

CAREER TECHNICAL STUDENT ORGANIZATIONS



POLICY HANDBOOK 2022

**CALIFORNIA DEPARTMENT OF EDUCATION
CAREER AND COLLEGE TRANSITION DIVISION**

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Purpose

The California Department of Education (CDE) is an advocate of what Career Technical Student Organizations (CTSOs) contribute to the motivation, education, mental well-being, and total development of students enrolled in career technical education (CTE) through activities which develop leadership, citizenship, social competencies, and a wholesome attitude toward living and work. Through the development of program standards, the State Superintendent of Instruction and the State Board of Education promote and support CTSOs and encourage all local school districts and charter schools that offer state-approved CTE programs to “organize and financially assist CTSOs as integral components of CTE programs that complement and enrich instruction.”

The United States Department of Education (USDE) has endorsed CTSOs as a critical component of an effective CTE program. The responsibility for CTE instructional programs and related activities, including CTSOs, rests with state and local education agencies. In supporting CTSOs, the USDE allows states to use Carl D. Perkins funds to provide leadership and support for approved CTSOs.

CTSOs enhance learning contextual instruction, leadership and personal development, applied learning, and real-world application. CTSOs work as an integral component of the classroom curriculum instruction, building upon employability, and career skills, and concepts through the application and engagement of students in hands-on demonstrations and real life and/or work experiences through a CTE program. CTSOs help guide students in developing a career path, a program of study, and provides opportunities in gaining the skills and abilities needed to be successful in those careers through CTSO activities, programs, and competitive events.

This handbook seeks to clarify and articulate the relationship and expectations of CTSOs, the role of CDE, the function of employed Education Program Consultants/State Advisors, and the relationship between CDE incorporated nonprofit state CTSO associations and these federal and state-recognized organizations. This handbook is not to be considered inclusive as each CTSO may have additional guidelines and/or processes.

Overview

The CTSO Handbook describes the relationship and responsibilities between the CDE, chartered CTSOs and their respective leadership boards, including Board of Directors, and/or Fiscal Boards.

CDE is responsible for programmatic leadership and fiscal oversight of all approved CTSOs as well as the integration of CTSO activities into the classroom and appropriate state approved CTE standards.

For nearly a century, CDE has provided direct leadership in the administration of recognized CTSOs. This connection is rooted in the core belief that CTSOs are an integral part of a CTE instructional program.

The National Office of each CTSO grants a charter to individual states. The State Superintendent of Public Instruction has designated authority to the Career and College Transition Division (CCTD) of CDE to provide administrative leadership, program of activities, and fiscal oversight. The State Advisor of each approved CTSO is responsible for the management and oversight of their respective CTSO. This includes providing leadership, guidance, and technical assistance for the integration of CTSO activities and leadership development into the appropriate CTE instructional program.

In 1997, in response to a ruling by the State Auditor, which stipulated that each CTSO include in their operations an adult board to oversee all fiscal operations, CDE directed each CTSO to establish a 501(c)(3) nonprofit to assist in the fiscal management.

According to the guidance, since CDE holds all State CTSO Charters, it shall remain the responsibility of the State Advisor, who is employed by CDE, to provide administrative leadership, manage all programmatic activities, and provide oversight to their respective CTSO.

State Guidance

USDE describes CTSOs as a critical component of an effective CTE program. The responsibility for CTE instructional programs and related activities, including CTSOs, rests with the state and local education agencies.

Schools are encouraged to provide opportunities for students to participate in a CTSO aligned specifically to their Industry Sector and pathway. In identifying the CTSO in which to affiliate, consideration should be given to the CTE Model Curriculum Standards that are addressed in the CTE program pathway.

For example: In mechanics/fabrication, there are two logical options to consider, FFA or SkillsUSA. If the curriculum is aligned to standards that are specific to agriculture and is part of an agriculture program, then the appropriate CTSO would be FFA. However, should the curriculum be aligned to standards addressed in the Manufacturing and Product Development pathway, then the appropriate CTSO would be SkillsUSA. Ultimately, the final decision on which CTSO to affiliate with rests with the local school/district.

In California, the official state charters for approved CTSOs are held by the California Department of Education, which has the responsibility for administrative leadership and fiscal management of each CTSO, as well as integration of CTSO activities into the appropriate CTE program. Approved CTSOs for California include:

Cal-HOSA
California DECA
California FBLA-PBL
California FCCLA
California FFA
SkillsUSA California

Each organization will be registered as a Nonprofit Corporation or, if applicable, Unincorporated Nonprofit Association. Each CTSO is managed through CDE and will be registered under the laws of California as well as related federal IRS regulations, compliant with all applicable requirements, and in good standing.

California Department of Education Oversight

CDE provides leadership, establishes procedures and policies, and exercises oversight of the administration of CTSOs. The following standards adopted by CDE address the governance of state-approved CTSOs which are operated under the direction of the Career and College Transition Division (CCTD) within CDE.

