



COLORADO ASSOCIATION FOR CAREER AND TECHNICAL ADMINISTRATORS POLICIES & PROCEDURES MANUAL

First Adopted: October 2023

*The CACTA Bylaws are a vital companion document to the Policies & Procedures Manual (PPM).
The Bylaws are the legal, governing document for the organization.
Be sure to consult both documents for needed information.*

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COMMONLY USED ACRONYMS

General CTE

ACTE – Association for Career & Technical Education – national organization

CACTE – Colorado Association for Career & Technical Education – state organization

CCCS – Colorado Community College System (administers secondary/postsecondary CTE)

CTE – Career & Technical Education

CTSO – Career & Technical Student Organization

EC – Executive Committee – elected CACTE officers (president, president-elect, secretary, treasurer, past president plus executive director, ex officio)

ED – Executive Director

PPM – Policies & Procedures Manual

STEAM – Science, Technology, Engineering, Arts & Mathematics

CACTE Divisions

CACTA – CO Association for Career & Technical Administrators

CVATA – CO Vocational Agriculture Teachers Association

CBAM – CO Business & Marketing Educators

CCD – Counseling & Career Development

ETMA – Engineering, Technology & Media Arts

CATFACS – CO Association Teachers of Family & Consumer Sciences

HPS – Health & Public Safety

PACE – Postsecondary, Adult & Career Education (emerging division)

ACE – Alternative Cooperative Education/Special Populations

T&I – Trades & Industry

Miscellaneous

CDE – Colorado Department of Education

CDHE - Colorado Department of Higher Education

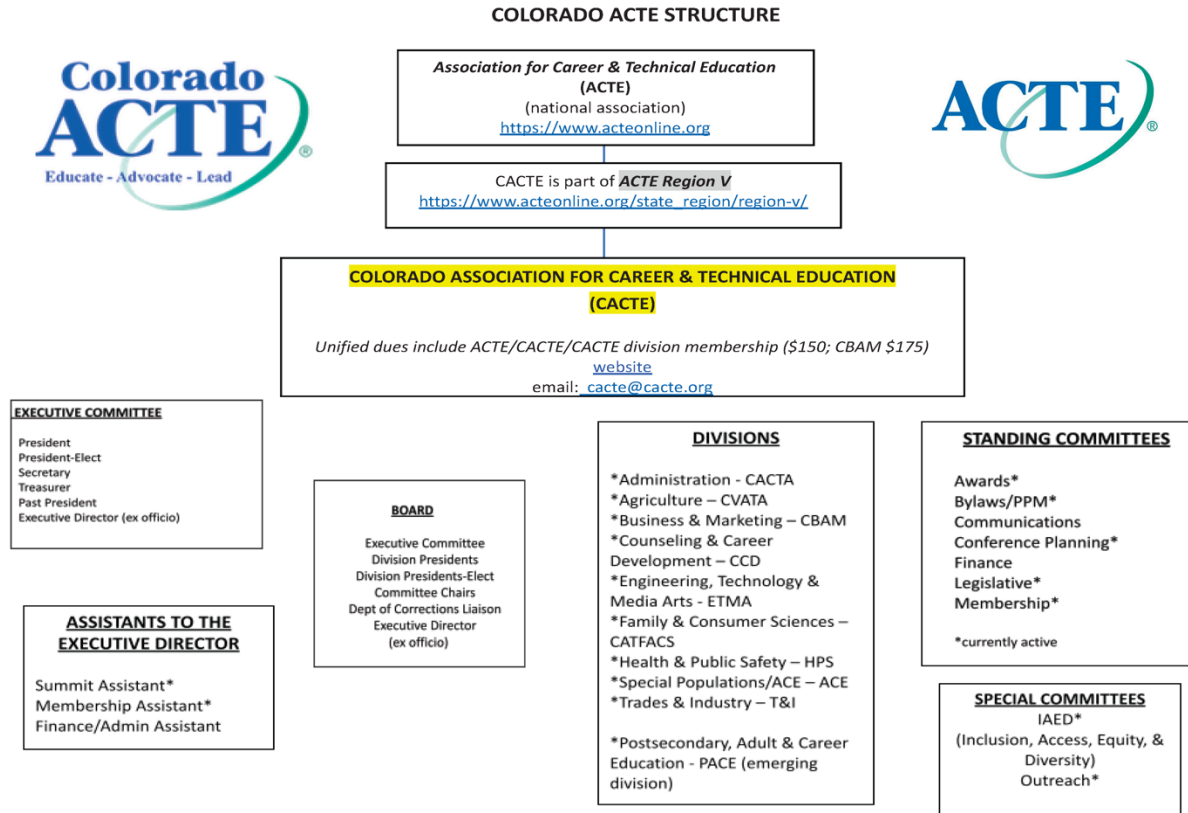
CDLE – Colorado Department of Labor & Employment

