

National Leadership Institute Final Report

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National Dissemination Center for Career and Technical Education
The Ohio State University

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National Leadership Institute

Final Report

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Lastly, we will always be indebted to the Scholars who participated in the NLI. The Scholars brought to the Institute an enthusiasm and desire to enhance their leadership ability. Without these two characteristics, the success of the NLI could not have been achieved.

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EXECUTIVE SUMMARY

The National Leadership Institute (NLI), a program of the National Dissemination Center for Career and Technical Education, focused on developing individual leadership capabilities for selected education professionals in secondary and postsecondary career and technical education in the United States.

The NLI was a yearlong program for each class. The first class began in July 2001 and ended June 2002. The second began in June 2002 and concluded in June 2003. The NLI helped current and future career and technical education leaders develop leadership capacity, establish a vision and mission for workforce education, lead change, understand the process of policy development, and understand the culture in which programs exist. Approaches to help potential leaders attain their goals and achieve NLI goals included face-to-face national meetings, distance education experiences, internships, mentorships, and readings and discussions.

The 2001–2002 Scholars included 33 secondary and postsecondary Scholars from 11 states. These individuals represented instructors, state directors of career and technical education, and community college administrators. Of this group of Scholars,

- more than 50% were given new responsibilities in workforce education
- approximately 25% were moved to new positions in workforce education
- three served as mentors for the 2002–2003 scholars
- two used their NLI experience to receive credit toward a graduate degree
- the vast majority agreed or strongly agreed that the NLI was a good investment of their time, and would recommend the NLI to coworkers/colleagues

The 2002–2003 Scholars included 25 Scholars from 13 states, consisting of individuals serving in positions such as teacher, Job Corps principal, state department of education administrators, technical and community college administrators, teacher educators, and tech prep coordinators. Of these individuals,

- one has been named Division Chair in a technical college
- four Scholars employed in state departments of education have had their areas of responsibility increased
- one has become highly involved in the state professional career and technical education association
- one has been named CEO of the largest career and technical education district in the nation
- one has been named as interim state director

The final evaluations, conducted at the end of the two NLIs (2001–2002 and 2002–2003), were compared, and noticeable and dramatic differences were found. First, the total average rating for all items was higher (4.5 compared to 3.9 on a 5-point scale) for the 2002–2003 NLI.

Additionally, the overall perception of the 2002–2003 NLI experience was rated at 4.9 on a 5-point scale. In terms of the general features of the NLI, substantial improvement occurred between the 2001–2002 and the 2002–2003 sessions. This finding was anticipated based on the fact that the NLI staff was using evaluation results from the 1st year to develop the agenda for the 2nd year.

A follow-up evaluation of the 2001–2002 Scholars was conducted in the summer of 2003, a year after the conclusion of their NLI experience. This evaluation examined the most meaningful aspects of the NLI, short-term changes, and long-term impacts. *The most meaningful aspects of the NLI* were the networking with other Scholars and leaders in the field, exposure to federal policy and legislation, and a more in-depth understanding of CTE issues. On a *short-term basis*, they passed their knowledge on to others and/or performed various leadership activities. The NLI went beyond just expanding the Scholars’ cognitive understandings by affecting their attitudes in unique ways—enhancing their confidence in relation to working in CTE, motivating them to seek further education, and making them more willing to fully assume leadership positions. The *long-term impact* of the NLI included a number of results. The Scholars indicated they possessed more positive attitudes toward CTE, increased leadership skills, and confidence in their ability to lead, and increased involvement with professional organization activities. The Scholars also saw the need to partner with other constituencies and the rest of education, promote the viability of CTE, and seek ways to improve student achievement. A follow-up evaluation of the 2001–2003 Scholars—a year after the conclusion of their NLI experience—was not possible due to the end of this activity in June 2003.

INTRODUCTION

The preparation of leaders for career and technical education is rapidly becoming an urgent need require immediate action. This introduction will discuss factors influencing the need for Career and Technical Education (CTE) leaders. These factors will then be followed by a section on developing CTE leaders, domestic changes, federal laws impact CTE, relationship of the Perkins Law and No Child Left Behind.

Factors Influencing the Need for CTE Leaders Center

America is facing a workforce crisis due to the shortage of skilled workers. Additionally, the large proportion of the most experienced educational administrators is rapidly retiring. A number of other shifting conditions, including federal legislation and domestic changes, require educational leaders' attention. Each of these topics is discussed below.

The Upcoming Workforce Crisis in America

Millions of jobs are going unfilled in business and industry due to the shortage of qualified candidates—jobs that offer excellent salaries, stimulating work, and advancement potential. Homeowners are finding it difficult to hire killed contractors, electricians, and plumbers.

Examples of employment opportunities abound (Eisenberg, 2002; Challenger, 2003). For example, more than 425,000 workers are needed in the information technology area now and more than 1.2 million will be needed by 2005. More than 60,000 service technicians are needed in the automotive industry where salaries range from \$30,000 to \$100,000. In the air conditioning and refrigeration area, 22,000 jobs are available. The construction industry is reporting more than 250,000 available jobs with the top carpenters, bricklayers, roofers, and painters making nearly \$100,000 a year. In the hospitality, healthcare, printing, transportation, and manufacturing industries are facing moderate to severe shortages. In the manufacturing area, 2 million jobs will be available in the next decade due to retirements, with many jobs for welders, tool- and die-makers, line managers and others paying more than \$50,000. Law enforcement agencies want to hire thousands of individuals at salaries at \$40,000 a year.

The oldest members of the baby-boom generation are now 57, and as they start retiring, job candidates with the right skills will be in high demand. Hecker (2002) reported that the Bureau of Labor Statistics projects that total employment would increase to 167.8 million jobs by 2010. During this same time period, Fullerton and Toossi (2002) stated that the Bureau of Labor Statistics indicated that the civilian labor force is projected to reach 158 million—a shortage of approximately 10 million employees.

The Shortage of Education Administrators

The U.S. is facing a rapidly declining reservoir of experienced educational leaders. In public education at the elementary, middle, and high school levels, the National Center for Education Statistics (2003) reports that 54% of principals are above the age of 50 and have about 25 years

of experience. Principals have significant effects on school climate and student outcomes (Educational Research Service, 2000; Sebring & Bryk, 2000). Fullan (2001) indicates that principals are important initiators or facilitators of continuous school improvement. Yet, despite a wave of impending retirements and chronic difficulties in finding candidates, few school districts have made a priority identifying and grooming potential leaders. (Olson, 2000). Directors of career education programs are often considered principals, and the above statistics are applicable to them, as well.

Shults (2001) indicated that at the postsecondary level, 45% of the current community college presidents plan to retire by 2007, and the number of advanced degrees conferred in community college administration decreased 78% from 1982–83 to 1996–97. The National Center for Education Statistics (2001) indicated that 30% of the faculties in community colleges were at least 55 years old, and 52% of respondents between the ages of 55 and 64 planned to retire by 2004. As was the case with public schools, career education leaders are included in these statistics for postsecondary institutions. The National Council for Workforce Education (2003) reported that 26% of its membership plans to retire within the next 5 years.

Developing CTE Leaders

Developing educational leaders to meet the needs of our citizenry is a difficult task. Goodlad (2002) stated “the most dismayingly scary characteristic of the current school reform era is the preoccupation with simplistic prescription devoid of diagnosis and purpose” (p. 23). Goodlad went on to indicate that the Americans have repeatedly indicated they want schools that develop personal, social, vocational, and academic attributes.

Developing the next generation of career and technical education leaders will require close cooperation between the academic and career and technical education leaders. Career and technical education, along with the rest of the education enterprise, is facing a rapidly changing external and internal environment. Rojewski (2002) reported “work, family, and community life, coupled with persistent calls for educational reform over the past several decades, present numerous challenges to professionals in career and technical education” (p. 1). The factors in the external and internal environment require constant attention, as career and technical education leaders plan, implement, and evaluate their programs.

In order to begin a discussion on developing the next generation of leaders for career and technical education (CTE), it is important to establish a clear definition of terms. The definitions of leaders and leadership in CTE are essential in this process.

Gardner (1995) defined a leader as “an individual who significantly affects the thoughts, feelings, and behavior of a significant number of individuals” (p. ix). For the purpose of this paper, leaders in CTE are defined as those who earn the respect of individuals, stress obtaining higher core indicators of performance to assess CTE program effectiveness and improving the secondary and postsecondary outcomes of students who pursue CTE, act with honesty and integrity, and extend CTE thinking beyond the status quo. This definition includes individuals who hold positions of authority as well as opinion leaders in the internal and external environment impacting CTE.

Kotter (1996) defines leadership as “a set of processes that creates organizations in the first place or adapts them to significantly changing circumstances. Leadership defines what the future should look like, aligns people with that vision, and inspires them to make it happen despite the obstacles” (p. 25). Leadership in CTE requires individuals to collaborate with others (e.g., parents, students, educators, and business representatives) in envisioning and creating effective and efficient CTE programs.

To become leaders, career and technical educators must find time to examine, analyze, debate, and evaluate issues related to their policies and practices. Most jobs, including those in CTE professions, now require some level of proficiency in the use of technology. These prospective leaders need a learner-centered model of leadership development that recognizes schools and community colleges as complex organizations, learning as an interactive process, and prospective leaders as competent learners. The use of learner-centered professional development programs delivered through face-to-face meetings and distance communication technology, including the use of teleconferencing, listservs, chatrooms, and downloadable information, are strongly recommended. Creating change in secondary and postsecondary education also requires leaders who see the future, understand the changing demographics, identify the needs of individuals and future employers, understand policy development processes, and lead educational reform.

Domestic Changes

A number of other domestic changes have also impacted leadership. Some of the more important changes include the ongoing need for educational reform, increasing diversity of our population, growing dependence on technology, changing social values, shifting family structures, increasing competitiveness for resources, and continuing urbanization.

Businesses, industries, governmental agencies, and other organizations are calling for educational reform. Employers are seeking individuals with high academic, technical, and employability skills (e.g., punctuality, teambuilding, writing, and speaking).

Federal Laws

The activities of leaders in CTE are influenced, at the federal level, by two laws. These are the Carl D. Perkins Vocational and Technical Education Act of 1998 (Pub. L. No. 105-332) and the No Child Left Behind Act of 2001 (Pub. L. No. 107-110).

The Carl D. Perkins Vocational and Technical Education Act Amendments of 1998 (Pub. L. No. 105–332). The Perkins law was signed into law on October 31, 1998. The Amendments required each state to identify core indicators of student performance that included, at a minimum, measures of each of the following

- student attainment of challenging State-established academic, and vocational and technical, skill proficiencies,
- state adjusted levels of performance and State levels of performance recognized as equivalent, a proficiency credential in conjunction with a secondary school diploma, or a postsecondary degree or credential,

- placement in, retention in, and completion of postsecondary education or advanced training, placement in military service, or placement or retention in employment, and
- student participation in and completion of vocational and technical education programs that lead to nontraditional training and employment

States, with input from eligible recipients, may also identify in its state plan additional performance indicators for vocational and technical education activities authorized under the Act. States with previously developed state performance measures that met the requirements of core indicators may use these measures to gauge the progress of vocational and technical education students.

No Child Left Behind Act of 2001. The No Child Left Behind law was signed into law on January 8, 2002. This new law focuses on four basic education reform principles: stronger accountability for results, increased flexibility and local control, expanded options for parents, and an emphasis on teaching methods that have been proven to work.

Stronger accountability for results requires states to be responsible for having strong academic standards for what every child should know and learn in reading, math, and science for elementary, middle, and high schools. Beginning in the 2002–2003 school year, schools were required to administer tests in grades 3–5, grades 6–9, and grades 10–12. Beginning in the 2005–2006 school year, tests will be administered every year in grades 3–8. Beginning in the 2007–2008 school year, science achievement will also be tested.

Increased flexibility and local control gives states and local school districts a greater voice in using annual federal education dollars. Local people will have more voice about which programs they think will help their students the most. Additionally, the Act simplifies programs, so that schools don't have to cut through as much red tape to receive and use federal funding.

Expanded options for parents provides new ways to help students, schools, and teachers. Starting in the 2002–2003 school year, it provides parental options for students enrolled in schools identified as failing.

Emphasis on teaching methods that have been proven to work allows the targeting of education dollars to research-based programs that have been proven to help most children learn. Federal dollars will be tied to programs that use scientifically proven ways of teaching children to read. Schools and teachers will get help from funds that allow schools to promote teacher quality through training and recruitment.

Relationship of the Perkins Law and No Child Left Behind

The Carl D. Perkins Vocational and Technical Education Act Amendments of 1998 (Pub. L. No. 105–332) and the No Child Left Behind Act of 2001 (Pub. L. No. 107-110) were written to promote educational excellence designed to help close the academic and technical skill gap between disadvantaged and minority, and majority, students. The relationship of the Perkins performance indicators and the No Child Left Behind basic principles are similar (see Figure 1).

As can be seen in Figure 1, these federal laws require secondary CTE leaders to place emphasis on accountability—especially as it relates to the attainment of academic and technical skills, placement and retention in postsecondary education, advanced training, military services, or employment. In accomplishing these outcomes, CTE leaders must be prepared to develop appropriate mission and vision statements to accomplish these goals, provide professional development opportunities; use instructional techniques that have been proven to be effective, match academic and industry standards to course content; develop articulation agreements with postsecondary education programs; use benchmarking and continuous assessment of student progress; retain students to graduation; provide all students with a variety of postsecondary options (i.e., 4-year colleges, technical schools, community colleges, and employment); and help students formulate relevant postsecondary education plans. The professional development of CTE leaders in all of these areas presents numerous challenges.

Carl D. Perkins Core Indicators of Performance Requirements	No Child Left Behind Basic Principles			
	Stronger accountability for results	Increased flexibility and local control	Expanded options for parents	Teaching methods proven to work
Student attainment of academic, and vocational and technical skill proficiencies	X			X
Student attainment of secondary school diploma or its recognized equivalent, a proficiency credential in conjunction with a secondary school diploma, or postsecondary degree or credential	X	X	X	X
Placement in, retention in, and completion of postsecondary education or advanced training, placement in military services or placement or retention in employment	X	X		
Student participation in and completion of vocational and technical education programs that lead to nontraditional training and employment	X		X	

Figure 1. The common goals between the Perkins indicators of performance requirements and the No Child Left Behind basic principles.

At the postsecondary level, CTE leaders must give greater attention to providing relevant professional development opportunities to administrators and faculty on workforce development

issues. They also need to develop articulation agreements with secondary and higher education programs; provide advance standing for students who have already completed similar courses; develop curricula based on industry standards; and provide opportunities for students to acquire state and national credentials.

DESCRIPTION OF THE NATIONAL LEADERSHIP INSTITUTE

The NLI was designed to help build leadership capacity for career and technical education. Applicants were identified as individuals showing strong potential for assuming state and national leadership positions in career and technical education. The following paragraphs explain the application and selection process of the NLI, as well as the program content and delivery methods.

NLI Scholars completed the following forms to be considered for participation in the program: Application, Reference, and Statement of Agreement

Application

The *Application (Appendix A)* required contact information and responses to these five questions:

1. What do you feel have been your most important contributions to career and technical education? (Consider your involvement and leadership roles in professional organizations, with business and industry, with student organizations, and other organizations both work and nonwork related.)
2. In your opinion, what should be the vision for career and technical education?
3. What leadership roles in career and technical education would you pursue after participating in the National Leadership Institute?
4. What is your philosophy of leadership?
5. What would be your contribution to the National Leadership Institute?

The requested *Reference form (Appendix B)* included contact information for a state or national reference, current employer, service organization reference, and two personal references. A *Statement of Agreement (Appendix C)* was also submitted that outlined the expectations of the participant if selected into the program. The participant's vita and transcripts, along with a nonrefundable application fee, were also part of the application package.

An extensive marketing campaign was conducted before and during the 1st year of the NLI. Also, calls for applications were made through presentations at CTE professional organizations, mailings, and e-mails. State Directors for career and technical education were instrumental in nominating Scholar prospects providing underwriting. Early in the 2nd year, many people were contacting Institute staff regarding details of how and when to apply.

Selection

Once all application materials were received, they were reviewed by Institute staff. Scholars were selected based on the following criteria: leadership potential, service (both professional and community), creative/innovative potential, academic performance, vision (both inside and outside career and technical education), teamwork skills, and accomplishments. These criteria were developed by the 20 members of the Professional Development Advisory Committee (*Appendix D*). Once the Scholars were selected, an acceptance letter was sent, (*Appendix E*), followed by details for the first national meeting (*Appendix F*). The NLI fee was required within 30 days of acceptance. The NLI fee covered national meetings costs, including speakers, selected

reference materials, transmissions of biweekly distance learning experiences, national meeting field experience transportation, meeting rooms, meeting meals and breaks, and audiovisual equipment.

Program Content

The framework of the NLI program focused around five themes structured to help current and future career and technical education leaders to

- develop leadership capability
- understand policy development processes
- understand the culture and context in which programs operate
- delineate vision and mission statements
- lead change and reform initiatives

In the *developing leadership capability* area, the content was focused on developing Scholars' leadership philosophy, leadership styles, and perpetual learning. In *understanding policy development processes*, Scholars studied policy and decision making processes, legislative and budget processes, developing and delivering high impact messages, establishing networks, and influencing policy. The theme of *understanding culture* included sessions on diversity and pluralism, ethics, demographics, civility, and globalization. *Delineating a vision and mission for career and technical education* address workforce development, academic achievement, and evaluation and accountability. Finally, *leading change* examined change processes, partnerships and collaborations, risk taking, conflict resolution, educational reform, and new models of CTE.

Program Delivery

Six major methods were used to deliver the 12-month NLI program.

- Individual Leadership Plan
- national face-to-face meetings
- a minimum of 12 meetings per year via distance technology
- mentorship
- internship
- interactive discussions of current research and critical ideas

The Scholars developed Individual Leadership Plans (*Appendix G*) with goals and achievement strategies for the year-long program. Plans were submitted to the Institute staff and revised as needed throughout the year. Scholars reported that writing this plan provided critical information regarding gaps in their skills and knowledge—which then helped them focus on specific skills they wanted to acquire. They then began to see where they needed mentoring (both informal and formal), and how internships could help fill those gaps.

The Scholars participated in national face-to-face meetings (*Appendixes H–N*). This approach has been widely used in the delivery of leadership development programs. These meetings enabled the Scholars to work in group settings and to establish strong networks with each other and with current and emerging leaders. These meetings also enhanced the interaction and conversation during the distance sessions. The culminating national meeting focused on crafting

a career and technical education vision statement that represented the Scholars' evolved views (*Appendixes O and P*).

