



# Career and Technical Student Organizations

The United States Department of Education (USDOE) has endorsed Career and Technical Student Organizations (CTSOs) as a critical component of an effective Career and Technical Education (CTE) program. The responsibility for CTE instructional programs and related activities, including CTOS, rests with state and local education agencies.

## I. OVERVIEW

CTSOs are defined in the Federal Carl D. Perkins Career and Technical Education Improvement Act of 2006, Section 3. Definitions as follows:

### (6) Career and Technical Student Organization

- (A) In general – The term ‘career and technical student organization’ means an organization for individuals enrolled in a career and technical education program that engages in career and technical education activities as an integral part of the instructional program.
- (B) State and National Units – An organization described in subparagraph (A) may have state and national units that aggregate the work and purposes of instruction in career and technical education at the local level.

State charters for Texas CTOS are held by the Texas Education Agency (TEA), which has the responsibility for leadership and fiscal oversight of each organization, as well as integration of CTOS activities into a state-approved CTE program of study. TEA sponsors the following CTOS:

- A. BPA - Business Professionals of America
- B. DECA
- C. FBLA - Future Business Leaders of America
- D. FCCLA - Family, Career and Community Leaders of America
- E. FFA
- F. HOSA - Health Occupations Students of America
- G. SkillsUSA
- H. TSA - Technology Student Association

## II. OVERSIGHT POLICY

Unless otherwise determined by management of the TEA, a TEA CTE staff member shall serve as the representative to provide oversight for one or more CTOS(s).

The Board of Directors of each CTSO shall adopt and implement Bylaws and Policies for the efficient operation and fiscal management of the CTSO. TEA staff shall not be involved in the day-to-day operations (membership dues, finances, conference registration) of a CTSO except for administrative leadership of the Board of Directors and to review CTSO expenditures and audit reports.

TEA CTE staff shall:

- A. provide administrative leadership and oversight at meetings and conferences in collaboration with the CTSO Board of Directors;
- B. work in partnership with the CTSO Board of Directors to cooperatively evaluate the CTSO for effectiveness and compliance with the goals of the CTSO;
- C. serve as ex-officio, non-voting members on the CTSO Board of Directors, including the Executive Board and its executive sessions and committees; and
- D. monitor the CTSO requirements for Perkins grant funds as established in the funding agreement with TEA, and provide administrative leadership with the Board of each CTSO to determine that the policies and rules are carried out in a timely and equitable manner.

### **III. FINANCIAL ACCOUNTABILITY**

The USDOE allows states to use Federal Carl D. Perkins funds to provide leadership and support for the CTE student organizations.

Title I Part B – State Provisions, Section 124. State Leadership Activities.

(c) Permissible Uses of Funds.-

(4) support for career and technical student organizations, especially with respect to efforts to increase the participation of students who are members of special populations;

TEA CTE staff will monitor for fiscal compliance and verify that the requirements are met in order for the CTSO to receive Perkins funds.

- A. Each CTSO Board of Directors shall be responsible for ensuring financial accountability and shall implement checks and balances in order to accomplish the organization's purposes.
- B. According to OP 07-04 - Agency Standards of Conduct and Conflicts of Interest, no TEA employee shall solicit, accept, or agree to accept an honorarium or remuneration in consideration for services that the employee would not have been requested to provide but for the employee's official position or duties.
- C. **AUDITS**
  - 1. Each CTSO shall employ an independent certified auditor to perform an annual audit and 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 organization. The certified auditor will attend and present the annual independent audit to the Board of Directors. A printed copy of the audit must be provided to each board member.

2. An electronic copy of the annual independent audit report shall be furnished to the TEA CTE staff and submitted to the TEA eGrants system as required.
3. The audit cannot be paid for from Perkins funds. Perkins funds can be used for other allowable expenses in the budget, thus freeing up necessary funds for audit expense.
4. Each CTSO shall submit to the TEA CTE staff, monthly or no less than quarterly, financial reports of cash disbursements and payments.
5. Each CTSO board of directors must review and approve monthly or no less than quarterly, financial reports of cash disbursements and payments.
6. All expenditures shall be tied to the mission and goals of the organization. Each CTSO will utilize a standardized expense reimbursement form.
7. CTSOs shall have policies prohibiting the receipt and disbursement of currency.
8. All CTSO checks shall be serially pre-numbered and accompanied by appropriate supporting documents as required in the Bylaws/Policies. Only designated CTSO representatives shall have authorization to sign checks.
9. TEA CTE staff shall not have authorization to sign CTSO checks.

D. MEAL EXPENSES

1. Receipts for CTSO entertainment, meals and etc. shall have a list of the attendees.
2. When meals are provided at no charge for all participants, neither CTSO participants nor TEA staff may claim reimbursement for those meals.

E. CREDIT CARDS

1. For CTSOs that have credit cards, itemized credit card statement(s) shall be submitted monthly or no less than quarterly to the TEA CTE staff.
2. Each CTSO shall adopt a policy that limits the use of a CTSO-owned card to legitimate organizational expenses. Use of a CTSO credit card for non-organizational or personal expenses is prohibited.
3. Copies of receipts shall accompany all statements and/or payment vouchers before reimbursements can be approved.
4. TEA CTE staff shall not be assigned or have the use of CTSO corporate credit cards. If authorized expenses are incurred by TEA CTE staff, personal credit cards may be used and reimbursement claimed on an expense voucher submitted to the organization.

**F. TRAVEL POLICY FOR TEA CTE STAFF**

1. All CTSO travel must be approved prior to travel. Expense vouchers submitted to TEA by staff shall be reviewed and approved by the employee's supervisor.
2. TEA CTE staff expenses may be paid by the CTSO when sufficient funding is not available from TEA. Any CTSO travel reimbursement to TEA CTE staff will be noted in the CTSO's monthly or no less than quarterly, financial reports submitted to TEA.
3. TEA CTE staff attending CTSO state conferences or CTSO board meetings may request compensatory time plus travel time if it is mandatory to attend meetings outside the normal eight hour work day.

**G. TEA COORDINATION**

1. Membership rosters and dues may not be received or processed at TEA.
2. If the CTSO Board of Directors authorizes a private post office box to receive mail for the organization, TEA CTE staff shall not have access to or responsibility for the box.
3. TEA CTE staff may not be assigned a CTSO cellular telephone or other communication device.

**IV. PLANNING AND MANAGEMENT**

Each CTSO shall:

- A. have a policy providing membership opportunities to students previously or currently enrolled in a CTE state-approved program of study;
- B. have a policy that requires teachers to inform administrators of a desire for either their students or themselves to pursue leadership roles in the organization; administrative notice shall include the expected times away from school and expenses related to meetings; and
- C. plan their state conferences and competitive events (if held during the school year) between 1:00 p.m. on Thursday and 6:00 p.m. on Saturday in order to balance the time students and teachers are away from school.

**V. CTE PROFESSIONAL DEVELOPMENT CONFERENCES**

- A. CTSO activities shall include involvement in CTE statewide professional development conferences. Presentations shall include techniques for integrating CTSO activities into the CTE program of study. Special emphasis should be given to strategies to increase the participation of students who are members of special populations.
- B. CTSO state directors/officers shall schedule all CTSO activities in collaboration with and approval by the PDC grant recipient(s) and TEA CTE grant administrator.

*Revisions: September, 2004; October, 2006*

