



This handbook includes General Information, Chapter Information, Conference, Leadership, Bylaws, State and District Policies and Procedures and Ceremonies.

*FBLA inspires and prepares students to become community-minded business leaders in a global society through relevant career preparation and leadership experiences.*

Colorado FBLA is a resource and support organization that does not select, control, supervise or approve local chapter or individual member activities except as expressly provided for in the Handbook and Bylaws.

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# 2024 - 2025 Colorado FBLA Handbook

## Preface

No longer is classroom instruction enough for the development of strong, assertive leadership today in preparation for an active leadership role tomorrow. Through Future Business Leaders of America (FBLA), members learn how to lead and participate in group discussions, preside at meetings and conferences, work effectively within committees, and engage in practical problem solving and decision making. Members learn the value of competition on local, district, state, and national levels by experiencing the responsibility of success as well as the challenge of defeat.

Through contact with teachers, advisers, employers, and interested businesspeople, FBLA members gain confidence in themselves and in their abilities. At the same time, they learn that to develop these abilities to the fullest is a personal responsibility as well as an organizational goal.

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# Colorado Future Business Leaders of America

9101 East Lowry Boulevard

Denver, CO 80230-6011

Dear Colorado FBLA Members and Advisers,

Welcome to the new FBLA membership year! I am Yaelyn Chavez, and I am grateful to be serving as this year's State President. I am from Johnstown in NOCO, better known as the town where the new Bucees is located. I became an FBLA member in 7th grade and love this organization for all the opportunities it provides for its members. I look forward to everything that we will accomplish this term.

FBLA is an organization that allows for networking and growing both as a leader and as an individual. There are a large variety of opportunities available for both members and advisers, from programs to service events and more. Whatever you choose, make sure to get involved! Engaging with your community through these opportunities allows you to learn more about the world and earn those coveted ribbons for name tags at our State Leadership Conference.

The State Officer team has created the program of work for the 24-25 term. We will be focusing on a variety of initiatives, ranging from a financial literacy competition for members to a leadership article series, along with CTSO collaborations and alumni partnerships. We will also be continuing past initiatives such as our Service Sunday and Star Member posts. If you are interested in finding out more about our program of work, please visit the Colorado FBLA website.

We will be starting off our year with a combined Fall Leadership Conference with DECA on October 1st. The state officer team will also be holding virtual monthly membership meetings with valuable information on a variety of topics. Members also have an opportunity to serve on our State President's Council or as an officer for their district. Further information on all of this can also be found on our website.

If you have any questions about how to get involved, please feel free to reach out to me or the state officer representing your district. I cannot wait to see our amazing members flourish this year. Let us get out there and show everyone what FBLA is made of!

Best regards,

Yaelyn Chavez  
Colorado FBLA State President  
[president@coloradofbla.org](mailto:president@coloradofbla.org)



## General Information

### Career and Technical Education

Career and Technical Education is training that equips the recipients with entry skills, retrains them for changing employment, or updates them with current technological skills.

### Program Standards

- Career and technical education programs are an important component of the total educational system.
- Career and technical education programs should duplicate or simulate actual work environments.
- Career and technical education programs must be taught by individuals who have work experience in the occupation.
- Career and technical education programs are to be operated under the guidance of advisory committees.
- Career and technical education should be available to all who need it, want it, and can profit by it.

### Competencies

The State Board for Community Colleges and Occupational Education/Colorado Community College System believes that student organizations are an integral part of career and technical education programs.

The value of career and technical supportive education is broader than teaching students an occupation. Students need to learn not only how to earn a living but how to live a satisfying and meaningful life. They need to develop social skills and positive attitudes as well as stable and productive values if they are to be successful as employees and as citizens of their communities.

For career and technical supportive education, teaching is more than the act of instruction. It cannot be reduced to something a teacher does in the classroom or laboratory--a technique or a procedure because it involves the teacher's total influence on students' lives. Career and technical supportive education has a responsibility to provide students with the kind of experiences they need to develop an identity.

Therefore, teaching is the kind of example a career and technical education teacher sets by work and action. Interests, attitudes, appreciations, ideals, biases, habits, lifestyle, and much more have an important effect on the personal development of the student.

Career and Technical Student Organizations (CTSOs) exist to provide students with the kind of experience they need to develop their full potential for living a satisfying life as well as experiences that develop leadership and planning abilities, moral character, and mutual understanding. Although their stated objectives may be different, the overriding purpose and goals of career and technical student organizations are quite similar as a **curricular** activity. Leadership skills are defined as competencies in leadership, citizenship, organization, initiative and personal development responsibility, which are integrated into the career and technical education program.

Common elements of leadership competencies include:

- citizenship
- organization
- initiative
- personal development
- responsibility
- leadership

Common elements of leadership competencies include:

- community service
- critical thinking skills
- decision making skills
- leadership skills
- job search skills
- parliamentary procedure
- public speaking
- business and industry partnerships
- teambuilding

Suggested examples of activities which demonstrate leadership competencies include:

- elect chapter officers
- participate in mock job interviews
- plan and conduct field trips
- prepare a newsletter
- attend professional meetings
- review professional goals
- establish committees
- professional dress and grooming
- parliamentary procedure
- individual competitions
- community service/service learning
- team competitions
- speech preparation and delivery
- work with business leaders
- participation in school and social activities

## Student Organizations

The activities of career and technical student organizations (CTSOs) are a required part of all secondary career and technical education programs. Student activities are also an important part of many postsecondary programs. The recognized career and technical student organizations in Colorado are:

- DECA—An Association of Marketing Students
- FBLA—Future Business Leaders of America
- FFA—An Association for Agricultural Education Students
- FCCLA—Family, Career and Community Leaders of America
- HOSA—Future Health Professionals
- (SC)2—Successful Career Students of Colorado



- SkillsUSA—An Association for Technical and Industrial Education Students
- TSA—Technology Student Association

### Postsecondary

Postsecondary level students in Health Science Education, Marketing Education and in Trade and Industrial Education participate in student activities through the organizations of HOSA, Delta Epsilon Chi and SkillsUSA. The postsecondary organization for business students is Collegiate FBLA, which is open not only to postsecondary career and technical students but to other students who enroll in postsecondary general business, business administration, or business-related courses.

## Colorado FBLA Facts

### Colorado State Theme

2024 – 2025: Reach New Horizon

### Colorado Membership\*

FBLA: 6,768

Middle School Division: 171

Collegiate Division: 53

TOTAL: 6,992

*\*2023-2024 school year*



The [2023 – 2024 Colorado FBLA Annual Report can be found online.](#)

### Colorado FBLA History

The Colorado Chapter of Future Business Leaders of America (FBLA) was first organized in 1962 by John Binnion. Colorado was chartered with the national office June 15, 1963, as state chapter number 33. The organization was created as a result of the increasing interest in business education on the part of the high school students throughout the state and on the interest expressed by business, teachers, and community leaders. Through FBLA, all sought to emphasize the importance of business and the role it plays in the lives of all people.

Colorado FBLA's first official chapter was at Loveland High School (Charter 232) and Colorado Collegiate FBLA's first official chapter was at Adams State College (Charter 1576) and Colorado FBLA Middle School's first official chapter was Platte Valley Middle School.

All career and technical business education programs in the State of Colorado must provide an opportunity for their students to participate in a student leadership organization. This organization is the Future Business Leaders of America (FBLA). Its primary purpose is to develop leadership characteristics in each student for his/her career, home, and community.

### Colorado Song

I'm Colorado born and Colorado bred and when I die, I'll be Colorado dead!

So rah rah Colorado, rah rah Colorado Rah rah that dear old state of mine

I've traveled east and I've traveled west and now I know that COLORADO'S BEST!

So rah rah Colorado, rah rah Colorado Rah rah that dear old state of mine

## State Structure

The Colorado State Chapter is comprised of active chartered local FBLA chapters within Colorado which are then divided into geographical districts. The State Chapter is governed by the Colorado FBLA Bylaws.

### State Staff

Name	Position	E-mail	Areas of Responsibility
Molly Davis	State Adviser	<a href="mailto:molly.davis@cccs.edu">molly.davis@cccs.edu</a>	General FBLA Questions, Conference Questions
Jennifer Cormier	Program Director State Chairperson	<a href="mailto:jennifer.cormier@cccs.edu">jennifer.cormier@cccs.edu</a>	Curriculum Questions, Program Approval Questions
Ashley Manning	Program Assistant	<a href="mailto:ashley.manning@cccs.edu">ashley.manning@cccs.edu</a>	Finance and Payment Questions
Tonya Davies	State Officer Adviser	<a href="mailto:tdavies@pvre7.org">tdavies@pvre7.org</a>	State Officer Questions, State Officer Candidate Questions
Sharon Seger	Judge Coordinator	<a href="mailto:judges@coloradofbla.org">judges@coloradofbla.org</a>	Competition Judges at State Leadership Conference
Aly Johnson	New Teacher Mentor	<a href="mailto:COBMEFmentor@gmail.com">COBMEFmentor@gmail.com</a>	New Advisers

### State Chairperson-Adviser

The FBLA State Chairperson-Adviser is appointed by the Colorado Community College System as the Business, Marketing, Entrepreneurship & Finance Program Director. The State Chairperson-Adviser's responsibilities, which may in some cases be delegated to the State Adviser or other members of the Colorado Board of Directors includes the following:

- Serve as liaison between the National Office and the State Board of Directors
- Represent the State Board of Directors to the national association
- Bring matters relative to the operation of the State Chapter to the president/chief executive officer and the National Board of Directors.
- Prepare and submit informational reports to the National Office relative to internal revenue affairs.
- Appoint the Colorado FBLA State Officer Team Adviser in accordance with Colorado guidelines.
- Coordinate the activities of the Colorado FBLA Board of Directors, District Leadership Conferences, Fall Leadership Conferences, State Leadership Conference, and National Leadership Conference. The Adviser serves as a liaison between the local, state and national levels.