Face-to-face instruction provided an opportunity for learners and instructors to exchange ideas, solve problems, clarify new information, and confirm progress. Scholars were provided with session agendas and materials in advance, to allow preview time.

On-line instruction provided an opportunity to reduce travel, direct costs and time by allowing Scholars to participate from their workplaces or homes. On-line instruction allowed instruction at the Scholar's convenience, and content could be updated hourly to ensure timeliness. One of the biggest advantages of on-line instruction was that geographical location was no longer a consideration. Some Scholars felt freer to express their ideas when they were composing them on-line, compared to speaking in front of a group. It was also more convenient to access information when a session had been missed.

The interactive distance-delivery part of the Institute program was delivered over the Internet through the Professional Development Speaker Series and Chats with Experts. These sessions were closed discussions with the Scholars and others via chat rooms moderated by NLI staff. If a Scholar could not log on during the live presentation, each was encouraged to view the archived session to gain the information shared. The list of speakers with topics each addressed can be found on <http://www.nccte.org>.

Internships and mentorships were designed by each Scholar to address Individual Leadership Development Plan goals. Both activities were flexible to allow optimum benefit for the Scholar. The detailed guidelines and forms (*Appendixes Q, R, and S*) for each component were shared with the Scholar at the first national meeting.

DESCRIPTION OF SCHOLARS

The 2001–2002 National Leadership Institute consisted of 33 secondary and postsecondary Scholars from 11 states (*Appendix T*). In 2002–2003, the NLI included another 25 Scholars from 13 states (*Appendix U*). Of the total 58 Scholars who participated in the Institute during its 2-year existence, 33% were male and 67% were female; 81% of the 58 Scholars were between the ages of 36 and 55. Scholars with primarily a secondary focus comprised 52%, and those with a postsecondary focus comprised 48% (see Figure 2). The Scholars were diverse in their titles and current leadership roles. Some of their titles included state directors, state departments of education administrators, technical and community colleges administrators, teacher educators, classroom instructors and principals, and tech prep coordinators.

Characteristics	<i>f</i>	%
Gender		
Male	19	33
Female	39	67
Total	58	100
Age		
26–30 years	3	5
31–35 years	4	7
36–40 years	6	9
41–45 years	11	19
46–50 years	18	31
51–55 years	12	21
56–60 years	14	7
Total	58	100
Focus Level		
Secondary	30	52
Postsecondary	28	48
Total	58	100
Organization		
State staff	22	38
University	10	17
Community college	15	26
K-12	11	19
Total	58	100

Figure 2. Characteristics of 2001–2002 and 2002–2003 National Leadership Institute Scholars.

BENEFITS OF PARTICIPATING IN THE NATIONAL LEADERSHIP INSTITUTE

The purpose of the NLI was to build leadership capacity for secondary and postsecondary workforce education. The NLI was structured to help current and future career and technical education leaders:

- create conditions for learners of all ages to achieve at high levels of academic and technical skills in the workplace
- understand political and financial challenges to providing quality education
- understand and lead educational reform/change processes
- understand the changing culture and the significance of diversity
- become effective users of research and evaluation findings
- identify the need for, and plan and implement effective programs
- engage in continuous learning
- understand the role of a leader and how to exercise those responsibilities
- develop and maintain significant connections and linkages essential for impacting policy development
- develop a leadership style that motivates and inspires others

The 2001–2002 Scholars included instructors, state directors of career and technical education, and community college administrators. Of this group of Scholars:

- more than 50 % were given new responsibilities in workforce education
- approximately 25 % were moved to new positions in workforce education
- three served as mentors for the 2002–2003 Scholars
- two used their NLI experience to receive credit toward a graduate degree
- the vast majority agreed or strongly agreed that the NLI was a good investment of their time, and would recommend participating in the NLI to coworkers/colleagues

The 2002-2003 Scholars consisted of individuals serving in positions such as teacher, Job Corps principal, state department of education administrators, technical and community college administrators, teacher educators, and tech prep coordinators. Of these individuals

- one has been named Division Chair in a technical college
- four Scholars employed in state departments of education have had their areas of responsibility increased
- one has become highly involved in the state professional career and technical education association
- one has been named CEO of the largest secondary career and technical education district in the nation
- one has been named as interim state director

At the conclusion of the year-long NLI, Scholars were asked to submit the reflection component of their Individual Leadership Plan. The instructions were to write a summary of their achievements and challenges upon fulfilling their Action Plan. Guidelines in writing their reflections included

- changes or modifications made to original goals
- activities that provided positive or negative leadership development
- readings or information that stimulated or deflated your thoughts about leadership
- presenters that reaffirmed or made you reevaluate your leadership goals
- evaluation of your leadership experience

The following quotes are excerpts from Scholar reflections.

I believe my activities to learn all fiscal aspects of Career and Technical Education (CTE) assisted me in my leadership development. I have now become the lead person on fiscal matters pertaining to CTE within my division and our Budget Office. These activities have assisted me in interacting with other divisions within the agency.

Prior to my involvement in the NLI, I did not see myself as a leader. Yes, I was a hard worker and conscientious. I was recognized in my community for my contributions. But I did not perceive myself as an individual who should step forward and be actively involved in policy development and leading institutional and system change. I thought that was the role and responsibility of others much more experienced and wiser than me.

Participation in the NLI forced me out of my comfort zone. I began to redefine my personal and career goals. I began to understand that providing leadership in career and technical education was my responsibility as much as anyone else's.

The week in Washington, DC, was a highlight for me. It was a wonderful experience to be able to rub shoulders with national policy towards decision makers. It also made me realize that important decisions effecting national policy are being made by people who are a lot like me. More than any other experience in NLI, the week in Washington made me realize that I have a responsibility in helping to shape policy on local, state, and national levels.

This year has been a launching point for me. As my formal experience in the Leadership Institute comes to a close, I look forward to advancing the cause of grassroots CTE leadership as a graduate of the program.

This past year has been a tremendous growth year for me. My membership in the 2001–2002 National Leadership Institute contributed in key ways to the broadening of my professional horizons.

EVALUATION

The evaluation activities for the National Leadership Institute were conducted by James W. Altschuld and Yung-Chul Kim. Two evaluation reports, Comprehensive Evaluation of the National Leadership Institute 2001–2003 and Follow-Up Evaluation for 2001–2002 Scholars (conducted 1 year after completing the program), were prepared. A follow-up of the 2002–2003 Scholars was not conducted due to the fact that the funding was discontinued after June 30, 2003.

2001–2003 Summary

An evaluation report was written to summarize and compare the National Leadership Institutes 2001–2002 and 2002–2003 (*Appendix V*). This report summarized face-to-face meeting of both groups. The Scholars from year 1 provided input and suggestions that were incorporated for year 2.

Based on the outcomes of the scaled items and responses to the open-ended questions of all evaluations used, 2nd-year Scholars were more supportive of the experience than were 1st year respondents. This perception appeared to come from the fact that the NLI was implemented more effectively in the 2nd year. In both years, the NLI afforded exposure to ideas, concepts, and speakers that could not readily be readily available in local settings. For example, interacting with leaders and respected experts in CTE from across the nation, enriching/broadening perspectives beyond the CTE field, and understanding policy formation and external factors surrounding the field were all unique to the NLI.

Secondly, the organization and structure of the entire experience was improved by NLI staff over the 2-year time period. The higher year end ratings for the 2nd year reflect the insights and related efforts of staff to provide an enhanced learning experience. Given these results and the perception that Scholars felt that they still needed more time at the meetings to fully absorb the content and reflect on what they were learning, it may be that only minor, fine-tuning level of adjustments need to be made in future NLI or similar endeavors.

With respect to impact, scholars perceived personal and professional growth, and were empowered to assume leadership roles in the field. More than simply having expanded knowledge, they expressed a willingness to commit to changing and developing the nature of career and technical education.

After examining the individual and detailed evaluation reports over the 2 years, staff made the following recommendations

1. While it is clear from the data that the NLI went well and was noticeably better than the 1st year of this project, the number of participants dropped about 25%. Given the quality that is now in evidence, more effort might be devoted in the future to recruiting a larger and perhaps an even more diverse group of Scholars.

2. More in-depth and follow-up study should be conducted to learn about the long-term impacts of the NLI. In that regard, questions could focus on the direct effect on the organizations in which participants work, the contributions they make that enhance the quality of the workplace, and their perceptions of growth attributable to their involvement.
3. Attention should be given to the nature and extent of the mentoring activity. Sometimes it was effective and sometimes it was not. Although it was not under the direct control of the NLI staff, ways should be sought to improve how it takes place, its overall efficacy, and how it could be better facilitated via staff. Perhaps what is done in the future could focus more on the role of the mentors and how their work with and assistance to scholars can promote the advancement of CTE.
4. In terms of reflection, quite different activities could be interjected into the meetings. Examples might be: reflective panels made up of and orchestrated by participants; the use of reflection types of evaluation instruments; and possibly participant-led focus group interviews.
5. By adding activities such as those described in point 4 above or others, the flow and pacing of what is already a well-received NLI experience would be even better.
6. The evaluation reports for each specific meeting provide many additional and useful details. NLI staff are encouraged to review those reports for other input and ideas for leadership activities that might be offered in the future.

2001–2002 Follow-Up Evaluation Summary

A follow-up evaluation of 2001–2002 scholars was conducted to determine the impact of the National Leadership Institute to date. The evaluation occurred a little more than a year after they were formally involved with the NLI. It was felt that understanding Scholar perceptions regarding the benefits of participation would be helpful. The evaluation was summative in nature and was sent via an e-mail survey. The open-ended questions dealt with perceptions of: (a) meaningful aspects of the experiences they had through the NLI; (b) short-term changes that they would attribute to being part of it; and (c) long-term effects that might result from their participation. The complete evaluation report (*Appendix W*) is included.

The majority of respondents are very positive about working as a leader in the field and actively searching for mechanisms to grow as professionals based on the NLI experience. There is a clear and consistent message that the NLI provided a solid foundation—from the basic infrastructure (networking and provision of resources), to sharing and disseminating knowledge (training others, presenting papers, involving themselves in professional organization activities), to being active in advocating for CTE, and to becoming proactive or more future-oriented (encouraging the formation of broader rather than insular partnerships).

Based on the findings of this evaluation, the following recommendations were made:

1. A subsequent follow-up evaluation, several years from now, might be conducted to determine the long-term, subtle effects on the 33 1st-year and the 26 2nd-year participants.
2. Other alternatives for evaluation might be considered, even though they would require more human and fiscal resources. Probing interviews would be useful to understand how the NLI affected the mindset of participants. To what extent did they maintain the contacts they established through the NLI? Did they continue to be active pursuers and users of information? What was the nature of changes in their leadership activities and style? How successful were these changes? Were they able to create and sustain change within their organizations?

APPENDICES

Appendix A

National Dissemination Center for
Career and Technical Education



Professional Development Academy

National Leadership Institute

Application Form

Name _____

Address _____

**City, State,
Zip Code** _____

**E-mail
Address** _____

Home Phone _____

Work Phone _____

Fax _____

Employer _____

Address _____

**City, State,
Zip Code** _____

**E-mail
Address** _____

Phone _____

Fax _____

**Current
Position
Description** _____

Supervisor _____

**Highest
Degree
Earned** _____

National Career and Technical Education Professional Development Academy

National Leadership Institute Application Forms

Directions:

Please submit a letter to the Academy Staff addressing the points below. Your letter should be typed, 12 pt. font, not to exceed **three** pages.

1. What do you feel have been your most important contributions to career and technical education? (Consider your involvement and leadership roles in professional organizations, with business and industry, with student organizations, other organizations both work and non work related.)
2. In your opinion, what should be the vision for career and technical education?
3. What leadership roles in career and technical education would you pursue after participating in the National Leadership institute?
4. What is your philosophy of leadership?
5. What would be your contribution to the National Institute?

.....
Application materials include:

- the application form (attached)
- a letter to address the questions listed above,
- letter of recommendation from your employer
- your vita
- your transcripts
- your list of references form (attached)
- your statement of agreement form (attached)
- a \$25 non refundable application fee (money order or check made out to The Ohio State University)

Finalists may be contacted for a phone interview with Academy staff.

Submit application materials to:

Rebecca A. Parker
National Dissemination Center for Career and Technical Education
The Ohio State University
1900 Kenny Road
Columbus, Ohio 43210

Limited number of spaces available!
Application Deadline: March 15, 2001

Appendix B

National Dissemination Center for
Career and Technical Education



Professional Development Academy

National Leadership Institute

Applicant Reference Form

Page 1

State or National Level Reference

Name _____

Title _____

Organization _____

Address _____

City, State, Zip
Code _____

E-mail Address _____

Phone _____

Fax _____

Current Employer Reference

Name _____

Address _____

City, State, Zip
Code _____

E-mail Address _____

Phone _____

Fax _____

Service Organization Reference

Name _____

Occupation _____

Address _____

City, State, Zip
Code _____

E-mail Address _____

Phone _____

Fax _____

Name



Professional Development Academy

National Leadership Institute

Applicant Reference Form

Page 2

Name _____

Occupation _____

Address _____

**City, State,
Zip Code** _____

**E-mail
Address** _____

Phone _____

Fax _____

Personal Reference

Name _____

Occupation _____

Address _____

**City, State,
Zip Code** _____

**E-mail
Address** _____

Phone _____

Fax _____

Mail or fax to:

Rebecca A. Parker
National Dissemination Center for Career and Technical Education Professional Development Academy
The Ohio State University
1900 Kenny Road
Columbus, OH 43210
fax: 614/688-3258

Appendix C

National Dissemination Center for
Career and Technical Education



Professional Development Academy

National Leadership Institute

Statement of Agreement

If selected to participate in this Institute, I agree to—

- ❖ *Complete my Leadership Professional Development Plan*
- ❖ *Participate in four national meetings to be identified at the initial meeting (including initial meeting).*
- ❖ *Engage in scheduled meetings via distance technology*
- ❖ *Complete assigned readings*
- ❖ *Engage in approved mentorship experience*
- ❖ *Engage in approved internship*
- ❖ *Participate in evaluation efforts of The National Institute*

I understand what I have committed to and agree to actively participate in this Institute experience which may cause me to financially support any or all activities. I also understand that names I have included on this form and in my vita may be called for references, as well as other state and local leaders.

The institute fee of \$6,000 will be paid 30 days after notice of acceptance.

Cancellation Policy: All cancellations and requests for refunds must be submitted in writing. A refund of \$1,200 will be made for cancellations between June 1 and October 1, 2001. There is no refund after October 1.

Applicant Signature

Date

Applicant Name (please print)

The Ohio State University is an equal opportunity, affirmative action employer. Women, minorities, veterans, and individuals with disabilities are encouraged to apply.

Appendix D

**Professional Development Academy
Advisory Committee Members Names**

Jon Alexio, Miami-Dade Community College, Florida

Patrick Ainsworth, California Department of Education

Cathy Behm, Reynolds High School, Oregon

Ann Benson, Oklahoma Department of Education

Jesse Carreon, Rio Hondo College, California

Edward Chin, Wisconsin Technical College System

Vanessa Cooley, Rhode Island Department of Education

Charlotte Coomer, Ohio Department of Education

Michael Erwin, North Montco Technical Career Center, Pennsylvania

Jim Everett, Metropolitan Community Colleges, Missouri

Kimberly Green, National Association of State Directors of
Vocational Technical Education Consortium, Washington DC

Joe May, Pueblo Community College, Colorado

James McKenney, American Association for Community Colleges, Washington DC

Robert Muller, Texas Education Agency

Linda Parrish, Texas A & M University

J. D. Ross, Joliet Junior College, Illinois

Jacquie Shank, Washington Local School District, Ohio

Jay Smink, National Dropout Prevention Center/Network, South Carolina

Jerry Tuchscherer, University of Idaho

Charles Wade, Council on Post Secondary Education, Kentucky

Appendix E

**Consortium
Partners**

**National Dissemination
Center for Career and
Technical Education**



The Ohio State University
1900 Kenny Road
Columbus, OH 43210-1090
Phone: 800-678-6011 or 614-292-9931
Fax: 614-688-3258
E-mail: ndccte@osu.edu

19

**The
University
Of Illinois**

<Date>

**University of
Minnesota**

<Name>

<Address>

**The Ohio
State
University**

Dear <Name>,

You have been selected as a Scholar of the 2001 National Leadership Institute. The Academy staff congratulates you on this achievement. The National Leadership Institute is designed to build leadership capacity for workforce education.

**Oregon State
University**

The National Leadership Institute will afford you a unique and challenging professional growth experience. You are embarking on a year that should have a profound and positive impact on the remainder of your career. We are excited that you have chosen to be among the "first class of Scholars". The National Dissemination Center for Career and Technical Education has made significant investment in this initiative. You too, have agreed to commit a considerable portion of valuable resources.

**The
Pennsylvania
State
University**

Leadership demands a vision. You have been identified as one who possesses the visionary quality to advance workforce education both now and the years to come. You will be expected to draw upon the rich experiences and make application to leadership situations in career and technical education. We look forward to our first meeting in St. Louis, Missouri, July 16-19, 2001. Detailed information will be mailed to you soon.

**Associate
Partners
Academy for
Educational
Development**

Sincerely,

**Johns
Hopkins
University**

N. L. McCaslin
Site Director

Rebecca A. Parker
Assistant Director
Professional Development Academy

Appendix F

**Consortium
Partners**

**National Dissemination
Center for Career and
Technical Education**



The Ohio State University
1900 Kenny Road
Columbus, OH 43210-1090
Phone: 800-678-6011 or 614-292-9931
Fax: 614-688-3258
E-mail: ndccte@osu.edu

**The
University
Of Illinois**

<Date>

**University of
Minnesota**

<Name>

<Address>

**The Ohio
State
University**

Dear <name>,

It is with excitement and anticipation I send you this letter of detail for our first meeting of the 2001 National Leadership Institute Scholars. The Academy Staff is looking forward to meeting you in St. Louis, Missouri, July 16, 2001. We will begin promptly at 12:00 p.m., and conclude on Thursday, July 19, at 12:00 p.m. The meeting will be held at the Hyatt Regency St. Louis, One St. Louis Union Station, St. Louis, MO 63103, (p) 314-231-1234.

**Oregon State
University**

When reserving your room, you must refer to the National Dissemination Center Leadership Institute to credit our block of rooms. Please make your reservations soon. I will be sending you the agenda and other information via email as final details and plans are made. The dress code is business casual, however we will be taking individual and group photographs one afternoon. We ask that men be in coats with ties and women be in business attire for the photos.

