3/20), (1/21), (3/21)

- a. Members of the board of directors shall be reimbursed reasonable and necessary travel, meal, and hotel expenses while attending meetings on behalf of ACTE. Receipts are required for all expenses (excluding meals and incidentals) regardless of the dollar amount.
- b. The maximum meal daily allowance/budget, including tips, will follow the IRS US GSA guidelines for meals and incidental expenses (M&IE rate) based on location of event) and will be provided on the current travel expense form. Receipts are not required for meals and incidentals.
 - i. If a meal is furnished while on ACTE travel, board members will not claim reimbursement for that meal; the allotment (as found on the most recent US GSA M&IE Breakdown) for the provided meal will be deducted from the M&IE rate.
 - ii. The budget/allowance for the first and last travel days will be reimbursed at the US GSA guidelines for meals and incidental expenses (M&IE rate) for travel days; travel days will be reimbursed at a full 75% a day's rate per the allotment found on the most recent US GSA M&IE breakdown for first and last travel days.
- c. Travel reimbursement expense forms shall be submitted to ACTE Headquarters offices for processing no later than 45 days after travel. The 45-day period begins on the last day of travel.
- d. A copy of the airline ticket or receipt, showing time of departure and return, will be required. Where expenses are shared, a copy will be accepted, provided that the name and address of the other participant is listed. If automobile travel is used instead of air travel, the total expense shall not exceed the coach airfare. The mileage reimbursement rate will automatically be adjusted to the standard IRS rate for mileage allowance. Travel to and from the airport and parking is an allowable expense.
- e. (Deleted 7/15)
- f. ACTE will reimburse board members for the cost of the first checked bag when spending four nights or fewer, or the first and second checked bags when spending five nights or more, as authorized by ACTE for official meetings and activities. ACTE will not reimburse for overweight bags.
- g. (Deleted 3/21)
- h. ACTE will not reimburse for personal/vacation days due to Board travel.
- i. ACTE will be in full compliance with the IRS and its guidelines regarding travel reimbursements. The IRS recognizes reimbursement when traveling for business purposes under an

accountable plan. To be considered an accountable plan, all expenses must have a business connection, incurred while performing services for the organization. Board members are able to request reimbursement if their travel expenses (those allowable per the ACTE guidelines) to and from their destination are entirely for business purposes. In order to ensure reimbursement for business travel, Board members must be able to prove certain elements of the expenses. Utilizing a travel expense form, stating the purpose of the business travel, and providing all receipts of their travel ensures that the records have been adequately accounted for and will be compliant during the annual audits.

- j. ACTE will not reimburse change fees for travel except in the case of inclement weather (that is not already waived by the airline/other mode of transportation), acts of God, national emergencies, or an ACTE-initiated event/change. If a change is needed to previously made travel arrangements, the costs of the change fee will be the responsibility of the Board member without exception, in addition to any additional cost of the new travel arrangement.

- VI.19 During ACTE president's presiding year, ACTE will assume the major administrative and logistical costs of communications, reproduction, and related support services necessary for performing the responsibilities of the office. Support services are defined as secretarial services, substitutes (when necessary), and other expenses as deemed appropriate by the executive director and/or the board of directors. (12/03), (7/07), (7/12), (7/17), (7/22)
- VI.20 ACTE CareerTech VISION and national policy registration fees will be waived for the Board of Directors, incoming Board members, and Vice President-Elects. (12/03), (7/07), (7/12), (7/11), (7/16), (7/17), (3/19)
- VI.21 Board members may be reimbursed for payment of substitute teachers while the board member is on official ACTE business in accordance with the Region or Division budget policies. (12/03), (12/05), (7/07), (12/19)
- VI.22 ACTE will reimburse the travel insurance premium of any member of the board of directors whose expenses are paid, either in part or in full, other than by ACTE when travel is related to the business of ACTE or the individual is officially representing ACTE. (12/03), (7/07), (12/19)

All Board reimbursement requests are submitted to the Executive Assistant for initial review and approved by the Executive Director prior to payment.

4. System for authorizing travel advances

- Travel Advance Request form must be completed and approved prior to the issuance of any travel advance.
- A Travel Expense Report must be submitted upon completion of a trip no later than 45 days after the end of the trip. All outstanding travel advances must be settled at that time and included in that Expense Report.

5. System for authorizing and approving investment changes

Board Policy:

- X.16A The Investment Policy will provide guidelines for the investment of funds held by ACTE. Its objectives have been established in conjunction with a comprehensive review and assessment of ACTE's attitudes, goals, expectations, investment time horizon, risk tolerance level, present investment allocation, and current and projected financial requirements. The objectives are:
- a. To maximize return within reasonable and prudent levels of risk and at the same time, to maintain sufficient liquidity to meet expected and reasonably unexpected cash requirements.
 - b. To provide exposure to a wide range of investment opportunities in various markets while limiting risk exposure through prudent diversification.
 - c. To control costs of administering and managing the investments.
- X.17 Invested funds of ACTE are subject to the decision of the Investment Committee and effected by the chief financial officer and/or executive director. The chief financial officer and/or executive director shall approve the movement of investment funds between ACTE accounts subject to withdrawal restrictions. (12/03), (7/07), (7/12), (7/17), (3/21), (7/22)
- X.22 A Staff Designee shall provide the Finance Chair with a monthly investment report and a quarterly report to the Board of Directors showing the status of current short-term investments, long-term investments, and other investments. (7/20)
- X.29 ACTE reserves may be accessed by a three-fourths vote of the Board of Directors. Board-designated reserves may only be used for catastrophic purposes. Capital reserves may only be used for major improvements to ACTE headquarters building.

6. System for reconciling monthly product inventory

- Procedures are in place to facilitate monthly product inventory and include procedures to resolve discrepancies in a timely manner.
- All counts are performed, at minimum, twice and compared.
- A monthly physical inventory is taken, and discrepancies are recorded on the monthly inventory report. Staff are required to state reasons for the discrepancies and take all corrective actions necessary.
- All inventory is held onsite.

