



Utah
Career and Technical Student Organizations (CTSO)
Advisor Handbook

Updated April 2026

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Policies and Procedures

The state CTSO Advisors will review and implement the current version of the Utah CTSO Policies and Procedures manual each year. The document can be found in the CTSO OneDrive.

Calendaring and Fee Spend Plans

By August 1 of each year, State Advisors will submit the next school-year event summaries to the CTSO manager at the Utah State Board of Education (USBE). Detailed calendaring information will be provided to CTE Directors and event summaries will be displayed on the USBE CTE website.

Event summaries must include dates, locations, costs, and meal information for each CTSO sponsored event. A spend plan for each student fee that will be collected for the year must also be submitted detailing what the fee covers (ex: meals, support for the conference, etc.)

Leadership Training Institute (LTI)

A Leadership Training Institute is held each year in early June for all incoming CTSO State Officers, State Advisors, and the state staff member over student officers. This purpose of the training is to teach leadership principles to the student officers, set goals for the year, and work on calendaring and scope of work for the upcoming school year.

This leadership training is sponsored by the Career and Technical Education Department at the Utah State Board of Education. Registration fees (including hotel, meal, speaker costs, etc.) may be required depending on the budget for that year. Each year one of the state CTSOs helps to run and organize the training. The rotation is generally in alphabetical order (with exceptions for scheduling conflicts), for example:

2027 – SkillsUSA
2028 – TSA
2029 – DECA
2030 – Educators Rising
2031 – FBLA
2032 – FCCLA
2033 – FFA
2034 - HOSA

Evaluations

At the end of each school year the State Education Specialist, in collaboration with the CTSO's Advisory Board, conducts a State Advisor evaluation. Those surveyed for the evaluation should include

school advisors for the CTSO, Advisory Board members, and industry partners. It may also include students involved in the CTSO and parents of students.

The State Education Specialist, in collaboration with the CTSO State Advisor, will also conduct evaluations of state staff paid through State CTSO Management funds. These evaluations will be used to update the scope of work for state staff in the new school year and/or as part of the salary negotiation for the new school year. Determination of contract renewal status is also determined through this evaluation process.

Evaluations should be completed by May 31 of each year. Completed state staff evaluations should be documented and retained by the State Education Specialist per the USBE retention schedule.

Financial Review

It is required that each organization has a financial review from a third-party vendor each year. The review will help ensure each organization is using the most up-to-date accounting practices and that all finances are appropriate. A copy of the financial review must be submitted to USBE upon completion of the review. For FY27 the recommended accounting firm is Child Richards.

Ryan Child or his staff

Phone: 801-621-0440:

Email: ryan@childrichards.com

Address: 2490 Wall Ave, Ogden, UT 84401

Insurance

It is required that each CTSO carry their own liability insurance policies. The Utah State Board of Education will help with the cost of this insurance (pending available funding) through the CTSO budget and reimbursement requests in the Utah Grants System. Some general guidelines are to have several million dollars in liability per event and that the policy covers both the CTSO in general and members of your Board.

Biennial Program of Quality Reviews

USBE will conduct a Program of Quality Review of each CTSO every other year (in even years). This review will focus on quality standards including operation and organization, program management, and fiscal management. The standards for review can be found in the CTSO OneDrive. A survey of local chapter advisors and CTE leaders throughout the state will be conducted by USBE prior to the review and results will be provided to the CTSO State Advisor for discussion as part of the review. The State Advisor, organization Fiscal Manager, and State Education Specialist must be part of the formal review. Other staff may be included as needed. The findings of the review should be discussed with

the organization Advisory Committee. The organization is responsible for implementing any improvement plans that result from the reviews.

Membership Monitoring

Each year CTSO membership is collected and evaluated as part of CTE funding and membership trends.

State Advisors report membership to USBE on November 15 and April 1 of each year. State CTSO Advisors are asked to pull this membership data from their national office on or as close to these dates each year.

State Advisors are asked to organize the data in an Excel spreadsheet in the following format and upload the data in MOVEit (the secure USBE file transfer system) [here](#): in order to comply with Family Education Rights and Privacy Act (FERPA) regulations to protect student personal information. The spreadsheet template is in the shared OneDrive for CTSO Advisors under the forms file. Please organize information using the following format.

