



**Utah
Career and Technical Student Organizations
(CTSO)**

Policy Guide

Updated April 2020

ADA Compliant: April 2020

Utah Career and Technical Student Organizations – Authority and Purpose

Utah CTSOs are authorized by Utah's legislature and State Board of Education (53E-3-507; R277-914). State CTSOs are fiscally and programmatically accountable to the Board and exist at the will of the Board. USBE CTE staff provide supervision, leadership, and general oversight of each state organization.

All Utah state Career & Technical Student Organizations have a corresponding national organization. State CTSO activities are required components of the CTE programs. The Utah State Board of Education designates and sponsors a CTSO for each CTE content area, aligned to its Career Clusters and Career Pathways. Utah CTSOs are intra-curricular organizations and are integral to the CTE programs at the secondary and postsecondary levels of instruction. CTSOs place significant emphasis on student leadership and skill development. CTSOs are more than a short-term competition for one area of interest and are reasonable in cost to allow participation by students state-wide. Each CTSO must support a career cluster(s).

The Utah State Board of Education recognizes eight CTSOs that support Career and Technical Education programs in Utah:

- DECA
- Educators Rising
- FBLA
- FCCLA
- FFA
- HOSA
- SkillsUSA
- TSA

Each organization plays a significant role in providing opportunities for students to learn and practice leadership development, academic and technical skills, and community involvement. Events and activities are conducted at the local, state, and national levels. CTSO programs and competitive events must reflect current standards and competencies for the education programs that they support. Students are encouraged to be members of the Career and Technical Student Organization for the CTE pathway in which they are participating. CTSOs provide professional development activities for teachers.

The purpose of this manual is to provide information regarding the policies and procedures, both fiscal and programmatic, required for daily operation of the state and local level activities and events of Utah CTSOs. There is some variation by organization since each was developed independently with separate parent organizations, constitutions, bylaws, rules, regulations, traditions, occupational program competencies, and levels of activity. This document provides guidelines and processes, as well as specific information on procedures that CTSOs and LEAs must follow to ensure fiscal accountability and the educational integrity of the program.

CTSO Principles

1. Leadership development is foremost among the goals for career and technical student organizations.
2. CTSOs strengthen academic as well as career and technical skills of students by providing contextual learning experiences as part of classroom lessons.
3. CTSOs are educational laboratories in which students learn how to develop their leadership skills and professional potential by setting and accomplishing goals and tackling projects that promote problem-solving skills.
4. CTSOs build on students' interest and help motivate the student to strive toward educational excellence.
5. Leadership and career development of students is achieved by their participation in community projects and through networking with business and industry.
6. CTSOs are student organizations governed by and for students.

State CTSO Operation and Organization

1. Each state CTSOs should be established as a 501(c)(3) nonprofit organization as a subordinate of their national association's tax status. Internal Revenue code prohibits 501(c)(3) organizations from:
 - a. Organizing or operating for the benefit of private interests, such as the CTSO State Advisor, members of their families, officers of the organization, other designated individuals, or persons controlled directly or indirectly by such private interests;
 - b. Allowing any part of the net earnings of a CTSO to benefit a CTSO State Advisor or member. A CTSO Advisor or member is a person having a personal and private interest in the activities of the organization;
 - c. Benefiting a person having substantial influence over the organization; and
 - d. Attempts to influence legislation as a substantial part of their activities. Advisors and members may not participate in any campaign activity for or against political candidates as representatives of the CTSO.
2. State CTSOs are required to file all appropriate tax documents required for 501(c)(3) organizations and remain in good standing with the State of Utah. Failure to comply may result in funds being withheld from the organization and/or a withdraw of state support of the organization. If an organization fails to file an exempt organization annual return, it may be subject to penalties. In addition, an organization that fails to file the required return or electronic notice for three consecutive tax years will automatically lose its tax-exempt status. State CTSOs are also required to report payments to independent contractors via 1099 tax forms for every contractor paid more than the minimum amount (listed annually by the IRS) for services during a year. Copies of

these forms must also be filed with the IRS and sent to payees by the end of January immediately following the year for which the income is paid.

3. CTSO programs and competitive events must reflect current standards and competencies for the education programs they support.