7. System for reviewing payroll and quarterly payroll tax returns and authorizing and approving payroll changes

- Employees charged with payroll and distributions must have been appropriately trained.
- The duties of approving job actions and approval of time are segregated from the distribution of the paychecks. Job actions and time requests must be approved by the appropriate director/supervisor and not by the payroll processor.
- The payroll processor reviews preliminary pay lists/proof sheets to ensure that employees will be paid correctly.
- Directors are required to provide the payroll processor with any final pay due to employment termination. Any lump sum payments and other types of additional pay must be properly documented and approved.
- All changes to salaries are made via “Salary Adjustment” form as approved by the Executive Director prior to processing.
- All payrolls are distributed properly, accurately, and in a timely manner. ACTE payrolls are made semimonthly (on the 15th and the last day of the month).
- For hourly and non-exempt employees, time cards reflect the actual hours worked rather than the hours scheduled to work.
- Overtime and compensatory time hours worked are appropriate and approved in advance by the employee’s supervisor. ACTE complies with all applicable laws concerning the payment of wages and will correct any inadvertent improper deduction, should it occur.
- Payroll checks and earning statements are securely delivered via a third-party vendor.
- All paychecks are delivered to the specific employee. Others are not authorized under any circumstance to accept anyone else’s paycheck.
- Quarterly tax filings are prepared and filed automatically by the third-party payroll vendor to ensure all filings are completed by the due date and to ensure accuracy. A reconciliation of actual taxes paid is tied to the general ledger balances.
- All payroll is recorded and reported on the monthly financial statements so any variance can be identified.

- Payroll entries are also reported on the monthly bank reconciliation as reported to the Chief Financial Officer.
- Payroll registers produced by the third-party vendor are reviewed after processing, reconciled to control totals, and approved prior to finalization.
- The total number of payments and/or direct deposits is reconciled to agree with payroll registers.
- There is, at minimum, an annual review of the allocation of payroll costs to the appropriate accounts, programs and/or other functional areas.

8. Review of the bank balances/monthly statements

- The preparer of the bank reconciliation(s) is independent of the cash receipt functions.
- Bank balances and monthly statements are available 24/7 through direct bank online access for the Executive Director by unique password.
- The Executive Director, Chief Financial Officer, and Finance Chair are provided a monthly bank reconciliation, which can be compared to the bank balances at any time.

9. System for wire and ACH transfer transactions

- The ACTE operating account is set up as dual control for wire and ACH transfers. Dual control requires both a requester and an approver in order for a wire or ACH transfer to be completed. The wire or ACH transfer request can only be initiated with the approval of the Executive Director.

10. System for reviewing monthly check register

- Monthly check registers are given to the Finance Chair as a supplement to the monthly financials and bank reconciliation due by the 20th of each month. It is the responsibility of the Finance Chair to review all checks processed and question any items. It is also the responsibility of the Finance Chair to ensure all check numbers are accounted for and that check numbers remain sequential from month to month.

11. System for Accounts Receivable

- Accounts Receivable maintenance is handled by the Senior Manager, Accounts Receivable. The General Ledger is maintained by our Senior Accountant.
- ACTE uses a secure lockbox maintained by the bank to receive check deposits. All checks received at the lockbox are automatically deposited into ACTE's checking account by the bank without being touched by ACTE staff. This is the preferred method of receiving check payments.

- A lockbox deposit report is downloaded from the bank website daily, and the transactions are entered into our Association Management System or Registration System as applicable.
- Checks received at the office are forwarded to the lockbox by our Mailroom Manager without being touched by accounting staff.
- Occasionally, checks received in the office or hand delivered at an event will be manually deposited into the bank account using a check scanner provided by the bank. This is done by the Sr. Manager, Accounts Receivable. Deposits are made, at minimum, once a week and more frequently as dependent on volume.
- A Trial Balance report showing all accounts receivable is run monthly by the Sr. Manager, Accounts Receivable. All balances aged over 30 days are distributed to the appropriate staff to follow up on collections, and monthly statements are mailed accordingly. ACTE prides itself on an extremely low allowance for doubtful accounts, as we have a 99% collectability rate. For the small amount of delinquent accounts, they are written off only after all attempts have been exhausted.
- All collections are required to be made payable to “ACTE” or the “Association for Career and Technical Education.” Checks are required to be restrictively endorsed upon receipt.
- All receipts and deposits are reconciled monthly with departmental ledgers. All funds are stored in secure locations prior to deposits.
- No single individual can collect funds, update receivable records, reconcile accounts receivable, and approve transactions.
- Invoices are issued upon receipt of an authorized and approved Invoice Request Form with support if applicable. All other A/R with balances are invoiced at least monthly or as required by an agreement.
- All A/R is batched, and a control total is established. A comparison of processing control totals to input control totals is made monthly, and corrections are made as necessary.

12. System for the handling and processing of cash transactions

- ACTE does not accept cash payment for any transactions.
- ACTE does not have or allow petty cash.

13. System for backing up network and accounting software, databases, and password protection

- ACTE outsources the IT function to perform the following:
 - Outsourced staff positions are classified with special trust and are prohibited from sharing passwords.
 - Identify critical activities, backup files, and programs.
 - Establish procedures for patch management, portable computers, workstations, and servers.
 - Periodically review system security and application access logs.