**The
Pennsylvania
State
University**

It is time to send your Institute fee of \$4,750.00. This payment needs to be made by June 30, 2001. We can take Purchase Orders, Master Card, and Visa. If you have already notified us of method of payment, or billing address, we will notify the appropriate parties.

**Associate
Partners**

**Academy for
Educational
Development**

Again, congratulations and we look forward to seeing you in St. Louis in July!

Sincerely,

**Johns
Hopkins
University**

Rebecca A. Parker
Assistant Director
Professional Development Academy

Appendix G

2002-2003 National Leadership Institute

Individual Leadership Plan

Purpose: The Individual Leadership Plan is a process for scholars to assess their strengths, weaknesses and opportunities pertaining to leadership attributes, knowledge, and performance to achieve leadership influence and confidence within Career and Technical Education. This document is a work-in-progress, which may change over the next year as a result of your experiences.

Instructions: Complete the ILP and submit to the NDCCTE office by August 1, 2002.

Name:	Current Position:
--------------	--------------------------

Write your leadership vision for Career and Technical Education:

Guidelines in developing your one to five-year vision:

- Present or future career goals
- Personal or professional goals

2002-2003 National Leadership Institute

Individual Leadership Plan

Instructions: Develop an action plan to achieve your CTE leadership goals. A sample matrix is on page 3.

- Factors to consider in developing your action plan:
- Past and present work or organizational experiences
 - Presenters that reaffirmed or made you re-evaluate your leadership goals
 - Feedback from participation and networking at professional conferences and national meetings
 - Change
 - Flexibility
 - Mentorship or Internship experiences
 - Education
 - Readings and research
 - Usefulness
 - Realistic time constraints

	July 2002	August 2002	September 2002	October 2002
Leadership Goals:				
Areas of Leadership Development:				
Performance Objectives:				
Barriers and Outcomes:				
Learning Resources:				
Outcome and Evaluation:				
Additional Resources:				

	November 2002	December 2002	January 2003	February 2003
Leadership Goals:				
Areas of Leadership Development:				
Performance Objectives:				
Barriers and Outcomes:				
Learning Resources:				
Outcome and Evaluation:				
Additional Resources:				

	March 2003	April 2003	May 2003	June 2003
Leadership Goals:				
Areas of Leadership Development:				
Performance Objectives:				
Barriers and Outcomes:				
Learning Resources:				
Outcome and Evaluation:				
Additional Resources:				

2002-2003 National Leadership Institute

Individual Leadership Plan

S A M P L E

Continuous: ----▶Ending: —————▶

Action Plan

Instructions: Develop an action plan to achieve your CTE leadership goals. A sample matrix is on page 3.

Factors to consider in developing your action plan:

- Past and present work or organizational experiences
- Presenters that reaffirmed or made you re-evaluate your leadership goals
- Feedback from participation and networking at professional conferences and national meetings
- Change
- Flexibility
- Mentorship or Internship experiences
- Education
- Readings and research
- Usefulness
- Realistic time constraints

	July 2002	August 2002	September 2002	October 2002
Leadership Goals:	To become a CTE State Director in two years	—————▶		
Areas of Leadership Development:			Understand the roles and responsibilities of a State Director	
Performance Objectives:			Schedule an appointment and interview the State Director	
Barriers and Outcomes:		Scheduling time with a State Director		
Learning Resources:		Read: <u>Modeling for Administrative Success in CTE</u>		
Outcome and Evaluation:			Met with the State director and suggested additional readings and people to mentor. (see reflection)	
Additional Resources:				

2002-2003 National Leadership Institute

Individual Leadership Plan

Reflection

Instructions: Write a reflection of your achievements and challenges upon fulfilling your Action Plan.

Guidelines in writing your reflection:

- Changes or modifications made to original goals
- Activities that provided positive or negative leadership development
- Readings or information that stimulated or deflated your thoughts about leadership
- Presenters that reaffirmed or made you re-evaluate your leadership goals
- Evaluation of your leadership experience

Appendix H

NATIONAL LEADERSHIP INSTITUTE

Hyatt Regency St. Louis
One St. Louis Union Station
St. Louis, MO 63103
(P) 314-231-1234
Regency A Meeting Room

AGENDA

**Monday
July 16, 2001**

- 12:00 Welcome
Dr. N. L. McCaslin – Director, Professional Development Academy
- 12:15 Greetings from Office of Vocational and Adult Education
Ellen Holland - U.S. Department of Education
- 12:30 Greetings from The National Dissemination Center for Career
and Technical Education
Dr. Floyd L. McKinney – Director
- 1:00 Meet the Scholars of 2001 Activity
Introductions
Review of Agenda
Scholars Expectations for National Leadership Institute
Rebecca A. Parker – Assistant Director, Professional Development Academy
- 1:45 “Leadership and Futuring: Making Visions Happen
*Dr. John Hoyle – Professor of Educational Administration and Future Studies,
Texas A & M University*
- 2:45 Break
- 3:00 “My Ideal Leadership Position in a Ideal Organization”
Small Group Guided Activity and Discussion
*Dr. John Hoyle – Professor of Educational Administration and Future Studies,
Texas A & M University*
- 4:45 Professional Development Leadership Plan: A time for Reflecting, Questioning
and Planning
Scholars meet by Regions with Site PDA Representative
- 5:30 Adjourn

6:30 Dinner
Entertainment – Carl Hurley

**Tuesday
July 17, 2001**

7:30 Breakfast

8:15 Professional Development: Leadership and Love
*Dr. John Hoyle – Professor of Educational Administration and Future Studies,
Texas A & M University*

9:15 Creation of Personal Professional Development Leadership Plan
*Dr. John Hoyle – Professor of Educational Administration and Future Studies,
Texas A & M University*

10:00 Break

12:00 Lunch

1:00 A Panel of Leaders – “Leadership Through the Eyes of Leaders”
*Dr. Patricia Donohue – Vice Chancellor for Education
St. Louis Community Colleges*

Dr. Mike Rush – State Administrator, Idaho Division of Professional-Technical Education
Dr. Edgar Farmer – National Centers Site Director, The Pennsylvania State University
Dr. Daniel Bbeck – Associate Professor, St. Louis University

2:15 Reactions and Questions from Scholars for Panel Participants

3:00 Break

3:30 National Dissemination Center for Career and Technical Education Overview
Floyd L. McKinney - Director
National Research Center for Career and Technical Education Overview
Charles R. Hopkins - Director

4:30 Scholars meet by Regions with Site PDA Representative
Reflections of Activities

5:30 Adjourn

Dinner on your own

8:00 *Optional* – Join with other Scholars in small groups to view and discuss “Leading in a Time of Change” by Drucker & Senge
Site PDA Representatives

**Wednesday
 July 18, 2001**

7:30 Breakfast

8:15 Trends Facing Career Technical Education
 Educational, Economic, Governmental
Dr. N. L. McCaslin – Director, Professional Development Academy

9:00 “A Postsecondary Perspective of CTE”
George Boggs – President, American Association of Community Colleges
 10:00 Break

10:30 “A Secondary Perspective of CTE”
Ken Gray – Professor, The Pennsylvania State University

12:00 Lunch

1:00 Implications for CTE
Small group discussions and interactions with George Boggs and Ken Gray
 3:00 Break

3:15 Distance Technology: Bi-weekly Meetings via Distance
 Greg Nagy – Director of Technology, NDC

4:30 Group/Individual Photo Session

6:30 Dinner
 Shaw’s Garden – Missouri Botanical Gardens
Sponsored by the St. Louis Community Colleges

**Thursday
 July 19, 2001**

7:30 Breakfast

8:15 “An In-Depth Look at the National Leadership Institute”
 Internship Guidelines
 Mentorship Guidelines
Academy Staff
 10:00 Break

10:15 National Meetings Schedule
Professional Development Leadership Plan

11:30 Final Thoughts

Appendix I

National Leadership Institute in Washington D.C.

January 14-18, 2002

The Mayflower
A Renaissance Hotel
1127 Connecticut Ave NW
Washington DC 20036
(phone) 202-347-3000
(fax) 202-776-9182

Objectives for the NLI Washington Policy Meeting

- Develop an understanding of strategies for impacting CTE policy issues at the federal level.
- Develop knowledge of the legislative and budgeting processes.
- Determine effective approaches for working with press in influencing policy.
- Determine policy issues related to how CTSOs impact student achievement and development.
- Develop testimony and evidence for major CTE policy issues at the local, state, or national level.
- Visit community college and K-12 programs to determine strategies for impacting local and state policies.

Agenda

Senate Room for all sessions

Mezzanine for all meals

Monday, January 14, 2002

7:30 Welcome – **Floyd L. McKinney**, NDCCTE Director
Breakfast

- 8:00 *Presider – Pradeep Kotamraju, Minnesota*
Carol D’Amico — Developing Policy Knowledge and Skills, Leadership, and Need for Lifelong Learning
- 8:25 Scholars’ discussion with Carol D’Amico
- 8:45 Group discussion
 Implications for leadership and policy development.
 Individual Leadership Development Plan
 Further reading and study
- 9:30 Overview of NLI Activities for the Week—N. L. McCaslin, PDA Director
- 9:45 Break
- 10:15 *Presider – Cynthia Pellock, Pennsylvania*
 Strategies for Impacting CTE Policy at the Federal Level
Thomas Linney,—Outgoing Vice-President and Director of Governmental Relations, Council of Graduate Schools; **Robert Muller**—Deputy Assistant Director, Office of Vocational and Adult Education, U. S. Department of Education; and **Craig Piercy**—Assistant Vice President for Federal Affairs, Wayne State University
- 11:15 Group discussions with Thomas Linney, Robert Muller and Craig Piercy,
 (3 groups will spend 20 minutes each with Tom Linney, Robert Muller, and Craig Piercy)
- 12:15 Lunch
- 1:15 *Presider – Gloria Arevalo, California*
 Each of the 3 groups will discuss what they consider to be the keys to influencing Federal policy
- 1:45 Groups report what they consider to be the keys to influencing Federal policy
- 2:15 Review Legislative and Budgeting Processes—N.L. McCaslin
- 2:45 Break
- 3:00 Each of 6 small groups will identify discuss where and how we can impact the legislative and budgeting process
- 4:30 Small groups report
- 5:00 Adjourn for the day

Tuesday, January 15, 2002

- 8:00 *Presider – Jerry McMurtry, Idaho*
 Breakfast with **Emily Stover DeRocco**, Assistant Secretary for Employment and Training, U.S. Department of Labor

- 8:30 Emily Stover DeRocco—Policy Issues in Workforce Development
- 9:15 Interaction with Emily Stover DeRocco
- 9:45 Break
- 10:00 *Presider – Doug Major, Oklahoma*
Policy Issues for CTE in the Next 5 Years
Panel Presentation: Kim Green—Executive Director, National Association of State Directors of Career Technical Education Consortium; Jim McKenney—Director of Economic Development, American Association of Community Colleges; Marsha Silverberg—Director, National Assessment of Vocational Education
This session will also be a webcast for the PDSS
- 11:15 Questions from the Scholars and across the nation
- 12:00 Lunch
- 1:00 *Presider – Rebecca A. Parker, PDA Assistant Director*
Identify major policy issues from the webcast
Each of 6 small groups will discuss policy issues and select top two issues
- 2:00 *Presider – Virginia O'Brien Irwin, New Hampshire*
Preparing to Testify Before Congress—**Robert E. Taylor**—Educational Consultant
- 2:45 Scholars discussion with Robert E. Taylor
- 3:15 Break
- 3:30 Group Work – Begin to Outline Testimony
- 4:15 *Presider – Rebecca Niemi, Minnesota*
Presenting Testimony—Panel Presentation-**Angela Manso**—Government Relations, American Association for Community Colleges; **Chin-Chin Ip**—Subcommittee Staff Director, Rules Committee, Congresswoman Deborah Pryce; **Jane Oates**—Senior Education Advisor, Senator Edward M. Kennedy's Office; and **Nancy O'Brien**—Assistant Executive Director for Government Relations, Association for Career and Technical Education
- 5:00 Scholars discussion with David Baime, Chin-Chin Ip, Jane Oates, and Nancy O'Brien
- 5:30 Adjourn for the day

Wednesday, January 16, 2002

- 7:30 *Presider – James Smith Jr., North Carolina*
Breakfast with **Dennis Berry**—Director, Division of National Programs, Office of Vocational and Adult Education; and **Ron Castaldi**—Director, Division of Vocational-Technical Education, Office of Vocational and Adult Education and their Professional Staff
- 7:55 Dennis Berry and Ron Castaldi—OVAE Division Overviews and Introduction of Professional Staff
- 8:15 Scholars discussion with Dennis Berry, Ron Castaldi, and Professional Staff
- 8:45 Sources of Policy Information—N. L. McCaslin
- 9:00 *Presider – Sandy Dunkel, Illinois*
Using the Press to Promote Policy: **Joyce Winterton**—Associate Director of Education, USA TODAY; **Susan Page**—USA TODAY Washington Bureau Chief; and **Peter Eisler**—USA TODAY Investigative Reporter for the News Section.
- 9:45 Scholars discussion with Joyce Winterton, Susan Page, and Peter Eisler
- 10:15 Break
- 10:30 Each of the 6 small groups will begin writing testimony using developed their outlines
- 12:00 Lunch
- 1:00 *Presider – Angela Neal, Idaho*
“CTSO’s: Their Role and Impact in Student Development and Achievement”—**Ed Davis**, DECA; **Coleman Harris**, National FFA Organization; **Tim Lawrence**, SkillsUSA; **Randy Sims**, Business Professionals of America; **Carolyn Brown**, Family, Career, and Community Leaders of America
This session will also be a webcast for the PDSS
- 2:15 Questions from the Scholars and across the nation
- 2:45 Break
- 3:00 *Presider – Clay Mitchell, California*
Panel Presentation—Developing Major Support Groups/Networking
Betsy Brand—American Youth Policy Forum; **Paul Cole**—New York State AFL-CIO; **Mary Conk**—American Association of School Administrators; **Basil Whiting**—National Association of Manufacturers
- 4:00 Scholars discussion with Betsy Brand, Paul Cole, Mary Conk, and Basil Whiting
(4 groups will spend 15 minutes with each of the 4 panelists)
- 5:00 **Reception** for Scholars, Presenters and U.S. Department of Education OVAE Staff
State Room

Thursday, January 17, 2002

7:30 Breakfast

8:15 Depart for Arlington Public Schools

2801 Clarendon Boulevard, Suite 306
Arlington, Virginia 22201
Phone: 703-228-7207
Fax: 703-228-7205

9:00 *Presider: Michael R. Morton, Director, Career, Technical and Adult Education, APS*
Identification of Strategies for Impacting Local and State Policies

Panel Discussion:

Charles L. Downs, Interim President, Northern Virginia Community College

Dr. Marie Djouadi, Principal, Wakefield High School, APS

Mary Hughes Hynes, Chair, Arlington School Board

Michael R. Morton, Director, Career, Technical and Adult Education, APS

Dr. Robert G. Smith, Superintendent, APS

Dr. William Sullivan, Director, Career Center, APS

- Overview of Arlington Public Schools (APS) and Community
- How does APS identify local and state policy issues?
- How does APS establish Career and Technical Education (CTE) policy at state and local levels?
- What new CTE policies have been identified at the state and local levels in the past year or two?
- What suggestions does APS have for developing local and state policy (e.g., building networks, leading change, views of leadership, leadership challenges)?

9:45 Group Discussions

Participants will be divided into groups for further discussion

10:30 Depart for Tour of Career Center
(816 South Walter Reed Drive, Arlington, VA 22204 – 703-228-5800)

12:15 Lunch at Arlington Career Center

1:15 Depart for Alexandria Campus of Northern Virginia Community College
(3001 North Beauregard Street, Alexandria, VA 22311-5097 – 703-845-6200)

1:45 *Presider: Barbara Wyles, Provost, Northern Virginia Community College*
Identification of Strategies for Impacting Local and State Policies

Panel Discussion:

Charles L. Downs, Interim President, Northern Virginia Community College
Northern Virginia Community College Division Chairs (Building Trades,
Automotive, Communication Design and Photography, Information System
Technology, Acquisition and Procurement)

- Overview of community college and community it serves
- Corporate University
- How do they identify local and state policy issues?
- How do they establish CTE policy at state and local levels?
- What new CTE policies have you identified at the state and local levels in the past year or two?
- What suggestions do you have for developing local and state policy (e.g., building networks, leading change, views of leadership, leadership challenges)

4:15 Innovative Community Technology Services
2026 Eisenhower Avenue
Suite 3135

5:30 Depart for Chart House

6:00 Group Dinner

Chart House
One Cameron Street
Alexandria, Virginia
Phone: (703) 684-5080
Located on the Potomac River in Old Town Alexandria

Friday, January 18, 2002

7:00 Continental Breakfast

7:30 Presider: N.L. McCaslin
Mock Hearings conducted by Scholars

9:00 Depart for Capitol Hill by bus

10:00 Scholars meet with Senators/Representatives from their State
(Scholars schedule appointments)

12:00 Return to Mayflower
Lunch as group and debrief the week in DC

2:00 Adjourn

Appendix J

NATIONAL LEADERSHIP INSTITUTE

Marriott Mountain Shadows
5641 E. Lincoln Drive
Scottsdale, AZ 85253
(P) 480-948-7111

AGENDA
MISSION POSSIBLE

Purpose:

To have the National Leadership Institute Scholars develop a vision and mission statement for career and technical education and identify strategies for leading educational reform and change.

Outcomes:

- Scholars understand current vision and mission statements developed by the Association for Career and Technical Education, American Association of Community Colleges, theorists/researchers in career and technical education, and states represented by the National Leadership Institute Scholars 2001-2002.
- Scholars develop a vision and mission statement that is supported by the National Leadership Institute Scholars 2001-2002.
- Scholars understand the change process as it relates to establishing a vision and mission for career and technical education and implementing educational reform and change.
- Scholars develop a procedure for establishing and monitoring partnerships and collaborations necessary in leading educational reform and change efforts.
- Scholars are willing to take risks and resolve conflicts in educational reform and change efforts.

**Sunday
June 23, 2002**

Main Pool

7:00 Informal Pool Side Get Together

**Monday
June 24, 2002**

Cochise

7:30 Breakfast

Welcome

N. L. McCaslin – Director, Professional Development Academy

Floyd L. McKinney – Director, National Dissemination Center for Career & Technical Ed.