Year	Org ID	Organization	ChapterID	Chapter Name	MembershipID	Last Name	First Name	Grade	Male/Female
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The organization IDs are:

- 1=FFA
- 2=FBLA
- 3=FCCLA
- 4=HOSA
- 5=DECA
- 6=Skills USA
- 7=TSA
- 8=Educators Rising

When reporting the data, please **highlight any new chapters** (numbers that have not been used in the past). These new chapter numbers need to be identified as new in the reporting system. If there is a school that has been a chapter in the past, but has not had students for several years, please identify these chapters as new so we can check to make sure their number is already in the Data Gateway.

Membership numbers are uploaded into the USBE Data Gateway where CTE Directors can see the student numbers and information for their Local Education Agency (LEA).

Scope of Work/Yearly Agreements

Grant Application

Each year the CTSO State Advisor, in conjunction with their respective Advisory Boards and the State Education Specialist, must complete the CTSO Grant Application and apply in Utah Grants. Please visit the arts of the [USB E website](#) for Utah Grants resources.

When completing the CTSO Grant Application, consider the following:

Authorized Signatures:

The Utah Grants Management System requires two distinct roles that should be assigned as follows:

- The Creator – this should be the organization’s fiscal manager. The creator will enter applications and reimbursement requests in the system.
- The Approver – this should be the organization’s state advisor. This person is the main point of contact for the grant. The approver will approve and submit items in the system. Correspondence for the grant will be sent to the approver.

Project Abstract:

The project abstract is a narrative that should provide detailed information about the organization and how it serves the students of Utah. You should include the following points in detail with specific examples:

- How your CTSO connects to Utah’s Career Clusters and Career Pathways.
- Your CTSO’s goals and plan of work/activities for the fiscal year.
- How your CTSO will work in collaboration with business and industry partners to further your goals.

A partial sample answer might be:

“Utah DECA is a co-curricular organization that connects to the national Business Management and Entrepreneurship; Financial Services; and Marketing Career Clusters. It specifically ties to the following Utah Career Pathways: Broadcasting and Digital Media, Graphic Design and Communication, Finance, Business, Hospitality & Tourism, and the Marketing pathways. Many of our students are recruited from these courses. All of our competitive events tie to these pathways. Utah DECA provides real world opportunities. Utah DECA provides training in leadership, communication, interpersonal communication, and business principles for students. The organization works closely with Business and Marketing teachers across the state in all business and marketing classes to provide opportunities

to further enhance student learning and growth. "

A partial sample answer might be:

"FCCLA has set the following goals and plan of work for the 2026-2027 school year:

1. Promote chapter and state participation in the FCCLA National Programs particularly the Student Body National Program. We will increase participation by 5% through information and promotion of this program.
2. Promote leadership development through participation in the 2026 Fall Leadership Conference.
3. Promote the statewide FCCLA service initiative. Each year the state officers choose a service initiative. This year it will be raising funds and working with the Salt Lake Ronald McDonald House.
4. Promote chapter and state recognition program focusing primarily on Four Star Chapter.
5. Increase STAR Event competition participation by 10%.
6. Promote chapter fundraisers to boost the image of Family and Consumer Science (FCS) by featuring them on social media.
7. Inspire members to apply for scholarships through the national organization and Utah FCCLA through social media, email, and other marketing measures.
8. Promote chapter outreach to increase business and industry support. Teach this at Fall Leadership and promote during the year. Recognize a chapter that has increased business support.
9. Publish and distribute public relations materials three times per year.
10. Motivate students to be active FCCLA members in their chapters and to pursue leadership positions. Advertise this effort at Fall Leadership and promote on social media each month.
11. Provide professional development opportunities for chapter advisers several times a year. Trainings will be provided during the summer FCS conference, Fall Leadership, Regional Competitions, and with the development of an online course.
12. Form partnerships with Utah Association of Family and Consumer Science in promoting "Say Yes to FCS".

A partial sample answer might be:

"Utah HOSA works with the National Pediatric Cancer Foundation. This was selected by HOSA FHP as the national service project. Utah HOSA has a strong partnership with the following local companies ARUP Blood Services, HOPE 4 Utah, Ronald McDonald House in Salt Lake City, and other local food and care coalitions for the homeless. Utah HOSA has worked with these organizations for various local service projects and events. In addition, Utah HOSA is partnering with the Salt Lake County Medical Reserve Corps to provide additional hands for their service projects while they will be attending our Fall Conference to provide breakout sessions, including "Stop the Bleed". We are the pilot state for the National Library of Medicine's Health Literacy Ambassador Certification. Utah HOSA works closely with Intermountain Healthcare, who provides scholarships and judges at the State Leadership Conference. Another major

sponsor of Utah HOSA is the Utah Hospital Association. They have a member that serves on our Advisory Board and provide support at the State Leadership Conference. Utah HOSA also has a strong partnership with Davis Technical College and Eagle Gate College, who provide space and judges for our Health Professions events. HOSA brings relevance to the classroom through industry-based competitive events. Having strong partnerships with business and industry on our Advisory Board and through our competitive events keeps our students informed on up-to-date industry knowledge and increases career awareness and potential local career options. "