Each CTSO shall:

- Allow individual chapters to affiliate via their respective CTSO State Advisor, prior to registering students for their respective CTSO.
- Have a fiscal adult board in accordance with their constitution and bylaws, articles of incorporation or other foundational documents, and recommendations/guidelines of their National CTSO and consistent with the California Education Code and policies set forth by CDE.
- Be authorized to enter into contracts and agreements to fulfill the organizational mission consistent with policies and governance requirements of the national CTSO charter, state and federal nonprofit regulations, CDE policy, and contracts administered by CDE. CTSOs entering into contracts are subject to final approval of CDE.
- Adopt and abide by the financial guidelines established through the Generally Accepted Accounting Principles (GAAP).
- Meet any governance and reporting requirements of the affiliated national organization, IRS, State of California, and CDE.
- Secure appropriate levels of liability insurance coverage for the CTSO, board members, and volunteers.
- Ensure that the non-discrimination policy is in place according to the State of California.
- Employ an independent certified auditor to perform audits on an annual basis following the agreed-upon procedures for which the American Institute of Certified Public Accountants, Statement on Attestation Standards would apply as guidance for performing and reporting. Each independent auditor will issue an opinion on the accuracy and fairness of the entity's financial statement.

- The audit shall include all accounts, investments, and financial activities of the CTSO.
- The certified auditor will present the annual independent audit to the CTSO Board, including a printed or electronic copy of the audit for each board member.
- An electronic copy of the annual audit report shall be provided to the State Advisor and to the CCTD Director.

CDE will appoint a state advisor for each approved CTSO to work with the CCTD Director as a leadership team in establishing policy and direction for all CTSOs in California in accordance with the CTSO Policy Handbook. Final authority for all CTSOs is delegated to the CDE CCTD Director.

CDE Staff shall:

- Have official responsibility to provide administrative oversight, guide program decisions, and ensure policies and rules are carried out in a timely manner, and ensure that state and federal regulations as related to the CTSO are maintained.
- Provide leadership, guidance, and technical assistance for the integration of CTSO activities and leadership development into the appropriate CTE instructional program.
 - Curriculum enhancement for student leadership development
 - Professional development opportunities including on-site visits
 - Outreach, marketing, and program development
 - Advocacy and support of development and/or improvement of high quality CTE (HQCTE) programs
- Provide general fiscal oversight of the organization, expenditures, and related activities.
- Annually review and approve respective CTSO affiliation based on the following criterion:
 - The school offers a CTE program or pathway that is aligned with the CTE Model Curriculum Standards for the appropriate CTSO.
 - An appropriate CTE-credentialed teacher agrees to serve as the CTSO advisor and teaches in one of the pathway courses.

- All participating students in the CTSO are currently enrolled in the aligned pathway courses or have previously completed all pathway course.
- All students enrolled in the courses aligned with the CTSO are provided equal opportunity to participate in local, state, national, and/or international activities associated with the CTSO.
- Evaluate the CTSO state affiliate for effectiveness and compliance with goals of the organization in an equitable manner.
- Serve as a member on CTSO boards, including executive and fiscal boards, and committees.
- Serve as the liaison in a leadership capacity with the national CTSO regarding implementation of national partnerships, programs, competitions, and other activities to ensure access, eligibility, and participation of California students, CTE educators, and CTSO stakeholders.
- Serve as a CDE liaison for State/Region/District/Section/Local leadership activities and ensure:
 - Conferences, meetings, and events are planned, coordinated, and conducted to provide optimal education value for participants within available resources.
 - Educational workshops and activities are planned and conducted in accordance with CDE policy and educational goals for CTE.
- Provide leadership and guidance of the state CTSO state officer program to ensure:
 - Quality training, leadership development opportunities, and support to chapters is provided throughout the duration of the state officer term(s) of service.
 - Effective state officer participation in state, regional, national, and/or international events.
 - State officers are properly chaperoned and supervised at state, regional, national, and international events.
 - Fair, consistent, and appropriate procedures for state officer conduct, supervision, election/selection, expectations, and discipline are defined, documented, and implemented.
- Promote partnerships between the CTSO and industry, education, community, and government agencies including resource development.

- Ensure high levels of professional conduct are exhibited by all CTSO participants:
 - Clear procedures are developed, documented, and updated by participating CTSO school/district administration, local advisors, and/or students' parents/guardians for responding to supervision/eligibility/discipline situations.
 - School administration and LEAs acknowledge and have a clear understanding of their responsibility for local CTSO chapter advisor supervision/discipline and that final liability and accountability for students, teachers, and chaperones rests with the local school district.
 - Code of conduct/expectations for local CTSO students, advisors, and volunteers are developed in harmony with local school district policies and California Education Code.
 - Code of conduct/expectations are maintained and reviewed annually and shared with administrators and chapter advisors.
 - State and National CTSO chaperone and student supervision policies and standards are communicated and adhered to by the California delegation attending events beyond the state-level.
 - Ensure that any legal and risk management protections the CDE is authorized and able to extend to CTSOs is clearly understood by boards, are in effect, and that any changes to these liability protections are communicated to the CTSO.

The State Advisor shall NOT be involved in the daily fiscal operations (membership dues, finances, etc.) of a CTSO state affiliate. The Board of each CTSO state affiliate shall adopt and implement bylaws and policies for the efficient operation and fiscal management of the CTSO state affiliate.

Fiscal Board and Fiscal Procedures

The adult fiscal board/governing board/board of directors, hereinafter referred to as The Board, shall be the official fiscal governing body of the CTSO. The management of funds and property of the corporation shall be vested in The Board who shall pursue such policies and principles as shall be in accordance with the provisions of the articles of incorporation, the constitution and bylaws of the CTSO, and the laws of the State of California.

The Board shall meet at least twice each fiscal year at such time and place as prescribed by The Board. Special meetings may be called at any time by the chairperson of The Board.