Purpose and Objectives

N. L. McCaslin

8:00 Assembling the Evidence (Drafting the Mission Statement)

National Leadership Scholars, *Peggy Geib, Jamie Justice, David Dailey, and Curt Lucas*

10:00 Break

10:15 Re-examining the Evidence (Drafting the Glossary—Defining Key Terms)

National Leadership Scholars, *Peggy Geib, Jamie Justice, David Dailey, and Curt Lucas*

12:15 Lunch (*Yuma*)

1:00 Preparing a Possible Solution (Preparing Guiding Principles)

National Leadership Scholars, *Peggy Geib, Jamie Justice, David Dailey, and Curt Lucas*

3:00 Break

3:15 Vision Possible! (Determining Our Statement)

Rebecca Parker

5:15 Recess (Dinner on your own)

**Tuesday
June 25, 2002**

Cochise

7:30 Breakfast

8:00 Leadershift
N. L. McCaslin and Rebecca Parker

10:00 Break

10:15 Leadershift (Con't.)
N. L. McCaslin and Rebecca Parker

11:00 Leading Change—An Overview
National Leadership Scholar, *Kay Ellingwood*

12:00 Lunch (***Hopi***)

1:00 Establishing a Sense of Urgency
Creating a Guiding Coalition
Developing an Implementation Strategy
National Leadership Scholars, *Steve Mumma, Sara Laviolette, Kathryn Striebel, Jodi Elness*
(Each group will have five minutes to summarize this session beginning at 2:40)

3:00 Break

3:15 Communicating the Changed Vision
Empowering Broad-Based Action
Generate Short-Term Wins
National Leadership Scholars, *Steve Mumma, Sara Laviolette, Kathryn Striebel, Jodi Elness*
(Each group will have five minutes to summarize this session beginning at 2:40)

5:15 Recess (Dinner on your own)

**Wednesday
June 26, 2002**

Cochise

8:00 Breakfast

8:30 Consolidating Gains and Producing More Change
Anchoring New Approaches in the Culture

National Leadership Scholars, *Steve Mumma, Sara Laviolette, Kathryn Striebel, Jodi Elness*
(Each group will have five minutes to summarize this session beginning at 2:40)

10:15 Break

10:30 So What Have We Accomplished

N. L. McCaslin and Rebecca Parker

12:00 Lunch (*Pima*)

Joint Meeting of the 2002–2002 and 2002–2003 Scholars

Purpose:

To introduce the 2001–2002 and the 2002–2003 National Leadership Institute Scholars and recognize the Scholars who have completed the 2001–2002 Institute.

Outcomes:

- Scholars in the 2001–2002 National Leadership Institute and those in the 2002–2003 National Leadership Institute will establish a communication network.
- Scholars will enhance their skills of interacting with individuals in business and social settings.
- Scholars will examine positive ways of dealing with adversity in their personal and professional lives.
- Scholars of the 2001–2002 National Leadership Institute will be recognized.

1:00 Meet the Scholars

N. L. McCaslin and Rebecca Parker

1:20 Enhancing Your Skills of Interacting with Individuals in Business and Social Settings

Rosemarie Rossetti

2:20 Break

- 2:40 Reflections of the 2001–2002 Scholars
What have you gained personally as a leader?
What was the highlight of your NLI experience?
What advice would you offer a new Scholar?
- 3:10 Questions for the 2001–2002 Scholars from the 2002–2003 Scholars
- 4:00 Recess
- 5:30 Reception (*Yuma-Cochise*)
- 6:30 Dinner--A Celebration of Leaders—(*Yuma-Cochise*)
“It’s Just Like Riding a Bike: Coping with Change, Dealing With Adversity”
Speaker, *Rosemarie Rossetti*, Rossetti Enterprises, Inc.
Presentation of Certificates
Concluding Comments from the 2001-2002 Scholars
- 9:00 Adjourn

Appendix K

NATIONAL LEADERSHIP INSTITUTE

Marriott Mountain Shadows
5641 E. Lincoln Drive
Scottsdale, AZ 85253
(P) 480-948-7111

AGENDA

**Wednesday
June 26, 2002**

Joint Meeting of the 2001–2002 and 2002–2003 Scholars

Purpose

To introduce the 2001-2002 and the 2002-2003 National Leadership Institute Scholars and recognize the Scholars who have completed the 2001-2002 Institute.

Outcomes

- Scholars in the 2001-2002 National Leadership Institute and those in the 2002-2003 National Leadership Institute will establish a communication network.
- Scholars will enhance their skills of interacting with individuals in business and social settings.
- Scholars will examine positive ways of dealing with adversity in their personal and professional lives.
- Scholars of the 2001-2002 National Leadership Institute will be recognized.

1:00 Meet the Scholars (*Cochise -Yuma*)

N. L. McCaslin and Rebecca Parker

1:20 Enhancing Your Skills of Interacting with Individuals in Business and Social Settings

Rosemarie Rossetti

2:20 Break

2:40 Reflections of the 2001-2002 Scholars

3:10 Questions for the 2002-2002 Scholars from the 2002-2003 Scholars

4:00 Recess

4:30 Official Picture and Individual Pictures of the 2002-2003 Scholars

5:30 Reception (*Cochise -Yuma*)

6:30 Dinner--A Celebration of Leaders (*Cochise -Yuma*)

“*It’s Just Like Riding a Bike: Coping with Change, Dealing With Adversity*”

Speaker, Rosemarie Rossetti, Rossetti Enterprises, Inc.

Presentation of Certificates

Concluding Comments from the 2001-2002 Scholars

9:00 Adjourn

**Thursday
June 27, 2002**

Purpose:

To introduce the Scholars to the National Leadership Institute and the role of leaders and leadership development for secondary and postsecondary career and technical education.

Objectives:

- To establish the expectations for the Institute.
- To increase the Scholars’ knowledge of leadership and leadership development.
- To develop individual leadership plans for the 2002-2003 Scholars.
- To develop the technological skills needed to participate in the National Leadership Institute.
- To develop a learning community among the Scholars.

**Thursday
June 27, 2002**

Cochise-Yuma

7:30 Breakfast

8:00 Overview of the National Leadership Institute,
N. L. McCaslin, Director, Professional Development Academy
Greetings, *Floyd L. McKinney*, Director, National Dissemination Center for
Career and Technical Education
Review of Agenda, *Rebecca Parker*, Assistant Director, Professional Development
Academy

- 9:00 Scholars Expectations for National Leadership Institute
Rebecca A. Parker—Assistant Director, Professional Development Academy
- 10:00 Break
- 10:15 State Leadership for Career Technical Education
Jo Kister, Educational Consultant
- 12:00 Lunch
- 1:00 Postsecondary Leadership for Career and Technical Education
Arlene H. Parisot, Montana State Director, Director for Workforce Development, Office of the Commissioner of Higher Education
- 1:30 Secondary Leadership for Career and Technical Education
Patrick Ainsworth, Assistant Superintendent, Director, Standards & High School Development Division, California Department of Education
- 2:00 Implications for Career and Technical Education
Small Group Discussions and Interactions
- 3:00 Break
- 3:15 Trends Facing Career Technical Education
Education, Employment, Government, Societal
Dr. N. L. McCaslin – Director, Professional Development Academy
- 4:00 Recess

**Friday
June 28, 2002**

Cochise-Yuma

- 8:00 Breakfast
- 8:30 Overview of the National Dissemination Center for Career and Technical Education,
Charles Hopkins - Director
Overview of the National Research Center for Career and Technical Education,
Floyd McKinney - Director
- 9:00 In-depth Look at the National Leadership Institute Components
Distance Meeting Schedule
N. L. McCaslin and Rebecca Parker, PDA

- 10:00 Break
- 10:15 Individualized Computer Assistance
Greg Nagy, Director of Technology, NDCCTE
- 12:00 Lunch
- 1:00 Leadership Through The Eyes of Leaders
Panel Participants:
Milton Ericksen, Arizona State Director of Career-Technical Education
Michael Lesiecki, Maricopa Community College
Wallace Rande, Associate Professor, Northern Arizona University
Michael Elrod, Doña Ana Branch Community College
- 2:00 Reactions and Questions from Scholars for Panel Participants
- 3:00 Break
- 3:15 Developing Individual Leadership Plans
Mentorships
Internships/Projects
- 4:30 Recess
- 6:00 Dinner—*Ranchero Fiesta*

**Saturday
June 29, 2002**

Cochise-Yuma

- 8:00 Breakfast
- 9:00 Continued Development of Individual Leadership Plan
- 10:00 Break
- 10:15 Discussing Individual Leadership Development Plans
- 11:00 Final Thoughts
- 11:30 Adjourn

Appendix L

NATIONAL LEADERSHIP INSTITUTE

THE FAIRMONT DALLAS

1717 N. AKARD ST.

Dallas, TX 75201-2301

(P) 214-720-2020

(F) 214-720-5282

October 13-16, 2002

**Developing Your Leadership Capability
And
Understanding Culture**

Purpose:

The National Leadership Institute Scholars will develop their leadership ability and identify strategies for understanding and improving the culture for career and technical education at the secondary and postsecondary level.

Outcomes:

- Scholars will identify the characteristics of leaders that they have known or wish they had known.
- Scholars will develop the ability to motivate others through persuasion.
- Scholars will identify the characteristics of visionary leaders.
- Scholars will determine how they can use persuasion to motivate others.
- Scholars will identify their ideal leadership position in an ideal organization.
- Scholars will identify economic, governmental, societal and educational trends facing career and Technical Education.
- Scholars will examine the perspective of business and industry leaders regarding the impact of increased diversity on the workplace
- Scholars will examine the perspective of career and technical education leaders regarding the impact of increased diversity on secondary and postsecondary career and technical education.
- Scholars will distinguish between different levels of collaboration, identify components of a conceptual framework for collaboration, and apply these to their individual settings.

**Sunday
October 13, 2002**

5:00 p.m. Informal Conversation with David Pearce Snyder

Garden Room

6:00 p.m. Keynote Speaker and Dinner

Garden Room

Welcome

Floyd L. McKinney – Director, National Dissemination Center for Career & Technical Ed.

Keynote Speaker: “Preparing the Future for CTE”

David Pearce Snyder, Futurist, Snyder Family Enterprises

Dinner

Purpose and Objectives

Becky Parker – Assistant Director, Professional Development Academy

**Monday
October 14, 2002**

7:30 Breakfast – ***Patio Room***

8:00 Leaders I Have Known and Others I Wish I Had Known – ***Terrace Room***

John R. Hoyle, Texas A&M University

9:00 Characteristics of Leaders That I Admire

Small Group Session, National Leadership Institute Scholars

10:00 Break

10:15 Motivating Others through the Art of Persuasion

John R. Hoyle, Texas A&M University

11:15 How Can I Use Persuasion to Motivate Others?

Small Group Session, National Leadership Institute Scholars

12:15 Lunch—***Patio Room***

1:30 Transforming Vision into Reality to Rally the Troops—***Terrace Room***

John R. Hoyle, Texas A&M University

2:30 Creating Visionary Career and Technical Education Programs

Small Group Sessions, National Leadership Institute Scholars

3:30 Break
Patio Room

3:45 My Ideal Leadership Position in an Ideal Organization—**Terrace Room**
Small Group Session, National Leadership Institute Scholars

4:30 Recess

6:00 Dinner—**Garden Room**

The Visionary Leader You Can Become
John R. Hoyle, Texas A&M University

Tuesday
October 15, 2002

7:30 Breakfast - **Patio Room**

8:00 Postsecondary Workforce Education for the 21st Century—**Terrace Room**
Raul Ramirez—Doña Ana Branch Community College, New Mexico State University

9:00 Secondary CTE for the 21st Century
Ken Gray—The Pennsylvania State University

10:00 Break

10:15 Implications for CTE—**Terrace Room**
Small group discussions and interactions with Raul Ramirez and Ken Gray

11:15 Adjourn

11:30 Lunch
Patio Room

12:00 Luncheon Program--Changing Demographics of the U.S. Population
Harold Hodgkinson, Center for Demographic Policy, The Institute for Educational Leadership, Washington, DC

- 1:00 Increased Diversity: What it means to Business—***Terrace Room***
Mark Butler, Diversity Manager, Marathon Ashland Petroleum, Findlay, OH
Judy Kelly, Federated Department Stores, Inc., Atlanta, GA
Jonathan Ying, Human Resource Manager, Texas Instruments, Dallas, TX
- 2:00 Small Group Interaction with Business Representatives (Mark Butler, Judy Kelly, and Jonathan Ying)

3:00 Break
Patio Room

- 3:15 Increased Diversity: What it means to CTE—***Terrace Room***
Homer M. ("Butch") Hayes, President, College of the Mainland, Texas City, TX
Robert Muller, Chief of Staff, Texas Education Agency, Austin, TX
M. Frank Stluka, Project Manager, U.S. Dept. of Labor, Office of Youth Services
and Job Corps, Dallas, TX
- 4:15 Small Group Interaction with CTE Professionals
- 5:15 Recess (Dinner on your own)

**Wednesday
October 16, 2002**

8:00 Breakfast—***Patio Room***

8:30 Establishing Coalitions and Small Group Activity—***Terrace Room***
Daniel F. Perkins, *The Pennsylvania State University*

10:15 Break

10:30 A Guide for the Powerless and Those Who Don't Know Their Own Power:
Recommendations for the Reauthorization of Carl D. Perkins Vocational and Applied
Technology Act of 1998—Background and Preparation for the January Policy Meeting in
Washington, DC
N. L. McCaslin and Rebecca Parker, Professional Development Academy

12:00 Adjourn

Appendix M

National Leadership Institute in Washington D.C.

January 13-17, 2003

The Mayflower

A Renaissance Hotel

1127 Connecticut Ave NW

Washington DC 20036

(Phone) 202-347-3000

(Fax) 202-776-9182

Objectives for the NLI Washington Policy Meeting

- Identify major policy issues in CTE and workforce development,
- Develop an understanding of strategies for impacting CTE policy issues at the federal level,
- Increase knowledge of the legislative and budgeting processes,
- Determine effective approaches for working with press in influencing policy,
- Assemble information and evidence for major CTE policy issues at the local, state, or national level.
- Visit community college and K-12 programs to determine strategies for impacting local and state policies.

Agenda

Senate Room for all sessions

Mezzanine for all meals

Sunday, January 12, 2003

7:30 Informal Meeting

Overview of NLI Activities for the Week—**N. L. McCaslin**, PDA Director; and **Rebecca Parker**, PDA Assistant Director

Monday, January 13, 2003

8:00 Welcome—**Floyd L. McKinney**, NDCCTE Director

Breakfast with **Hans Meeder**, Deputy Assistant Secretary, Office of Vocational and Adult Education, U.S. Department of Education

8:30 *Preside*— **Lindel Fields, Oklahoma**

Hans Meeder—*Major Policy Issues in Career and Technical Education*

9:15 Scholars' discussion with Hans Meeder

9:45 Break

10:00 *Presider* – **Robin White, Ohio**

Strategies for Impacting CTE Policy at the Federal Level

Carolyn Teich—American Association of Community Colleges; **Hans Meeder**—Deputy Assistant Director, Office of Vocational and Adult Education, U. S. Department of Education; and **Janet Bray**—Executive Director, Association for Career and Technical Education; **Bruce Hunter**—Associate Executive Director, Public Policy, American Association of School Administrators

11:00 Group discussions with Carolyn Teich, Hans Meeder, Janet Bray and Bruce Hunter (4 groups will spend 15 minutes each with Carolyn Teich, Hans Meeder, Janet Bray and Bruce Hunter)

12:00 Lunch

1:00 *Presider* – **John Albright, Oklahoma**

Emily Stover DeRocco, Assistant Secretary for Employment and Training, U.S. Department of Labor—*Major Policy Issues in Workforce Development*

1:45 Scholars' Q&A with Emily Stover DeRocco

2:15 Break and Preparation for the Webcast

3:00 Webcast—Panel on Carl D. Perkins Reauthorization

Kim Green, Moderator and Executive Director, National Association of State Directors of Career Technical Education Consortium, **Nancy O'Brien**, Government Relations, Association for Career and Technical Education; **Jim McKenney**, American Association of Community Colleges; **John Foster**, Pennsylvania State Director of Vocational-Technical Education; and **Patty Sullivan**, Council of Chief State School Officers

5:00 Adjourn for the day

Tuesday, January 14, 2003

7:30 Breakfast

8:00 Work on information for meeting with your Senator or Representative

9:45 Break

10:00 *Presider – Dawn Holley, Florida*

Implications of the National Assessment of Vocational Education Interim Report: Findings and Implications for Policy: An Interactive Session with the Scholars
Nancy O'Brien—Government Relations, Association for Career and Technical Education; **Kim Green**, Executive Director, National Association of State Directors of Career Technical Education Consortium; and **Sara McPhee**, Research Associate, National Association of State Directors of Career Technical Education Consortium

12:00 Lunch

1:00 *Presider—Rebecca A. Parker, PDA Assistant Director*

Identify major policy issues from the previous presenters
Each of 4 small groups will discuss policy issues and select top two issues

1:40 Scholars report their policy issues to the group

1:50 Develop Assumptions about the Future—**N.L. McCaslin**—PDA Director

3:00 Break and Preparation for the Web cast

3:30 *Presider (webcast facilitator— Diane Dingfelder, Minnesota*

Web cast—Reauthorization of Carl D. Perkins: Key Features Needed for Secondary and Postsecondary CTE, **Jane Oates**—Senior Education Advisor for Senator Edward M. Kennedy

4:30 Questions from the Scholars and across the nation

5:00 Adjourn for the day

Wednesday, January 15, 2003

- 8:00 Breakfast with OVAE Staff—**Richard LaPointe**, Director, Division of High School, Postsecondary and Career Education; **Amy Bennett**, Chief, Effective Practices and Dissemination Branch; **Ellen Kelly Holland**, Outreach and Dissemination Program Specialist; and **Gisela Harkin**, Career Development Program Officer
- 8:30 *Presider – Alan Hall, Kentucky*
OVAE staff—OVAE Division Overviews and Introduction of Professional Staff
- 8:45 Scholars discussion with OVAE Staff
- 9:00 *Presider – Carol Watson, Pennsylvania*
Panel Presentation—Developing Major Support Groups/Networking
Edward R. Kealy—Executive Director, The Committee for Education Funding; **David Shreve**—Program Director, National Conference on State Legislatures; and **Basil Whiting**—Senior Fellow, National Association of Manufacturers
- 10:00 Break
- 10:15 Scholars discussion with Edward R. Kealy, David Shreve, and Basil Whiting (3 groups will spend 20 minutes with each of the 3 panelists)
- 11:15 Lunch
- 12:00 Bus to USA TODAY
7950 Jones Branch Drive
McLean, VA 22108
- 12:45 *Presider – Kelley Rhoe-Collins, Louisiana*
George Boggs, *Critical Policy Issues in Workforce Development*; President and CEO, American Association of Community Colleges
- 1:30 Scholars discussion with George Boggs
- 2:00 *Presider – Rebecca Woodhull, Illinois*
Using the Press to Promote Policy: **Joyce Winterton**—Associate Director of Education, USA TODAY; **Kathy Kiely**—Congressional Correspondent, USA TODAY Editorial, **Del Jones**—Corporate Management Reporter, USA TODAY Editorial
- 3:00 Scholars discussion with Joyce Winterton and USA TODAY staff
- 3:30 Tour of USA TODAY and Focus Groups
- 5:30 Light Refreshments for Scholars, Presenters and U.S. Department of Education OVAE Staff; USA TODAY
- 7:00 Bus back to the Mayflower, Dinner on your own

Thursday, January 16, 2003

7:30 Breakfast

8:00 Depart for Maryland Secondary Programs

9:00 Center of Applied Technology North
800 Stevenson Road
Severn, MD

Welcome/Greetings
Visit specific programs

10:30 Panel members to address:

How do you identify local and state policy issues?