CWDC – Colorado Workforce Development Council

THE VALUE OF MEMBERSHIP

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 <i>relevant</i> and <i>current</i> information• Recognition of profession• Provider of professional development• <i>Trusted</i> access to <i>wisdom</i>	<ul style="list-style-type: none">• <i>Saves</i> you time and money• Provides you <i>access</i> to products and services at reduced costs• Is your <i>voice</i> on issues that are important to you• Facilitates your <i>networking</i> needs with colleagues across the country on different issues• <i>Keeps you current</i> 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

COLORADO ACTE STRUCTURE



INTRODUCTION & BRIEF HISTORY

Colorado ACTE was founded in 1917.

**an article # in parentheses refers to the CACTA Bylaws*

MISSION & PURPOSE (Article II)

The **mission** of CACTA is to promote professional leadership and development of members to ensure Career and Technical Education within the education systems of Colorado will meet the continually changing education and training needs of students and business/industry.

The **vision** of CACTA is to energize and communicate the passion and values of Career and Technical Education throughout our community.

HIERARCHY OF GOVERNING DOCUMENTS

1. *Bylaws*

The CACTA Bylaws are the legal, governing document for the organization. Bylaws are living documents subject to change as organizational needs change, but there should be relatively few substantive changes. Only the members of the Association can change the Bylaws.

2. *Policies and Procedures Manual (PPM)*

The CACTA Policies & Procedures Manual includes operational details of the organization. Policies are established to guide the organization 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. The PPM includes the standing rules of the Board.

The Policies and Procedures Manual is reviewed and updates approved annually by the Board.

3. *Strategic Plan/Program of Work*

Based on the ACTE Strategic Plan and the CACTE Program of Work, the CACTA Program of Work is developed by the Board and represents an expression of the core purpose and values of the Association. It serves as a blueprint for the future direction of the organization. The POW serves as a map for the priority allocation of resources and determines the annual objectives and work plan for volunteer leaders and staff.

MEMBERSHIP DUES

The CACTA Executive Committee Members have the responsibility of establishing dues for the membership classifications. Any changes in dues structure from the present must be approved by the membership at a regularly scheduled business meeting. All active member dues (ACTE, CACTE, and CACTA) shall be paid to the CACTE Executive Director or the Treasurer of the Association.

ORDER OF BUSINESS

The order of business at the regular meeting shall be as follows:

- I. Call to order by the President or designated officer
- II. Approval of Agenda
- III. Approval of the minutes of the last meeting
- IV. Report of the Secretary
- V. Report of the Treasurer
- VI. Report of Standing Committees
- VII. Report of Liaisons
- VIII. Unfinished Business
- IX. New Business
- X. Announcements
- XI. Adjournment

CACTA EXECUTIVE COMMITTEE (Article VI)

The Executive Committee shall be composed of the President, President-Elect, Secretary, Treasurer, and immediate Past President.

Duties and responsibilities of the Executive Committee are as follows:

- Make recommendations to the Board
- Act in place of the Board between meetings on matters not specifically reserved as Board decisions.
- Develop the CACTA Program of Work, referring to the ACTE Strategic Plan, and including a set of broad goals which reflect the current direction of the association and the anticipated needs of the members
- Supervise the implementation of the Program of Work
- Develop the leadership abilities of the division officers
- Assist division officers in meeting their responsibilities and carrying out their duties
- Assist in the development of the agenda for the Board meetings
- Act as representatives of the Association in divisional, regional and national activities
- Plan and implement Division activities at CACTE CareerTech Summit
- Align division bylaws with CACTE and ACTE (this does *not* mean they need to copy CACTE/ACTE bylaws) and provide CACTE Executive Director access to the bylaws
- Appoint division members to CACTE committees (for example: if division has an awards person, that person serves on CACTE Awards Committee and so on for each corresponding CACTE Committee)

EXECUTIVE COMMITTEE MEETINGS

- Regular meetings of the EC shall be held. A face-to-face EC meeting will be held at the CACTA Mid-Winter Conference.
- Special meetings of the EC may be called by the President or at the joint request of the majority of the members of the EC. At least seven days' notice should preferably be given to all members of the EC for any special meeting.