- Back up Office 365 Mailbox, One Drive, Sharepoint, and Teams.
- Maintain email spam filter.
- Ensure accounting software, membership software, and file storage are all cloud-based.
- Ensure only authorized and documented access to the production systems.
- Ensure strong passwords are in place for all production systems (interval change, minimum length, lock out, etc.).
- Ensure documented procedures are in place for removing access to all production systems when notified of an employee termination.
- Ensure sensitive and restricted data remains classified and protected by restricted access.
- Ensure antivirus software is installed, operating, and being updated for all computing resources (laptops, desktops, and servers).
- Provide Envision Cybershield Product
 - 24/7 monitoring of all PCs and servers.
 - One-click ticketing system.
 - Hands-free remote support.
 - PC/server patch management: automated security AND application patching.
 - Antivirus licensing and automated patching.
 - Anti-malware licensing and automated patching.
 - Web traffic protection & content filtering.
- Ensure system administrator access to the production systems is restricted and based on need.
- ACTE performs the following IT functions in-house:
 - Ensures all policies on acceptable use of computer resources are included in the employee handbook and effectively communicated to all employees, including new hires.
 - Provides outsourced vendors with lists of personnel with a need to access critical applications, individual account setup, and passwords.

14. System for conducting random internal control studies

- Random internal control studies are performed as requested by the ACTE Audit Committee. However, internal control reviews are of limited value when done by a non-independent person.
- Internal control studies may periodically review any aspect of accounting (cash receipts, payables, general ledger, bank, etc.).

15. PCI Compliance

- ACTE is currently in compliance with the Payment Card Industry (PCI) Data Security Standard. These standards address appropriate security measures needed in place to secure customer information, i.e., credit card numbers, etc.

16. Audit Review Committee selection and structure

- The committee shall be composed of one representative from each ACTE Region and one chairperson. In addition, two members will be appointed by the President, at least one of whom shall be a “financial expert.”
- The term of office is the association’s operating year. Members serve for a three-year period and may serve up to two terms per position.
- The Committee elects the Chair with approval from the Board of Directors. The Chair serves one three-year term. A Chair may be re-appointed to a second term if it is deemed to be in the best interests of the committee.
- The Region Vice Presidents appoint their committee representative.
- The Chair of the Committee serves as the Whistleblower Compliance Officer.
- Members of this committee should have some accounting experience.

17. Finance Committee selection and structure

- The Executive Committee serves as the Finance Committee.
- Board Policy VI.28—The Executive Committee shall appoint the finance chair by an application process open to all newly elected and existing Board members. If no newly elected and existing Board member applies for the position by the stated deadline, the Executive Committee may then ask and appoint a former Board member to serve in the role of Finance Chair. The Finance Chair will serve as a voting, ex-officio member of the Executive Committee. If a past Board member is selected as the Finance Chair, they will not be reimbursed for meeting expenses and may join the meeting virtually. A past Board member serving as Finance Chair will not be a voting member of the Board of Directors. (12/03), (7/07), (7/12), (7/17), (3/21)

18. Standard Operating Procedures

- Documented and detailed standard operating procedures (SOPs) are a requirement for all ACTE tasks. This SOP requirement was established in 2007, and routine updates, changes, and additions are made as needed. These SOPs are stored on a network drive, which can be accessed as needed.

19. System for reviewing all monthly General Ledger transactions

- General Ledgers by selected departments are distributed monthly to the appropriate Director or program lead responsible for those departments. They are required to review each transaction on the General Ledger and notify the Senior Accountant of any error through a Journal Entry Request Form. The Journal Entry Request Form must be completed in its entirety and include the

reason why a correcting entry is necessary, the date of the original transaction, and the correcting coding for the adjustment.

- Separation of Duties for General Ledger transactions: Accounting staff perform reconciliations and distribute reports. Senior Staff and program leads initiate financial transactions, which then must be approved by a Senior Staff member, and the Executive Director reviews and approves all financial reports prior to finalization.
- All transactions require support and an appropriate Director-authorized signature and General Ledger code.
- The accounting close of month is completed no later than the 10th day of each month, and General Ledgers are distributed to the appropriate Directors. Directors then have no later than the 15th day of each month to identify and request corrections. Directors then receive detailed financial statements to report variance explanations no later than the 19th day of each month. The Executive Director receives the completed financial reports no later than the 20th day of each month to be approved prior to submission to the ACTE Finance Chair. This process allows adequate time to review the reconciled ledger, ensure accuracy, and obtain approval in a timely manner.

20. System for Funds/Cash Flow Management

- Cash flow is monitored and reported monthly as included in the monthly financial reports to the Executive Committee. This monitoring ensures adequate cash is available as needed during cycles of both light and heavy expenditure volume. Cash flow is recorded by category to make historical comparisons as to monthly cycles. An appropriate level of cash flow is maintained to ensure funds are available when all expenditures are due to maintain a current pay status with all vendors.

21. System for identifying suspected fraud or theft

- ACTE implemented a Whistleblower Policy in January 2006. This policy is included in the employee handbook and distributed to all staff on an annual basis. It is also included in the Board Policy Manual.

Board Policy

X.26: Whistleblower Policy (3/06), (7/07), (7/12), (7/17), (7/22)

- The Association for Career and Technical Education Code of Ethics and Conduct (“Code”) requires directors, officers, and employees to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As employees and representatives of ACTE, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations.

- It is the responsibility of all Directors, officers, and employees to comply with the Code and to report violations or suspected violations in accordance with this Whistleblower Policy.

22. System for collecting and paying sales tax

- As products are purchased from ACTE, applicable sales tax is automatically calculated through our Association Management System (AMS) through the Orders module, depending on the state the order will be shipped to. At the end of each month, a report is run to show taxes collected. Payment is then submitted to the state sales tax collection authority, which is required quarterly.
- ACTE applies for a special temporary sales tax permit to sell items on-site at VISION. Sales tax is collected on all purchases and then remitted to the state after the event. Specific requirements vary by state.

23. System for Asset Management

- All ACTE property is assigned a corresponding asset number in our Fixed Asset Software for managing assets.
- All equipment is secured, and any removal must be approved by the Executive Director.
- All capital purchases are to be included in the annual budget submission for approval by the Board of Directors prior to purchase.
- All “attractive” items, such as laptops, projectors, and cameras, are kept in secure locations when not in use.
- All furniture and equipment are accounted for and included in the property records.
- The use of ACTE property offsite is accounted for with a “Technology Sign-out” form.
- The complete list of assets is reviewed annually by finance and operations staff to identify any changes and ensure the list remains an accurate reflection of current assets.