How do you help establish Career and Technical Education (CTE) policy at the state and local levels?

What new CTE policies have been identified at the state and local levels in the past year or two?

What suggestions do you have for developing local and state policy (e.g., building networks, leading change, views of leadership, leadership challenges)?

Trudy E. Chara, Workforce Coordinator, Maryland Department of Business and Economic Development

James Foran, Director, High School Reform Initiatives, Maryland State Department of Education

Judy Hendrickson, Director of Academic Affairs-Career/Workforce Education, Maryland Higher Education Commission

Thomas Miller, Director, Career and Technology Education, Anne Arundel County Public Schools

Katharine M. Oliver, Assistant State Superintendent, Career Technology and Adult Learning, Maryland State Department of Education

Joan Valentine, Principal, Meade High School, Anne Arundel County Public Schools

12:15 Lunch at Center of Applied Technology North

1:15 Leave for HCAT Center

2:00 Anne Arundel Community College, Hospitality, Culinary Arts and Tourism (HCAT)
Baltimore-Annapolis Boulevard
Glen Burnie, MD

Faith Harlan-White, Dean, Community Education and External Learning,
Anne Arundel Community College

Kathleen M. Beaman, Director, Business and Education Partnerships,
Anne Arundel Community College

Scott Strong, Director, HCAT Institute

Howie Vilie, Executive Chef, HCAT Institute

3:15 Leave for Annapolis

4:00 Arrive in Annapolis

5:00 Gather for Dinner

Chart House Restaurant
300 Second Street
Annapolis, MD 21403
Phone (410) 268-7166

5:30 Dinner is served!!!

7:15 Estimated departure to return to Mayflower

Friday, January 17, 2003

7:30 Continental Breakfast

8:30 Depart for Capitol Hill by bus

9:00 Scholars meet with Senators/Representatives or staff from their respective State
(Scholars schedule appointments)

12:00 Return to Mayflower

12:30 Lunch as group and debrief the week in DC

1:30 Adjourn

Appendix N

NATIONAL LEADERSHIP INSTITUTE

Adam's Mark Hotel
Fourth St. & Chestnut
St. Louis, Missouri 63102
(P) 314-241-7400
(F) 314-241-9839

AGENDA
June 22-25, 2003

Purposes:

- To build/enhance leadership skills that prepare Scholars to:
 - > craft appropriate organizational vision and mission statements
 - > perform as change agents within educational reform
 - > serve as effective and efficient negotiators
- To afford opportunities for Scholars to evaluate the National Leadership Institute experience

Sunday
June 22, 2003

Location-TBD

7:00 Welcome & Importance of Leadership in Today's Economy
Floyd L. McKinney – Director, National Dissemination Center for Career & Technical Ed.

Review Agenda and Reflection Questions

- What worked for you regarding your experience in the NLI?
- What would you like to improve regarding your experience in the NLI?
- How have you been able to influence others, impact your decision making, and impact others decision making because of your participation in the NLI?
- How have your responsibilities on the job changed due to your participation in the NLI?

N. L. McCaslin—Director, Professional Development Academy

Monday
June 23, 2003

Anticipated Outcomes:

- *Scholars analyze current vision and mission statements developed by the U. S. Department of Education, Office of Vocational and Adult Education; Association for Career and Technical Education; American Association of Community Colleges; theorists/researchers in career and technical education, and states represented by the National Leadership Institute Scholars 2001-2002.*
- *Scholars craft a vision and mission statement*

Monday Morning

8:30 Crafting A Mission Statement, *N. L. McCaslin and Rebecca Parker*
 Who are we?
 What do we do?
 For whom do we do it?
 Why do we do it?

9:00 Crafting a Mission Statement, (Work in 3 Small Groups) National Leadership Scholars,
TBD

10:00 Break

10:15 Report from Small Groups on Their Mission Statements

10:30 Developing Consensus, *N. L. McCaslin and Rebecca Parker*

Monday Afternoon

1:00 Defining Key Terms, *N. L. McCaslin and Rebecca Parker*

1:30 Drafting the Key Terms, (Work in Small Groups) National Leadership Scholars, *TBD*

2:00 Report of Key Word Definitions

2:30 Preparing Guiding Principles, *N. L. McCaslin and Rebecca Parker*
 Principles that guide our work
 Principles that guide our culture

3:00 Break

3:15 Drafting the Guiding Principles, (Work in Small Groups) National Leadership Scholars,
TBD

4:00 Report on Guiding Principles

4:30 Confirming Our Statement, *N. L. McCaslin and Rebecca Parker*

**Tuesday
June 24, 2003**

Anticipated Outcomes:

- *Scholars demonstrate knowledge of change processes as related to leading and implementing educational reform and change.*

Tuesday Morning

8:30 The Heart of Change--Leading and Implementing Educational Change Processes, *L. H. Newcomb, The Ohio State University*

Overview

Increase Urgency

Build the Guiding Team

Get the Vision Right

9:30 Work in Small Groups to Address Increasing Urgency, Building the Guiding Team, and Getting the Vision Right

10:15 Break

10:30 Report to Group

11:00 The Heart of Change—Leading and Implementing Educational Change, *L. H. Newcomb, The Ohio State University*

Empower Action

Create Short-term Wins

Tuesday Afternoon

1:00 Work in Small Groups to Address Empowering Action and Creating Short-term Wins

1:45 Report to Group

2:00 The Heart of Change—Leading and Implementing Educational Change, *L. H. Newcomb, The Ohio State University*

Don't Let Up

Make Change Stick

3:00 Break

3:15 Work in Small Groups to Address Don't Let Up and Making Change Stick

4:00 Report to Group

**Wednesday
June 25, 2003**

Anticipated Outcomes:

- *Scholars demonstrate willingness to take risks and resolve conflicts in educational reform and change efforts.*
- *Scholars are recognized for their participation in the National Leadership Institute*
- *Scholars reflect on participation in the year-long program of the National Leadership Institute and are afforded the opportunity to evaluate their experience*

8:30 Getting to Yes—Negotiating Differences, *N. L. McCaslin and Rebecca Parker*

9:30 Role Playing Activity, National Leadership Institute Scholars, *TBD*

10:15 Break

10:30 Report from Small Groups

11:00 Scholars share reflections...

- What worked for you regarding your experience in the NLI?
- What would you like to improve regarding your experience in the NLI?
- How have you been able to influence others, impact your decision making, and impact others decision making because of your participation in the NLI?
- How have your responsibilities on the job changed due to your participation in the NLI?

N. L. McCaslin and Rebecca Parker

12:00 A Celebration of Leaders

Speaker, *J. D. Ross, President, Joliet Junior College*

Presentation of Certificates

Concluding Comments from the 2002-2003 Scholars

2:00 Adjourn

Appendix O

National Leadership Institute 2001-2002 Scholars Vision for Career and Technical Education

MISSION STATEMENT

Career and Technical Education (CTE) – educating and training America’s workforce.

GLOSSARY OF TERMS USED IN MISSION STATEMENT

CTE – a constellation of programs, initiatives, and efforts, and an essential component within the total education system. CTE develops knowledge, skills, and attitudes for career and workplace success.

educating – developing the knowledge base of the learner.

training – developing the skill base of the learner.

America’s workforce – emerging, existing, and transitioning workers in a worldwide economy.

OUR GUIDING PRINCIPLES

Basic Beliefs

We:

- ▶ have a vested interest in individual student success;
- ▶ believe that education is a lifelong process, and that individuals learn at different times and in different ways;
- ▶ are customer driven;
- ▶ are responsive to changes in the economy;
- ▶ offer value added services for education and training;
- ▶ hold ourselves accountable to measurable outcomes;
- ▶ are also accountable to others for our actions; and
- ▶ are passionate about CTE.

Principles That Guide Our Work


We:

- ▶ are an integral part of economic success on many levels;
- ▶ contribute to the quality of life in our communities;
- ▶ provide a skilled and knowledgeable workforce, and
- ▶ embrace and utilize industry, academic, and employability standards to drive curriculum, instruction, and assessment.

Principles That Guide Our Culture

We:

- ▶ value knowledge-based and skill-based teaching and learning as measured by authentic assessment;
- ▶ recognize that experience as well as continuous professional development is essential;
- ▶ value access and diversity;
- ▶ adhere to the principles of continuous improvement;
- ▶ use data-driven and research-based decision making to improve CTE programs and practices;
- ▶ value qualitative and quantitative research to advance the body of knowledge in CTE;
- ▶ support national efforts to disseminate research and best practices in CTE;
- ▶ actively pursue collaboration and partnerships to achieve our mission; and
- ▶ align resources to support our mission.



CTE
CAREER & TECHNICAL EDUCATION

**NATIONAL
DISSEMINATION
CENTER**
THE OHIO STATE UNIVERSITY

These statements do not necessarily reflect the views of the National Dissemination Center for Career and Technical Education.

The National Dissemination Center for Career and Technical Education is funded by the Office of Vocational and Adult Education, U.S. Department of Education.

Appendix P

National Leadership Institute 2002-2003 Scholars' Vision

MISSION STATEMENT

The Career and Technical Education (CTE) community prepares learners with academic, technical, and employability skills to participate in a global workforce.

GLOSSARY OF TERMS

Career and Technical Education community – CTE community is made up of a number of collaborative, interactive partners including, but not limited to, individuals within local, state, and federal education agencies, businesses, industries, labor groups, legislatures and families.

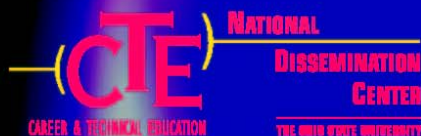
Learners – Career and technical learners are represented within all ages, genders, ethnicities, socioeconomic groups, and disabilities.

Academic skills – Academic skills are developed through participation in core academic subjects as defined in the No Child Left Behind Act of 2001; academic skills may also be developed through the integration of career and technical education and academic studies.

Technical skills – The U.S. Department of Education, through the Office of Vocational and Adult Education (OVAE), has established 16 broad career clusters that introduce students to academic and technical skills in a particular economic sector. These sectors include:

- ▶ Agriculture, Food & Natural Resources
- ▶ Architecture & Construction
- ▶ Arts, A/V Technology & Communications
- ▶ Business, Management & Administration
- ▶ Education & Training
- ▶ Finance
- ▶ Government & Public Administration
- ▶ Health Science
- ▶ Hospitality & Tourism
- ▶ Human Services
- ▶ Information Technology
- ▶ Law, Public Safety & Security
- ▶ Manufacturing
- ▶ Marketing, Sales & Service
- ▶ Science, Technology, Engineering & Mathematics
- ▶ Transportation, Distribution & Logistics

Students are also introduced to safety knowledge needed for future education and careers.



These statements do not necessarily reflect the views of the National Dissemination Center for Career and Technical Education.

Employability skills – Job seeking, job attainment, and job retention are three overlapping employability skills. Within these aspects are many skills, which include:

- ▶ Communication
 - Resume writing
 - Interviewing
 - Technical and business writing
- ▶ Team building
- ▶ Decision making
- ▶ Problem solving
- ▶ Critical thinking
- ▶ Leadership
- ▶ Business work ethic
- ▶ Ethics
- ▶ Following directions
- ▶ Cultural understanding and appreciation

Participate – An individual participates when demonstrating the ability to compete as a productive worker by:

- ▶ Actively seeking employment;
- ▶ Demonstrating active involvement, flexibility, and adaptability in a work environment that reflects global diversity; and
- ▶ Applying learning in a variety of contexts for career advancement.

Global workforce – A global workforce is made up of competitive, productive workers who have the ability to work anytime, anyplace, with anyone. Collaboration among countries would produce quality standards recognized around the world. Skills obtained through career and technical training would be portable by meeting local, state, national and international skill standards. Credentials earned would be transferable anywhere.

OUR GUIDING PRINCIPLES

CTE professionals value the following guiding principles related to their work:

- ▶ Respect the individuality and diversity of learners by fostering a student-focused environment.
- ▶ Create an engaging learning environment within a global context by being competent in their knowledge base.
- ▶ Strive for excellence and quality in the integration of academic, technical, and employability skills.
- ▶ Implement a continuous improvement model that includes critical reflection, collaborative partnerships, and family and community relationships.
- ▶ Influence national and state legislation that promotes leadership, professional development, and the dissemination of evidence-based research.

CTE professionals are committed to a culture that:

- ▶ Focuses passionately on the learner.
- ▶ Promotes excellence and continuous improvement.
- ▶ Fosters respect and appreciation for diversity.
- ▶ Encourages trust, integrity, and honesty for open, respectful communication.



These statements do not necessarily reflect the views of the National Dissemination Center for Career and Technical Education.

Appendix Q

2002-2003 National Leadership Institute

Guidelines for National Leadership Institute Internship Experience

Purpose of Internship Experience: To engage the Scholar in experiences and/or activities above his/her current leadership position to a level or position to which is aspired.

Use an agreement form, generated by the Scholar with the following components:
(Please submit to the NDC Academy Staff for approval prior to September 30, 2002.)

- ❖ Personal Data
 - Name
 - Institution
 - Address
 - Phone
 - Email

- ❖ Internship Contact Person Data
 - Name
 - Institution
 - Address
 - Phone
 - Email

- ❖ Internship Job Description
 - Goals/Objectives for Internship
 - Anticipated Projects and Assignments
 - Anticipated Benchmarks

Expected Outcomes

Upon completion of internship, submit a Reflection Report of your experience. This report should include, but not be limited to:

- Goals/Objectives of the Internship
- Description of overall experience (including projects and assignments)
- Achievement of Outcomes
- Facilitators/barriers in achievement of goals/objectives
- Insights into role/position experienced in the internship
- Personal evaluation of internship experience

Estimated number of hours for your experience

Appendix R

2002-2003 National Leadership Institute

Internship Agreement Form

Instructions: Complete this form and submit to the NDC/PDA office by **September 30, 2002**. Once you are notified of internship approval, you will begin your internship experience. Reflection Reports are due to the NDC/PDA office no later than **May 30, 2003**.

Personal Data:

Name

Institution

Address

Phone

Email

Internship Contact Person Data:

Name

Institution

Address

Phone

Email

Internship Job Description:

Goals/Objectives for Internship

Anticipated Projects and Assignments

Anticipated Benchmarks

Expected Outcomes

Estimated Number of Hours _____

Signatures or Statements of Approval:

Internship/Work Site Supervisor Date

Site Director Date

NDC/PDA Personnel Date

OFFICE USE ONLY

- Internship Approved
- Completed Internship
- Submitted Reflection Report

Appendix S

2001 National Leadership Institute

Mentor's Handbook

Focus of the National Leadership Institute:

- To enhance the skills and knowledge of current leaders of CTE so they can provide vision and advocacy for the profession

Purpose for mentoring:

- Mentoring is a process where the mentor and the scholar work collaboratively toward the goal of promoting and developing the scholar's skills, abilities, knowledge, performance and thinking

Your role as a mentor is to:

1. Help the scholar grow personally and professionally within CTE
2. Share wisdom, insights, knowledge, and experience
3. Facilitate brainstorming, goal setting and learning
4. Communicate and encourage a two-way exchange of information, and act as a sounding board for ideas and concerns
5. Counsel and help to interpret and clarify CTE's organization, culture, political structure and vision
6. Build and maintain the relationship
7. Identify learning opportunities, resources and contacts that will enhance the scholar's experience
8. Coach and gives feedback
9. Assist with important life or career decisions
10. Provide and receive feedback
11. Listen and offer suggestions to further leadership development
12. Identify and assist in meeting key CTE leaders in various positions

Areas the scholar may be looking for your guidance include:

1. Understanding the role of a leader and how to exercise the responsibilities inherent in that role
2. Developing effective strategies for engaging in continuous learning to enhance leadership qualities
3. Improving the understanding of and ability to lead reform/change processes
4. Developing a new vision for career and technical education
5. Identifying needs, developing plans and implementing effective programs
6. Understanding the political and financial challenges of planning and implementing programs

Areas the scholar may be looking for your guidance includes: (Cont.-)

7. Acquiring an in-depth understanding of and potential for career and technical education programs
8. Gaining skill in interpreting and using research findings and evaluation information to improve programs and develop new initiatives
9. Increasing knowledge of business and industry needs and ways to collaborate with employers and government agencies, such as the U. S. Department of Labor
10. Increasing knowledge of the legislative process
11. Gaining skill in working with governing boards and bodies and other leaders
12. Developing ability to influence policy making at local, state, and national levels

Format for you and your scholar's meetings:

- In-Person
- Telephone conferencing
- E-mentoring
- Other options

Time commitment:

- One meeting per week (Ideal)
- Three meetings per month (Minimal)

Tips in working with your scholar:

1. Take the initiative to schedule the first meeting
2. Make a list of things you would have wanted to know when you were in the scholar's position
 - ✓ Your professional career development
 - ✓ Expectations or concerns with the mentoring relationship
 - ✓ Your organization or position
 - ✓ Starting out in a new organization
3. Be clear about the purpose of the mentorship and the boundaries
4. Create an agenda before each meeting
5. Take time to explore your scholar's interests, goals and objectives
6. Develop a calendar based on these interests, goals and objectives
7. Keep a log of your scholar's progress and any notes that would be beneficial as a reminder to discuss at the next meeting
8. Include your scholar in professional and social gatherings relating to CTE

9. Offer some of your favorite metaphors, sayings, war stories, and hard-learned lessons
10. Let your scholar observe you dealing with a challenging situation, running a meeting or conference, networking with others
11. Arrange opportunities for your scholar to gain additional experiences within CTE
12. Build on your scholar’s past experiences and education in CTE
13. Ask questions and listen to your scholar’s responses
14. Plan for the next meeting
15. Experiment with the process

Suggested guidelines for the mentoring relationship:

1. Meetings begin and end on time
2. Both the mentor and scholar actively participate in the relationship
3. Communication is open, candid, and direct
4. Honor each other’s expertise and experience
5. Safeguard confidentiality
6. Manage time
7. Put interruptions aside

Sample questions for you to ask the scholar to assure accountability and progress with the mentoring relationship:

The mentoring relationship	<ul style="list-style-type: none"> ➤ How are we doing? ➤ What is the quality of our interaction? ➤ In what ways might we strengthen our relationship?
The learning process	<ul style="list-style-type: none"> ➤ Is the process we are using working to facilitate your Individual Leadership Plan? ➤ In what ways are your learning needs being met or not met? ➤ What might we do to make the process work better for you? ➤ What do we need to change or strengthen? ➤ What are you learning about yourself as a learner in this process?
Measurable outcomes	<ul style="list-style-type: none"> ➤ What progress are you making on your Individual Leadership Plan? ➤ What are your greatest successes thus far? ➤ What is your biggest frustration or challenge? ➤ What gives you the most satisfaction about what you are learning?