CACTA OFFICER DUTIES

Duties of CACTA President

- Prepare the agenda for Executive Committee and Board meetings, in conjunction with the Executive Director
- Preside at all meetings of the Association, Board and Executive Committee
- Provide leadership in carrying out the yearly Program of Work
- Oversee CACTA finances
- Present officer report at Annual Business Meeting during conference
- Appoint chairs for all committees
- Clearly communicate roles and responsibilities to committee chairs
- Provide for a smooth transition to the person assuming this role next
- Attendance at ACTE VISION, ACTE National Policy Seminar and Region V is encouraged
- Maintain current ACTE/CACTE/CACTA membership dues
- Perform all other duties as assigned

(See Appendix A for President's Monthly Activities Calendar)

Duties of CACTA President-Elect

- Assume duties of president in his/her absence
- Fills the office of president in the event the office becomes vacant
- Act as an ex-officio member of all committees, actively participating in Legislative Committee
- Develop Program of Work for his/her year as President

- Attendance at ACTE VISION and Region V is encouraged
- Provide for a smooth transition to the person assuming this role next
- Maintain current ACTE/CACTE/CACTA membership dues
- Perform all other duties as assigned

Duties of CACTA Secretary

- Keep minutes of all meetings of the Division in permanent record form
- Provide minutes to the Board within two weeks of the meeting
- Handle association correspondence as needed
- Present officer report at Annual Business Meeting during conference
- Attendance at ACTE VISION, ACTE National Policy Seminar and Region V is encouraged
- Provide for a smooth transition to the person assuming this role next
- Maintain current ACTE/CACTE/CACTA membership dues
- Perform all other duties as assigned

Duties of CACTA Treasurer

- Monitor that Board approved policies/procedures related to the financial operations of the association are followed.
- Present proposed CACTA budget to Executive Committee
- Review monthly financial statements
- Prepare financial reports to be presented at each CACTA Board meeting
- Serve as chair of the Finance Committee
- Working with the President, prepare an annual financial report of the Association, subject to financial review/audit by the proper personnel
- Ensure that association taxes are filed in a timely manner
- Ensure that the association has proper insurance coverage
- Ensure that appropriate and accurate financial records are submitted to CACTE Executive Director in a timely manner
- Ensure that CACTE Executive Director is a signatory on Division financial accounts, if division uses CACTE EIN number (12/22 – all but Ag)
- Deposit checks received from CACTE within 90 days
- Present officer report at Annual Business Meeting during conference
- Attendance at ACTE VISION, ACTE National Policy Seminar and Region V is encouraged
- Provide for a smooth transition to the person assuming this role next
- Maintain current ACTE/CACTE/CACTA membership dues
- Perform all other duties as assigned

Duties of CACTA Past President

- Assist and guide the President and Board in carrying out duties of the organization
- Offer continuity, insight and wisdom
- Serve on the Awards Committee
- May communicate with and act as coordinator of the Past Presidents’ Emeritus group to consider tasks of significance to the Board
- Present officer report at Annual Business Meeting during conference
- Attendance at ACTE VISION, ACTE National Policy Seminar and Region V is encouraged
- Provide for a smooth transition to the person assuming this role next
- Maintain current ACTE/CACTE/CACTA membership dues
- Perform all other duties as assigned

CACTA COMMITTEES (Article VIII)

CHARGE: To carry out the mission and purposes of the association.

- Committees are the workforce of the association and play a significant role in implementing the program of work and overall success of the association.
- Committee members will maintain current ACTE/CACTE/CACTA membership dues.
- Ideally, CACTE Committees are made up of the persons from the corresponding Division Committees (for example: CACTA Awards Chair serves on CACTE Awards Committee)

Types of Committees

- Standing Committees are listed in the Bylaws.
- Special Committees may be appointed by the President as deemed necessary.