State CTSO Advisory Committee

1. The Utah Career and Technical Education Leadership Organizations Advisory Committee consists of one secondary CTE Director designated from each of eight CTE Regions with the chair being the State CTE Director. Non-voting members of the committee include the State CTSO Advisors, State Education Specialists, and State CTSO Support Staff.
2. This Advisory Committee makes recommendations to USBE and the Utah CTSO organizations on the activities of the leadership organizations in the state. Generally, the State CTSO Advisory Committee meets twice each school year. Additional meetings may be called by the State CTE Director as necessary to conduct business.
3. State CTSO Advisors and Education Specialists should carry out the decisions of the committee for each respective CTSO.

Organization Bylaws

1. Each CTSO must develop and follow its own organization bylaws. Bylaws should be approved by the organization Advisory Board and available on the Utah CTSO website. The bylaws describe the governing structure for the organization, including how state officers are to be elected, the requirements to run for office, the composition of the organization advisory committee/board of directors, and the requirements for meetings.
2. Organization bylaws are to be reviewed by the organization advisory committee/board of directors annually to ensure they remain relevant and up to date.

Organization Advisory Boards

1. An Advisory Board must be established by each organization to function in an oversight capacity for the organization's activities and financial transactions.
2. The Advisory Board must consist of not less than five members, one of which must be the State Education Specialist over the career cluster. The other two or more members may be elected or appointed in accordance with the bylaws of the respective leadership organization.

3. The organization Advisory Board should function in collaboration with the CTSO State Advisor and USBE Education Specialist to assist in major decisions and financial oversight.

CTSO State Advisors and State Staff

1. The Utah State Board of Education coordinates the operation of Career and Technical Student Organizations through the administration of discretionary grant programs. Each funded agency is responsible for accomplishing a set of prescribed goals and objectives to ensure statewide management of the CTSO for which they were awarded funds. USBE will closely monitor grantees for adherence to the contractual terms of their agreements.
2. CTSO State Advisor scope of work, designated responsibilities and a list of deliverables, and salary) and state staff agreements (including scope of work and salary) are approved annually by the State Education Specialist and USBE Financial Operations.
3. Individuals seeking to provide State CTSO Advisor or State CTSO Staff services to Utah CTSOs must apply, interview, and be selected by USBE for the position in which they are interested. The annual scope of work will include:
 - a. Specific responsibilities of the position and details of the work to be done;
 - b. Deliverables with timelines to USBE;
 - c. Amount of compensation and schedule of payments to be made; and
 - d. Rights and responsibilities of all parties involved.
4. Each organization's Advisory Board, in conjunction with the State Education Specialist, must conduct an annual performance evaluation of the work accomplished by the CTSO State Advisor. Other state staff paid through the grant program must also have an annual performance review conducted by at least the State Education Specialist and the CTSO State Advisor.
5. The State CTSO Advisor will not chaperone any student member at any state or out-of-state conferences, other than state officers at a state officer activity.
6. State Advisor scope of work is considered "outside employment" when the state advisor is also a district/charter employee. It is understood that State Advisor work is conducted "outside" the school contract. Advisors should designate non-district/charter times to receive and respond to emails and phone calls. Advisors should work out an agreement with their district/charter administration regarding time away from district/charter responsibilities to conduct State Advisor business.

Financial Procedures – General Accounting Processes

1. Each organization is responsible for maintaining financial accounts in accordance with general accounting principles and proper and ethical fiscal management

procedures. A computerized accounting system must be used to maintain financial records.

2. CTSO organization funds are funds generated from state dues, conference registrations, fundraising activities, and donations of monies for a specific organizational purpose (e.g., scholarships, awards, or supplies). Funds received from community sources must be clearly denoted on CTSO budget sheets and include a description of the intended uses of the funds. Funds received for conference fees from local CTSOs must be used to supplement the expenses accrued for that particular event.
3. Each CTSO state organization must draft an annual budget in collaboration with the State Education Specialist. The organization Advisory Board must approve an annual budget and any changes to the budget during the fiscal year. The Organization Advisory Board must review and approve financial statements quarterly. A final year-end financial report, including all financial transactions for the current fiscal year, must be submitted to the Advisory Board.
4. The State Advisor, under the direction of the Advisory Board, must submit the year-end financial statement to the organization's national office or direct to the Internal Revenue Service (on appropriate forms) in order to comply with current tax laws for nonprofit organizations.
5. All checks require two signatures. It is recommended that at least three adults be authorized to sign checks. The State Education Specialist is not allowed to be an authorized signer.
6. Each organization advisor will submit all financial records for review on a schedule established by the State CTE Director.
7. All financial records for each organization will be submitted to USBE for review whenever there is a change in state advisors.
8. Each CTSO organization must maintain financial records for at least six years plus the current year.
9. Each CTSO must maintain an equipment inventory for all equipment purchased with CTSO funds. Records must be maintained that includes a description of the property, a serial number or other identification number, acquisition date, cost of the equipment, the location, use and condition of the equipment, and any ultimate disposition data including the date of disposal. A physical inventory of the property should be taken, and the results reconciled with the inventory records at least once every two years.