24. System for Human Resource Management

- All hiring practices are reflective of ACTE’s nondiscrimination policy (include reference in Personnel Handbook).
- Past work experience is verified by the hiring Director.
- Criminal background checks are performed prior to hiring.
- I-9 forms are processed within three days of hire date.
- All new employees are required to attend a new employee orientation with the Senior Accountant.
- Personnel files are maintained to include current job descriptions and performance appraisals.
- All personnel records are maintained in accordance with retention schedules, and access to confidential records is limited to those with a “need to know.”

- Performance evaluations are performed, documented, and submitted annually. For new employees, evaluations are performed after a three-month period of review.
- Leave taken is properly approved and tracked in the payroll system.
- An exit interview is scheduled once notice of termination has been given in order to provide valuable information as to the staff experience on which improvements can be made as necessary.
- Policies are in place to ensure awareness and compliance for reporting outside employment activities (Employee Handbook section 4.13).

25. System for Authorizing Corporate Credit Cards

- The ACTE Executive Director must approve the issuance of any corporate American Express credit card.
- Monthly American Express charges are distributed to cardholders for coding, the inclusion of supporting receipts, and approval.
- The monthly corporate AMEX bill is reviewed in its entirety by the Executive Director and Finance Chair.

26. System for Authorizing Copies

- The copy machines require a departmental access code in order for copies to be produced.
- At each month's end, a report is generated from the copier and expensed to the appropriate department for inclusion in the General Ledger.

27. System for office supplies

- The purchase, storage, and issuance of supplies are properly controlled to prevent over-purchasing, pilferage, deterioration, and damage.

28. Building security

- Only appropriate staff and tenants are allocated keys to the office and building.
- The building is secured by an alarm system, cameras, and monitoring service.

29. System for budgeting

- The draft annual budget is developed by staff and presented to the Executive Committee for review. The process is guided by the Chief Financial Officer with input from Directors and program leads. The Executive Director gives final internal approval to the draft budget before it

is presented to the Executive Committee. The Executive Committee meets in June to review the budget and decide if they want to move it forward to the full Board for approval or request revisions. The full Board reviews the budget as recommended by the Executive Committee at the July Board meeting and votes for approval.

Board Policy:

- X.1 The proposed annual budget shall be prepared by the Executive Committee for consideration by the Board of Directors. (7/12)
- X.2 The Executive Director shall not approve any expenditure, other than contractual, for which funds are not budgeted without the specific approval of the Board of Directors. (7/12)
- X.3 In order to authorize necessary expenditures in excess of budgeted line items, budget allotments may be reallocated between activity accounts within major program cost centers by the Executive Director with written approval of the Finance Chair. All budget reallocations shall be included in the monthly report to the Board of Directors. (7/21)
- X.4 Increases to any major budget cost center shall be made only with the approval of the Executive Committee. (7/22)
- X.5 All non-budgeted contracts for services and materials in excess of \$5,000 shall require approval of the Board of Directors. (7/22)

30. Signature Authority

Board Policy:

- X.14 All checks for disbursement of ACTE funds shall bear the actual signature of one of the following individuals: (7/22)
 - a. President.
 - b. President-elect.
 - c. Executive Director.
 - d. Deputy Executive Director.
- X.15 All checks over the amount of \$10,000 require at least two signatures. Checks over the amount of \$50,000 require that at least one signature be that of an ACTE officer. (7/18)

31. System for membership accounting

- ACTE maintains an up-to-date control schedule of all members and dues rates.
- Membership billing invoices are automatically generated from our Association Management System (AMS).

STATE FINANCIAL DETAIL ACH REPORT SAMPLE

Within the State Chapter Module, the on-screen State Financial Detail Report lists state dues receipts within the month.

Selected Report:

Transaction Date Between: and

ID#	First Name	Last Name	Email	Company	Full Address	Country	State Chapter	Phone	Product Code	Description	Transaction Date	Dues Amount
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The exported file for the State Financial Detail Report gives you a breakdown of the monthly deposit.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	ID#	First Name	Last Name	Email	Company	Full Address	Country	State Chapter	Phone	Product Code	Description	Transaction Date	Dues Amount
2	147245										CA-California Assn for C	7/19/2023	29
3	387913										CA-California Assn for C	7/3/2023	15
4	461216										Career and Technical Ed	7/10/2023	20

ANNUAL REPORT

ACTE's current annual report can be viewed [here](#).

Examples of annual state reports can be viewed at ACTE State Association Leaders' Resources—ACTE (acteonline.org)

CONFERENCE MATERIALS REQUEST FORM

We are delighted to offer the standard package of the following materials. We've included additional material options at the bottom of this list; please feel free to note preferred quantities, and we'll add these materials to your standard package. Thank you for sharing information on ACTE and our upcoming events with your attendees!

- 10 ACTE membership flyers
- 10 ACTE member insurance flyers
- 10 ACTE save-the-date flyers, noting all upcoming events
- 10 CareerTech VISION flyers
- 10 flyers promoting our next signature event (other than VISION)
- 10 CTE Learn flyers
- 10 *Techniques* magazines

Contact and event information

Additional Materials—Please select preferred material.

We will print and ship 10 of each checked piece. If you would like additional quantities, please note the quantity with the name of the marketing piece in the field below (i.e., 25 ACTE membership brochures).

- ACTE leadership program flyers
- ACTE Excellence Awards flyers
- ShopACTE flyers
- ACTE division flyers
- ACTE membership brochures

Techniques subscription forms

Sets of army trading cards

Please note if you need additional quantities for materials.

<https://www.acteonline.org/conference-materials-request-form/>

EXECUTIVE DIRECTOR SAMPLE JOB DESCRIPTION

POSITION DESCRIPTION

POSITION TITLE: EXECUTIVE DIRECTOR

REPORTS TO: Board of Directors

BASIC FUNCTION:

The Executive Director is responsible for the effective operation of the Association Headquarters, for carrying out the Board of Directors' directives, and for the operations and activities of the Association. The Executive Director also serves as secretary to the corporation and is designated an ex-officio (non-voting) member of the Board and Executive Committee.