Mentor Activity Planning Guide for the Scholar (Optional)

Instructions: Use this chart to record ideas that come to mind as you think about the activities that would enhance your scholar's mentoring experiences.

- What opportunities are available in-house?
- What is available outside the office?
- What kinds of opportunities exist to reinforce the scholar's goals and objectives?
- What kinds of opportunities exist that might accelerate new learning?

Possible Learning Opportunities

In-house:

Outside the office:

To gain exposure to new learning:

To reinforce the goals and objectives of the scholar's ILP:

To accelerate new learning:

S A M P L E

2001 National Leadership Institute

Mentor Activity Planning Guide for the Scholar

Instructions: Use this chart to record ideas that come to mind as you think about the activities that would enhance your scholar's mentoring experiences.

- What opportunities are available in-house?
- What is available outside the office?
- What kinds of opportunities exist to reinforce the scholar's goals and objectives?
- What kinds of opportunities exist that might accelerate new learning?

Possible Learning Opportunities

In-house:

1. Meetings
2. Networking

Outside the office:

1. Committee meetings
2. Conferences
3. Networking
4. Organizational meetings

Opportunities to get exposure to new learning:

1. Conferences
2. Trade shows
3. Meetings
4. Books, articles

Opportunities to reinforce the scholar's ILP:

1. Committee and project assignments
2. Attending office meetings together
3. Check-in conversations (telephone or e-mail)

To accelerate new learning:

1. Enhance assignments
2. Shadowing other individuals in action

Mentor/Scholar Activity Log (Optional)

Scholar: _____ Phone #: _____

Mailing Address: _____

E-mail: _____ Fax: _____

Best day to meet: _____ Time: _____

Date:	Description and comments of the activity:
Time:	
Location:	
Date:	Description and comments of the activity:
Time:	
Location:	
Date:	Description and comments of the activity:
Time:	
Location:	
Date:	Description and comments of the activity:
Time:	
Location:	
Date:	Description and comments of the activity:
Time:	
Location:	
Date:	Description and comments of the activity:
Time:	
Location:	

Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

1. To develop a plan to prepare the scholar to assume a significant high-profile-leadership position with the CTE organization
2. To assist the scholar in depth analysis of leadership strengths and weaknesses
3. To assist the scholar with developing their Individual Leadership Plan
4. To introduce the scholar to best-practice leadership experiences

We have discussed the protocols by which we will work together, develop, and, in the same spirit of partnership, collaborate on the development of a work plan. In order to ensure that our relationship is mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly twice a month and be in contact by telephone or e-mail once a week
2. Identify opportunities and experiences to enhance the scholar's leadership talent and skills
3. Maintain confidentiality of our relationship which means that anything discussed will remain between us unless we agree ahead of time if specific information will be shared to others
4. Respect the ground rules we have set.
5. Confirm all the dates and times for meetings and activities-- (Scholar)
6. Pay for his or her own expenses
7. Plan the agenda for the next meeting at the end of each meeting
8. Provide regular feedback to each other
9. Evaluate our progress to see if we are meeting the scholar's goals and objectives

We agree to meet regularly until we have accomplished our defined goals and objectives. When the goals and objectives have been accomplished, we will review the agreement, evaluate our progress, and reach a learning conclusion. The relationship is then considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated the mutually agreed on goals and objectives.

In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. If this occurs, we agree to use the ending of the relationship as a learning opportunity.

Mentor's Signature and Date

Scholar's Signature and Date

Appendix T

**National Dissemination Center for Career and Technical
Education**
NATIONAL LEADERSHIP INSTITUTE
2001-2002 SCHOLARS

CALIFORNIA

Gloria Arevalo

Tech Prep/School to Career Program
Coordinator
Rio Hondo Community College

Clay Mitchell

Education Program Consultant
California Department of Education/ROCP
Unit

Kathryn Striebel

Professor – Lead Instructor
Mira Costa College

IDAHO

Jerry McMurtry

Associate Professor, Career and Technical
Educator
University of Idaho

Angela Neal

Business and Office Technology Program
Manager
Idaho Division of Professional-Technical
Education

ILLINOIS

Sandy Dunkel

Principal Consultant
Workforce Preparation Partnerships Division
Illinois State Board of Education

KENTUCKY

Debora Almgren

Federal Programs Consultant
Kentucky Department for Technical Education

David Burgos

Director of Technical Education and Workforce
Development
Hopkinsville Community College

Jamie Justice

Director, Technical Education and Workforce
Development
Kentucky Community and Technical College
System

Curt Lucas

Program Consultant
Kentucky Department of Education

MINNESOTA

David Dailey

Director of Disabilities, Assessment, Learning
Center,
Placement and ADA Coordinator
State of Minnesota, MNSCU System

Kay Ellingwood

Director, Work Ready Center
Century College

Jodi Elness

Director of Enrollment Management, Records,
and Registration
St. Cloud Technical College

Pradeep Kotamraju

Director, Institutional Research and External
Relations
Customized Training Division
Dakota County Technical College

Sara Laviolette

Perkins Coordinator/Student Support Service
Manager
Hennepin Technical College

Steve Mumma

Director of Career and Technical Education
School to Career Coordinator
Wayzata Public Schools

Rebecca Niemi

Counselor and Perkins Coordinator
Itasca Community College

Debra Rogne

Interim Dean of Academic Affairs
Rochester community and Technical College

Appendix U

**National Dissemination Center for Career and Technical
Education**

***NATIONAL LEADERSHIP INSTITUTE
2002-2003 SCHOLARS***

MISSOURI

Deborah Goodall
Director, Tech Prep
The Metropolitan Community Colleges

NEW HAMPSHIRE

Virginia O'Brien Irwin
Administrator, Career Development Bureau
New Hampshire Department of Education

NORTH CAROLINA

James Smith Jr.
Education Consultant II
North Carolina Department of Public
Instruction

OHIO

Sharon Enright
Assistant Director
Career-Technical and Adult Education
Ohio Department of Education

Isaac Kershaw IV

Assistant Director
Career-Technical and Adult Education
Ohio Department of Education

Barbara Nicol

Assistant Director, Adult Workforce Education
Ohio Department of Education

Julie Novel

Tech Prep Consultant
Ohio Department of Education

Gayl Ray

Consultant
Career Pathways and Professional
Development
Ohio Department of Education

Ralph Shibley

Director of Career-Technical Teacher Education
University of Rio Grande

Raul Soto

Assistant Director, Administrative Field Services
Ohio Department of Education

OKLAHOMA

Peggy Geib

Director, Strategic Partnering
Francis Tuttle Technology Center

John Howell

Assistant Superintendent
Autry Technology Center

Douglas Major

Superintendent/CEO
Pioneer Technology Center

CALIFORNIA

Cindy Beck

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California Department of Education

FLORIDA

Dawn Holley

Assistant Professor
Florida A&M University

IDAHO

Jenniene Kauer

Teacher Educator
Idaho State University

ILLINOIS

Dora Welker

Principal Consultant
Illinois State Board of Education

Rebecca Woodhull

Director, Illinois Office of Educational Services
Southern Illinois University

KANSAS

Karmey Olson

Education Program Consultant
Kansas State Department of Education

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Northern Kentucky Technical College

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Kentucky Department of Education

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Planning and Articulation Officer
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Brenda Norman

Director, Network for Customized Training,
Education, and Development
Minnesota State Colleges and Universities

Bruce Steuernagel

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Minnesota State Colleges and Universities

NEW HAMPSHIRE

Kimberly Runion

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Work
New Hampshire Department of Education

NEW JERSEY

Marie Barry

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New Jersey Department of Education

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Joyce Boudreau

State Consultant Health Careers Education
Ohio Department of Education

Kelly Herold

Tech Prep Coordinator
The University of Akron

Susan Nell

Teacher Educator
The Ohio State University

Raymond Timlin

Director, Kent State Tech Prep Consortium
Kent State University

Roberta White

Vice President, Performance and Outcomes
Great Oaks Institute of Technology and Career
Development

OKLAHOMA

John Albright

Principal of Education
Treasure Lake Job Corps

Lindel Fields

Assistant Superintendent
Tri County Technology Center

Carla High

Special Programs Manager
Francis Tuttle Technology Center

PENNSYLVANIA

Carol Watson

Cooperative Education Coordinator
Williamsport Area School District

TEXAS

Alfredo Acevedo, Jr.

Managing Director for Continuing Education
Texas Education Agency

Appendix V

**Comprehensive Evaluation of the National Leadership Institute
2001—2003**

**James W. Altschuld and Yung-Chul Kim
November 2003**

Introduction

In this report, the evaluation endeavors for the National Leadership Institute (NLI) are summarized. The general purpose of the NLI for both years was to prepare individuals for the challenges of leadership in Career and Technical Education (CTE). The NLI was conducted over a 2-year period—July 16, 2001, to June 22–25, 2003, for two groups of Scholars. In Year 1 (2001–2002) there were 33 Scholars from 11 states and in Year 2 (2002–2003) there were 25 Scholars from 13 states. An evaluation followed each face-to-face meeting of these two groups, and one follow-up evaluation for 1st year Scholars was conducted—for a total of 8 evaluation activities.

Characteristics of National Leadership Institute Activities

The Institute consisted of the national meetings (3 and 4 for Year 1 and 2 Scholars, respectively), biweekly meetings held via web casts, mentoring and internships, and the development of an Individual Leadership Plan. The 2 years are compared in Table 1.

Table 1. Major Characteristics of National Leadership Institute Activities by Year

	2001-2002 Institute	2002-2003 Institute
Date	June 2001–June 2002	June 2002–June 2003
Major themes	Developing leadership capability Establishing a vision and mission for CTE Leading change Developing policy Understanding culture	
Major activities	3 national meetings 28 webcasts Individual Leadership Plans Mentorships Internships	4 national meetings 32 webcasts Individual Leadership Plans Mentorships/ Internships
Number and distribution of participants	33 Scholars from 11 states	25 Scholars from 13 states

Overview of Evaluation Activities

Evaluation surveys of varying types were administered at each national meeting or via e-mail and fax. Given the formative emphasis of the evaluation, an open-ended format was perceived as the best way to orient the questions for the first two meetings of Year 1 Scholars and the first three meetings of Year 2 Scholars. Both open- and closed-ended items were employed for the final meetings of Year 1 and Year 2, with the latter items providing summative ratings of each full year of activities.

2001–2002 NLI

An evaluation activity followed three national meetings of the NLI for the 1st-year Scholars from June 2001 to June 2002. In addition, the follow-up evaluation was conducted for the impact of the NLI in September 2003. As a result, four evaluation activities were conducted, and their major features are provided in Table 2.

Table 2. Major Features of the Evaluation for 2001–2002 NLI

	1st Meeting	2nd Meeting	Final Meeting	Follow-Up Evaluation
Date	July 16–19, 2001	January 14–18, 2002	June 23–26, 2002	September 2003
Location	St. Louis, MO	Washington, DC	Scottsdale, AZ	
Number of respondents	21	15	26	14
Data collection	At the final day of the Institute	At the final day of the Institute	At the final day of the Institute	E-mail
Nature of evaluation	Formative	Formative	Summative and formative	Summative
Evaluation format	Open-ended items	Open-ended items	Open-ended and scaled items	Open-ended items
Evaluation questions	Fulfillment of expectations, Meaningful aspects, Improvement of the Institute Recommendations for future agendas, Anticipated problems	Highlights, Implementation of specific activities, Best features, Aspects needing improvement, Overall satisfaction	<u>Open-ended:</u> Meaningful aspects, Improvement of the Institute <u>Closed-ended</u> General features of the Institute, Individual Leadership Plan, Learning culture	Meaningful aspects, Short-term changes, Long-term impacts

2002–2003 Institute

The evaluation for 2002-2003 Scholars dealt with their perceptions regarding the four national face-to-face meetings conducted from June 2002 to June 2003. In Table 3, a brief summary of the major features of these evaluations is presented.

Table 3. Major Features of the Evaluation for 2002-2003 Institute

	1st Meeting	2nd Meeting	3rd Meeting	Final Meeting
Date	June 26–29, 2002 (4 days)	October 13-16, 2003 (4 days)	January 13–17, 2003 (5 days)	June 22–25, 2003 (4 days)
Location	Scottsdale, AZ	Dallas, TX	Washington, DC	St. Louis, MO
Number of respondents	24	15	13	19
Data collection	At the final day of the Institute	Center’s web board E-mail fax	At the final day of the Institute, by e-mail and fax	At the final day of the Institute
Nature of evaluation	Formative	Formative	Formative	Formative and summative
Evaluation format	Open-ended items	Open-ended items	Open-ended items	A mixture of open-ended/ scaled items
Evaluation questions	Scholars’ expectations, Significant aspects, Improvement of the Institute, Recommendations for future topics, Anticipated problems	Beneficial aspects, Use of information learned Best features and areas needing improvement, Overall satisfaction/ recommendations	Highlights, Implementation of specific learning, Best features, Aspects needing improvement, Overall evaluation	<u>Open-ended:</u> Meaningful aspects, Short-term changes, Long-term Impacts <u>Closed-ended:</u> Individual Leadership Plan, Outcomes, Overall perceptions

Evaluation Results for the Scaled Questions

For the purpose of the analysis, the results of the closed-ended items for the final meeting are shown in order for 2001-2002 and 2002-2003 scholars. Then summaries of the open-ended questions across the meetings of both years are given. Then, similar data from the 2 years are discussed. The scaled items permitted comparisons across the 2 years. The scaled data were handled through the descriptive statistics package available from SPSS. For statistical analyses, the scaled items were treated as being at the interval level of measurement, with missing values replaced by the mean of all observed values for each item.

2001-2002 Institute

There were three main overarching questions, with 18 sub-questions embedded in them. As indicated in Table 4, the means for the sub-questions ranged from 3.3 to 4.5, with 8 of 18 being 4.0 or higher on the 5-point scale (5 is the highest positive point). A summary of these results is presented below.

General Features of the Institute. In this category, there were five sub-questions about the topics/activities/presenters, the learning of new ideas, and whether the time required by the Institute was seen as a worthwhile investment. Based on the overall mean (3.9), respondents generally gave a favorable rating to the category. More specifically, most of them perceived that they learned new ideas for developing their Individual Leadership Plans. Twenty-two (22) of the 26 respondents agreed or strongly agreed that the Institute was a good investment of their time. In terms of the relevance of the topics and presenters at the Institute, the average means were somewhat lower (3.6), but still positive. Seventeen (17) out of 26 felt that the activities of the Institute were well balanced.

Individual Leadership Plan (ILP). The six sub-questions in this area included the usefulness of developing ILP via interaction with mentors and supervisors, and with national meetings and on-line meetings. The overall rating in this category (3.7) was the lowest of the three subtotals in Table 4, but still positive. Although five of the six items attained average ratings below 4.0, consistently over half of the respondents on each sub-question had chosen response options 4 or 5. There was a similar pattern across most of the items with a noticeable group of 7–11 respondents choosing responses below choices 4 and 5. Clearly, in terms of the Individual Leadership Plan, there was a mixed perception of how well it was facilitated during the course of the year. In general, the Scholars did not rate this aspect of the NLI as favorably as they rated the other two areas.

Learning Culture. This category contained seven sub-questions in regard to the degree of support for leadership development activities from project staff/organization, and coworkers, feasibility of scheduling, and overall satisfaction with the Institute. The overall mean was 4.1, and the question attaining the highest average was in regard to the NDC staff,(i.e., they provided a supportive

Table 4. Results of the Scaled Items for 2001-2002 Institute ($n = 26$)**General Features of the Institute**

Item Statement	Frequency						<i>M</i>	<i>SD</i>	NR
	1	2	3	3.5	4	5			
1. Topics and subjects of the Institute were relevant to my needs.	2	3	3		13	5	3.6	1.2	
2. A good balance of activities (e.g., on-line and virtual meetings, feedback, discussion) has been maintained.	2	1	6		9	8	3.8	1.2	
3. I learned new ideas for planning my leadership development activities.	2	3	2		5	14	4.0	1.4	
4. Speakers and panelists fit well with the objectives of the Institute.	2	3	5		7	8	3.6	1.3	1
5. Participating in the Institute was a good use of my time.	3	0	0	1	7	15	4.2	1.3	
Subtotal						3.9	1.1		

Individual Leadership Plan (ILP)

1. My mentor/supervisor helped me in clarifying the overall nature of my plan.	1	3	5	1	8	7	3.7	1.1	1
2. My mentor/supervisor helped me in developing a concrete set of activities to follow.	1	5	4	1	7	7	3.6	1.2	1
3. Interactions with key resource persons were useful for generating components of my LDP.	0	4	4	1	9	7	3.8	1.0	1
4. National meetings were a good sounding board for ideas regarding plan development.	1	3	2	1	8	11	4.0	1.2	
5. On-line meetings were a good sounding board for ideas regarding leadership development.	2	4	5		10	3	3.3	1.2	2
6. I was able to develop practical plans for my ILP based on the Institute experience.	1	5	1		10	8	3.8	1.2	1
Subtotal							3.7	.9	

Learning Culture

1. Staff of the National Leadership Institute created a supportive atmosphere for leadership development.	1	1	2		3	19	4.5	1.1	
2. Management at my organization was supportive of my leadership development activities.	1	1	4		2	18	4.3	1.1	
3. Coworkers encouraged me throughout the year in this endeavor.	0	3	5		10	7	3.8	1.0	1
4. Regular meetings with mentor/supervisor helped enhance leadership development.	2	5	4		6	9	3.6	1.4	
5. The overall schedule for the Institute was workable for me.	1	2	3		10	10	4.0	1.1	
6. The year was filled with various/rich learning opportunities.	1	1	2		4	18	4.4	1.1	
7. I would recommend the Institute to coworkers/colleagues.	2	0	3		3	18	4.4	1.2	
Subtotal							4.1	.9	
Total							3.9	.9	

Note: Scale ranges: 1 = Strongly Disagree; 2 = Disagree; 3 = Don't Know; 4 = Agree; 5 = Strongly Agree. *M* = Mean; *SD* = Standard Deviation; NR = Non-Respondent

environment). The organizations at which participants were working were considerably more supportive (4.3) than coworkers (3.8). The lowest mean (3.6) was observed for the supervisory or mentoring question. The overall schedule seemed to be workable in that most of the respondents (22 of 26) felt that the yearlong Institute was filled with rich learning opportunities. Twenty-one (21) of the 26 participants would recommend the NLI to coworkers and colleagues.