The specific charge of The Board shall be the financial viability and management of the operation of the CTSO. The CDE program manager, who serves as the state advisor, and staff will be responsible for all policy regarding program development and leadership. (this statement is not true in all CTSOs)

The fiscal office of the CTSO shall be designated annually by The Board. The official office of the CTSO shall be the California Department of Education, 1430 "N "Street, Sacramento, CA 95814.

Standards and criteria, including all policy and procedures developed by The Board for the purpose of fiscal governance shall be contained in the CTSO policy manual. This policy manual shall be separate from the CTSOs constitution and bylaws. Amendments or revisions to the policy manual shall be the responsibility of The Board and shall not be in conflict with the CTSO constitution and bylaws.

The Board shall:

- Ensure that the CTSO constitution and bylaws reflect any guidelines and policies as outlined in the CTSO Policy Handbook.
- Have the authority to exercise appropriate fiduciary responsibility as required of a nonprofit board including:
 - Ensure financial resources to support organizational operations.
 - Provide accounting controls and oversight for compliance with state law and federal regulations.
 - Provide accurate annual financial statements to the membership at large.
- Maintain and publish meeting minutes, bylaws, financial reports, and other governing documents related to fiscal decisions in accordance with nonprofit industry-accepted documentation retention policies and CDE.
- Adopt and implement policies and procedures and allocate resources for the efficient operation and fiscal management of the CTSO consistent with state law, federal regulations, CDE policy and contracts, and Generally Accepted Accounting Practices (GAAP).
- Provide oversight and responsibility for filing annual tax returns and all other state and federal financial and governance forms required for a 501(c)(3).

- Ensure legal and ethical integrity of board members and their agents.
- Keep accurate financial and program records, meeting minutes, and updated bylaws; provide items to the CTSO state advisor upon request and post on CTSO state websites.
- Ensure appropriate risk management strategies are maintained, including adequate levels of general liability, directors' and officers' asset loss/crime coverage (bonding), and other insurance protections are always current and in force.

CTSO Boards have the authority to accept and authorize contracts as well as the responsibility to ensure the contract is fully executed and completed as stated in the contract. All contracts are to be signed by the respective CTSO Board Chair or their designee.

Each CTSO Fiscal Board shall approve fiscal controls that meet or exceed the generally accepted accounting principles established for 501(c)(3)—non-profit organizations. In addition, The Board shall:

- Develop, approve, and modify, as necessary, an annual budget for the CTSO.
- Submit financial reports to the State Advisor quarterly or upon request.
- Develop and enact procedures for quarterly review of financial reports and transactions.
- Ensure all expenditures are related to the mission and goals of the organization.
- Establish a schedule for conducting an annual independent audit.
 - Employ an independent CPA to perform an annual audit.
 - Include all accounts, investments, and financial activities of the organization as a part of the audit or financial review/study.
 - Submit the audit result to the CTSO Board, including a printed or electronic copy of the audit for each Board member.
 - Submit an electronic copy of the annual independent audit report to the State Advisor and CCTD Division Director.

As a California non-profit corporation, each CTSO is able and encouraged to conduct fundraising activities and receive donations in support of the purpose of the organization at local, section, district, regional, and state levels. CTSOs shall maintain current status with the State of California Department of Justice, Office of the Attorney General Registry of Charitable Trusts.

Supervision of Students

CTSO activities often require that students travel throughout the state and, on occasion, to out-of-state national student leadership conferences. It is imperative that students be properly supervised during these events. CDE recommends the following guidelines be followed when students are traveling for district or state-sponsored CTSO events.

Local educational agencies (LEAs) will:

- Establish a clear written understanding with parents and chaperones regarding the rights and responsibilities of chaperones during the travel period.
- Provide a chaperone for each gender group when attending overnight conferences. If an individual LEA cannot provide chaperones for both gender groups, an arrangement with another participating LEA is recommended.
- Ensure that students and parents agree to and sign a code of conduct agreement. Such code should be explicit that participating students will ultimately be responsible for the consequences of their actions.
- Obtain written parental/guardian permission, including complete medical information, for participating students.
- Assume the responsibility and liability of students and advisors participating in all CTSO activities.

CDE staff will:

- Use due diligence at all times in supervising CTSO students on approved CTSO activities and events.
- Possess and maintain a current teaching credential, as outlined by the appropriate CTSO constitution, and/or administrative credential issued by the Commission on Teacher Credentialing. In the absence of a current credential, CDE staff must have been fingerprinted in accordance with *Education Code (EC) Section 45125*, within the past two years and have their records on file in the office of the state advisor.
- Have at least 3 years of teaching AND industry experience in alignment with the appropriate CTSO.
- Comply with Use of Vehicle rules for official business if transporting students.

Role of the National, State, and Local CTSOs

The Carl D. Perkins Career and Technical Education Act defines a CTSO as an organization for individuals enrolled in a CTE program that engages in CTE activities as an integral part of the instructional program. CTSOs operate on local, state, and national levels.

Each chapter must have state-approved affiliation by their respective State Advisor prior to registering students for their respective CTSO membership.

The Local CTSO must:

- Be an approved CTE program that has a sequence of courses or pathways that are integral to the CTSO.
- Employ a chapter advisor who possess a Single Subject or CTE Credential for the industry sector in which the CTSO is aligned with.
- Demonstrate that the chapter advisor of record is the teacher in at least one course within the appropriate CTSO pathway used for affiliation.
- Develop a Program of Work that integrates leadership and industry skills into the curriculum of each course which is aligned with the CTSO.
- Only affiliate students who are currently enrolled in the approved CTE program that is integral to the CTSO or students who have completed all courses within the CTE program or pathway.
- Have a set of elected student officers, elected by students, and an established constitution and bylaws.
- Have established a non-discrimination policy, web policy, social media policy, and travel policy.