### State Adviser

The FBLA State Adviser is appointed by the Colorado Community College System as the Colorado FBLA State Adviser. The State Adviser's responsibilities include the following:

- Establish, implement, and manage the process for logistical support for state conferences and other leadership events including but not limited to site contracts, registration, content management systems, and event contracts.
- Knowledgeable about the logistical support processes for the state conferences and other leadership events including but not limited to site contracts, registration, content management systems, and event contracts.
- Manage FBLA membership, finances, official records, conferences, public relations, and competitive events.
- Plan and coordinate training and leadership activities related to the FBLA state officer team.
- Provide statewide technical assistance to local chapter advisers in establishing and strengthening their career and technical student organization activities.
- Promote membership recruitment and retention in FBLA.
- Supervises and serves as the team leader for the FBLA state officer team that is composed of

student officers and adult advisers.

- Coordinate and plan all FBLA State Officer meetings.
- Promote FBLA as an integral part of Business Education.
- Represent Colorado at national conferences.
- Assist with the assessment of CTE programs funded under the Carl Perkins Act, including assessment of the participation and performance of special populations.
- Expand the use of technology in CTE programs, including teacher training, distance learning and focusing on programs that lead to high skill, high wage, or high demand careers.
- Mentor new teachers and assist with growing student organization participation with focus expanding on leadership skills.
- Assist with curriculum development, programs of study, career clusters implementation, academic integration, and professional development activities, ensuring that educators, students, and parents stay current with industry trends.
- Assist with the improvement of academic, career and technical skills of students by strengthening the components of the programs and integrating academic standards and career and technical education.
- Review and/or develop policies, procedures and guidelines for operation of the state organization and chapter through the assistance of the state level FBLA executive committees and in accordance with the state association constitutions/bylaws.
- Establish and maintain partnerships among local education agencies, postsecondary institutions, and business and industry.
- Serve as a team member with other Assistant Program Directors/CTSO Advisers to plan, promote and support combined career and technical student organization activities such as, but not limited to Legislative Day, Officer Leadership Training, the SBCCOES Presentation.
- Assist and provide technical assistance with the program approval process, which includes but is not limited to having a basic knowledge level of the program approval process, use of the online system, conditions of programs, data collection, and the ability to communicate information to educators.
- Effectively communicates both orally and in writing with supervisors, subordinates and administrative assistants.
- Develops and manages budgets for FBLA, and monitors expenditures of federal and student dollars.

### *State Officer Team Adviser*

State Officer Team Adviser Job Description:

- To provide communication between the state FBLA/business staff, the state FBLA officers, nominating committee, the FBLA advisers and FBLA members in Colorado.
- To assist in the planning, conducting, coordinating and evaluating of leadership training activities of the Colorado career and technical student organization.
- Review and recommend changes in all state career and technical student leadership training activities.

In addition, the FBLA State Officer Team Adviser is responsible for the following:

- Provide direction, counseling, supervision, and suggestions to the State Officer Team
- Attend meetings at national, regional, and state levels upon request of the State Adviser and/or Colorado Community College System
- Offer guidance in the writing of the State Program of Work
- Coordinate officer attendance at the District Leadership Conference and other CO FBLA events
- Attend, supervise and assist in coordination of all meetings:
  - State Officer Meetings
  - Summer CTSO Training
  - June National Leadership Conference
  - Colorado Fall Leadership Conference
  - November National Fall Leadership Conferences, when applicable

- April State Leadership Conference
- Any other state sponsored FBLA activities, when applicable
- Coordinate and validate state officer forms:
  - Travel Authorization Forms, Driver's License, Medical Forms, School transcript, Auto insurance, Yearly report, Reimbursement forms, E-mail and home addresses, Officer information form, Emergency form, Meeting agendas and minutes
- Coordinate and validate Monthly Officer Reports:
  - Obtain Monthly Officer Reports
  - Respond to all Monthly Officer Reports and provide appropriate consultation
  - Report any problem in not receiving Monthly Officer reports
- Assist the State Adviser with any additional needs prior to and at state sponsored meetings and conferences
- Assist with State Nominating Committee at the State Leadership Conference
- Serve as the liaison between the State Officer Team and the State Adviser
- Make all assignments for attendance at official functions
- Send out e-mail communication to all officers from the State Adviser
- Communicate all responses of officer team to the State Adviser
- Coordinate and provide materials needed at functions
- Represent the State Officer Team in its best interest

### *State Judge Coordinator*

Judge Coordinator Job Description:

- Recruit qualified judges for all events (live and prejudged)
- Communicate with judges about events, lodging and other logistics
- Collect pre-judged materials, if applicable
- Sort data and e-mail materials to judges, if applicable
- Create spreadsheet of prejudged and production scores, if applicable
- Create judge folders and administrator packets, if applicable
- Coordinate on-site judge orientation during conference
- Send thank you notes to judges
- Collect and analyze judge evaluations for continuous improvements

### *State Competitive Events Coordinator, not currently filled*

The Competitive Events Coordinator completes at least the following tasks:

- Familiarity with the registration system
- Identify, communicate with, support and assist Competitive Events personnel
- Plan the Competitive Event schedule
- Provide an update at the SLC Adviser Orientation
- Determine supplies needed
- Assist in tabulations team selection

### *State Tabulations Director, not currently filled*

- Run the tabulations room at SLC
- Ensure correct data entry of event scores
- Communicate winner's list to production company

### *State New Teacher Mentor*

- Serve as liaison between state office and new teacher advisers in Colorado FBLA
- Contact new advisers on a regular basis to mentor and answer questions

## State Office Services

- **Installation/Reactivation.** Those wishing to organize local FBLA chapters receive guidance in the installation of new and reactivated chapters.
- **State Officer Visits.** State Officers are available to visit chapters, in person or virtually. To request a state officer, complete the form found online [here](#).
- **Networking.** Connecting with other advisers to share ideas.
- **Technical Assistance.** The state chapter helps organize district and state leadership conferences.
- **Training.** The state chapter provides in-service training for chapter advisers.
- **Material Requests.** Requests are quickly filled and inquiries are answered.
- **Resources.** Access to resources to assist in the implementation of FBLA.

## State Board of Directors

The Board of Directors guides and directs the activities of Colorado FBLA. It is composed of the State Chairperson- Adviser, State Adviser, elected district board members, the Colorado FBLA State Officer Team Adviser(s), the Colorado FBLA State President, Colorado Business and Marketing Educators Representative, Administrator and representative(s) from business and industry.





2024 - 2025 Colorado FBLA Board of Directors

<p><b>District 1</b>                  Shelley Tregoning                  Greeley Central High School                  1515 14<sup>th</sup> Ave.                  Greeley, CO 80631  <a href="mailto:stregoning@greeleyschools.org">stregoning@greeleyschools.org</a></p>	<p><b>District 7</b>                  Daleen Munoz                  Rocky Ford High School                  100 W. Washington Ave.                  Rocky Ford, CO 81067  <a href="mailto:Daleen.munoz@rockyford.k12.co.us">Daleen.munoz@rockyford.k12.co.us</a></p>
<p><b>District 2</b>                  Sean McCoy                  Monarch High School                  329 Campus Dr                  Louisville, CO 80027  <a href="mailto:sean.mccoy@bvsd.org">sean.mccoy@bvsd.org</a></p>	<p><b>District 8</b>                  Kalee Buhr                  Centauri High School                  17889 US Highway 285                  La Jara, CO 81140  <a href="mailto:kbuhr@northconejos.com">kbuhr@northconejos.com</a></p>
<p><b>District 3</b>                  Janet Brophy                  Idalia High School                  26845 County Road 9.2                  Idalia, CO 80735  <a href="mailto:brophyj@idaliaco.us">brophyj@idaliaco.us</a></p>	<p><b>District 9</b>                  Dee James                  Ouray High School                  PO Box N                  Ouray, CO 81427  <a href="mailto:djames@ourayschool.org">djames@ourayschool.org</a></p>
<p><b>District 4</b>                  Traci Davenport                  Peetz High School                  311 Coleman Avenue                  Peetz, CO 80747  <a href="mailto:davenportt@peetzschoool.org">davenportt@peetzschoool.org</a></p>	<p><b>District 10</b>                  Katie Pettee                  Littleton High School                  199 E. Littleton Blvd.                  Littleton, CO 80121  <a href="mailto:kaclark@lps.k12.co.us">kaclark@lps.k12.co.us</a></p>
<p><b>District 5</b>                  Kaylyn Fergione                  Grandview High School                  20500 E. Arapahoe Rd.                  Aurora, CO 80016  <a href="mailto:kfergione@cherrycreekschools.org">kfergione@cherrycreekschools.org</a></p>	<p><b>District 11</b>                  Janna Robinett                  Rock Canyon High School                  5810 McArthur Ranch Rd.                  Highlands Ranch, CO 80124  <a href="mailto:Janna.robinett@dcsdk12.org">Janna.robinett@dcsdk12.org</a></p>
<p><b>District 6</b>                  Jo Powell                  Pine Creek High School                  10750 Thunder Mountain Avenue                  Colorado Springs, CO 80908  <a href="mailto:jo.powell@asd20.org">jo.powell@asd20.org</a></p>	<p><b>District 12</b>                  Jen Sheets                  Cherry Creek High School                  9300 E. Union Ave.                  Greenwood Village, CO 80111  <a href="mailto:Jsheets4@cherrycreekschools.org">Jsheets4@cherrycreekschools.org</a></p>
<p><b>Colorado FBLA State Adviser</b> – Molly Davis – <a href="mailto:molly.davis@cccs.edu">molly.davis@cccs.edu</a>  <b>Colorado FBLA State Chairperson-Adviser</b>– Jennifer Cormier – <a href="mailto:Jennifer.cormier@cccs.edu">Jennifer.cormier@cccs.edu</a>  <b>Colorado FBLA State President</b> – Yaelyn Chavez, Roosevelt HS, <a href="mailto:president@coloradofbla.org">president@coloradofbla.org</a>  <b>Colorado FBLA State Officer Adviser</b> – Tonya Davies, Platte Valley High School, <a href="mailto:tdavies@pvre7.org">tdavies@pvre7.org</a>  <b>Administrator Representative</b> – <i>Currently Vacant</i>  <b>CBAM Representative</b> – Lindsay Bornhofen, Air Academy High School  <b>Business Representative</b> – Michael Gotwald, Lockheed Martin</p>	