RESPONSIBILITIES AND AUTHORITIES:

1. The Executive Director has full responsibility/accountability for all program areas not otherwise administered by the Board and serves as the chief executive officer of the association.
2. As secretary, the Executive Director is directly responsible to the Board of Directors and provides proper communication to the Board of all issues, activities, and meetings. The Executive Director sees to the preparation of agendas, the keeping of all minutes and records, arranges for elections, and sees to the care of all Association property. The Executive Director is authorized to sign on behalf of the Association all public documents requiring a corporate secretary's signature.
3. The Executive Director provides advice and leadership to the Board of Directors on strategic planning and all relevant issues.
4. The Executive Director facilitates and coordinates the activities of leaders who act on behalf of the Association and the profession.

5. The Executive Director is authorized to sign legal and other documents on behalf of the Association and acts as the principal Executive Officer under the direction of the executive committee, which oversees the work of the Executive Director on behalf of the Board. The Executive Director is responsible for the management of the Association in accordance with the policies and directives of the Board.
6. The Executive Director has sole responsibility for the hiring, training, supervision, and dismissal of all staff personnel.
7. The Executive Director shall provide for the organization and oversee the operation of a financial office, which shall certify the accuracy of all bills and vouchers upon which money is paid and shall collect all monies due the Association and deposit said funds in such depositories as shall be directed by the treasurer. The Executive Director shall see that the books and accounts of the Association are kept in proper order and be responsible for seeing that an annual budget is prepared for the consideration of the Board of Directors.
8. The Executive Director shall provide or arrange with the approval of the Board of Directors for legal counsel to the Board on matters involving the Association. It is the obligation of the Executive Director to make certain that the Association operates in compliance with all applicable laws.
9. The Executive Director is to be in attendance and represent the Association, with the President, when he/she is present, at all official functions that the Association hosts or to which the Association has been invited.
10. The Executive Director is responsible for initiating programs and services for the membership and for organizing and directing the functioning of the committees of the Association.
11. The Executive Director shall maintain such relationships with other Associations, education, government, public service organizations, vendors, and others as necessary for the best interest of the Association.
12. The Executive Director shall operate under the parameters of the Association bylaws, Board policy manual, personnel policy manual, and the Board-approved employment contract.

POSITION DESCRIPTION

Position Title:	EXECUTIVE DIRECTOR	
Department:	EXECUTIVE DIRECTOR OFFICE	
Classification:	<input checked="" type="checkbox"/> Exempt	<input type="checkbox"/> Non-Exempt
Reports to:	BOARD OF DIRECTORS	
Supervises:		
Budget Responsibility:	<input type="checkbox"/> None	<input checked="" type="checkbox"/> Yes Amount \$1-2 million

SUMMARY OF RESPONSIBILITIES:

As the Executive Director of the _____ Association, this position is responsible for the effective and efficient operation of the Association office, for carrying out the Board of Directors' directions, and for ongoing outreach efforts to other associations and government entities.

ESSENTIAL FUNCTIONS:

1. Directly responsible to the Board of Directors for the administration of the Association office and for proper interpretation and fulfillment of the function of programs as approved by the Board. Supervises staff and oversees the maintenance of the membership lists.
2. Establishes close working relationships with key policymakers in Congress and in the Department of Education.
3. Builds a nationwide legislative network that enables the Association to quickly and effectively respond to legislative issues relevant to the Association.
4. Establishes communication vehicles to keep the members, leaders, and external stakeholders informed on Association activities and issues relevant to the work of the Association.
5. Establishes and maintains relationships with other associations to promote the legislative agenda.
6. Serves ex-officio on the Board of Directors and provides guidance to the Board on issues and policies.
7. Manages the financial accounts of the Association.
8. Maintains direct staff liaison to all standing and ad hoc committees and assists with the completion of their work.
9. Serves as the voice of the career academy networks and promotes the value of the career academies and the Association to appropriate audiences.
10. Coordinates all meetings of the Association.

WORKING RELATIONSHIPS:

- **Internal:** Works with the Board of Directors, committees, and other volunteers.
- **External:** Interacts on a regular basis with other Association leaders, legislators, OVAE personnel, suppliers, and the media.

EXPERIENCE, SKILLS, AND QUALIFICATIONS:

1. Minimum five (5) years experience in related position. CTE experience required. Association experience preferred.
2. Bachelor’s degree preferred.
3. Must have excellent analytical and problem-solving skills.
4. Must be able to prioritize, organize, multitask, and use time management skills.
5. Must be accurate and detail oriented.
6. Must have experience with budget development and maintenance.
7. Must be able to work irregular hours and travel as required.
8. Must have strong interpersonal, communication, and listening skills.
9. Must have good written skills.
10. Must be able to work with minimal supervision and have good decision-making skills.
11. Must be able to work in a team environment.
12. Knowledge of *Robert’s Rules of Order* preferred.
13. Supervisory experience a plus.
14. Must be flexible.

*This job description does not include all the responsibilities of the position. You may be asked by the Board of Directors to perform other duties. You will be evaluated in part based upon your performance of the responsibilities included in this job description and other duties you are asked to perform. The Board reserves the right to revise this job description at any time. **This job description is not a contract of employment, and either you or the employer may terminate employment at any time, for any reason (other than discrimination as outlined in the Association policy manual).***

I have reviewed the preceding job description and understand the requirements of the position. I am capable of performing all the requirements of this job.