The Local CTSO shall:

- Understand the important role the CTSO has in furthering the goals of CTE.
- Develop, refine, and evaluate materials, methods, and techniques used by local, state, and national organizations.
- Encourage students to be active members of their CTSO.

- Allow the chapter to be student-led rather than instructor-led.
- Be innovative, creative, and flexible in managing the CTSO.
- Collaborate with support groups that can facilitate CTSO and CTE program activities.
- Create a sense of community among students who are enrolled in a CTE program by encouraging them to become members of a CTSO chapter.
- Actively promote CTE and CTSOs in the community.
- Provide a learning environment that will complement and reinforce—rather than compete with or duplicate—CTE training.
- Work cooperatively with students and teachers to develop skilled leaders.
- Encourage students to learn from both successful and not-so-successful activities.
- Help chapter leaders carry out their responsibilities.
- Have a current knowledge of CTSO-related policies, documents, and publications.
- Assist with the fiscal management of the CTSO chapter.
- Review the CTE curriculum and determine how best to fully integrate CTSO activities into the classroom.
- Encourage student members to employ group consensus-making principles in an effort to overcome difficult problems facing the chapter.
- Encourage members to elect an officer team that is able and willing to provide leadership for the chapter.
- Assist in the development of an effective officer team.
- Facilitate the development of a meaningful program of work that will guide the chapter for the membership year.
- Encourage members to take full advantage of the benefits of CTSO membership.
- Encourage members to participate in state and national competitive event programs.
- Facilitate participation in local, section, region, state, and national competitions.

- Help members plan, organize, and conduct fundraising projects that will finance chapter activities not supported by school funds.
- Use chapter activities to develop and refine leader and follower skills in students.
- Encourage parents to get involved in chapter project and activities.
- Secure approval for activities and programs from local, state, and national agencies, when appropriate.
- Provide ongoing counsel and advice to chapter members and officers.
- Provide advice, support, and service to state and national CTSOs.
- Retain responsibility for their student delegation at all activities, both in-state and out-of-state.
- Adhere to district guidelines regarding ratio of students per advisor/chaperone.
- Not allow any student to attend any activity without an adult district-assigned advisor/chaperone.
- Be responsible to the state advisor or their designee for maintaining overall control of disciplinary and/or medical problems of their students and carry out such organizational duties as may be assigned by the state advisor.
- In the event of a major disciplinary infraction, after consultation with the state advisor, contact the school principal and the district superintendent or designee. The student will be sent home at the expense of the school district and/or parents. Refer to the individual CTSO policy for further guidance.

The State CTSO shall:

- Share the mission and purpose of their respective national organizations.
- Manage the operation of the state CTSO in a manner consistent with state/national constitutions and bylaws, and within state policy.
 - Establish and maintain a structure and system of governance (involving stakeholders), as empowered by the CDE.
 - Develop an annual business plan and budget to support quality programs.
 - Provide staffing and logistical support necessary to implement the business plan within budget parameters.

- Establish a procedure for posting on social media.
- Maintain networks and collaborative efforts with teachers.
 - Establish a state-wide communication system.
 - Provide training opportunities to advisors that are related to the role of CTSOs.
 - Provide an annual report on programs and finances to all stakeholders.
- Help recruit chapter advisors and student members.
 - Set measurable annual targets for advisor and student recruitment.
 - Incorporate recruitment in all planning activities.
- Plan and implement programs that support the CTE curriculum.
 - Participate in the development of CTSO program standards.
 - Evaluate student and teacher interests and needs on a regular basis.
 - Incorporate programs into planning activities that meet student/teacher needs.
 - Initiate strategies that build program participation.
- Adopt sound fiscal and organizational practices that ensure accountability.
 - Adopt and implement a full disclosure policy on all financial matters.
 - Cooperate fully with those responsible for the annual state audit and evaluation.
 - Provide for fiscally sound accounting and audit procedures.

The National CTSO shall:

- Provide activities that are integral to the program area served by the CTSOs.
- Offer leadership development opportunities to members at the local, section, region, state, and/or national levels.
- Conduct professional development programs for state advisors, local advisors, and teachers.
- Develop a curriculum-based national program of work, including materials and competitive events, designed to recognize excellence in performance.

- Maintain a public awareness and outreach program that will project a positive and professional image of the CTSO to promote the value of CTE.
- Serve as a national advocate for CTE with public policy makers, business and industry leaders, and the general public.