## State Officer Team

Members of the State Officer Team establish goals for Colorado FBLA, implement state projects to achieve those goals, and present workshops at various conferences and school sites. They act as ambassadors to present a positive image of the organization.

The team is composed of the State President, Colorado's National Officer Candidate/Executive Vice President, State Vice President of Education, State Vice President of Progress, State Vice President of Service, and State Officers representing each of the eleven districts. The local chapter adviser of each officer shall serve as ex-officio, non-voting members.



## 2024 – 2025 Colorado FBLA State Officer Team

Name	Email	Adviser	Adviser Email
<b>Yaelyn Chavez</b> President <i>Roosevelt High School</i>	<a href="mailto:president@coloradofbla.org">president@coloradofbla.org</a>	Sabrina Peterson	<a href="mailto:speterson@weldre5j.org">speterson@weldre5j.org</a>
<b>Shriya Ginjupali</b> Vice President of Service <i>Grandview High School</i>	<a href="mailto:vp-service@coloradofbla.org">vp-service@coloradofbla.org</a>	Ann Lujan	<a href="mailto:Alujan2@cherrycreekschools.org">Alujan2@cherrycreekschools.org</a>
<b>Annabelle Rusco</b> Vice President of Education <i>Roosevelt Preparatory</i>	<a href="mailto:vp-education@coloradofbla.org">vp-education@coloradofbla.org</a>	Sabrina Peterson	<a href="mailto:speterson@weldre5j.org">speterson@weldre5j.org</a>
<b>Lauren Anderson</b> Vice President of Progress <i>Pine Creek High School</i>	<a href="mailto:vp-progress@coloradofbla.org">vp-progress@coloradofbla.org</a>	Jo Powell	<a href="mailto:Jo.powell@asd20.org">Jo.powell@asd20.org</a>
<b>Tony Bermudez</b> State Officer – D2 <i>Longmont High School</i>	<a href="mailto:D2stateofficer@coloradofbla.org">D2stateofficer@coloradofbla.org</a>	Jim Giveans	<a href="mailto:Giveans_james@svvsd.org">Giveans_james@svvsd.org</a>
<b>Lyndi Huelskamp</b> State Officer – D3 <i>Flagler High School</i>	<a href="mailto:D3stateofficer@coloradofbla.org">D3stateofficer@coloradofbla.org</a>	Chris Huelskamp	<a href="mailto:chuelskamp@af20.net">chuelskamp@af20.net</a>
<b>Addison Hoozee</b> State Officer – D4 <i>Prairie High School</i>	<a href="mailto:D4stateofficer@coloradofbla.org">D4stateofficer@coloradofbla.org</a>	Beth Kilmer	<a href="mailto:bkilmer@prairieschool.org">bkilmer@prairieschool.org</a>
<b>Vivian Yang</b> State Officer – D5 <i>Grandview High School</i>	<a href="mailto:D5stateofficer@coloradofbla.org">D5stateofficer@coloradofbla.org</a>	Ann Lujan	<a href="mailto:Alujan2@cherrycreekschools.org">Alujan2@cherrycreekschools.org</a>
<b>Josephine Langdon</b> State Officer – D6 <i>Ellicott High School</i>	<a href="mailto:D6stateofficer@coloradofbla.org">D6stateofficer@coloradofbla.org</a>	Elsie Tossas	<a href="mailto:elsiefeliz@esd22.org">elsiefeliz@esd22.org</a>
<b>Isabella LeBoeuf</b> State Officer – D10 <i>Arapahoe High School</i>	<a href="mailto:D10stateofficer@coloradofbla.org">D10stateofficer@coloradofbla.org</a>	Caroline Swank	<a href="mailto:cswank@lps.k12.co.us">cswank@lps.k12.co.us</a>
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<b>Caleb Cole</b> State Officer – D12 <i>Cherry Creek High School</i>	<a href="mailto:D12stateofficer@coloradofbla.org">D12stateofficer@coloradofbla.org</a>	Jen Sheets	<a href="mailto:Jsheets4@cherrycreekschools.org">Jsheets4@cherrycreekschools.org</a>

### State Publications and Resources

- Memo Monday – This is an email sent to all advisers every Monday outlining important announcements and upcoming dates and deadlines.
- Social Media – Colorado FBLA is active on Facebook, Instagram, TikTok
- Colorado FBLA Handbook – This is the official guide for Colorado FBLA. This handbook also contains the official regulations, policies, and procedures for Colorado FBLA.
- Colorado District Leadership Handbook – This is the official guide for Colorado FBLA District Conferences.
- State Officer Handbook – This is the official guide for the State Officer Team and gives instructions on applying for office.
- *COLORADO FBLA TODAY* – This is a statewide newsletter that is posted on the Colorado FBLA



website by the State Vice President of Education and provided to all local chapters. To submit an article, click [HERE](#).

- [Colorado FBLA Website](#) – This is a front facing web source for members and advisers. The website contains contact information and a calendar of events.
- [Colorado Business, Marketing, Entrepreneurship & Finance Website](#) – This website is the go-to resource center to help guide the Business, Marketing, Entrepreneurship & Finance program.

### State Program of Work

The Colorado FBLA State Program of Work is developed by the State Officer Team. This year, the Program of Work can be found online as a living, updated document:

- Goal 1: Service – To assist and raise awareness of the organization within Colorado as well as communities in need through community service, March of Dimes, Colorado Relief Fund, financial leadership and financial literacy activities
  - Advocate, educate and promote Community Service to all Colorado FBLA members
  - Promote financial leadership and literacy
  - Increase funding and educate members on the March of Dimes
  - Increase funding for and educate members on the Colorado Relief Fund
- Goal 2: Education – To assist and raise awareness of the organization within Colorado through promotion of classroom activities, Business Achievement Awards, Peak Awards/Champion Chapter and competitive events
  - Promote classroom activities
  - Business Achievement Awards
  - Peak Awards & Champion Chapter
  - Competitive Events
- Goal 3: Progress – To assist and raise awareness of the organization within Colorado through public relations, outreach, sponsorships and advocacy
  - Recruitment
  - Recognition and Advocacy
  - District Engagement

### District Structure

The Colorado State Chapter is composed of twelve geographical districts.

The following schools are in each district (only active chapters are included):

District 1				
Berthoud	Fossil Ridge	Mountain View	Rocky Mountain	University
Briggsdale	Greeley Central	Pawnee	Roosevelt	Valley
Eaton	Greeley West	Platte Valley	Thompson Valley	Weld Central
Fort Collins	Liberty Common	Poudre	Timnath	Windsor
Fort Lupton	Loveland			

District 2				
Adams City	Global Leadership	Longmont	Northglenn	Stratton
Boulder	Horizon	Mead	Silver Creek	West Grand
Broomfield	Legacy	Monarch	Stargate	Westminster
Fairview				

District 3				
Akron	Burlington	Idalia	Otis	Wiggins

Arickaree	Flagler	Limon	Prairie	Woodlin
Brush	Fort Morgan	Lone Star	Stratton	Yuma

<b>District 4</b>				
Caliche	Holyoke	Merino	Revere	Weldon Valley
Fleming	Julesburg	Peetz	Sterling	Wray
Haxtun				

<b>District 5</b>				
Bennett	Cherokee Trail	Deer Trail	Smoky Hill	Strasburg
Byers	Endeavor	Grandview		

<b>District 6</b>				
Air Academy	Doherty	Fountain Ft. Carson	Palmer Ridge	Rampart
Banning Lewis	Ellicott	Lewis Palmer	Peyton	Sand Creek
Big Sandy	Falcon	Liberty	Pikes Peak Online	Vista Ridge
Canon City	Florence	Mesa Ridge	Pine Creek	Widefield
Discovery Canyon				

<b>District 7</b>				
Cheraw	Fowler	Las Animas	Pueblo West	Swink
Cheyenne Wells	Granada	McClave	Rocky Ford	Trinidad
Crowley County	Kim	Pueblo Centennial	Springfield	Wiley
Eads	La Junta	Pueblo South		

<b>District 8</b>				
Alamosa	Ignacio	Monte Vista	Sanford	Sierra Grande
Bayfield	Lake County	Pagosa Springs	Sangre de Cristo	Walsenburg
Centauri	La Veta	Primero	Sargent	

<b>District 9</b>				
Aspen	Dove Creek	Moffat County	Olathe	Rangely
Cedaredge	Fruita Monument	Montrose	Ouray	Steamboat Springs
Central	Grand Junction	North Fork	Palisade	
Delta	Hayden			

<b>District 10</b>				
Arapahoe	Englewood	Littleton	Rangeview	Riverdale Ridge
CEC	Gateway	Mullen	Regis Jesuit	Vista Peak
Denver East	Heritage	Pickens		

<b>District 11</b>				
Chaparral	Elizabeth	Legend	Ponderosa	STEM High School
Douglas County	Highlands Ranch	Mountain Vista	Rock Canyon	ThunderRidge

<b>District 12</b>				
Alameda	Cherry Creek	Eaglecrest	Green Mountain	Overland
Chatfield	Dakota Ridge			



## Local Chapter Structure

Local chapters consist of young men and women who are enrolled in business education programs at the secondary level. Each chapter is organized and officially chartered in accordance with the principles of FBLA, Inc. The chapter must be affiliated with the district, state, and national organizations.