Fiscal Reporting - Leadership Organization Accounts

1. State CTSO activities are planned on a 'break even' basis. If an event ends with a surplus or deficit, adjustments will be made in future events to balance funds.
2. An independent audit is required annually for each Utah CTSO to obtain reasonable assurance of appropriate financial statements including accuracy of accounting and financial reporting in compliance with state and federal laws and regulations. Each CTSO is independently held accountable for any audit exceptions. A copy of the annual independent audit report for each CTSO shall be provided to the USBE State CTE Director at the conclusion of the CTSO's fiscal year. Each CTSO organization Advisory Board will review the findings of annual independent audits as required by USBE.
3. A transaction form must be used for all transactions (whether cash, credit, debit, EFT, etc.) that contains detailed and pertinent information about the purpose of each transaction. Receipts and other backup documentation for these transactions must be attached to the transaction form and preserved for accountability purposes. The requisition form requires two signatures authorizing the requested payment. Dates and dollar amount must be included. Records should be organized and easily accessible. Checks must not be signed without a completed transaction form.
4. For each meal paid for by CTSO organization funds, a roster providing the name and title (student, presenter, board member, advisor, etc.) of those participating in the meal, as well as a brief description of the reason for the meal (student advisor meeting, state competition, etc.) should be kept along with the receipt. Airfare and hotel receipts must also have detailed records with traveler names directly associated for each ticket/room.
5. Proper documentation when providing gift cards must be kept. Gift cards should be treated like cash. A list with signatures of those receiving gift cards must be kept along with a brief narrative for the justification of the purpose and use of the gift cards.
6. Advisors are not required to obtain bids for out-of-state travel providers. However, they must use the most cost-effective provider and provide information supporting their decision during program reviews.
7. Any interest earned from the CTSO organization funds must be reported at least quarterly and remain in the organization's account.

Financial Procedures – State Add-on and Federal Budgets

1. State CTSO funds are distributed to districts/charter schools through State CTE Add-on funds by formula that takes into account the relative number of CTSO

- participants. An annual budget will be developed by USBE and shared with Districts/Charter Schools for expenditure of statewide CTSO funds. Federal Perkins funds may also be used to help with costs of State CTSO Administration and other statewide CTSO expenses.
2. Funds allocated for the State Advisors are intended to cover the cost of the advisor's time, office expenses and equipment, and in-state travel. Free or donated rooms must be used to offset the cost of student lodging and may not be used for state advisor/staff rooms.
 3. National conference travel for secondary first place winners and state officers must be requested in writing to USBE showing the name, school, contest and a cost breakdown per student. Up to half of the allowance is available prior to the national conference if requested. Travel requests should be submitted to the State CTSO Support Staff at least 30 days prior to the anticipated travel. This account provides one-half the cost of the award, not to exceed the approved annual national competition award amount. All final national conference travel funds must be requested within 30 days after the conclusion of the conference by submitting appropriate information to the State CTSO Support Staff. These funds can only be used for students in grades 9-12. Grade level is determined by student's grade level at time of state competition. An activity summary sheet showing details and costs of the event must be submitted to the State CTSO Support Staff at the beginning of each school year.
 4. State funds only support 1st place winners. However, each organization has a separate policy on participation. The State CTSO Advisory Committee will not override the policy of each CTSO. However, LEAs have final control of their own winners allowed to travel to national competitions. If State CTSOs fund other than 1st place winners, they must make sure everyone understands the state policy which does not allow state funding or require support from districts/charters for other than 1st place winners. Districts/charters may choose to allow other than 1st place winners to travel along with 1st place winners if an adequate number of advisors are already being sent to supervise the 1st place winners. There is no expectation that districts/charters will send students or advisors for other than 1st place winners.
 5. The formula for determining the division of State Winner Travel Funds among CTSOs is "Five Year Historical High Number of Winners / Total Amount of State Winner Travel Assistance Available = Dollar Amount Available per State Winner." The dollar amount available per State Winner will be divided among each CTSO according to each CTSO's five-year historical high number of state winners funded. The amount of funds available for each student will be determined annually based on budget availability. An additional state flex amount may be available in a fiscal year based on budget availability. An equal amount of flex dollars will be divided equally among the CTSOs as above.