Establishing a Chapter

Each CTSO State Advisor shall annually review and approve applications for affiliation with their respective CTSO. This multi-step process for affiliation must adhere to the state and national policies. The following are foundational components for establishing a local chapter in an approved CTSO. Included in the chart is a list of documents that could be used to validate each required component.

| Components of a Chapter | Types of Documentation |
|--|---|
| <p>CTE Program</p> <ul style="list-style-type: none"> • Approved CTE program that has a sequence of courses or pathways that are integral to the CTSO. | <ul style="list-style-type: none"> • Master Schedule • Description of courses • Course catalog • CalPADS code for each course • Assurance statement by site administration |
| <p>Chapter Advisor</p> <ul style="list-style-type: none"> • Be a district faculty member of the school in which the local chapter is located • Be an authorized Single Subject or CTE-credentialed instructor in the industry sector/pathway. | <ul style="list-style-type: none"> • Employment verification • Copy of CTC credential information • Assurance statement by site administration |
| <p>Program of Work</p> <ul style="list-style-type: none"> • Integrate leadership and industry skills into curriculum as aligned with CTSO | <ul style="list-style-type: none"> • Course/Pathway outline • CTSO Program of Work • Assurance statement by site administration |
| <p>Student Membership</p> <ul style="list-style-type: none"> • Students members must be currently enrolled in the CTSO aligned with their coursework or previously completed the pathway to participate. • Middle school students must be enrolled in career exploration directly aligned to the CTSO that will prepare them for entry into secondary industry sector pathways. | <ul style="list-style-type: none"> • Student rosters • Student transcript • Assurance statement by site administration |

| Components of a Chapter | Types of Documentation |
|---|--|
| <p>Affiliation</p> <ul style="list-style-type: none"> • Elected student chapter officers (should occur within first few months of establishing a chapter). • Established constitution and bylaws to govern chapter | <ul style="list-style-type: none"> • Chapter meeting minutes of chapter officer elections • Chapter constitution • Chapter bylaws |
| <p>Established Policies</p> <ul style="list-style-type: none"> • Non-discrimination policy • Web communications & social media policy • Travel policy | <ul style="list-style-type: none"> • CTSO marketing materials • Course syllabi • District/school written policies • Assurance statement by site administration |

Virtual, Homeschool, and other Alternative Programs

Local chapters shall follow the same guidelines for affiliation and participation with the State CTSO regardless of format (i.e. virtual, home school, alternative). CTSO chapters are designed to be on a school site, in-person, and with curriculum based on CTSO Model Curriculum Standards for the specific pathway aligned to the CTSO.

In the rare occurrence that the preferred format of an on-site CTSO is not possible, such as in a virtual school, the guidelines for affiliation will remain and be enforced. In addition, all students in the virtual, homeschool, or alternative chapter must reside in the same county as the chapter address and be able to participate in in-person events at the local, regional, state, national, and/or international levels.

Applications for affiliation are submitted annually to the State Advisor at the CDE for review, assurance of eligibility, and approval.

CTSO Leadership

The CDE holds the state charter for each CTSO recognized in California. The State Superintendent of Public Instruction has designated the Director of the CCTD to oversee all CTSOs. Under the leadership of the Director for CCTD, CDE designates a consultant within the division to serve as the State Advisor for each CTSO. This State Advisor shall provide direction for the CTSO, oversee the day-to-day operations, approve all affiliations, and represent the CTSO at local, region, state, and national events.

Each CTSO is aligned to specific industry sectors. When establishing a local charter, the first consideration should be to align with the industry sector which is directly connected to

that CTSO. Ultimately, the final decision on which CTSO to affiliate with rests with the local school/district.

| CTSO | State Advisor | Description | Primary Industry Sector |
|-------------|--|--|--|
| Cal-HOSA | Cindy Beck cbeck@cde.ca.gov | HOSA is an intra-curricular student organization for those interested in the field of healthcare. | <ul style="list-style-type: none"> • Health Science and Medical Technology |
| DECA | Molly Anderson moanderson@cde.ca.gov | DECA is a national CTSO that prepares emerging leaders and entrepreneurs in marketing, finance, hospitality, and management. | <ul style="list-style-type: none"> • Marketing, Sales and Service |
| FBLA-PBL | Molly Anderson moanderson@cde.ca.gov | FBLA is a national CTSO that brings business and education together in a positive relationship through innovative leadership and career development programs. | <ul style="list-style-type: none"> • Business and Finance |
| FCCLA | Melissa Webb mwebb@cde.ca.gov | FCCLA is a national CTSO providing personal growth, leadership development, and career preparation opportunities for students in Family and Consumer Sciences education. | <ul style="list-style-type: none"> • Education, Child Development and Family Services • Fashion and Interior Design • Hospitality, Tourism and Recreation |
| FFA | Charles Parker cparker@cde.ca.gov | FFA is an intra-curricular student organization for those interested in agriculture and leadership. | <ul style="list-style-type: none"> • Agriculture and Natural Resources |

| CTSO | State Advisor | Description | Primary Industry Sector |
|-----------|--|---|--|
| SkillsUSA | Tara Neilson tneilson@cde.ca.gov | SkillsUSA is a national CTSO consisting of a partnership of students, teachers and industry working together to ensure America has a skilled workforce. | <ul style="list-style-type: none"> • Arts, Media and Entertainment • Building and Construction Trades • Energy, Environment and Utilities • Engineering and Architecture • Information and Communications Technologies • Manufacturing and Product Development • Public Service • Transportation |

Establishing a New CTSO

An organization that is interested in establishing a charter with CDE to create a new CTSO must follow the approval, justification, review, and evaluation process. CTSOs are defined in and are an allowable use of federal funds in the Perkins Act of 2006 (as amended by the Strengthening Career and Technical Education for the 21st Century Act of 2018). Beyond this, recognition of and the designation of a CTSO is left to the states.

For consideration in establishing a new CTSO, the prospective organization must have a minimum of twenty-five (25) LEAs willing to be part of the proposed CTSO and at least two hundred fifty (250) student members. In addition, each LEA shall have a program of study and sequence of courses that fall within the program standards for the proposed industry sector(s) to be served by the new CTSO.