Duties of Committee Chairs

- Serve as member of the CACTA Board
- Become familiar with the duties of the committee as stated in the CACTA PPM
- Review previous committee reports
- Upon appointment, contact and inform committee members of their duties and responsibilities as stated in the CACTA PPM
- Fulfill all responsibilities of the committee
- Prepare an annual report on the activities of the committee; send electronically to the CACTA secretary; and be prepared to share at the Annual Business Meeting during the CACTA Mid-Winter Conference

DUTIES OF STANDING COMMITTEES

AWARDS COMMITTEE

CHARGE: Recognize outstanding achievements by individuals who have made extraordinary contributions to the career and technical education field in CACTA

- CACTA Awards
 - CACTA Administrator of the Year
 - CACTA Emerging Leader
 - CACTA Inclusion, Access, Equity, and Diversity Champion
 - CACTA CTE Champion
- Develop, review, and update criteria and applications for CACTA Awards
- Solicit nominations for the CACTA awards
- Review applications and select award winners for each category
- Notify all award winners and nominators of results and invite them/their guests to the awards presentation(s) at the CACTA Mid Winter Conference
- Arrange for the purchase/engraving of awards and printing of certificates
- Arrange for the presentation of awards at the CACTA Mid Winter Conference - suggest inviting nominator to do presentation

BYLAWS/POLICIES & PROCEDURES COMMITTEE

CHARGE: Keep the Bylaws and PPM current, reflective of desires and needs of members, and inclusive of changes needed in CACTA Bylaws and/or PPM necessitated by changes in CACTE or ACTE Bylaws

- Evaluate Bylaws and PPM for any necessary revisions
- Receive and make proposed Bylaws changes; discuss and submit to the CACTA Board as described in Bylaws Article X

- If the CACTA Board approves Bylaws changes for presentation to the membership, write summary sheet of changes and post/distribute according to timeline in Article X, section 2
- If approved by the membership, arrange for the posting/distribution of revised CACTA Bylaws, including to CACTE
- If there are approved ACTE or CACTE Bylaws changes, make necessary automatic updates to CACTA Bylaws
- Receive and make proposed PPM changes; discuss and submit to the CACTA Board for approval as described in the PPM
- If approved by Board, distribute revised PPM to Board members
- Work closely with President and Board during this process

COMMUNICATIONS COMMITTEE

CHARGE: Ensure that Colorado CTE and CACTA information is visible to members and to the public

- Convey to public and membership the mission, purposes and function of the association
- Share CTE public relations materials via website, social media, e-newsletters and other appropriate means
- Promote the desirability of becoming a career and technical education professional
- Encourage CACTA members to submit articles for CACTA, CACTE and/or ACTE publications

CONFERENCE EXHIBITS COMMITTEE

CHARGE: To arrange for relevant vendors to attend the CACTA Mid Winter Conference

- Invite vendors to CACTA Mid Winter Conference
- Secure vendors for conference exhibits
- Follow up with vendors after the conference to say thank you for attending

FINANCE COMMITTEE

CHARGE: Safeguard the assets of the association

- Chaired by the CACTA Treasurer
- Develop appropriate financial oversight process for the finances of the association
- Create and maintain a culture of honesty and high ethics
- Review association resources and determine a percentage of annual operating budget to set aside as a reserve/contingency fund
- Arrange for annual financial review of records
- Study the needs of CACTA and submit an annual proposed budget to the Executive Committee
- Helpful if outgoing treasurer can serve on committee for one year after term ends

LEGISLATIVE COMMITTEE

CHARGE: Advise Board and members on legislative issues impacting career and technical education and develop an effective network for the dissemination of information regarding legislative issues

- With the assistance of the CACTE/CACTA Legislative Specialist and/or ACTE:
 - Keep members informed of legislation that impacts CTE at the local, state and national levels
 - Develop and distribute annual CACTE Legislative Priorities document
 - Establish and maintain good relationships with state and national legislators
 - Keep legislators informed of accomplishments and concerns of CTE throughout the year
 - Work closely with the Colorado Community Colleges System and ACTE on state/national legislation

- o Organize and maintain a communications network among committee members so that immediate action can be set into motion
- o Be prepared to contact legislators by most appropriate method
- o Ensure posting of legislative information/updates as needed
- Coordinate statewide legislative activities, such as Day at the Capitol or advance preparation for National Policy Seminar activities
- Adhere to Legislative Committee Operating Norms
 - o Participate in bimonthly committee calls during Legislative Session and other calls as needed

MEMBERSHIP COMMITTEE

CHARGE: To promote and position CACTA as a desired organization for administrators to join and become engaged, active members.