## Local Chapter Adviser

One or more certified teachers in the business education department must serve as chapter adviser. The success or value of a chapter depends on many factors, but the most important influence is the leadership of the chapter adviser.

## Local Chapter Executive Board

Each local chapter elects or selects an executive officer board. Sample officer titles may be: president, vice president, secretary, treasurer, reporter, historian, and parliamentarian. The main function of the board is to guide the chapter and organize a program of work.

## Membership and Financial Structure

Future Business Leaders of America, Inc., like many other student organizations that are an integral part of the school's career and technical education training program, is financed primarily through individual memberships in local chapters. Members' dues are paid through the local chapter. Some chapters, acting as a unit for the members, pay the dues from funds derived from income-producing chapter projects. The income from national membership dues is used exclusively by the national association for services provided to local and state chapters.

Colorado state chapter operations are financed through the payment of state dues by members. District and local activities are financed through the payment of chapter dues. Memberships at the local, district, state, and national levels are unified and are not available separately. The basic philosophy of FBLA has always been that members and chapters engage in financial leadership projects to make possible various chapter activities and programs.

## New Chapters

If interested in beginning an FBLA chapter, contact the State Adviser. Once the application is approved, the chapter will receive a chapter number and login to enter members and activate the chapter.

## State and National Dues

State and National dues are payable to National FBLA by **October 20** to be eligible for Gold Seal recognition and chapter/state membership awards at NFLC and **December 1** of the current year for competitive eligibility at district leadership conferences and chapter/state membership awards at SLC. State and National dues should be sent to the national office. Membership cards are sent after membership dues are received at the national office.

If a chapter misses the December 1<sup>st</sup> deadline, competition eligibility can still be met if a \$10 late fee per member is paid, only until the district leadership conference deadline.

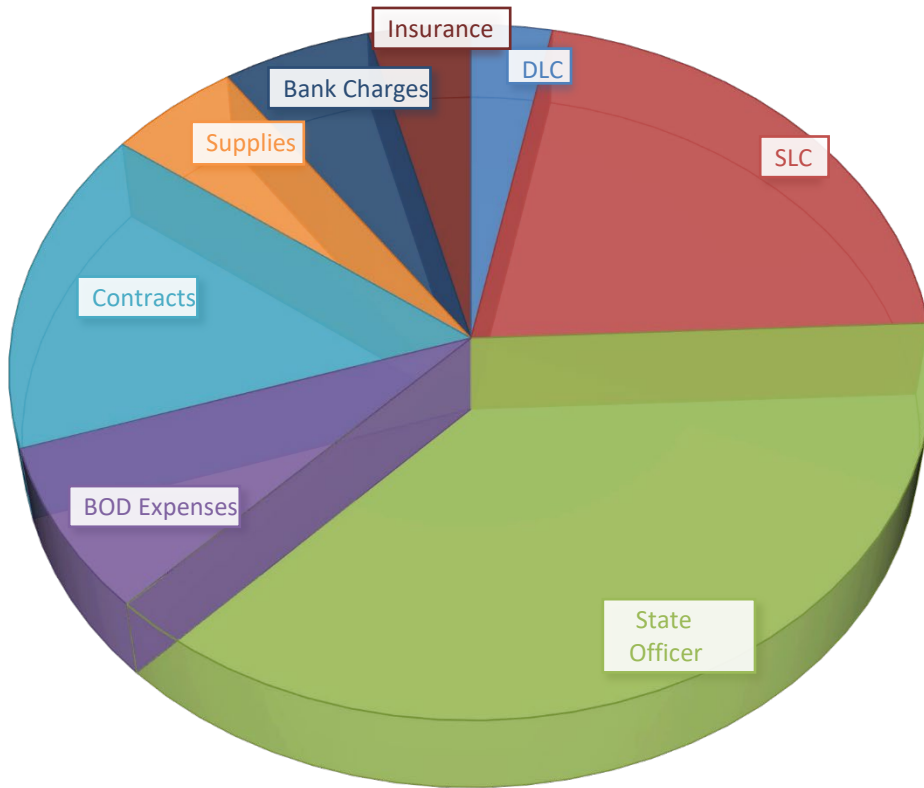
For competitive eligibility at the State Leadership Conference, spring semester dues are payable to National FBLA by March 1<sup>st</sup> or one week prior to the state leadership conference early bird deadline (whichever comes first).

Division	Dues Amount
National Middle School FBLA	\$10.00
Colorado Middle School FBLA	\$5.00
National FBLA	\$10.00
Colorado FBLA	\$10.00
National Collegiate FBLA	\$10.00
Colorado Collegiate FBLA	\$10.00

## Financial Support

How are my Colorado FBLA dues spent? See below for a chart based on past expenditures:

### HOW ARE MY DUES SPENT?





## Chapter Information

### Example Program of Work

#### **Category Legend:**

*Social Activities* · *Professional Development* · *Public Relations* · *Community Service* · *Business & Industry Connections* · *Financial Leadership Activities*

- August
- 5 – Officer Team Bonding Activity ·
  - 20 – High School Orientation – CTSO promotion table with board and candy ·
  - 21 – First Day of School: CTSO Class Presentations · · ·
  - 22 – CTSO Class Presentations · · ·
  - 26 – Recruitment Party: Ice Cream Social · ·
  - 28 – Officer Meeting (create bulletin board) ·
  - 30 – First CTSO Meeting during classes · ·
- September
- 3 – Registration deadline for Chapter Officer Kickoff
  - 4 – Officer Meeting
  - 6-13 – Tamale Fundraiser ·
  - 10 – CTSO Chapter Officer Leadership Kickoff ·
  - 18 – Business of Baseball · ·
  - 19 – Literacy Night · ·
  - 21 – FBLA Night at Football Game · ·
  - 27 – FBLA Spirit Day (wear FBLA shirt, practice powder puff game) · ·
  - 30 – Powder Puff Game ·
- October
- 2 – Officer Meeting
  - 9 – Middle School Presentation ·
  - 14 – CTSO Class Presentations · ·
  - 15 – CTSO Class Presentations · ·
  - 16 – Officer Meeting
  - 21-22 – Fall Leadership Conference · ·
  - 25 – Competition Selection ·
  - 28 – Trick-or-Treat Street · · · ·
  - 30 – Officer Meeting
- November
- 1-30 – Santa Cops Drive ·
  - 6 – Officer Meeting
  - 8 – Gathering Grounds Coffee Shop Tour and Presentation · · ·

	13 – March of Dimes Education Event ·
	20 – Officer Meeting
	22 – Serve Thanksgiving Dinner · ·
December	4 – Officer Meeting
	6 – Guest Speaker: March of Dimes · ·
	11 – Advisory Committee Meeting: CTSO Presentation ·
	13 – Holiday Party ·
	18 – Officer Meeting
January	7 – Officer Meeting, CTSO Bulletin Board Update ·
	9 – CTSO Presentations in Class · ·
	10 – Welcome Back Meeting · ·
	13-24 – Testing Competitions ·
	29 – Night of the Stars: Competition Presentations to local business and industry connections · ·
February	3 – CTSO Week: Community Service - Deliver Nursing Home Notes · ·
	4 – CTSO Week: Teacher Appreciation Gifts Delivered ·
	5 – CTSO Week: District Leadership Conference · · ·
	6 – CTSO Week: Send advocacy emails to legislators ·
	7 – CTSO Week: Member Ice Skating Party ·
	19 – Officer Meeting
	24 – CTSO Social Media Campaign Videos for CTE Month ·
March	4 – Officer Meeting
	8 – Chili Cook-off Fundraiser ·
	18 – Officer Team Bonding Event ·
	26 – Denver Tour and Presentations: Mint and Pepsi Center · · ·
April	10 – Community Service: Adopt-a-Highway Clean-up · · ·
	15 – Advisory Committee Meeting: CTSO Presentations ·
	23-25 – State Leadership Conference · · ·
May	2 – Submit article to newspaper about SLC accomplishments ·
	8 – Senior Celebration ·
	11 – Officer Team Interviews/Selection
	13 – CTSO End-of-Year Banquet · ·
	22 – Community Service: Flower planting at businesses in town · · ·
June	3-4 – Officer Team Retreat · ·
July	5-9 – CTSO National Leadership Conference · ·
	20 – Officer Meeting

[Here is a link to example Program of Work documents from FBLA chapters across the state.](#)

## Examples of Activities

The following is a list of activities that have been successfully completed by other chapters. They are only examples, but they should give chapters ideas for the program of work.