The prospective organization must:

- Have a constitution and bylaws.
- Have a fiscal adult board in accordance with their constitution and bylaws, articles of incorporation, or other foundational documents consistent with the California Education Code and policies set forth by the CDE.

- Submit a budget that demonstrates financial capacity to operate.
- Establish a 501(c)(3).
- Allow individual chapters to affiliate via their respective state advisor.
- Be authorized to enter into contracts and agreements to fulfill the organizational mission consistent with state and federal nonprofit regulations, CDE policy, and contracts administered by the CDE. CTSOs entering into contracts are subject to final approval of CDE.
- Adopt and abide by the financial guidelines established through the Generally Accepted Accounting Principles (GAAP).
- Meet any governance and reporting requirements of IRS, State of California, and CDE.
- Secure appropriate levels of liability insurance coverage for the CTSO, board members, and volunteers.
- Ensure that the non-discrimination policy is in place according to the State of California.
- Employ an independent certified auditor to perform audits on an annual basis following the agreed-upon procedures engagement for which the American Institute of Certified Public Accountants, Statement on Attestation Standards, would apply as guidance for performing and reporting. Each independent auditor will issue an opinion on the accuracy and fairness of the entity's financial statement.
 - The audit shall include all accounts, investments, and financial activities of the CTSO.
 - The certified auditor will present the annual independent audit to the CTSO Board, including a printed copy of the audit for each board member.
 - An electronic copy of the annual audit report shall be provided to the state advisor and to the CCTD Director.
- Have a plan to engage all students enrolled in a pathway course addressed by the CTSO in CTSO activities.
- Have an appointed state advisor by the CCTD Director.

Alternatives to Student Organizations

Any CTE program which receives Perkins funding is required to provide leadership as an integral component in every CTE course. For many, engaging in an approved CTSO meets this criterion. However, a local site may elect to remain unaffiliated from any of the approved CTSOs. If this is the case, each course in the pathway must include appropriate objectives to meet the Perkins requirement for leadership development. Failure to include these objectives and provide leadership opportunities for all CTE students may affect the program's Perkins funding.

Use of a club does not meet the intent of the Perkins funding guidelines. Leadership must be for all students and not a selected few and must be part of the students grade in their CTE course(s).

Per the 2020–23 Federal Perkins V State Plan, if a district or school is unable to, or elects not to, provide the opportunity for students to participate in one of the six CTSOs recognized by California, the district or school may offer an alternative leadership development program that should include all of the following:

- a) Is integrated into the classroom content
- b) Annually elects student officers
- c) Has a constitution and bylaws
- d) Conducts monthly meetings
- e) Is part of the classroom grade
- f) Includes community service activities
- g) Engages students in activities outside the local school
- h) Provides opportunities for students to participate in state-wide and/or national events

Frequently Asked Questions

Which CTSO should we be part of?

- Schools are encouraged to provide opportunities for students to participate in a CTSO aligned specifically to their industry sector and pathway. In identifying the CTSO to affiliate with, consideration should be given to the CTE Model Curriculum

Standards that are addressed in the CTE program pathway. For example, in Culinary Arts, there could be three options to consider, FBLA, FCCLA, or SkillsUSA.

- If the curriculum is aligned to standards that are specific to Food Service, Hospitality, Tourism and Recreation, then the appropriate CTSO would be FCCLA.
- However, should the curriculum be aligned to standards addressed in the Business and Finance pathway, then the appropriate CTSO would be FBLA.
- Or, if the curriculum is aligned to standards addressed in Arts, Media and Entertainment, then the appropriate CTSO would be SkillsUSA.

Are CTSOs a club?

- CTSOs are not after-school clubs where only a few CTE students belong. They are a powerful instructional tool integrated into the CTE curriculum and classroom for all students.

Who is in charge of a CTSO?

- The overall responsibility for each CTSO shall be vested in the assigned state advisor as identified by the CCTD Division Director.

Appendices

NASDCTEC Statement of Policy: CTSOs

Appendix A

NASDCTEC Statement of Policy Career and Technical Student Organizations

The National Association of State Directors of Career Technical Education Consortium maintains a relationship with career and technical student organizations and encourages cooperation and support in strengthening programs of career and technical education, tech prep, and school-to-work. Recognizing that career and technical student organizations provide students with employability skills, business partners, community outreach, leadership opportunities, school-to-career solutions, and comprehensive programs in career majors, the National Association of State Directors of Career Technical Education Consortium endorses implementation of career and technical student organizations as an integral part of the instructional program.

In view of this belief, this policy represents the position of the National Association of State Directors of Career Technical Education Consortium:

1. The National Association of State Directors of Career Technical Education Consortium recognizes the educational programs and philosophies embraced by the career and technical student organizations, the following career and technical organizations are an integral part of career and technical education instructional programs:
 - Business Professionals of America
 - Family, Career and Community Leaders of America
 - Future Business Leadership of America – Phi Beta Lambda
 - Health Occupations Students of America
 - National DECA
 - National FFA Organization
 - National Postsecondary Agriculture Student Organization
 - National Young Farmer Educational Association
 - SkillsUSA
 - Technology Student Association
2. The National Association of State Directors of Career Technical Education Consortium recognizes total student development as being necessary for successful roles in society and for entering the labor market.
3. The National Association of State Directors of Career Technical Education Consortium encourages its membership to endorse, support, and promote the growth of career and technical student organizations within states in an effort to improve workplace and leadership skills of students.