Signed by (Employee): _____

Signed by (President): _____

Date Signed: _____

EXECUTIVE DIRECTOR SAMPLE GOALS/EVALUATION

EXECUTIVE DIRECTOR PERFORMANCE EVALUATION

Considerations for your evaluation

Independent studies have shown that successful Association executives should have the following attributes and/or abilities:

- Policy-level activity involvement
- Highly respected by members
- Demonstrate leadership performance with staff
- Have effective delegation skills
- Provide staff motivation rather than direction
- Work closely with the Board of Directors and other volunteer leaders
- Have concentration on long-term goals and strategic planning at leadership level

Also, keep in mind the purpose of the Executive Director and that he/she is responsible for:

- The implementation of association policy
- The financial management of the association, including assistance with the annual budget, monitoring expenses to stay within budget
- The hiring of competent staff, their training, organization, compensation, and morale
- Providing adequate staff support to effectively run the organization
- The identification of challenges and opportunities for the organization and the profession

Given the above considerations, please rate the following by writing the number of your choice in the blank space to the left using the rating system below:

5 = Outstanding	Performance far surpasses normal standards.
4 = Superior	Performance almost always exceeds normal standards.
3 = Competent	Performance is adequate. Consistently meets normal expectations.
2 = Fair	Performance is adequate. Some deficiencies exist.
1 = Unsatisfactory	Performance is unacceptable.
N = No Opinion	Reviewer does not feel qualified to provide a ranking in this area.

ADMINISTRATIVE MANAGEMENT

- ___ Has in place an effective staff team to implement program of work.
- ___ Is resourceful in dealing with conflicts.
- ___ Understands and utilizes strategic planning techniques.
- ___ Utilizes time effectively.
- ___ Keeps leadership informed.
- ___ Provides guidance to the volunteers on policy and program issues.
- ___ Works to strengthen volunteer structure to improve decision-making.

Your Comments

PERSONAL ATTRIBUTES

- ___ Respects the dignity and value of others.
- ___ Aptitude for dealing with a wide variety of people.
- ___ Observes professional standards of conduct on a daily basis.
- ___ Adapts to change and has the ability to “think outside the box.”
- ___ Sensitive to member needs.
- ___ Is fair in dealing with all members.
- ___ Shows poise in handling sensitive issues.
- ___ Accepts constructive criticism.
- ___ Conscientious and confident in fulfilling responsibilities.
- ___ Encourages innovation and forward thinking of leaders, members, and staff.
- ___ Is adept at changing negative situations into positive experiences.
- ___ Solves problems instead of blaming and criticizing.

Your Comments

POLICY AND FISCAL MANAGEMENT

- ___ Demonstrates fiscal responsibility in managing ACTE.
- ___ Operates within the approved budget and uses resources effectively.
- ___ Provides policy guidance for the Board, staff, and volunteers.
- ___ Actively participates with the Board to help formulate policy.
- ___ Keeps the Board focused on forward-thinking objectives and goals.
- ___ Keeps the Board and members aware of changes that affect the organization and the profession.
- ___ Clearly defines responsibility among Board members, staff, and volunteer leaders.
- ___ Effectively liaises with related organizations and key stakeholders.
- ___ Ensures that all operations are in full compliance with the law.

Your Comments

___ **OVERALL RATING OF EXECUTIVE DIRECTOR**

GENERAL COMMENTS:

COLORADO ACTE MONTHLY CONFERENCE PLANNING TIMELINE

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Contact hotels for contracts.	ED	Ongoing		
Make copies of necessary files and move to next year's folders; update where possible.	ED	Fall	In CACTE Google Drive	
Create schedule for next year.	ED	Fall	In CACTE Google Drive	
Take inventory of badge ribbons—order more.	ED	Fall		
Take inventory of badge holders and inserts—order more.	ED	Fall		
Send “we are grateful for you” message to exhibitors.	Summit Asst	November	Constant Contact	
Send “we love you and hope to see you in July” message to exhibitors.	Summit Asst	February	Constant Contact	
Meet with hotel reps to review contract and see physical space.	ED	Fall	Conference hotel	
Get event code from hotel to use with registration info.	ED	January/ February	Conference hotel	
Select food for meals & snacks.	Conf Plan Com	April	Conference hotel menu & food spreadsheet	
Tell hotel about dietary needs/numbers.	ED	On July 11	Conference hotel	
Confirm meal/bev numbers w/hotel.	ED	On July 11	Conference hotel	
Send conference contract and budget to agent for event cancellation insurance.	ED	January		
When provided, pay event cancellation insurance bill.	ED	March	Insurer portal	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Prep "save the date" flyer for the next year's summit.	ED	Spring	Canva	
Set attendee registration rates.	ED, Summit Asst, Board approves	January	Board meeting	
Update attendee registration info in DLG.	ED, Summit Asst	January/ February	DLG	
Prepare attendee reg info posts for website and newsletter.	ED, Summit Asst	Early March	DLG	
Open attendee registration.	ED	3/15	DLG	
Send News Flash that reg is open.	ED	3/15	Constant Contact	
Spot-check registrations to be sure people are members.	Summit Asst	April-June	DLG	
Send email to CTE admin assts to review reg process and use of PRE spreadsheet to gather info.	ED, Summit Asst	Early March	Zoom	
Close attendee reg on July 11 early.	ED	July 11, early a.m.	DLG	
Select paid keynote speaker.	Conf Plan Com	Fall		
Sign contract with paid keynote speaker.	ED			
Communicate with paid keynote speaker.	ED			
Make arrangements and communicate with CO CTE Director.	ED	Ongoing		
Send in form for ACTE representative.	ED	Dec/Jan	ACTE State Resources website	
Communicate with ACTE representative.	ED	Jan-July		
Put overview schedule on website, indicating meals included.	ED	Late fall, after EC retreat	Website	
Put tentative schedule on website—indicate meals included. Be SUPER clear about who needs to attend what days.	ED	March	Website	
Add hotel info and link to website.	ED	March	Website	
When ready, put link to Whova agenda website on CACTE website.	ED	Late June/July	Website	
Set exhibitor registration rates.	ED, Summit Asst		CACTE Google Drive	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Update exhibitor registration info in Constant Contact.	Summit Asst		Constant Contact	
Prepare exhibitor reg info posts for website and newsletter.	Summit Asst		Constant Contact	
Open exhibitor registration.	Summit Asst	3/15	Constant Contact	
Send News Flash.	Summit Asst	3/15	Constant Contact	
Add exhibitor logos to website as they register.	ED	Spring	Website	
Close exhibitor reg on July 1.	ED	7/1	Constant Contact	
Update Call for Proposals for breakout sessions & roundtables.	Conf Plan Com		Google form– CACTE Drive	
Create social media memes for Call for Proposals.	Conf Plan Com OR ED/Asst		CACTE Canva account	
Prepare CFP posts for website and newsletter.	ED			
Open CFP by March 1.	ED	2/28	Google form, website, social media	
Give Conf Plan Committee access to CFP spreadsheet.	ED	4/16	Google Drive	
Review submissions.	Conf Plan Com	4/20 & 4/27	Google Drive	
Make final selections for breakouts & roundtables.	Conf Plan Com		Google Drive	
Slot breakout sessions into program.	Conf Plan Com		Google Drive	
Decide roundtable themes.	Conf Plan Com		Google Drive	
Send “we’re sorry” emails to declined submissions.	ED	By May 10		
Send “yay” emails to accepted submissions.	ED	By May 10		
Send “details” emails to presenters– BO & round tables.	ED/Asst	Early June		
Send “final details” emails to presenters–BO & round tables.	ED/Asst	1-2 weeks ahead		
Send appropriate Whova emails to presenters.	ED	Late June/July		
Prepare room host cards for BOs & RTs.	ED	Late June	Google Drive	
After final details in place, print room host cards for BOs & RTs on cardstock.	ED	1 week ahead?	Google Drive	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Buy \$10 Starbucks gift cards for Breakout speakers.	ED	Late June	King Soopers	
Update Division Day form and send to Program Directors, Div pres, pres-elect.	Conf Plan Com	March 9	Google form–CACTE Drive	
Enter Division Day plans into schedule & Whova “sessions” spreadsheet.	ED	Early June	Google Drive	
Send current division reg #s to Program Directors, Div pres, pres-elect.	ED	Late May, after early bird–6/2/23		
Send updated division reg #s to Program Directors, Div pres, pres-elect.	ED	When reg closes		
Pay Whova bill for next year.	ED	November	Whova	There is usually a “sale” late in the year.
Start creating the event.	ED	January–July	Whova	
Create attendees Whova spreadsheet & upload.	ED	July	Whova	
Create exhibitors Whova spreadsheet & upload.	ED	Late June	Whova	
Create sessions/speakers Whova spreadsheet & upload.	ED	Late June/July	Whova	
Send emails to attendees about downloading Whova.	ED	Late June/July	Whova	
Start putting announcements in Whova–schedule delivery.	Asst/Conf Plan Com	June/July	Whova	How can Conf Plan Com support? Ideas they have?
Recruit someone for “Mindfulness” activities.	ED	April/May		
Design certificate of attendance, make it fillable & do “adding” magic.	ED	July	PDF	
Create list of guests.	ED	July	Google Drive	
Design name badges–attendees, exhibitors, guests.	ED	May	Avery	
Print name badges w/CO CTE Mission on back (sticker on badge holder).	ED	Week before	Avery	
Pre-stuff name badges and division ribbons.	Bonnie, ED	Week before		
Inventory & print exhibitor table tents.	ED	June	Avery	
Inventory & print “reserved” table tents.	ED	June	Avery	
Print various signs–hashtag/internet, polos drawing tix, etc.	ED	June	Google Drive	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Prepare evaluation, thinking about what specifics we want/need to know.	Asst/Conf Plan Com/ED	June	Google Drive	
Prepare QR code for evaluation; print signs to have around.	Asst	June	Google Drive	
Create Annual Business Meeting agenda & prepare for mtg.	ED/President		Google Drive	
Prepare Officer Installation Ceremony script.	ED	May	Google Drive	
Send Officer Installation Ceremony script to EC & incoming officers.	ED	July		
Be sure gavel makes it to the Summit.	ED & President	July		
Create Executive Committee Meeting agenda & prepare for mtg.	President		Google Drive	
Create Board Meeting agenda & prepare for mtg.	President		Google Drive	
Create Board Orientation agenda & prepare activities.	President-elect	June	Google Drive	
Set EC and Board meeting dates for upcoming year.	President-elect & ED	May/June		
Make arrangements for Board dinner either at the hotel OR at nearby restaurant.	President	April		Depends on F&B numbers
Order new name badges for incoming Executive Committee members.	ED	Early June	Office Depot	
Send Awards Portal info to Awards Committee for review/selection of recipients.	Awards Com Chair	By June 12		
Finalize Award winners.	Awards Committee	By June 29	Google Drive	
Write notification letters for Award winners.	ED	By mid-June	Google Drive	
Send notification letters to Award winners.	Awards Com Chair	By end of June	Google Drive	
Obtain presenters for each award—start with nominator.	Awards Com Chair	By end of June		
Write script for Awards Ceremony.	Awards Com Chair	By July 10	Google Drive	
Write blurbs about award winners for website links.	Awards Com Chair	By July 10	Google Drive	
Order plaques for awards, clocks for Hall of Fame.	ED	By June 30	US Recognition	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Print certificates for award winners.	ED	By June 30	Google Drive	
Create award winner memes for social media.	ED	Week after	Canva	
Profile award winners on social media.	ED	Week after	Twitter/FB/Instagram	
Order plaques for outgoing EC officers.	ED	Early June		
Buy gift cards for outgoing EC officers.	ED	Early June		
Buy gift cards for CACTE drawings.	ED	Early June		
Take inventory of CACTE blue polos; order any needed.	ED	Early June		
Determine who will need CACTE Board burgundy polo; order any needed.	ED	Early June		
Start gathering "stuff" to take to Summit.	ED	Early July		See packing list
Write thank-you notes.	ED	Late June/early July		See list
Arrange for people to take some of the STUFF to the Summit!	ED	Early July		
Write "After Summit" email to attendees; have it ready to go after add Sarah's slides link.	ED	Early July	Constant Contact	
Send "After Summit" email to attendees.	ED	Last day of Summit or next day	Constant Contact	
AFTER SUMMIT				
Send \$25 Amazon e-gift card to random evaluation completer.	ED	Late July		
Compile summary PDF of evaluation results.	ED	August	Google Drive	
Share evaluation summary & actual spreadsheet w/Board & Conf Planning Committee.	ED	September	Google Drive	
Send thank you e-gift cards to 2022-23 Committee members.	ED	August		
Stock up office tub.	ED	August		
Stock up name badge ribbons, name badge inserts, name badge holders, etc.	ED	August/Sept		
Copy needed docs over to next year's Summit folders.	ED	Fall	Google Drive	
Make notes about ideas/suggestions/changes in parking lots in various folders.	ED	Fall	Google Drive	