### Business & Industry Connections

- Invite speakers from educational institutions, local businesses, and personnel agencies.
- Arrange field trips to local businesses.
- Manage a school savings bank.
- Provide a job-placement service.
- Prepare members for competition.

### Community Service

- Present Thanksgiving and Christmas food baskets
- Visit the sick and/or elderly
- Read to the blind
- Volunteer for a charity
- Provide word processing services
- Conduct a school assembly
- Award scholarships
- Provide hosts and hostesses for school sponsored events
- Establish a tutoring program
- Sponsor a school activity

### Public Relations

- Write news articles for the following:
  - School and community newspaper
  - Colorado FBLA Today
  - Tomorrow's Business Leader
  - Social Media
- Write a radio announcement or a feature story
- Make a bulletin board display
- Prepare a layout for a school yearbook
- Submit articles for publication by other organizations

### Professional Development

- Conduct an officer training session
- Attend the various FBLA conferences
- Invite speakers to present workshops on leadership and private enterprise
- Set aside regular meeting time for member leadership development

### Recruit Members and New or Reactivated Chapters

- Host a membership sign-up booth at school registration
- Utilize school announcements and bulletin boards
- Write articles for school newspaper
- Host a party or a meeting with food for prospective members
- Visit a school that does not have an active FBLA chapter and give a presentation
- Write letters to schools that do not have FBLA chapter



### **Attend and Participate in Conferences**

- Enter competitive events and actively participate in the various FBLA conferences

### **Seek District, State, or National Office**

- Discuss leadership positions available through FBLA
- Set up a process where potential candidates are approved
- Organize a campaign

### **Host Social Events**

- Coordinate activities with another FBLA chapter in the area
- Get together with the other student organizations in the school
- Go ice skating, roller skating, miniature golfing, etc.
- Sponsor a dance
- Host a party, potluck dinner, picnic, etc.
- Conduct an awards program

### **Conduct Financial Leadership Activities**

- Provide a word processing service for faculty, business, and civic organizations
- Sponsor Financial Leadership Activities (fundraisers)
- Provide inventory services
- Prepare and sell athletic programs

## **Committee Structure to Accomplish a Program of Work**

### **Need for Committees**

The most active chapters have been those which utilize several committees effectively. Committees aid in the development and implementation of activities for the following reasons:

- Ensure the success of activities by delegating specific responsibility to specific individuals or groups.
- Provide opportunities to develop responsibility and leadership experience to more members.
- Allow more members to participate in the development and execution of projects.
- Promote more efficient chapter meetings by brainstorming and discussing specific ideas outside the meeting.

### **Standing Committees**

Standing committees are appointed at the beginning of each year and operate until the end of the school year. Suggested standing committees include social, fundraising, service, conference, and careers and leadership.

### **Special Committees**

Special committees are appointed for a specific activity and are active only while the planning or execution of that project is in progress. Special committees include membership, selection, Christmas dance, etc.

### **How to Form a Committee**

Committees are generally formed in one of two ways. The general membership may appoint or elect the membership of a committee, or the chapter president may appoint a committee. It is helpful to have members on the committee who have an interest in the activity; therefore, members should be asked to volunteer. The resident should indicate which member is to be the chairperson or the committee can elect one.

The chapter president and vice president should be responsible for ensuring that the committee chairpersons facilitate committee meetings as needed or on a regular basis. The president and vice president should meet with the committees as often as possible.

### **Duties of a Committee Chairperson**

- Arrange in advance a meeting time and place.
- Be certain each committee member is informed of the meeting.
- Call the meeting to order. Introduce the members unless everyone is acquainted.
- Appoint one member to serve as secretary to the committee.
- State the purpose of the committee and the goal toward which the group is to work.
- Ask the group how the committee can go about suggesting solutions to the problem

### **The following rules are recommended:**

- Give every member a chance to participate.
- Solicit opinions.
- Keep the discussion on the questions.
- Summarize each point after the group has agreed on what action to take.
- Review, in closing, the points decided.
- Thank every member of the committee for his/her help.
- Use the secretary's notes to write the committee report.
- Make a duplicate copy of the report. Give the second copy to the secretary or to the president, as directed.
- When called on for the committee's report, give the committee members credit.
- Be prepared to give the report orally to the group unless figures are to be given.
- Offer suggestions to the group at the conclusion of the report.

### **Sample Agenda Outlines**

<b>SAMPLE AGENDA ABC HIGH SCHOOL FBLA MEETING</b>	
I.	<b>Call to Order</b>
II.	<b>Roll Call/Ice Breaker</b>
III.	<b>Approval of Minutes</b>
IV.	<b>Financial Report</b>
V.	<b>Officer Reports</b>
VI.	<b>Committee Reports</b>
VII.	<b>Unfinished Business</b>
VIII.	<b>New Business</b>
IX.	<b>Activities</b>
X.	<b>Announcements</b>
XI.	<b>Adjournment</b>

# SAMPLE AGENDA – WITH NOTES

## ABC High School FBLA Meeting

- I. Call to Order – by President
- II. Roll Call – by Secretary
  - a. Send around a sign-up sheet
  - b. Use as attendance for the day
- III. Approval of Minutes – by Secretary
  - a. Options:
    - i. Make copies to distribute to class
    - ii. Send via e-mail to class
    - iii. Post on social media group
    - iv. Have the minutes projected in the front of the class
    - v. Secretary may read the minutes aloud
  - b. President asks for a motion and second for approval of minutes
  - c. President asks for the class to vote on approval
- IV. Financial Report – by Treasurer
  - a. Gives any money updates – Did you have a financial leadership activity? Was money collected for field trips or other activities?
- V. Officers' Reports – by officers
  - a. Each officer gives an update of what's been happening, ex:
  - b. Vice President of Social Media Report – "I have been updating the class group page once a week with reminders of homework. Is this helpful? What other things would you like me to post on social media?"
  - c. Vice President of Desserts Report – "At today's meeting, Joe was assigned to bring desserts. I reminded him last night and we have Twinkies for the class to enjoy during the meeting. Thank you, Joe!"
- VI. Committee Reports – by committees
  - a. Program of Work should be accomplished through committee work. Each area should have a committee, with sub-committees as necessary, ex:
  - b. Financial Leadership Activity Committee Report – "The committee has been working on a Financial Leadership Activity. There will be Penny Wars between all the business classes to raise money for the March of Dimes. The winning class will be treated to pizza at the end of the month."
  - c. Professional Development Committee Report – "The committee is working with Mrs. Jones to set up a field trip to go to the Workforce Training Center next month."
- VII. Unfinished Business – any business not finished at the previous meeting
- VIII. New Business – any new business that has not been addressed by the officer or committee reports
- IX. Announcements – class announcements or other announcements
- X. Adjournment

## Sample Meeting Minutes

### Call to Order

President Makynna Hollis called the meeting to order at 9:03 a.m. The ABC High School FBLA meeting was held on October 12<sup>th</sup> during 2<sup>nd</sup> period in Room 231 in ABC, Colorado.

### Roll Call

A sign-up sheet was sent around the room for attendance and is attached to these minutes.

### Minutes

Hunter Donovan presented the minutes from the September 12<sup>th</sup> meeting by handing out copies to all members. There were no changes to the minutes. Sam Heath moved to accept the minutes as presented, Charitha Kunapuli seconded. The motion to accept the minutes passed.

### Financial Report

Samantha Packard, Vice President of Finance, presented the financial report. We have \$0 in the FBLA account. If we want to order cookies at the next meeting, we will need people to either bring money in to purchase the cookies or bring the cookies in themselves.

### Officer Reports

President Makynna said she's been working with the school Homecoming committee to have an FBLA face painting booth at the football game. We will need volunteers to paint faces. A sign-up sheet was passed around.

Secretary Hunter has written two thank you notes for the class to sign. The thank you notes were for the guest speakers during class last week.

### Committee Reports

Social Activity Committee – the committee has proposed for the class to go to Jersey Mike's before the Homecoming football game next week. After discussion, the class voted on the motion and the motion failed.

Community Service – the committee wants the whole school to bring in canned food items before Halloween to give to the local homeless shelter. The class voted on the motion to have a Canned Food Drive. The motion passed. Ava Trahan, committee chair, will give an update to the class before October 16<sup>th</sup> on what needs to happen.

Conference – the committee showed the video from the previous FBLA State Leadership Conference. There are several competitive events and workshops at this conference and District Leadership Conference. The committee talked about the competitive events and said there would be a sign-up for these events at the November meeting. The cost of the conference is \$50 per person.

### Unfinished

Business None.

### New Business

None.

### Announcements

- Remember the guest speaker we have next Monday on interviewing. Dress in your best business interview styles.
- Remember to complete Chapter 12 Review questions to turn in to Mrs. Jones on Tuesday.
- Remember to sign-up to volunteer at the Face Painting booth at Homecoming.