Supervision and Liability of Students Participating in State and National Events

1. The school district/charter school is legally responsible for the supervision of students at all local, state, and national CTSO activities. All participants (students and advisors) must abide by the regulations set forth by the district/charter and state CTSO. These regulations also apply to state officers. The state CTSOs retain the right to prohibit individuals from participation in activities for violation of these regulations.
2. Advisors/Chaperones are required to accompany and supervise students at all CTSO activities except for state officer functions. The district/charter must ensure the local CTSO has no less than one adult advisor/chaperone for each ten (10) student delegates in attendance at CTSO activities. If district/charter or national CTSO policies require a smaller chaperone to student ratio, then the number of students per advisor/chaperone shall follow district/charter guidelines. With the exception of state officer functions, no student delegation may attend CTSO activities without appropriate district/charter-assigned advisor/chaperone(s). To that extent, the advisor/chaperone(s) must remain on site at the CTSO event at ALL times.
3. The local CTSO advisor/chaperone(s) is responsible for maintaining discipline and enforcement of the student code of conduct, including curfew for their student delegation. If a student has a major conduct or disciplinary infraction, the local CTSO advisor/chaperone must consult with the CTSO State Advisor. The local CTSO advisor/chaperone must then contact the school principal and the district superintendent (or designee) to report the incident. The local CTSO advisor/chaperone and CTSO State Advisor have the authority to send the student home at the expense of the school or district or parent.
4. In general, students should travel with their group using transportation arranged by the school district or State CTSO. However, a school district may find other arrangements more convenient. The State CTSO Committee will not override the policy of each district/charter in getting their students to the events with adequate supervision. A student may not participate unless the district/school can provide adequate supervision during travel and at the event.
5. The LEA must obtain complete medical information for all student delegates. Those students without written permission and complete medical information are not allowed to participate in the CTSO activity. Any medical conditions, illnesses, and/or allergies must be brought to the attention of the CTSO State Advisor at least one week prior to attendance in any state CTSO activity or four weeks prior to any national CTSO event. The local CTSO advisor(s) is responsible for making arrangements to meet the health needs, including medication administration and storage, for his/her students. Districts/Charter Schools retain full responsibility to adhere to LEA policies and procedures regarding administration of medications

and/or medical treatments for students in their delegations throughout the CTSO activity.

6. If a student delegate has a family or personal medical emergency while attending a CTSO activity, the local advisor/chaperone must notify the CTSO State Advisor. Permission forms should include parental permission for any necessary medical treatment, including emergency care. If a student must return home early because of medical problems, the local advisor/chaperone must consult with the CTSO State Advisor, parent, and school administration; make the necessary arrangements; and, if required, accompany the student.
7. The use of 12 or 15 passenger vans for transporting students is a violation of state law (UCA 53-8-211.5).
8. Health and accident insurance are the responsibility of individual students and their families. LEA policies regarding personal insurance and participation in school activities should be followed.
9. Each state CTSO is required to purchase liability insurance to cover the organization and its leaders.
10. Attending Optional Events: Registration forms and materials will be kept separate and apart from other information on optional activities. Districts/Charter Schools are neither required nor encouraged to support student or advisor participation in the optional activities. However, if the district/school allows participation in the optional activities, adequate supervision must be provided according to district/school policies.
11. Each local CTSO chapter should develop a local CTSO plan of work, which incorporates leadership and skills development, community service projects, and fundraising efforts (if appropriate) for participation by all students. The local plan of work should be considered co-curricular and part of the CTE program of study.

Resolving Disputes

1. Most disputes that occur with CTSOs relate to membership reporting, deadline adherence, rule violations, and competitive event results. Each CTSO should have a grievance process and communicate that process to the local chapter advisors.
2. CTSOs must have specific appeal processes for competitive event disputes. All information must be available before a decision can be made.

Websites/Social Media

1. Websites, and social networking sites, and blogs, if used are the responsibility of the state or chapter advisors. Advisors are responsible to maintain appropriate content on the site.
2. Each Utah CTSO website should provide user-friendly information that is pertinent to local advisors, administrators, and students. Each website should be kept up to date. Organization bylaws should be available on the website.
3. Students may not have administrative rights to CTSO websites, social networking sites, or blogs.