2002–2003 Institute

There were four major scaled questions, with a total of 21 sub-questions embedded in them. As shown in Table 5, the average rating across all items was high (4.5), with individual item means ranging from 3.7 to 4.9. In particular, 18 of 21 items had average ratings over 4.0, with 12 attaining 4.5 or higher on the 5-point scale. Key results are highlighted below.

Features of the Institute. There were eight questions about the activities, speakers, scheduling, mentoring, etc. In light of the overall mean (4.5), the respondents gave a very favorable rating to the category. For most items, respondents chose the top two scale points for their responses. Ratings were high in relation to topics included in the Institute, speakers, and exposure to leadership ideas not usually available in local settings. Eighteen (18) of 19 respondents saw networking/interacting with other Scholars as an important feature. The majority felt that: the Institute had a reasonable mix of activities across the year; national meetings were well balanced in terms of activities; and the schedule was workable. Fourteen (14) out of 19 respondents saw mentoring as a good mechanism for leadership development, but it received a somewhat lower rating of 4.0 in this category.

Individual Leadership Plan (ILP). The four sub-items in this category included working on ILP and the extent of support from one’s home organization and co-workers. The overall average rating (3.9) was the lowest of the four categories in Table 5, but still was positive. Eleven (11) of the 18 respondents agreed or strongly agreed that their mentors provided appropriate guidance for the ILP, and 12 of 19 responded affirmatively that a practical ILP was produced. In terms of a supportive environment for participation in the Institute, the organization (4.2) was more encouraging than coworkers (3.7, the lowest mean for this set of items).

Outcomes. This category mainly dealt with the extent to which the objectives of the Institute (i.e., developing leadership capacity, leading change, developing a vision/mission for CTE, understanding the process of policy development, and understanding culture) were achieved for the year. Based on the average rating in the category (4.5), the results were quite positive. Specifically, over 16 out of the 19 respondents chose either the “agree” or “strongly agree” response options for all items.

Table 5. Results of the Scaled Items for 2002-2003 Institute ($n = 19$)

Item Statement	Frequency					M	SD	NR
	1	2	3	4	5			
1. Features of the Institute								
- Topics/subjects across the year were relevant to key CTE needs.	0	0	0	3	16	4.8	.4	
- A reasonable mix of activities (national/on-line meetings, feedback mechanisms, assignments, etc.) was used.	0	0	1	9	9	4.4	.6	
- Speakers/panelists during the year fit the objectives of the Institute.	0	0	0	4	15	4.8	.4	
- National meetings were evenly balanced (presentations, discussions, hands-on work).	0	0	1	7	10	4.5	.6	1
- The schedule for the year was workable/realistic.	0	0	0	5	13	4.7	.5	1
- Exposure was provided to leadership ideas not usually available in local environments.	0	0	5	10	4	4.0	.7	
- Mentoring was a good mechanism for leadership training.	0	0	1	3	15	4.7	.6	
- Networking/interacting with other Scholars was an important feature.								
Category Average						4.5	.3	
2. Individual Leadership Plan (ILP)								
- Appropriate guidance for the ILP was provided by my mentor/supervisor.	0	0	7	8	3	3.8	.7	1
- Management of my organization was supportive of this activity.	0	0	3	8	7	4.2	.7	1
- <i>Coworkers encouraged me throughout the year in this endeavor.</i>	0	2	7	5	5	3.7	1.0	
- A practical ILP was produced as a result of the NLI.	0	0	6	8	4	3.9	.7	1
Category Average						3.9	.5	
3. Outcomes								
- Leadership skills in CTE were enhanced.	0	0	1	6	12	4.6	.6	
- My ability to work with CTE reform and change improved.	0	0	0	10	9	4.5	.5	
- The Institute was an opportunity to develop a new vision for CTE.	0	0	2	8	9	4.4	.7	
- Understanding of how to influence policy increased.	0	0	1	4	14	4.7	.6	
- <i>Understanding the relationship of diverse cultures/populations to CTE was expanded.</i>	0	0	3	8	8	4.3	.7	
Category Average						4.5	.4	
4. Overall Perceptions								
- The Institute was well-managed/organized.	0	0	0	1	18	4.9	.2	
- Participating in the Institute was a good use of my time.	0	0	0	3	16	4.8	.4	
- The yearlong Institute provided a dynamic learning environment.	0	0	0	4	15	4.8	.4	
- I would recommend this experience to other CTE professionals.	0	0	0	2	17	4.9	.3	
Category Average						4.9	.3	
Average Across Categories						4.5	.3	

Note: Scale ranges: 1 = Strongly Disagree; 2 = Disagree; 3 = Don't Know; 4 = Agree; 5 = Strongly Agree.
M = Mean; SD = Standard Deviation; NR = Non-Respondent.

Overall Perception. This category attained the highest average rating (4.9). All respondents (19) agreed or strongly agreed across all sub-questions. The questions receiving the highest average (4.9) were “the Institute was well-managed/ organized” and “I would recommend this experience to other CTE professionals.” In addition, all respondents perceived that the Institute was a good investment of their time and that it was filled with dynamic learning opportunities.

Comparisons of 2001–2002 and 2002–2003 Institutes

Most of the scaled questions asked in 2001–2002 were similar to those of 2002–2003. A direct and fuller comparison of results on a number of selected variables from the scales used over the 2 years is found in Table 6. There are noticeable and dramatic differences in some of the categories included in the table.

First, overall perceptions of the 2002–2003 NLI were higher than those obtained for the earlier one. The total average rating (4.5) across all items in 2002–2003 Scholars was considerably above the 3.9 achieved in 2001-2002. Additionally, the overall perception of the 2002-2003 NLI was rated at 4.9 on the 5-point scale indicating a very strong level of satisfaction with what took place and evolved over the 12-month period.

In terms of general features of the NLI, a similar positive change pattern across the 2 years was noted. In every instance, substantial improvement occurred in the items portrayed in Table 6. This was not only good to see, it was also somewhat anticipated, based on the fact that NLI staff were using evaluation results from the 1st year to develop the agenda for the next set of NLI activities. Those modifications, which were incorporated into the 2002–2003 NLI, undoubtedly affected the quality of what was delivered and the subsequent ratings that emerged.

With regard to the Individual Leadership Plan (ILP), the results were the same for both years. It is important to stress that this aspect of the NLI is somewhat to quite a bit removed from the aegis and guidance of NLI staff. The causal chain of control and direction is stretched far thinner here than for other dimensions of this project. As was expected, results here were lower than staff would have liked, and probably represent a more mixed implementation in the field. Recommendations for how this might be handled in the future are supplied at the end of this report. Furthermore, it is interesting that the organizations where participants were working were considerably more supportive than coworkers.

Table 6. Comparisons Between 2001–2002 and 2002–2003 for Selected Similar Scaled Items

Item Focus	Mean Value in 2001–2002 Institute	Mean Value in 2002–2003 Institute
Total Average Rating Across All Items	3.9	4.5
Overall Perceptions		
Provision of a dynamic learning environment	4.4	4.8
Recommendation to other CTE professionals	4.4	4.9
Workability of overall schedule for the year	4.0	4.3
General Features of the Institute		
Topics and subjects	3.6	4.8
Balance of activities	3.8	4.4
Speakers and panelists	3.6	4.8
Individual Leadership Plan (ILP)		
Mentor’s/supervisor’s assistance for ILPs	3.7	3.8
Development of ILP plans	3.8	3.9
Organizational support for Institute	4.3	4.2
Coworker’s support for Institute	3.8	3.7

Evaluation Results for the Open-Ended Questions

Open-ended questions can be classified into three broad categories across all of the evaluations: beneficial aspects and best features of the Institute, areas needing improvement or recommendations for further meetings, and use of information or impact. The open-ended data were analyzed by grouping responses into meaningful themes and categories. The results for each category are presented in terms of themes and highlights.

2001–2002 Institute

Beneficial Aspects of the Institute. A similar item was incorporated into all evaluation activities to get a sense of what “works” in the NLI. As presented in Table 7, the standout features were the following: networking with other Scholars and leaders in the field, federal policy and legislation processes, and deeper understanding of CTE issues. One of the most frequently cited positives in regard to this question was networking and interacting with diverse people from around the country during the NLI. According to the follow-up evaluation, many respondents indicated that those connections were still maintained a year after the completion of their NLI. The focus on policy in the Washington, DC, meeting and exposure to CTE-related issues and concerns were viewed as the most rewarding experiences. Webcasts were seen as a way to stay connected during the year.

Table 7. Beneficial Aspects—2001–2002 Institute

	1st Meeting	2nd Meeting	Final Meeting	Follow-Up Evaluation
Themes	Leadership	Policy content	Developing CTE vision and leading change	
Highlights	Networking/ interacting Nationally renowned speakers Learning about leadership	Networking/ group interaction National speakers/panels CTE policy issues and Legislative processes Site visits Webcasts	Networking/ interacting Professional growth Meeting in Washington, DC Awareness of CTE resources Webcasts	Networking/ interacting Policy exposure/ CTE issues Leadership development Meeting in Washington, DC

Areas Needing Improvement or Recommendations for Further Institutes. This question was included in the evaluation forms for all meetings (see Table 8). A more interactive mode of learning and the facilitation of the program were frequently mentioned in this category. In the 1st meeting, participants perceived that lectures dominated, and there were not enough interactions among participants and presenters. In the Washington, DC meeting, tight scheduling and the need for more flexibility were cited. In the final meeting, the majority stated that an additional face-to-face meeting would have facilitated more networking and interaction. Lastly, mentorships in connection with developing Individual Leadership Plans did not appear to work out as well as intended.

Table 8. Areas Needing Improvement—2001–2002 Institute

	1st Meeting	2nd Meeting	Final Meeting
Themes	Interactive mode of learning Selection of presenters	Schedule management Meaningful site visits	Facilitation of the program Mentorship
Highlights	Broader content More diverse speakers Interactive and engaging learning Internship and mentoring	Tight schedule More careful selection of site visits Too many panels Assignments (time constraints)	More time for networking/interaction Selection of mentor More face-to-face meetings

Use of Information Learned or Impact of the Institute. The questions in this category are related to outcomes resulting from participation in the NLI. They were part of the second meeting evaluation and the follow-up evaluation. Based on participation in the NLI, respondents reported short-term endeavors such as sharing knowledge, educating coworkers, broadening CTE perspectives, and gaining confidence of their leadership in CTE and taking leadership responsibilities, accordingly (see Table 9).

One of the greater long-term impacts on participants was that now they possessed more positive attitudes of the field and were even greater supporters of it. The Scholars felt that their leadership skills had improved and they had greater confidence in their ability to provide leadership. They also wanted to expand partnerships with other CTE

constituencies and the rest of education, promote the viability of CTE, enhance the future-orientation for the field, and find ways to improve student achievement.

Table 9. Impact of the Institute—2001–2002 Institute

	2nd Meeting	Follow-up Evaluation
Themes	Enhancing relationship with other constituencies Short-term changes	Short-term changes Long-term impacts
Highlights	Increasing partnerships with policy makers, professional organizations, and business/labor Educating colleagues Sharing information Clarifying the role of CTE Helping long-term planning	Sharing information Taking leadership roles/Promoted based on participation Broadening CTE perspectives/ Continuing further education Gaining confidence of CTE/Greater supporter for CTE/Improving viability of CTE More future-oriented mindset

2002–2003 Institute

Open-ended questions, as noted for the prior year, may be classified into three broad categories across the four national meetings: beneficial aspects and best features of the Institute, areas needing improvement or recommendations for further meetings, and use of information or impact.

Beneficial Aspects of the Experience. In Table 10, themes emerging from responses are presented. From an inspection of the table, it was apparent that the four meetings had common threads. The most frequently cited one, as was the case in the results from the previous year, was networking and interacting with Scholars and nationally recognized leaders. Other important themes were: delving into critical CTE issues and enhancing one’s leadership knowledge and skills. Participants were able to broaden their perspectives. Of the four national meetings, the Washington, DC meeting was recognized as the most beneficial in that it supplied a unique national-level viewpoint. It also stood out due to the fact that it contained dynamic and distinctive interactive experiences.

Table 10. Beneficial Aspects—2002–2003 Institute

	1st Meeting	2nd Meeting	3rd Meeting	Final Meeting
Themes	Leadership awareness	Leadership and diversity	Policy processes	Vision and change
Highlights	Networking and interacting Speakers Learning about leadership	Networking/interacting Webcasts Speakers Mentorship Resources Food/facilities	National speakers/panels Resources Visits with policy makers Visits with the press CTE policy issues Networking and interaction Webcasts	Networking/interacting Vision/mission development Change strategy

Areas Needing Improvement or Recommendations for Further Institute. The common themes were: program scheduling and facilitation, more time for interaction, and reflection (see Table 11). There was a clear message that daily activities generally were too long for participants to easily contemplate and digest content and ideas, and that more time for interaction was needed. To some extent, mentorship was cited as a part of the NLI that was not working as well as it might due to time constraints. A few of the Scholars indicated more attention should be paid to selecting speakers/panels and schools to be visited.

Table 11. Areas Needing Improvement—2002–2003 Institute

	1st Meeting	2nd Meeting	3rd Meeting
Themes	Facilitation of the program Selection of presenters	Dynamic learning environment Time matters	Facilitation of the program Length of Institute activities
Highlights	Scheduling More diverse speakers Critical CTE issues Internship and mentoring	More time to interact and reflect More relevant panel Shortening the day Mentoring issues More individualized contact	Too many activities within limited time Field trips to schools with exemplary programs Shortening the day

Use of Information Learned or Impact of the Institute. The questions in this category were part of the evaluations of the second through the final meetings held for the 2002–2003 Scholars, with special emphasis being placed on this question at the final meeting. There was evidence that participants implemented some specific and short-term activities right after each meeting such as: presentations, holding meetings in their locations, training others, and helping with the development of strategic plans and projects. As a result of their participation, they also noted that building partnerships with other constituencies would be beneficial and that they would be more willing to assume leadership roles in CTE. Positive attitudes toward change and more confidence and passion for CTE were imbedded in their comments and are seen as a good sign from the perspective of potential long-term impact (see Table 12).

Table 12. Impact of the Institute—2002–2003 Institute

	2nd Meeting	3rd Meeting	Final Meeting
Themes	Knowledge sharing/ dissemination	Building partnerships Utilizing knowledge	Short-term changes Long-term impact
Highlights	Educating coworkers Helping with strategic planning	Enhancing relationships with other constituencies Sharing information	Training colleagues Presenting papers Broadening perspectives of CTE Gaining positive attitudes toward change More education/career advancement More confidence and passion for CTE

Comparisons of 2001–2002 and 2002–2003 Institutes

Based on the responses to the open-ended questions, similar patterns and attitudes were noted over the 2 years and two groups of Scholars. A brief summary of them is presented below.

In the 2001–2002 NLI, although the planning for the Institute was good and intended outcomes were generally achieved, there was still a need to revisit original conceptualizations and to streamline the execution of the program in a practical manner. Taking into consideration that the NLI was in its 1st year of implementation, a reasonable and solid start had been made. Certainly some unique characteristics of the Institute made an impression on the participants—particularly the Washington, DC, meeting and the webcasts. There were also many suggestions and ideas for program improvement that were primarily focused on program design and implementation.

In the 2002–2003 NLI, participants were quite supportive of the experience—particularly as to how it clarified their vision of the CTE field. In addition, they appreciated the fact that the NLI afforded opportunities not readily available in local settings (i.e., interacting with CTE leaders and respected Scholars from across the nation, learning about policy-making and the legislative process). The results from the 1st year were quite positive, and changes predicated upon them created an even better NLI experience in the 2nd year.

On the other hand, mentoring—a feature of the NLI that was not under the direct control of its staff—did not work as well as intended. This result was consistent for both groups of Scholars.

In light of the responses over the 2 years, there was a clear message that the NLI provided a solid foundation. For the 59 Scholars, it established a basic infrastructure (i.e., forming professional networks, exposure to new resources and leading edge scholars). It enabled them to share knowledge, disseminate (i.e., training colleagues, presenting papers, involving professional organization activities), and form more positive attitudes supportive of CTE. They were more willing to take an active role in advocating for CTE and implementing activities such as increasing more widespread partnerships for the field. They indicated that they additionally carried out some concrete, short-term activities immediately after participating in the meeting.

Conclusions

Based on the outcomes of the scaled items and responses to the open-ended questions, 2nd-year participants were very supportive of the experience and even more so than the 1st-year respondents had been. This perception appeared to come from the fact that the NLI in the second year was implemented more effectively. In both years, the Institute afforded exposure to ideas, concepts, and speakers that were not and could not be readily available or found in local settings. For example, interacting with leaders in CTE and respected Scholars from across the nation, enriching/broadening perspectives beyond the CTE field, understanding policy formation, and external factors surrounding the field were all unique to the Institute.

Secondly, over a 2-year period, the organization and structure of the entire experience was improved by project staff. The year-end ratings serve as ample proof of the effort made in the 2nd year to provide an enhanced learning experience. Given these results and the perception that participants felt that they still needed more time at the meetings to fully absorb the content and reflect on what they were learning, it may be that only fine-tuning types of adjustments need to be made in future Institute types of endeavors.