Minutes Submitted by:

## Guidelines for Reactivating or Chartering a New Chapter

When establishing a new chapter or reactivating a chapter, the following should be followed:

- Contact the State Adviser
- Ensure the CTSO guidelines in the CCCS Administrators Handbook are followed

Ideas for the reactivation or chartering of a chapter:

- Installation and initiation of members
- Showing the emblem ceremony
- Show FBLA membership video
- Ideas on membership drives and financial leadership activities
- Use of state and national brochures
- Talk from a state officer

Those to invite:

- School administration
- Instructors and counselors
- Students interested in business
- Parents
- Radio, television and newspaper representatives
- The business community (Advisory committee, employers, prospective supporters)





## Conferences

Leadership conferences give members of Future Business Leaders of America an opportunity to meet new people and to travel to different parts of their own state and throughout the nation. Members can be helped to develop leadership qualities and to learn about career and technical education opportunities from speakers and workshops.

### Colorado Fall Leadership Conference

In the fall, the state officer team hosts a fall leadership conference for local chapter officers and members. The main objective of these workshops is to provide leadership and competition training for local chapter officers and members.

### National Fall Leadership Conference

The purpose of the National Fall Leadership Conference is to develop comprehensive business and leadership skills in a national environment through professional networking and innovative workshops and keynote presentations.

### District Leadership Conference

- Each of the twelve districts has a conference in January/February hosted by the District State Officer.
- The purpose of the District Leadership Conference is to provide students with the opportunity to showcase their career and technical education skills via tests, productions and through presentations. Winners may qualify to represent their chapter and their district at the State Leadership Conference.
- Only registered members of Colorado FBLA may attend the District Leadership Conferences. Members must be registered in the National Database by December 2, registered for their respective DLC by the published deadline and members must be paid in the National Database by the dues eligibility deadline; failure to do so may result in the disqualification of students from competition.

### State Leadership Conference

- In April, Colorado FBLA presents a High School State Leadership Conference. The purpose of the conference is to elect state officers, conduct state business, and offer leadership and career workshops to members.
  - Another purpose of the State Leadership Conference is to provide students with the opportunity to showcase their career and technical education skills via tests, productions and through presentations; winners may qualify to represent their chapter, district and state at the National Leadership Conference. Students also engage with business and industry leaders in workshops, keynotes and additional career and technical education events.
  - Middle School and Collegiate divisions host their own State Leadership Conferences separately. See current calendar of events for dates.
- Only registered members of Colorado FBLA may attend the State Leadership Conference. Members must be registered in the National Database by the close of SLC registration, registered for SLC by the aforementioned deadline and members must be paid in the National Database by the dues eligibility deadline; failure to do so may result in the disqualification of students from the conference and competition.



## National Leadership Conference

- The National Leadership Conference is held in the summer. State winners from all states compete in the various events to determine the national champion. National officers are elected and workshops are offered.
- The purpose of the National Leadership Conference is to provide students with the opportunity to showcase their career and technical education skills via tests, productions and through presentations; winners receive recognition and may receive a scholarship or cash money.
- Only registered members of Colorado FBLA may attend the National Leadership Conference. Members must be registered in the National Database by March 1 (FBLA & Middle Level), registered for NLC by the start of conference and members must be paid in the National by March 1; failure to do so may result in the disqualification of students from the conference and competition.
- Any student attending the National Leadership Conference must be accompanied by his/her local adviser, local school district employee, or his/her parent. If the above mentioned is unable to accompany the student to the National Leadership Conference, the student will forfeit his/her right to competition and the next place winner will be notified.
- The top ten competitors/teams in each event will complete an intent form by the published deadline after State Leadership Conference. Any competitor/team not completing an intent form by the published deadline will forfeit their spot at National Leadership Conference to the next team in line.

## Conference Information

Both members and advisers need to plan early if they are to attend a conference. Here are some helpful suggestions and policies:

### Financial Arrangements

Determine how much money is needed for transportation and meals en route, plus meals at the conference, registration fees, hotel accommodations, cab or bus fares, etc. Make hotel and plane reservations early--it may save money.

Don't forget extra money for tips, souvenirs, and snacks. The tip amount and the person tipped will vary with the type of service received. The rule of thumb is 20 percent for good service.

Keep all receipts for money spent if using chapter money. The money may need to be accounted for when returning home. Check with your adviser.

### Travel Tips

- Be early for departure; two hours if flying
- Be responsible for your own belongings; keep valuable equipment on your person
- Room service can be expensive; use it sparingly
- At a restaurant, ask for separate checks before the order is placed
- Travel light; take just enough clothing for the trip

### Adviser Responsibilities

- Make and confirm all arrangements made for the conference. This includes travel, registration, hotels, and competitive events.
- Review the Code of Conduct with your students regarding their behavior and their curfew. Let them know all expectations.
- For an overnight conference, each student is required to have a signed Multiple Release Form on file. A district form can be substituted for this permission form. Advisers will keep these signed release forms with them during the conference. A completed Chapter Certification Form will be

submitted during conference registration for all district and state FBLA events.

- Review the FBLA Dress Code with students.
- Meet with students upon arrival at the conference to finalize arrangements for meals, meetings, competitions, etc.

## Colorado FBLA Code of Conduct

*The purpose of the Code of Conduct is to ensure that FBLA members who attend a conference are aware of expected behavior. It is the adviser's responsibility to discuss the form with the members and stress the importance of abiding by the rules. Colorado FBLA is proud of its reputation and encourages advisers to closely monitor students at all conferences. Advisers must have a signed Multiple Release Form in their possession at all FBLA activities and must submit a Certification Form certifying that all members have read and signed the form, which includes acknowledgement of this Code of Conduct.*

### **CONDUCT POLICIES AND PROCEDURES FOR COLORADO FBLA**

The following conduct policies reflect minimum behavioral standards for Colorado FBLA members. The policies are in effect for all delegates who are attending any Local, District, State or National FBLA function. The term "delegate" shall mean any FBLA member.

- Defacing of public property—any damage to or loss of property or furnishings of the properties being utilized for meeting purposes will be paid for by the individual or chapter responsible.
- Delegates shall keep their adult advisers informed of their activities and whereabouts at all times.
- Delegates will not be allowed to leave the conference site at any time without adult supervision.
- Delegates will be prohibited from participation without local supervision provided by a chapter or school. For the National Leadership Conference, a designated local adviser or parent will be expected to accompany the participants.
- Delegates shall not use their own cars or ride in cars belonging to others during the conference unless accompanied by an adviser or other responsible adult.
- Alcoholic beverages and controlled or illegal substances (drugs) of any form are not allowed. These items must not be used or possessed at any time, or under any circumstances. Use or possession of such substances may subject the delegate to criminal prosecution.
- Use of tobacco in any form by an FBLA member is prohibited, including e-cigarettes, vaping or juling.
- Delegates are expected to adhere to FBLA dress code at all competitions, general sessions and workshops. Notification of violations will be sent to the local adviser and administrator. Furthermore, competitors will not walk on stage during awards sessions if observed violating the dress code.
- Observe the curfews as listed in the conference program. Curfew is defined as being in your own assigned room by the designated hour.
- Delegates of the opposite gender are not allowed in sleeping rooms in hotels unless the door is WIDE OPEN or the chapter adviser or responsible adult is present in the room.
- Harassment based on race, color, religion, national origin, ancestry, sex, gender, sexual orientation or disability will not be tolerated. See information about the Harassment Policy in the Colorado FBLA Handbook.
- Delegates are to abide by all school, school district and venue policies.
- Colorado FBLA photographers and videographers will be taking photos and videos throughout the conference for use in any manner FBLA deems appropriate including, but not limited to, publishing in FBLA publications, on the FBLA website, and in connection with competitive performance events. By attending the conference, you grant FBLA the right, without approval, to photograph, record, use, and edit your photograph, video, image, likeness, appearance, performance, and any other indicia of identity, in any format whatsoever, and to publish, disseminate, exhibit, publicly display, give, sell, and/or transfer the same in any and all forms of media or distribution now known or hereafter discovered or developed (including, but not limited to, print media, Internet, Webcasting, video streaming, television or radio), for the use of FBLA, its affiliates, or any individual, organization, business, publication, network or other third party, in perpetuity, without payment or any consideration.



### **DISREGARDING OR VIOLATING THE CODE OF CONDUCT**

Delegates who disregard or violate this code will be subject to disciplinary action, including, but not limited to, competitive event disqualification, forfeiture of privileges to attend further events, confinement to your hotel room, dismissal from the conference, and being sent home at your own expense. Parents and/or guardians will be notified and FBLA reserves the right to notify law enforcement. Any Code of Conduct violation must be brought to the attention of the state adviser prior to the conclusion of the conference.

# Colorado Career and Technical Student Organization (CTSO)

## Multiple Release Form

**Please print and make sure to complete and sign all portions of the release form.**

*Please have student attendees and their parents/guardians read and complete this multiple-part form.*

*Copies are to be retained by the chapter advisor. The chapter advisor will ensure all forms are completed by a certification process. Follow the certification submission from each CTSO. Colorado CTSO's include: Creative Careers, DECA, FBLA, FCCLA, FFA, HOSA, SkillsUSA, TSA, and (SC)<sup>2</sup>.*

### MEDICAL RELEASE/AGREEMENT TO ACCEPT FINANCIAL RESPONSIBILITY

I hereby authorize any necessary medical/dental treatment required for this student. I/we further agree that I/we will assume all expenses involved in such medical/ dental procedures and will not hold the specific Colorado CTSO or its representatives liable for said expenses.

**List any medical/dental conditions that a medical doctor/dentist should be made aware of:**

.....  
.....  
.....

**List any allergies that a medical doctor/dentist should be made aware of:**

.....  
.....  
.....