CTSO Sponsored Activities and Events:

Provide detailed information for each of the Utah CTSO sponsored activities for the current fiscal year. Include name/title of the activity, dates, location, cost, etc. Include as many details as possible. This is the same information that you will be asked to provide annually (and separately) on the Event Summary document.

An example of this might be:

"The activities planned for FBLA for the school year 2026-2027 are:"

September 5-6, 2026 Homestead Resort, Midway	Advisor Training 5 th 1:00 – 4:30 pm – Newer Advisors 6:00 pm – All Advisors Opening and Dinner 6 th 8:30 am – 2:30 pm – All Advisor Sessions	\$0
September 12, 2026 Utah Valley Conv Ctr	Fall Leadership Conference 8:00 am – 4:00 pm	\$50
October TBD	State Prep Competitions Central/Southern Utah	\$20
October TBD	State Prep Competitions Northern Utah	\$20
November 15, 2026	American Enterprise Day	
November 22, 2026 UVU, Orem	Central Region Competition	\$20
TBD	Eastern Region Competition	\$20

TBD	Metro Region Competition	\$20
December 9, 2026 WSU, Ogden	Northern Region Competition	\$20
December 10, 2026 Snow Richfield	Southern Region Competition	\$20
February 3-14, 2027	Pre-conference & production testing window	
February 10-14, 2027	FBLA-PBL Week	
TBD	FBLA-PBL Officer Candidate Interviews and Board Meeting	
March 9-10, 2027 Davis Conf Ctr, Layton	FBLA State Leadership Conference	\$50
May 2, 2027 Farmington	FBLA Day at Lagoon	\$60
June 29-July 2, 2027 Nashville, TN	FBLA National Leadership Conference	\$1500

Budget:

The next part of the application is the Budget including expenses and a narrative. Each CTSO will be given exact amounts for your budget received from USBE prefilled on the application. This table is from a prior fiscal year and is shown here simply as an example. *This will be the budget that is uploaded into the Utah Grants System.*

Budget

Expense Categories:	Budget Amount
Management Costs (Salaries 100)	\$ 52,000.00
Financial Review (Purchased Services 300)	\$ 4,000.00
Liability Insurance (Purchased Services 300)	\$ 10,000.00
National Competition Costs (Travel 580)	\$ 42,000.00
Offset Student Costs (Purchased Services 300)	\$ 6,000.00
Total:	\$ 114,000.00

CTSO Staff Positions:

In the application, each CTSO will break out the required positions for CTSO management costs. The salary amounts you enter must match the scope of work documents that are signed and sent to the CTSO manager at USBE. The scope of work documents should NOT be uploaded into the Utah Grants Management system. If these positions are paid for out of organizational funds, just leave the salary information blank on the grant application. A signed scope of work is required for each required position, whether the person is paid by grant funds or organizational funds.

Staff Position	Staff Name	Annual Salary	# of Payments	Payment Amount
State Advisor:				
State Fiscal Manager:				
State Competitive Events Mngr:				
State Officer Advisor:				
State Communications Mngr:				
Other:				
Total:		0		

Budget Narrative:

In the narrative, please include general information specific to how you will be using the funds for "offsetting student costs". Other expense categories do not need to have a narrative.

Assurances:

Please read and review each of the assurances and mark that you agree to them.

Reimbursements and Documentation

You must request reimbursements through the Utah Grants Management System. Reimbursements should be requested at least quarterly, at a minimum. If you do not request quarterly reimbursements, you may no longer be eligible to receive state funds for CTSO management costs.

Detailed instructions can be found [here](#):

Supporting documentation must be provided for each request submitted. Supporting documentation examples are itemized receipts, invoices, payroll certifications, and proof of payment. The proof of payment can either be in the form of credit card statements, cancelled checks (front & back), or bank account statements clearly demonstrating that the checks or payments issued have cleared the bank on the dates you have designated in your request.