As to impact, participants perceived personal and professional growth, and were empowered to assume leadership roles to the field. More than simply having expanded knowledge, they expressed a willingness to commit to changing and developing the nature of career and technical education.

Overall Recommendations

From these results, as well as having examined the individual and detailed evaluation reports over the years, the following recommendations are made:

1. While it is clear from the data that the second NLI went well and was noticeably better than the 1st year of this project, the number of participants dropped about 25%. Given the quality that is now in evidence, more effort might be devoted in the future to recruiting a larger and perhaps an even more diverse group of Scholars.
2. More in-depth and follow-up study should be conducted to learn about the long-term impacts of the NLI. In that regard, questions could focus on the direct effect on the organizations in which participants work, the contributions they make that enhance the

quality of the workplace, and their perceptions of growth attributable to their NLI involvement.

3. Attention should be given to the nature and extent of the mentoring activity. Sometimes it was effective and sometimes it was not. Although it was not under the direct control of the Institute staff, ways should be sought to improve how it takes place, its overall efficacy, and how it could be better facilitated by the staff. Perhaps what is done in the future could focus more on the role of the mentors and how their work with and assistance to Scholars promotes the advancement of CTE.
4. In terms of reflection, quite different activities could be interjected into the meetings. Examples might be: reflective panels made up of and orchestrated by participants; the use of reflection types of evaluation instruments; and participant-led focus group types of interviews.
5. By adding activities such as those described in point 4 above or others, the flow and pacing of what is already a well-received NLI experience would be even better.
6. There are many additional and useful details in the evaluation reports for each specific meeting. Project staff are encouraged to review those reports for other input and ideas for leadership activities that might be offered in the future.

Appendix W

Follow-Up Evaluation
National Leadership Institute for 2001–2002 Scholars

James W. Altschuld and Yung-Chul Kim

Introduction

A follow-up evaluation of 2001–2002 scholars was conducted to ascertain the impact on them of the National Leadership Institute. The evaluation occurred a little more than a year after they were formally involved with the Institute. It was felt that understanding perceptions regarding the benefits of participation would be helpful. The evaluation was summative in nature.

Method

An e-mail survey was distributed to 32 1st-year scholars except for one who did not have a working e-mail address. Two follow-up reminders were sent as part of the survey process. A total of 14 responses were received.

The survey employed open-ended items to allow respondents to explain their feelings. The open-ended questions dealt with perceptions of: (a) meaningful aspects of the experiences they had through the Institute; (b) short-term changes that they would attribute to being part of it; and (c) long-term effects that might result from their participation. (See Exhibit 1 at the end of this report for the survey form). The written commentaries from the participants were carefully examined and grouped into categories. The results are provided in Table 1, which starts on p. 4.

Results

Meaningful aspects of the Institute. Institute features that stood out were: networking with other scholars and leaders in the field, exposure to federal policy and legislation, and more in-depth understanding of CTE issues. One of the most frequent themes emerging from this question was the idea of networking and interacting with diverse people from around the country. Further, many respondents indicated that those connections were still in place even a year after they had completed the Institute. The focus on policy at the Washington, DC, meeting was definitely a highlight of the year, and the exploration of key CTE issues and concerns was viewed as particularly rewarding.

The following statement illustrates some of the above points:

The National Leadership Institute (NLI) has been an extremely meaningful experience. I am sure when I look back 2 or 3 decades from now I will point to it as a significant turning point in my professional career. What stands out most for me are: (a) a more comprehensive understanding of the issues and problems faced within, and by, Career and Technical Education (CTE), particularly at the K–12 level; (b) the diversity of the backgrounds of those involved in CTE makes it both challenging and exciting; and (c) the

creation of a peer network of aspiring leaders in CTE that should hold the education profession in good stead.

Short-term changes. Based on participation in the Institute, respondents reported that they did such things as passing their knowledge on to others and performing various leadership activities. For example, they shared information and resources with colleagues or used the experience to develop a professional paper. The impact of the Institute went beyond just expanding cognitive understandings. It affected their attitudes in unique ways—enhancing their confidence in relation to working in CTE and motivating them to seek further education. In terms of actions, they were willing to more fully assume leadership positions and, in some cases, they were promoted. Some of the short-term activities noted by respondents were:

It was nice to have solid (data) information to share with coworkers about CTE and the new research that helps justify to the policy drivers that CTE does work.

The experience broadens my perspective of CTE. It empowered me to be more confident in my ability to speak about CTE and make sound decisions regarding its implementation.

Not only do I think locally, but also globally. I feel at ease speaking to policy makers—from local school boards to national leaders. At the same time as the institute, I completed an Ed.S. in Educational Leadership. The combination has opened doors for me in the CTE field, as well as strengthening my current position.

When I began the NLI, I was a program consultant for the _____ State Board of Education and now serve as the CTE State Director for _____. There is no doubt in my mind that my participation in the Leadership Institute provided me with an edge on this promotion.

Participation in the NLI inspired me to become involved in my state organization and to organize and chair a new committee at my college for CTE Advisory to the Academic Senate.

Long-term impacts. Perhaps the greatest impact on participants was that they possessed more positive attitudes toward the field and became even greater supporters of CTE, as their leadership skills grew and they gained greater confidence in their ability to actually lead. In turn, they noted that they were becoming increasingly involved with professional organization activities. They now see the need to partner with other CTE constituencies, and the rest of education, to promote the viability of CTE, and to seek ways to improve student achievement. The statements below are indicative of their thoughts:

I will be more proactive in support of CTE, and will look more aggressively for opportunities to promote it. I did gain a greater sense of self-confidence in discussing and promoting CTE as a result of this experience.

Modeling leadership behaviors learned in the institute

Solidarity across states, institutions, individuals working in CTE

_____’ efforts are focusing on improving the viability of CTE and the role it plays in improving student achievement. _____ recently became the 30th state to join the High Schools That Work consortium under my leadership.

I think that the NLI and the continuation of this project will have a great long-term impact on CTE as the network of NLI graduates continues to move upward and outward in their positions as related to CTE promotion and leadership.

Conclusions/Recommendations

The majority of respondents are very positive about working as leaders in the field and actively searching for mechanisms to grow as professionals based on the NLI experience. There is a clear and consistent message that the Institute provided a solid foundation—from the basic infrastructure (i.e., networking and provision of resources), to sharing and disseminating knowledge (i.e., training others, presenting papers, involving themselves in professional organization activities), to being active in advocating for CTE, and to becoming proactive or more future-oriented (encouraging the formation of broader, rather than insular, partnerships).

Based on the findings of this evaluation, we would recommend:

3. A subsequent follow-up evaluation, several years from now, might be conducted to determine the long-term, subtle effects on the 33 1st-year and the 26 2nd year participants.
2. Other alternatives for evaluation might be considered even though they would require more human and fiscal resources. Probing interviews would be useful to understand how the Institute affected the mindset of participants. To what extent did they maintain the contacts they established through the NLI? Did they continue to be active pursuers and users of information? What was the nature of changes in their leadership activities and style? How successful were these changes? Were they able to create and sustain change within their organizations?

Table 1. Organized List of Responses to Open-Ended Questions (N = 18)

1. Meaningful Aspects of the Institute

Themes	Responses
Networking	<p>The relationships that were built with others. It was important to meet those who construct CTE policy and drive it on a national level. Any time you get to converse with 33 scholars from 11 different states is a real benefit.</p> <p>The Institute was successful in connecting people from around the country that isn't possible through the national conference circuit. I have made friends that I can call on for technical and moral support to further the advancement of CTE.</p> <p>Networking—The group still maintains contact, but not as much.</p> <p>Building networks across the U.S.A.</p> <p>The connections I've made with other people. Gathering together people who were involved in technical education, not only at a postsecondary level, but also at secondary and state levels, proved to be an invaluable way to learn.</p> <p>Connections to other CTE people across the U.S.</p> <p>Networking with CTE professionals</p> <p>The scholars from the first NLI group formed a cohesive alliance that enabled us to network on a professional and social basis. This networking has continued to a degree even over a year after the end of our participation in NLI. We were also able to form a network with staff of NCCTE who have been a constant source of information, expertise, and support for what we do on a daily basis.</p> <p>I enjoyed meeting and having conversations about Career and Technical Education with folks from around the country. It was interesting to see various perspectives of “how” and “what” CTE is for others outside my state.</p> <p>The diversity of the backgrounds of those involved in CTE makes it both challenging and exciting</p> <p>The creation of a peer network of aspiring leaders in CTE that should hold the education profession in good stead.</p> <p>Meeting other members of the group—dialogue and networking.</p> <p>The NLI provided for the establishment of a working network of</p>

like-minded professionals and the opportunity to develop a common vision for CTE.

Policy exposure

The Washington, DC, agenda

The meeting held in January 2002 in Washington, DC was awesome! The focus on policy issues allowed us to meet and debate with national leaders from a variety of organizations/ associations. This first-hand exchange of information was invaluable.

The most rewarding experience was the Washington, DC trip. The sessions were great and it was very nice to hear from the decision makers. I was dreading, but really enjoyed, meeting with policy makers. This was a new experience for me, and I felt empowered.

The Washington experience and the working meeting in Scottsdale were outstanding and will always be of value to me.

Learning to advocate at the federal level; visiting with policy makers.

CTE-related issues

The resources that you can call upon to help drive CTE resources

Awareness of all facets of CTE education

Understanding how the system and the issues vary from state to state

Awareness of the politics of CTE and Perkins legislation

The wisdom, experience, and energy that were generated during discussions provided me with the most meaningful learning experiences. The speakers, workshop facilitators, and lectures stimulated conversation and debate, but the most valuable information usually evolved from discussion with other participants. It was also wonderful to be able to validate my personal experiences and beliefs with regard to Technical Education by sharing experiences and identifying specific trends.

A more comprehensive understanding of the issues and problems faced within, and by, Career & Technical Education (CTE), particularly at the K—12 level.

Leadership development

I developed my skills and confidence as a leader in the policy arena on behalf of CTE.

There is such a void of leadership in CTE that its survival is in question. The Institute brought together a group of practitioners who understand the application of CTE principles, the students being served, and the tenor of local communities. Unfortunately, we are in an era when only those from the traditional educational path are recognized as experts. If the Department of Education and others are going to listen only to those with Ph.D. after their names,

the Leadership Institute needs to look at ways of offering a degree to practitioners. Far too many of the “insiders” are theorists who themselves have experience only academia.

Others

The speakers and presenters

Dialoged with national leaders

My mentoring experience

The National Leadership Institute (NLI) has been an extremely meaningful experience. I am sure when I look back 2 or 3 decades from now I will point to it as a significant turning point in my professional career.

2. Short-Term Changes

Themes	Responses
Sharing information with coworkers and generating papers	<p>It was nice to have solid (data) information to share with coworkers about CTE and the new research that helps justify to the policy drivers that CTE does work. It was imperative to share with others the Bush administration’s vision of CTE.</p> <p>Unfortunately, I am doing the same job that I did when I was in the Institute. Also, I have not been given any greater leadership capacity at the ____ Department of Public Instruction since I “graduated” from the Leadership Institute. Upon returning from Washington, I had an opportunity to share some of what I learned with a small group of our local CTE administrators.</p> <p>I have used the related content in multiple state and local presentations. I have shared with colleagues many of the experiences of this workshop, recruited new potential participants, and have been active in supporting CTE whenever and wherever possible.</p> <p>The information and material I gathered at NLI</p> <p>Contributing author to the report, “The Status of Occupational and Technical Education In ____'s Community and Technical Colleges, National Research Center for Career and Technical Education, University of ____, May 2002.</p> <p>Specific quotable or reference-able knowledge</p> <p>To begin developing a position paper on using data to make CTE more visible within the education profession</p> <p>Helped developed a Comprehensive Perkins Database for the ____ postsecondary education system</p>

Taking leadership roles	<p>I have been willing to accept leadership positions in professional organizations because I feel like I have a lot to contribute as a result of the NCCTE Leadership Institute. It has been about professional growth.</p> <p>Participation in the NLI inspired me to become involved in my state organization and to organize and chair a new committee at my college for CTE Advisory to the Academic Senate. I am now a member of the Business Education State Advisory Committee.</p> <p>Due to the experiences I had with the Institute, I allocated resources to implement (State) Career & Technical Education Leadership Institute beginning July 2003.</p> <p>Starting January 2004, I will begin helping Perkins-affiliated post-secondary institutions lead, develop, manage, and formulate their local plans based on data and research.</p>
Broadening perspectives	<p>Not only do I think locally, but also globally. I feel at ease speaking to policy makers—from local school boards to national leaders. The combination has opened doors for me in the CTE field as well as strengthening my current position.</p> <p>I'm not sure that it is anything tangible. The experience has become part of my way of operating. I have a broader understanding of CTE and leadership. I know how to advocate.</p> <p>Provided a lens from a national perspective on the challenges CTE faces</p>
Stimulating my desire for further education	<p>Continued my education</p> <p>While attending the Institute, I completed an Ed.S. in Educational Leadership.</p> <p>Also, this experience enriched my doctoral program in education administration. I believe I was able to get more out of some of my classes as a result of my experience.</p>
Gaining of CTE confidence	<p>Gained credibility while maintaining a voice from the trenches</p> <p>The experience broadened my perspective of CTE. It empowered me to be more confident in my ability to speak about CTE and make sound decisions regarding its implementation.</p>
Promoted based on participation	<p>When I began the NLI, I was a program consultant for the _____ State Board of Education, and now serve as the CTE State Director for _____. There is no doubt in my mind that my participation in the</p>

Leadership Institute provided me with an edge on this promotion.

I've moved around within my educational institution, and the knowledge I gained from the Leadership Institute allowed me to promote and defend Technical Education with more conviction. I've been able to reference people, studies, statistics, and best practices on a national level, and this helps reinforce the importance of providing technical career choices to students of all ages. The legislative information that we gathered in Washington also made me much more aware of legal processes and procedures, and how career and technical education is created and impacted at a national level.

Others

Ready access to most current CTE research findings

Cannot think of anything specific

3. Long-Term Impacts

Themes	Responses
Support of CTE	<p>I will be more proactive in support of CTE and will look more aggressively for opportunities to promote. I did gain a greater sense of self-confidence in discussing and promoting CTE as a result of this experience.</p> <p>Depends on the level of commitment from NLI and their resources to keep scholars "in the know." I have committed my professional career to CTE. I don't know if NLI had that great of an impact on that decision. I do know that through NLI I learned a great deal about leadership and how to create an environment to promote CTE to others.</p> <p>I have become more of an advocate for CTE as a result of my experience. Students in my part-time teaching job at _____'s business and marketing education teacher education program have benefited from my experience. I have tried to instill in them a greater sense of dedication to the CTE profession than exists in the minds of many of our classroom teachers.</p> <p>To advocate to different constituent groups that CTE goes beyond just blue-collar production work.</p> <p>More active in advocating for CTE (2)</p> <p>Enhanced my ability to serve as an advocate and proponent of CTE, and improved my level of confidence in the ability to provide leadership.</p>

Right now I'm a Minority Student Advisor at _____ Community and Technical College. I find that students who are new immigrants have a higher success rate in career and technical education programs than they do in liberal arts. I'm sure this is because they are able to put their academic learning to use in lab situations, and this reinforces the lecture information. However, most students are unaware of the range of opportunities that are available in the United States with regard to jobs. They tend to focus on jobs that were prominent and pay well in their own countries—such as doctors and lawyers. Consequently, they often seek other options only after they've failed in the more traditional courses. This puts their academic and financial aid status in jeopardy and causes them untold stress and concern. I am a big advocate for technical career choices and I am in a position to help them achieve success in college through career choices that match their financial needs and personal abilities

Improving the viability of CTE

We in _____ are meeting with state legislators on additional revenue for CTE. This past session we were able to secure permanency on legislation in support of a local levy for CTE. Every school board in _____ approved the levy.

_____ ' efforts are focusing on improving the viability of CTE and the role it plays in improving student achievement. _____ recently became the 30th state to join the High Schools That Work consortium under my leadership.

Perhaps more visibility of CTE among policy makers

Increased quality of programming

More dynamic and focused vision of the future

The need to have CTE judged by the same criteria as other components of education

The importance of developing a common knowledge base that links CTE to the rest of education

Professional growth

More connection with professional organizations

Increased current and future opportunities to be influential without seeking a higher-level administrative position so as to avoid being too insulated from end-users.

After attending the Institute, I was a presenter at state and national conferences.

I have become more active in my school, my state, and also in attending national CTE conventions and meetings. I have also

joined and become active in professional organizations for my students: IAAP and AAMT.

Modeling leadership behaviors learned in the Institute

Besides the many friends and connections that I made during my year in the Leadership Institute, I received a medal from my college during Staff Development Day and a letter of recognition signed by the college president. I've also added it to my speaker bio and resume, and used the experience to promote development of career and technical leadership opportunities on campus

Enhancing partnerships

I have initiated new programs and certificates with other colleges in my geographic area to maximize the student population. Due to our severe budget situation, promoting the need for CTE programs needs to be a collaborative effort.

I understand that a majority of the scholars are in the age group of 45–55, and they are the drivers and decision makers for their organizations. However, it's imperative to market and recruit the next generation of CTE members. It was obvious that recruitment of the next generation was completely omitted by the makeup of the last group. I am not against new efforts to revitalize the CTE movement in existing circles; however, the effort to mobilize and educate others outside the circle needs to be a crucial factor if CTE is going to survive.

Solidarity across states, institutions, and individuals working in CTE

Others

Effective advocacy

Better grasp of resources

I won't forget the great experience and friendships. I miss the travel, dialogue, and support.

Local impact and limited national impact. The group was small.

I think that the NLI and the continuation of this project will have a great long-term impact on CTE as the network of NLI graduates continues to move upward and outward in their positions as related to CTE promotion and leadership.

Exhibit 1

**Follow-Up Evaluation
National Leadership Institute for 2001–2002 Scholars**

1. Reflect on the National Leadership Institute experience. What still stands out as most meaningful to you?

2. Describe how the Institute may have affected your work in CTE to date? Be specific (such as: “used content in a talk”; “trained coworkers on a technique (specify) from the Institute”; “was promoted based upon participation”; “continued my education” and so forth).

3. What do you see as the long-term (3–5 years out) impact of the National Leadership Institute on you (such as: “more active in advocating for CTE,” “changed attitude about CTE,” etc.) and on CTE (such as: “increased diversity of students,” “enhanced quality of CTE programs,” etc.)?

Impact on You:

Impact on CTE:

Thank You Very Much!