\_\_\_\_\_  
*Parent/Guardian Signature*

\_\_\_\_\_  
*Date*

### LIABILITY

The undersigned being the parent or guardian of student named above hereby agrees to release the State of Colorado, State Board for Community Colleges and Occupational Education, Colorado Community College System, the Colorado CTSO, its representatives, agents, servants, volunteers and employees from liability for injury to the said minor resulting from any cause whatsoever occurring to the said minor at any time while attending a conference or meeting of Colorado CTSO, including travel to and from said meeting, excepting only such injury or damage resulting from the willful acts of such representatives, agents, servants, and employees.

\_\_\_\_\_  
*Parent/Guardian Signature*

\_\_\_\_\_  
*Date*

### CODE OF CONDUCT AND DRESS CODE

Students are to conduct themselves in accord with exemplary standards of ethics and behavior, including zero tolerance for any actions that violate any civil or criminal codes. Students found to be in violation of any laws, regulations or policies established for the CTSO event they are attending will be subject to disciplinary action and/or prosecution. Their parents or guardians and school officials will be notified and the student may be removed from the event.

Dress is to reflect the CTE/CTSO image and to follow guidelines for specific events. Each CTSO has specific dress code guidelines. Reading and understanding completely the policies, practices, and procedures that will serve to govern the conduct and attire of persons attending a CTSO event, I do hereby agree to follow said policies, procedures, and practices and abide by any consequences of any violations.

\_\_\_\_\_  
*CTSO Member Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Parent/Guardian Signature*

\_\_\_\_\_  
*Date*

### PUBLICITY – STANDARD RELEASE FORM

CTSO photographers and videographers will be taking photos and video throughout the meeting for use in any manner the CTSO deems appropriate, including, but not limited to, CCCS/CTSO publications, use on the CCCS/CTSO website, and in connection with Competitive Events. Names will not appear on photos or in videos. By attending the meeting, you grant the CTSO the right, without approval, to photograph, record, use, and edit your photograph, video, image, likeness, appearance, performance, and any other indication of identity, in any format whatsoever, and to publish, disseminate, exhibit, publicly display, give, sell, and/ or transfer the same in any and all forms of media or distribution now known or hereafter discovered or developed (including, but not limited to, print media, internet, web casting, video streaming, television, or radio), for the use of the CTSO, its affiliates, or any individual, organization, business, publication, network, or other third party, in perpetuity, without payment or any consideration.

\_\_\_\_\_  
*CTSO Member Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Parent/Guardian Signature*

\_\_\_\_\_  
*Date*

## Chapter Certification Form

The CTSO members of \_\_\_\_\_ School have read the Code of Conduct, Dress Code and completed the CTSO Multiple Release Forms.

In addition, we certify that all staff provided by the school district and attending this conference with the Colorado CTSOs have completed and passed a Criminal Background Check and Sexual Abuse Prevention Training.

A meeting emergency plan has been created and communicated to attendees, parents of attendees and administrators.

\_\_\_\_\_  
(Adviser Printed Name)

\_\_\_\_\_  
(Adviser Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(School Administrator Printed Name)

\_\_\_\_\_  
(School Administrator  
Signature)

\_\_\_\_\_  
(Date)

This form is to be submitted during on-site conference registration. Do not send individual forms to the state. Individual forms must be in possession of the adviser.



## Leadership

The experience of running for a local, state, or national FBLA office--win or lose--is an educationally rewarding experience and one that is typical of the American way of life. A good campaign demands cooperative effort and allegiance on the part of each member of the team. In no situation other than in an FBLA office does a chapter member have more opportunity to develop the qualities of leadership. The qualifications and duties of the officers at each level of FBLA are presented in this section.

### Local Chapter Office

#### Qualifications for Local Chapter Office

Each local FBLA chapter follows its own regulations for running for local office. Many advisers have found it advantageous to elect new FBLA officers in May to serve until the same time the following year. This means that the officers who are in their senior year will have their major responsibilities over by May and their senior activities will not interfere with the FBLA activities. At the same time, they are available to assist the new officers with their duties. This also gives the officers a good opportunity to become thoroughly familiar with FBLA before they attend the conferences and workshops the following year.

#### Example Duties of Local Chapter Officers

All local chapter officers should be familiar with the chapter bylaws, as well as the annual program of activities. Each officer should cooperate with other officers and members at all times. The following is just an example list of officers and their duties. These officers, titles and duties will vary by chapter.

##### *President*

- Presides at officer and general meetings
- Appoints appropriately needed committees and committee chairpeople
- Maintains close communication with the chapter adviser
- Ensures that the tasks required to accomplish the program of work are being performed in a timely manner by the officer team
- Performs duties for the promotion and development of local, district, state and national FBLA

##### *Vice President of Membership*

- The Vice President of Membership presides at meetings in the absence of the president and would assume that position if it became vacant
- Work with the chapter adviser and other officers to develop a membership strategy for the year
- Promote the national membership programs to chapters
- Work with the other vice presidents to develop recruitment materials
- Performs other duties as directed by the president or chapter adviser

##### *Vice President of Communication*

- The Vice President of Communication oversees communication from the officer team to the chapter members and district, state and national organizations
- Monitor and update FBLA social media outlets with news and reminders

- Encourage chapter members to submit pictures and news articles for publication at the chapter, district, state and national websites and social media outlets
- Keep the FBLA website updated with chapter pictures and news links
- Performs other duties as directed by the president or chapter adviser

### Secretary

- The Secretary will perform duties that are common to the office
- Record the minutes of the officer and general meetings
- Assists the vice presidents with the creation of recruitment materials
- Performs other duties as directed by the president or chapter adviser

### District Office

Check with the State Officer, District Adviser and Board Member from the specific district to find out the district's offices and process for applying.

### State Office

The Colorado State Officers are a team of students dedicated to the planning and executing of the state program of work, Colorado Fall Leadership Conference and Colorado State Leadership Conference. The state officers are available to attend chapter meetings and officer installations.

### National Office

There are nine FBLA national officers who represent FBLA's membership. Elected by their peers at the National Leadership Conference and installed during the Awards of Excellence closing ceremony, the FBLA national officer team develops a program of work aligned to the strategic goals of FBLA. Throughout the year the team interacts with the membership to implement and enhance FBLA programs.





## Bylaws

### Colorado Future Business Leaders of America Bylaws

*Updated, April 2007, Updated, April 2008, Updated, June 2009, Updated, June 2010, Updated, July 2011, Updated, June 2014, Updated, April 2018, Updated, April 2019, Updated April 2020, Updated April 2021, September 2021, Updated September 2022, Updated September 2023, Updated April 2024*

#### ***Article I. Name***

**Section 1 - Name.** The name of this organization shall be the Colorado State Chapter of the Future Business Leaders of America. The letters "FBLA" may be used officially to designate the organization, its units, or members thereof. The Chapter is a subsidiary of the Future Business Leaders of America, Inc.

#### ***Article II. Purpose***

**Section 1 - General Purpose.** The purpose of FBLA is to assist youth and young adults enrolled in business programs to develop career and technical competencies, a sense of civic responsibility and to instill leadership capabilities for home, work, and community. FBLA is designed to be an extension of the instructional program; thus, becoming an integral part of the business curriculum.

**Section 2 - Promotion.** It shall be the purpose of the Colorado State Chapter to encourage and promote active FBLA chapters in educational institutions offering instruction in business education.

#### ***Article III. Membership***

**Section 1 - State Membership.** Colorado FBLA is a state organization for students currently enrolled in business programs (public, parochial, and private) or for those students who have previously taken at least one business course, including those operating under the provisions of the Colorado State Plan for Career and Technical Education, as provided by the current state and federal legislation. The Colorado State Chapter shall consist of all local chapters of FBLA in educational institutions in the State of Colorado.

**Section 2 - State Chapter Membership.** Membership of FBLA shall consist of the total members of the chartered chapters, and these members shall hold membership in Colorado and the respective local FBLA chapters on an active status determined by a payment of dues by the members or the school. The Colorado State Chapter is chartered as a member of the National FBLA organization as approved by the National Board of Directors of FBLA, Inc. Prospective Colorado FBLA chapters must be in the approval process or have an approved business program through Colorado Career and Technical Education, and get approval from the State Chairperson-State Adviser.

**Section 3 - Unified Membership.** Membership in FBLA is unified on the local, state and national levels and is not available separately. Membership is open to all business students and established by the payment of dues and by the fulfillment of other required obligations. Local chapter members shall be recognized only through the Colorado Chapter of National FBLA.

**Section 4 - Types of Membership.** Membership in the chapters of FBLA may consist of the following four types:

Active Membership - any student participating in a business program, including those operating under the provisions of the Colorado State Plan for Career and Technical Education, as provided by current state and federal legislation, is entitled to become an active member of the chapter. A member must accept the

purposes of the organization, subscribe to the creed, and demonstrate a willingness to contribute to good school/community relations, and possess and develop qualities for employment. Active members shall pay dues as established by FBLA and shall be eligible to participate in district, state, and national events, serve as voting delegates to district, state and national conferences, hold district, state and national office, and to otherwise represent Colorado or their local chapter as approved by their respective state and local adviser.

**Provisional Membership** - Colorado FBLA will accept continued membership of current members for one year after the closing of the business program. This will allow students to participate in FBLA activities at the local, district, state, and national levels. This does not allow for new FBLA membership (which will limit the participation/involvement at the state and national levels). The FBLA Colorado Board of Directors, the school district, the FBLA state adviser, and the program director for business education must agree upon the local adviser that will be responsible for all FBLA Chapter activities for that final year.