4. The National Association of State Directors of Career Technical Education Consortium encourages involvement of career and technical student organizations in efforts to strengthen career and technical education.

UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF VOCATIONAL AND ADULT EDUCATION

THE ASSISTANT SECRETARY

September 21, 2006

Dear Colleagues:

The Office of Vocational and Adult Education (OVAE) maintains a close relationship with the career and technical student organizations (CTSOs). We recognize that the past performance and future potential of your organizations are compatible with the challenging objectives of education in the 21st century, and we support your objectives and want to involve the thinking of all of the CTSOs in the improvement of career and technical education. On behalf of OVAE, I welcome the cooperation and support from your organizations in strengthening the goals of *No Child Left Behind* through your effective career technical education programs: stronger accountability for results, more freedom from states and communities, encouraging proven educational methods, and more choices for parents.

OVAE recognizes that the educational programs and philosophies embraced by the following CTSOs as being an integral part of career and technical education instructional programs:

- Business Professional of America
- DECA
- Future Business Leadership of America-Phi Beta Lambda
- National FFA Organization
- Family, Career and Community Leaders of America
- Health Occupations Students of America
- National Postsecondary Agricultural Student Organization
- National Young Farmer Educational Association
- Technology Student Association
- SkillsUSA

In addition, OVAE recognizes the concept of total student development as being necessary for all career and technical education students to assume successful roles in society and to enter the labor market. Our office will facilitate technical and supportive services to assist your organizations through state agencies in their efforts to improve the quality and relevance of instruction, develop student leadership, enhance citizenship responsibilities, eliminate sex and race discrimination and stereotyping, and serve students of special populations.

OVAE recognizes that the responsibility for career and technical instructional programs and related activities, including career and technical student organizations, rests with the state

and local education agencies. Further, we look forward to working together to increase the principles of *No Child Left Behind* and the *President's American Competitiveness Initiative*.

Sincerely,

Troy R. Justesen, Ed.D.

STATE OFFICE PARENT/GUARDIAN
CONFERRED CONSENT FORM

State Officer Name: _____

Address/City/State/Zip: _____

Telephone: _____ School: _____

_____ has my permission to take part in any Career Technical Student Organization (CTSO) activities deemed appropriate by the state advisor during the ____ - ____ year.

I understand my daughter/son may be traveling with a state advisor or other designated CTSO employee. I understand that the state advisor or other designated CTSO employee has been approved to serve as an advisor/chaperone/supervisor by CDE and meets all guidelines established by said agency.

I further understand that my daughter/son may at times be traveling with or transported by other state officers and that the State of California, CDE or any CTSO employee or official does not assume any liability or responsibility for the conduct of any student member.

I further understand that the state advisor or their designee will be supervising my daughter/son during the state sponsored activity and that the health and safety of all students is of the utmost concern. I understand that every effort will be made to provide student members with a state advisor/chaperone of the same gender but that in some cases this may not be possible.

I further understand that if my daughter/son needs significant medical attention or engages in misconduct pursuant to the CTSO Student Code of Conduct, that she/he will be sent home and the appropriate advisor will contact me.

Signature of Parent/Guardian: _____

Date: _____

**CAREER TECHNICAL STUDENT ORGANIZATION
STUDENT CODE OF CONDUCT**

A student member who violates or ignores any of the code of conduct or other conference specific rules subjects herself/himself to being removed from the Career Technical Student Organization (CTSO) activity and sent home at her/his own expense after consultation with he/his chapter advisor/chaperone and having any honors and/or office withdrawn. In addition to any actions taken by the CTSO, student members may also be subject to discipline by their home district pursuant to the California Education Code.

1. A student member shall at all times behave in a courteous and respectful manner, and shall refrain from conduct which would discredit the CTSO or their home district.
2. A student member shall participate fully in all appropriate conference activities, general session, workshops, business meetings, meals, etc. while attending any local, regional, or state CTSO activity.
3. A student member shall abide by the dress code adopted by the CTSO.
4. A student member shall be willing to follow instructions as directed by those responsible for the activity.
5. A student member shall treat others in a lawful and non-discriminatory manner.
6. A student member shall not damage or deface property at any CTSO activity. Damages to any property will be paid for by the member or her/his school district.
7. A student member shall stay at the designated hotel during the conference and shall keep her/his chapter advisor/chaperone informed of her/his activities and whereabouts at all times. Student members shall also comply with each hotel's rules for guests.
8. A student member shall observe curfew at the conference by being in her/his assigned room at the time designated in the conference program.
9. A student member shall not violate any state or federal laws. Alcoholic beverages shall not be consumed or purchased regardless of the members' age.

As a student member, I agree that I must abide by the above code of conduct.

Signature of Student Member: _____

Date: _____

I/We have read the above and understand that _____ must abide by the rules and understand the consequences of violating this code of conduct.

Signature of Parent/Guardian: _____

Date: _____

Emergency Medical Treatment Form

Appendix E

EMERGENCY MEDICAL TREATMENT
(PARENTAL CONSENT FORM)

I, _____ (Parent/Guardian's Name),

_____ (Relationship to Student),
of _____ (Name of Student), _____ (Student's Age), hereby
authorize in advance any necessary medical treatment required while she/he is attending
_____ (List Activity).