Colorado ACTE Monthly Conference Planning Timeline

2023 COLORADO ACTE CAREERTECH SUMMIT PLANNING GUIDE	WHO	TIMELINE	WHERE	NOTES
Review this doc for needed updates and copy for next year.	ED	August/Sept	Google Drive	
Do final income/expense report for 2023 Summit; pull from 2 fiscal years on QBO.	ED	Early Sept	Google Drive & QuickBooks	
Do budget for 2024 Summit.	ED	Late fall	Google Drive	
Upload Summit photos to Google Drive.	ED	August	Google Drive	
Print items to replace those used/ disappeared/etc.–table tents, thank-you notes, etc.	ED	Fall	Avery	

LEGISLATIVE AGENDA AND POLICY PRIORITIES EXAMPLES

[Virginia Policy Issues and Solutions](#)

[Colorado Legislative Priorities](#)



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CONTACTING YOUR LEGISLATORS

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Staying in touch with your legislators and the legislative process is an important part of active citizenship. Legislators are responsive to their constituent concerns, but there are some tips to maximize your input.

- You can find contact information for all the districts at <http://www1.leg.wa.gov/legislature>. You can find most information that you will need at this site, including the text of bills, committee hearing schedules, and contact information. You can sign up for automatic notifications of committee hearings, electronic newsletters, and other regular communications.
- Another great source for legislative information is <http://www.tvw.org/> They livestream the various committee hearings and floor action in both the House and Senate.
- Do your homework: Subscribing to the weekly WOVE Legislative Update is your best source of information related to CTE. Be sure you know the levels of government and the issues covered by each. State legislators can help you with issues related to state government and state agencies. They should be able to guide you to the right resources/people to help you with your problems with federal or local issues.
- Legislators need constructive input from their constituents. If you support or oppose a particular issue, explain why. How an issue affects you personally is very important information.
- Decisions about legislation are based on facts and verifiable information. Preprinted postcards, mass emails, and petitions are important ways to let your elected representatives know your position on issues, but **they are not as effective as personal communication**. Letters, phone calls, and

emails are all good ways to keep in touch. Remember to use your personal phone; use computers while on your own time.

On all messages of any kind, be sure to include your full name, address, and phone number. This will facilitate responses from your legislator.

Phone calls

A phone call can be very effective, but it is important to remember that the legislators are seldom in their offices to speak to you personally. They spend most of their time in committee hearings, caucus meetings, and meetings with constituents, etc. The legislative assistant will take a message and pass along the information. If you get the office voice mail, leave a complete (brief) message with your contact information. The voice-mail system allows for easy retrieval and storage of messages.

Emails

Legislators receive literally hundreds of emails each day. To make yours an effective communication, be sure to use your actual name in the “From” line, include your full name, address and phone number in the message, and use a descriptive “Subject” line, such as “Please support HB 1111, water rights” or “Oppose expanded gambling.”

If you filter your email, be sure to include your legislators in “accepted” incoming mail. It is very frustrating to respond to an email and have a message come back that the sender has been blocked.

In all your communications, please remember that legislators are contacted hundreds of times each day. Each legislator has only one legislative assistant (Senators get an extra helper during session only), so you may not receive an immediate response. Be assured that your message is received and noted by your legislator.

Letters

If you write a regular postal service letter, be sure to include your name, address, and phone number on the letter itself. Letters can be separated from the envelope, and contact information can be lost. It is a myth that a handwritten letter receives more attention than a typewritten letter. Handwritten letters are nice, but only if your penmanship is legible!

Requests For Appointments

All legislators want to make your visit to Olympia a positive experience. Legislators will make every effort to be available to meet with their constituents. The legislators all have very full schedules. Because of conflicting committee meetings and other legislative activities, it can be difficult to find a time to meet. It is best if you can be as flexible as possible.

Each office has a different system for handling appointment requests. You should start with a phone call to the office. The legislative assistant will let you know whether they prefer a call or an email request. Email is often easier to track.

If you go to Olympia, remember that winter weather can cause travel problems. Give yourself plenty of time and be safe. Legislative offices are often located in different buildings, so give yourself time between appointments to get to a new location. It is sometimes possible to meet jointly with multiple legislators. It is okay to ask for that option, but it will depend on their diverse schedules. Parking close to the capital is limited in space and time allowed. The cheap and easy way to park is to park downtown by the waterfront in the farmer's market area and then use the free DASH bus up to the capital. The DASH runs every 12 minutes during the week.

Food service is very limited at the Capitol. It is always a good idea to bring a sack lunch/snacks with you. Wear comfortable shoes!

For good information on the legislative process, parking information, and building maps, visit <http://www.leg.wa.gov/legislature/pages/visitingthelegislature.aspx>.

The information contained in this manual should not be considered legal or tax advice on any of the issues discussed herein. Rather, the manual provides general information concerning industry practices. Accordingly, state associations should not rely on any legal or tax opinion, analysis, or advice contained herein and are encouraged to seek legal advice from their own legal counsel and tax professional.