

Utah Career Technical Student Organization (CTSO)

Policies and Standards

State Advisory Committee

The Utah State Career and Technical Education Leadership Organizations Advisory Committee consists of State Advisors, State Program Specialists, State CTSO Program Assistant, State CTSO Program Coordinator, and one CTE Director designated from each of 8 CTE Regions. This Advisory Committee oversees the activities of the leadership organizations in the state and advises the CTE Consortium on State CTSO policies and procedures.

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. The board must develop and follow organization by-laws.
2. The Advisory Board must consist of not less than three members, one of which must be the State program specialist. The other two or more members may be elected or appointed in accordance with the bylaws of the respective leadership organization.

CTSO Advisors

1. Each Advisory Board, in conjunction with the State Program Specialist, must conduct an annual performance evaluation of the work performed by the CTSO advisor.
2. Advisor Contractual Service Agreements reviewed and approved annually by the Advisory Board and State Program Specialist. Each agreement must include general agreements required by the State Office of Education, and other specific agreements required by the Advisory Board and State Program Specialist.
3. State Advisors and State Program Specialists must sign a Memorandum of Understanding specifying the roles of the State Advisor and State Program Specialist.

Financial Oversight - Leadership Organization Accounts

1. The Organization Advisory Board must approve an annual budget and any changes to the budget during the fiscal year.
2. The Organization Advisory Board must receive and approve financial statements quarterly. A final financial report, including all financial transactions for the current fiscal year, must be submitted to the Advisory Board.

April 27, 2012

3. The state advisor, under the direction of the Advisory Board, must submit the year-end financial statement to the organizations national office or direct to Internal Revenue Service (on appropriate forms) in order to comply with current tax laws for nonprofit organizations.
4. The Advisory Board will review the findings of independent audits as required by the State Director of Career and Technical Education.

Fiscal Reporting and Auditing - Leadership Organization Accounts

1. Each organization advisor will submit all financial records for auditing on a schedule established by the State CTSO Program Coordinator.
2. All financial records for each organization will be submitted for auditing whenever there is a change in state advisors.

Fiscal Operating Procedures - Leadership Organization Accounts

1. Financial records will be kept on a computerized accounting system. The system will be evaluated by the State Program Specialist and approved by the State CTSO Coordinator.
2. All funds received must be entered into a spreadsheet or ledger that lists the source of the funds, date it was received, and the purpose of the payment.
3. All checks will require two signatures. It is recommended that at least three adults be authorized to sign checks.
4. A check requisition form will be used that contains additional information about the purpose of the check. Receipts for these payments must be attached to the requisition form and preserved for accountability purposes.
5. Checks must not be signed without a check requisition form.
6. When obtaining a receipt from a person providing services to an organization is difficult, a voucher must be used stating the purpose of the payment and must be signed by the individual receiving payment.
7. Checking accounts must be reconciled monthly. The checking accounts must be reviewed and approved in the quarterly Advisory Board meetings.
8. Advisors are not required to obtain bids for travel providers. However, they must use the most cost effective provider and provide information supporting their decision during the annual audit.

April 27, 2012

9. Each CTSO Advisor must maintain financial records for at least three years after the year-end financial statement. If an audit is started during the 3-year period, records must be kept until the audit is completed and all audit issues are resolved.
10. State Advisor contracts are considered “outside employment” where the state advisor is also a district employee. It is understood that State Advisor work is conducted “outside” the school contract. Advisors should designate non-district times to receive and respond to emails and phone calls. Advisors should work out an agreement with their district administration regarding time away from district responsibilities to conduct State Advisor business.

Financial Operating Procedures – State Add-on and Federal Budgets

1. The State Director for Career and Technical Education will designate a local agency to act as the fiscal agent for the add-on allocation and Federal budgets. (*Currently Bridgerland ATC*) State CTSO funds are distributed to districts by formula that takes into account the relative number of CTSO participants. An annual budget will determine the amounts for State Administration and student travel. The balance of State 1% funds will be retained by the districts to help offset district CTSO costs. Federal Perkins funds may also be awarded to help with costs of State CTSO Administration.
2. Each leadership organization state advisor will submit their Monthly Travel Expense Voucher by the 8th of each month. The amount of reimbursement will be based on the current State Travel Rules and Regulations.
3. Funds allocated for the State Advisor is intended to cover the cost of the advisor’s time, office expenses and equipment, and travel. State specialists must estimate the cost for the state advisors travel and include in the budget under “travel expenses”. All other expenses, including office supplies and equipment, will be paid to the state advisor through the bi-monthly contract payments. Free or donated rooms must be used to offset the cost of student lodging, and may not be used for state advisors rooms. Each state advisor must request prior approval for overnight in-state and out-of-state travel on the approved Travel Request Form. The request must be made at least 30 days prior to the travel. The amount of reimbursement will be based on the current State Travel Rules and Regulations. Estimated travel costs not used, may be carried over and included in the next year’s operating expenses for travel.
4. National conference travel for secondary first place winners and state officers must be requested in writing showing the name, school, contest and a cost breakdown per student. Travel requests should be submitted to the State CTSO Manager at least 30 days prior to the anticipated travel. This account provides one-half the cost of the trip not to exceed a maximum of \$300. 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

April 27, 2012

CTSO Manager at least 30 days prior to the event (45 days for events requiring overnight stays).

5. State funds only support 1st place winners. However, each organization has a separate policy on participation. The State CTSO Committee will not override the policy of each CTSO. 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 for other than 1st place winners. Districts 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 will send additional advisors to supervise other than 1st place winners
6. 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 compensate.
7. The formula for determining the division of State Winner Travel Funds among CTSOs is "Three Year Average Number of Winners / Total Amount of State Winner Travel Assistance Available = Dollar Amount Available per State Winner." This dollar amount will be the maximum amount available per student, not to exceed \$300 per student. The dollar amount available per State Winner will be divided among each CTSO according to each CTSO's prior three year average number of state winners funded.

Supervision and Liability of Students Participating in State and National Events

1. School districts are responsible for ensuring adequate supervision according to district policy. However, the CTSO Committee believes a chaperone/student ratio of about 1:10 is appropriate.
2. 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 school district in getting their students to the events with adequate supervision. A student may not participate unless the district can provide adequate supervision during travel and at the event.
3. Advisors should use State Travel rented or commercial charters when arranging ground transportation for students out-of-state.
4. Using 12 or 15 passenger vans for transporting secondary students is a violation of state law.
5. Health and accident insurance is the responsibility of individual students and their families. Any CTSO participant must provide proof of insurance in order to participate.

April 27, 2012

If necessary, students may purchase insurance coverage for these events through their local school district.

6. The CTSO liability insurance will continue to cover event/facility liability insurance and coverage above the Government Immunity Limit when necessary.
7. Attending Optional Events. Registration forms and materials will be kept separate and apart from other information on optional activities. Districts are neither required nor encouraged to support student or advisor participation in the optional activities. However, if the district allows participation in the optional activities, adequate supervision must be provided according to district.

Websites

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. Students may not have administrative rights to CTSO websites, social networking sites, or blogs.