Address/City/State/Zip: _____

Home Phone: _____ Work Phone: _____

Cell Phone: _____

Medical/Hospitalization Carrier Policy Number: _____

Other Medical Insurance/Policy Number: _____

Member Number: _____

Signature of Parent/Guardian: _____

Date: _____

Signature of Notary and Seal: _____

Date: _____

Medical Data

PLEASE PRINT. List any allergies or possible illness for which medicine or treatment may be needed during the conference period.

Allergies: _____

Type of Medicine Carried: _____

Currently being treated for: _____

Name and Address of Family Physician: _____

Physician's Phone Number: _____

In case of illness contact:

Name: _____

Phone Number: _____

Secondary Emergency Contact:

Name:

Phone Number: _____

Additional Information:

ADVISOR STATEMENT OF ASSURANCES

Advisor/Chaperone: _____

Advisor/Chaperone Cell Phone Number: _____

Chapter: _____

Advisor/Chaperone conduct should be exemplary at all Career Technical Student Organization (CTSO) events and activities, thus setting a good example for the students. Conduct of advisors/chaperones at all events shall adhere to the code established for student conduct and dress. Additionally, good sportsmanship is essential, and it is expected that advisors/chaperones will aid in promoting an understanding that there is more to life than just winning.

The State CTSO Office requires all advisors/chaperones attending the CTSO event to read and sign a copy of this form and return it to the State CTSO Office with event registration.

1. Local advisors should be aware of all policies and have in their possession all documents required for off-campus events and activities.
2. Local advisors are responsible for having each student attending the CTSO event to read, discuss, sign, and return the Student Code of Conduct form.
3. Local advisors are responsible for knowing the whereabouts of all their students at all times. Each local advisor should establish an emergency/safety policy with her/his students prior to the conference in order to meet this regulation.
4. Advisors must have with them at the activity/event a list of their students, as well as home telephone numbers and parents/guardian's names.
5. Curfew will be enforced by local advisors. Local advisors are responsible for room checks to ensure their students are in their assigned rooms.
6. No use of alcoholic beverages or narcotics will be permitted.
7. Identification badges or official activity buttons will be worn at all times.
8. Local advisors are responsible for their students' conduct and shall be available to their students at all times, or shall designate another advisor/chaperone who will be available to their students.
9. The local principal/designated administrator will be contacted in emergency situations if the local advisor cannot be located within a reasonable amount of time or is unable to give proper supervision. Student emergencies include, but are not limited to, health issues, accidents, severe misconduct such as possession of drugs or alcohol, failure to significantly abide with event rules, or family emergencies.

I have read the Statement of Assurances and agree to comply with these guidelines.

Signature of Advisor/Chaperone: _____

Date: _____

Signature or Administrator: _____

Date: _____

In case of emergency, the following local administrator should be contacted:

Name: _____

Title: _____

School Phone Number: _____

Cell Phone Number: _____

STUDENT PERMISSION FORM

Name: _____

Address/City/State/Zip: _____

Home Phone: _____ Cell Phone: _____

Chapter: _____

PARENT/GUARDIAN PERMISSION

_____ has my permission to attend and participate in _____ . I understand my daughter/son will be traveling under the supervision of _____. My daughter/son has been made aware that they are to obey the rules and supervisors. If there is some reason my daughter/son needs medical attention, or for some disciplinary reason must be sent home, I will be contacted and further understand that I will be responsible for any expenses incurred.

Signature of Parent/Guardian: _____

Date: _____

Non-Discrimination Policy

Appendix H

California CTSOs cannot discriminate based on sex/gender, race, color, age, creed, national or ethnic origin, physical or mental disability, veteran status, pregnancy status, religion or sexual orientation in its employment and education programs and activities.

It is the policy of the State of California to afford all persons in public schools, regardless of their disability, gender identify, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, equal rights and opportunities in the educational institutions of the state, California Education Code Sections 200-220.

Indemnification Clause

Appendix I

To the fullest extent permitted by law, the CTSO shall indemnify, defend and hold harmless the state, its departments, divisions, agencies, sections, commissions, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:

- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents arising out of or resulting from (1) the product provided of (2) performance of the work, duties, responsibilities, actions or omissions of the CTSO.
- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents arising out of or resulting from a breach by the Grantee of any representation or warranty made by the CTSO.
- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents arising out of or related to occurrences that the CTSO is required to insure against as provided for in this Guide.
- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents arising out of or resulting from the death of bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with CTSO activities, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the state.
- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents which results from an act of omission of the Grantee or any of its subcontractors in its or their capacity as an employer of a person.

To the fullest extent permitted by law, the CDE shall indemnify, defend and hold harmless the CTSO, its officers, board members, employees, volunteers and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:

- Any claim, demand, action, citation or legal proceeding against the CTSO, its employees and agents arising out of or resulting from (1) the product provided or (2) performance of the work, duties, responsibilities, actions or omissions of the CDE.
- Any claim, demand, action, citation or legal proceeding against the CTSO, its employees and agents arising out of or resulting from a breach of any representation or warranty made by CDE.
- Any claim, demand, action, citation or legal proceeding against the state, its employees and agents arising out of or related to occurrences that CDE is required to insure against as provided for in this Guide.
- Any claim, demand, action, citation or legal proceeding against the CTSO, its employees and agents arising out of or resulting from the death of bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with CTSO activities, by any of CDE's subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the CTSO.
- Any claim, demand, action, citation or legal proceeding against the CTSO, its employees and agents which results from an act of omission of CDE or any of its subcontractors in its or their capacity as an employer of a person.