- Increase membership in the association through retention of existing members and recruitment of new members
- Communicate the value of ACTE/CACTE/CACTA membership
- Identify new markets for membership growth
- Create, promote and enhance member benefits and services
- Prepare CACTA membership promotional materials for distribution
- Provide and maintain avenues for communication from members about concerns regarding ACTE, CACTE and CACTA
- Continuously update communications list
- Follow up with lapsed members, encouraging them to renew membership

PROGRAM OF WORK COMMITTEE

CHARGE: To develop and implement the CACTA Program of Work

- Work with the Executive Committee on the goals of the year and the plan to meet those goals

NOMINATION/ELECTION PROCEDURES (Article V)

Board acts as Nominating Committee

ELIGIBILITY

- Candidates for CACTA offices:
 - Must be professional or retired members of the Association
 - Candidates for CACTA offices will support and promote the mission and vision of CACTA.
 - Candidates for the office of President-Elect must have been a member of CACTA for at least one year before being elected.
 - Must maintain current ACTE/CACTE/CACTA membership dues

PROCESS OF NOMINATION/PUBLICITY

- President-elect nominations take place every year; secretary nominations take place in odd years; treasurer nominations take place in even years.
- Opening of nomination process is publicized via website, e-newsletter, social media and/or other appropriate means.
- Nominees may be self-nominated or nominated by the Board; nominations will close January 31.
- If there are no candidates for a given office by January 31, efforts will be intensified to find qualified candidates by CACTA Mid-Winter Conference.
- Board submits to the membership a slate of nominees for each office.
- Candidates are publicized via website, e-newsletter, social media, a poster at conference, and/or other appropriate means
- Candidates and their supporters are prohibited from distributing any printed campaign materials, telephone campaigns, or mass emails. Candidates may individually contact members via any form of communication so long as each nominee has equal opportunity.

METHOD OF ELECTION - HYBRID VOTING

- Members may vote only once by providing their ACTE member ID by electronic means.
- Open voting following the CACTA Mid-Winter Conference.
- President and 2 Board members not on the ballot verify official tabulation of results.
- Newly elected officers shall begin their terms at the end of the CACTE Summit of the year they are elected.

COMMUNICATIONS GUIDELINES

The mission of CACTA communications is to ensure that CACTA information (and Colorado CTE, when appropriate) is visible to members and to the public.

GENERAL INFO

- Communications are available electronically as a member benefit.
- Try to keep communication methods as current and accurate as possible.

WEBSITE

- Keep as current as possible
- Fix broken links as quickly as possible when notice/notified
- Try to help members learn to go to the website first for answers/information
- Feature members chosen for regional, national activities/awards; support announcements or links to documents; highlight CACTA activities; feature CACTA award winners; etc.

SOCIAL MEDIA

ACTE Principles for Using Social Media

- **Be personal.** Share your story of CTE through your own voice instead of “broadcasting” the message. Let your messages reflect your personality, use humor, and be transparent about who is posting messages. The goal should be to become a credible source of CTE information.
- **Keep your eye on the goal.** Refrain from posting personal attacks or negative comments about anyone. Straying away from your core message and facts will cause the community to lose trust in you and diminish the attention your social media presence receives from your followers, policymakers and media.
- **Facts not fiction.** Staying credible means sharing quality information and refraining from posting exaggerated or false information about your program, CTE in general or policymakers.
- **Be social.** Conversation is a two-way street, even online. Join topics and discussions with other people and organizations. The more you engage the CTE community and policymakers, the more the CTE message moves forward.
- **Ask questions.** If you have a question about engaging in social media advocacy, please feel free to reach out to the CACTE Executive Director with any questions you may have before engaging policy makers.

CACTE on Facebook = Colorado Association for Career and Technical Education

CACTE on Instagram = ColoradoACTE

CACTE on Twitter = @ColoradoACTE



- Give as many EC members access to social media sites as want it – varying perspectives on posts
- Use social media for timely news – things that are happening “right now”
- Build up hype for events with teasers and photos
- Use hashtags #CACTEnews, #CACTE23 (for Summit), #CareerTechEd
- For CTE Month, add hashtags #coleg and #CTEWorks4CO
- See other ideas on ACTE’s [Social Media Advocacy page](#)

FINANCIAL MANAGEMENT GUIDELINES

GENERAL INFO

- Those responsible for CACTA financial management shall act in the interest of the Association rather than of individuals, making decisions to protect the assets of the organization while moving the Association forward
- Provision is made for prudent internal fiscal controls such as competitive bidding, transparency and separation of fiscal responsibilities
- Provide appropriate accounting program for use of treasurer, ED and others as needed – currently QuickBooks Online; chart of accounts is housed in QBO
- The fiscal year of CACTA is July 1 to June 30
- All divisions except Agriculture currently use CACTE EIN number and therefore are part of CACTE corporate entity

FINANCIAL ACCOUNTS

- All CACTA financial accounts must have at least 3 signatories:
 - President-Elect or President or Past President
 - Treasurer
 - Executive Director of CACTE
- CACTE Executive Director must be signatory on all CACTA financial accounts because we use the CACTE EIN

BUDGETING

- Finance Committee prepares proposed CACTA budget
 - BUDGET CONSIDERATIONS:
 - Expenses for CACTA president and CACTA president-elect to attend ACTE National Policy Seminar and ACTE VISION will be paid as budget permits, minus what their work might pay/reimburse the officer.
 - Expenses include registration, transportation, lodging, meals/incidentals
 - IRS per diem amount for host city will be used for meals/incidentals
 - Day of departure/day of return uses 75% of host city per diem
 - Receipts must be submitted for reimbursement, along with “invoice to” CACTE form (person should keep copies for personal records)
 - Registration fee for one (1) conference per year will be paid by CACTA, as budget allows, for each member of the Executive Committee
- Finance Committee annually reviews association resources and determines a percentage of annual operating budget to set aside as a reserve/contingency fund
- Necessary expenditures in excess of budgeted amounts require approval of Executive Committee

FINANCIAL REVIEW

- Financial records shall be reviewed annually
 - A financial review may be conducted by 3 CACTA members with knowledge of financial matters 1-2 months after the fiscal year begins for the previous fiscal year.

CACTA ANNUAL CONFERENCE PLANNING GUIDELINES

[See Task Tracker, linked here.](#)

CONFLICT OF INTEREST POLICY

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 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.

Definitions

- Interested Person - any Board member, 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.
- Financial Interest - a person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
 - An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
 - A compensation arrangement with any entity or individual with which the Organization has a transaction or arrangement, or
 - 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. 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.

Procedures

- 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.
- The remaining board or committee members shall decide if a conflict of interest exists.
- 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.

PPM REVISIONS

- PPM will be reviewed annually and revised as needed at the direction of the Bylaws/PPM Committee
- A report and any proposed revisions will be submitted at a Board meeting in the Spring
- Any proposed revisions will be voted on during the Spring Board meeting, approved by a majority vote and become effective immediately unless otherwise indicated
- PPM will be made available to all CACTA Board members as revised

POLICY STATEMENT

If any statements or policies included in this document conflict with the Articles of Incorporation or Bylaws of the Colorado Association for Career and Technical Education, or Bylaws of the Colorado Association for Career and Technical Administrators such items are null and void.

APPENDICES

- A. Activities Calendar for President
- B. Technologies in Use

APPENDIX A

ACTIVITIES CALENDAR FOR PRESIDENT

JULY

- Assume office at end of CACTE CareerTech Summit

AUGUST

- Start work on Fall agenda for board meeting and refer to task tracker for conference planning

SEPTEMBER

- Refer to the task tracker for Conference planning.
- Monthly Exec committee meeting for conference planning.
- Contact all board members to schedule individual check-in meetings.
- Update CACTA website with new Board members, Admin spotlight, program spotlight.

OCTOBER

- Board meeting is usually scheduled this month. Confirm date, time and location.

NOVEMBER

- Meet with Exec committee for conference planning and refer to task tracker

DECEMBER

- Executive Committee meeting and refer to conference task tracker

JANUARY

- Final planning stages of conference with Board.
- Meet as necessary to finalize plans and refer to task tracker.
- Start Agenda for CACTA Business Meeting.

FEBRUARY

- CACTA Conference
- CACTA Business Meeting
- Post-Conference meeting at the end of the month for survey results and feedback.

MARCH

- Executive Committee meeting,
- Start CACTE Division Day planning.
- Continue to update the CACTA website.

APRIL

- Spring Board Meeting (date, time, location TBD).
- Continue CACTE Division Day planning.

MAY

- Continue CACTE Division Day planning with the Executive Committee.

JUNE

- Exec committee meeting.
- Division day planning continues.

JULY

- Division day at CACTE conference.
- Attend the CACTA Business meeting.

APPENDIX B

TECHNOLOGIES IN USE (10/2023)

- CACTA Google Drive
- rsvpBOOK.com – previous registration website
- PayPal – collect conference registration monies
- Wix - website manager

NOTES FOR NEXT UPDATE

- o Suggested by / current page / Suggested change