**State Honorary Life Membership** - may be persons making significant contributions to the field of business education and to the growth and development of FBLA at the state level. Honorary life members may be selected by the State FBLA Executive Council, Executive Committee or Board of Directors. These members shall not be eligible to vote or hold office and are not required to pay dues.

#### ***Article IV. Membership Dues***

**Section 1 - Membership Year.** The membership year shall be from August 1 through July 31

**Section 2 - Membership Dues.** Membership dues shall be established by the State Executive Council, and approved by the Colorado FBLA Board of Directors. Dues are payable prior to December 1 (received) of the current school year, for participation in competitive events at the District Leadership Conferences. Dues for members new to the business program, taken into the chapter after December 1 must be paid prior to attending the District or State Leadership Conferences.

#### ***Article V. State Chapter Management***

**Section 1 - Board of Directors.** An elected Colorado FBLA Board of Directors will establish policy and long-range plans of the organization. Elected advisers, one each representing their respective districts plus the State President of Colorado FBLA, State Officer Team Adviser(s), one CBAM representative, one business and industry representative and one Administrator shall be voting members of the Colorado FBLA Board of Directors.

The elected advisers shall be nominated by local chapters and elected by the local FBLA chapters of their respective districts for three-year terms in accordance with the nominating and voting procedures determined by the Board of Directors. If a district receives no nominations for the Board of Directors, then the State Chairperson shall appoint the board member of the vacant region. Appointments to the board may void the three-year term limitation.

Administrator's term is a two-year commitment. The CBAM representative will be determined by CBAM processes.

**Section 2 - Executive Council.** The Executive Council of Colorado FBLA shall be composed of the State President, Colorado's National Officer/Executive Vice President, Vice President of Service, Vice President of Education, Vice President of Progress and State Officers to represent the Colorado FBLA Districts. The State Executive Council shall meet upon the call of the State President, with the approval of the State Chairperson-State Adviser. The State Executive Council shall be given authority to plan and carry out activities that promote the welfare of FBLA, properly present the image of FBLA, and effectively represent FBLA as occasions may arise, as approved by the State Adviser-State Chairperson.

**Section 3 - Executive Committee.** The Executive Committee of Colorado FBLA shall be composed of the State



President, Colorado's National Officer/Executive Vice President, Vice President of Service, Vice President of Education, and Vice President of Progress.

Section 4 - Colorado FBLA State Chairperson-Adviser. In addition to being State Chairperson-State Adviser, these persons are ex officio members of all committees in the State Organization. It is their duty to advise the State Executive Council and committees on matters of policy and to assist the officers in conducting meetings and in carrying out programs. The State Chairperson-State Adviser reviews all applications for local charters. The State Chairperson-State Adviser act as an agent of the organization and is responsible for the administration of the funds of the chapter.

Section 5 - District Adviser. The adviser for each District of Colorado FBLA shall be the local adviser of the State Officer selected to represent the district. The District Adviser and Board Member representing the District shall have authority to manage all district activities.

Section 6 - Advisory Council Membership. The Colorado FBLA State Chapter shall have a FBLA State Advisory Council which consists of the following:

- State Chairperson-State Adviser
- Members of business and industry as selected by the Executive Council and Board of Directors.

Section 7 - Advisory Council Duties. The Council shall be responsible for serving as an advisory group cooperating with State Officers, State Chairperson-State Adviser and shall support and actively participate in the activities of the Colorado FBLA State Chapter. The Council may establish a plan whereby Colorado FBLA may receive grants or gifts of money or property to support state activities.

Section 8 - Governing Laws. The organization will abide by all existing laws and requirements of any organization to which it may report.

## *Article VI. State Officer Selections*

Section 1 - Selections. The offices of State President, Vice President of Service, Vice President of Education, Vice President of Progress and State Officers representing each district of Colorado FBLA are selected at the annual State Leadership Conference; only active members are eligible to hold office. National officer candidates are nominated and/or selected at the annual State Leadership Conference to run for the position of National Officer Candidate/Executive Vice President. Only active members are eligible to hold office.

Section 2 - Application. To be considered for an officer position in Colorado FBLA, a candidate shall: (a) have the endorsement of the parent(s) and/or guardians, the local adviser and school administrator; (b) file an official application with the State Adviser (c) have at least one full school year remaining the business education program; (d) hold or have held an elective office in his/her local chapter, their FBLA district, or comparable office in another CTSO, Student Council, or National Honor Society; and (e) be approved by the Selection Committee.

The Selection Committee shall select candidates for State President, National Officer Candidate/Executive Vice President, Vice President of Service, Vice President of Education, Vice President of Progress and State Officers. Each district may run at the State Leadership Conference an unlimited number of qualified candidates. A school may have no more than three (3) candidates run for an office.

Section 3 - Eligibility. Only those applicants who are officially certified to be eligible by the Selection Committee and who have prior permission of adviser, school district administrators, and parents are eligible to become candidates for a State or National office. A candidate for office in FBLA shall be from an active local chapter.

Section 4 - Term of Office. All officers will be installed at the annual State Leadership Conference and shall assume official duties immediately following the State Leadership Conference, with terms to expire at the close



of the Awards Program of the following State Leadership Conference.

Section 5 - National Officer Candidate. The National Officer Candidate selected to represent Colorado will serve as a voting member of the Colorado FBLA Executive Council/Committee in the capacity of their national office. In the event that Colorado's candidate is not selected nationally, they will serve as Colorado's Executive Vice President. If there is no national officer candidate selected at the State Leadership Conference to represent Colorado, this position will be left vacant for the year. The National Parliamentarian candidate is not eligible for Colorado FBLA Executive Vice President.

Section 6 - Voting Procedures. The Selection Committee will approve officer candidates and select the officers for the upcoming year.

Section 7 - State Officer Team Adviser. A State Officer Team Adviser will be selected by the Colorado FBLA Board of Directors, State Adviser-State Chairperson. The State Officer Team Adviser will be a certified business educator.

Section 8 - Selection Committee's Duties. The Selection Committee shall, through an intense evaluation process, carefully consider all candidates for office. The activities performed by the Selection Committee shall be determined by the State Adviser and State Officer Adviser prior to the annual State Leadership Conference. Members of the Selection Committee may include one member from each district.

### *Article VII - Voting*

Section 1 - Voting Delegates. Each local chapter in good standing shall be entitled to send voting representatives and one alternate (Standing Committee Member) from its active membership to the District and State Leadership Conferences in accordance with the following regulations:

- Under 50 members - two voting delegates
- 50 to 100 members - three voting delegates
- Over 100 members - four voting delegates

Section 2 - Verification of State Voting Delegates. All voting delegates must attend and will be verified at the voting delegate meeting.

### *Article VIII. Officer Duties*

Section 1 - The State President. It shall be the duty of the State President of Colorado FBLA to serve as chairperson of the Colorado Executive Council and Committee; preside over the Council meetings and business of the FBLA division; appoint appropriately needed committees and committee chairmen; serve as a member of the Colorado FBLA Board of Directors; maintain a close and continuing relationship with the State Chairperson-State Adviser; and perform other duties for the promotion and development of FBLA on the local, district, state, and national levels.

Section 2 - National Officer Candidate/Executive Vice President. It shall be the duty of the Colorado National Officer/Executive Vice President to fulfill his/her commitment to the National Association. In addition, he/she shall assist the President in the promotion and development of FBLA on the local, district, state and national levels, and serve as liaison between the State and National Associations.

Section 3 - The Vice President of Service. The State Vice President of Service shall keep an accurate record of the Chapter and State Executive Council meetings. One copy of the minutes and substantiating reports shall be given to the State Chairperson-State Adviser within one week after the annual State Leadership Conference and after any meetings of the Executive Council for the permanent files. The Vice President of Service shall also focus on promotion of state service projects, March of Dimes and Community Service Awards.

Section 4 – The Vice President of Progress. The Vice President of Progress shall assist the State Chairperson-State Adviser with the maintenance of all social media outlets for Colorado FBLA. The Vice President of Progress shall also focus on outreach, sponsorships, advocacy and promotion of the Colorado Relief Fund. The Vice President of Progress shall also report the financial standing of the organization during its annual meeting.

Section 5 – The Vice President of Education. The Vice President of Education shall act as a public relations officer for the Colorado Chapter and maintain a historical record of the Colorado State Chapter. The Vice President of Education shall prepare distribution FBLA newsletter(s) during the school year, and assist with the Social Media plan. The Vice President of Education shall also focus on promotion of Business Achievement Awards, Peak Awards, Competitive Events and Middle School FBLA.

Section 6 – The State Officers. It shall be the duty of the State Officer of each respective district to coordinate district conferences and to promote and develop FBLA in the districts which selected them. It shall be their responsibility to carry out the designated duties given to them by the State Executive Council/Committee.

Section 7 – Vacancy Replacements. If the office of the State President becomes vacant, the State Adviser, with consultation from the State Officer Team Adviser, will appoint the replacement from the executive officers. A replacement for any officer, other than the State President or Executive Vice President, who cannot serve his/her term may be appointed as recommended by the FBLA State Adviser-State Chairperson with the approval of the FBLA Board of Directors.

Section 8 – Removal from Office. A Colorado FBLA State Officer may be removed from office if he/she, in the opinion of the State Adviser-State Chairperson, Local Adviser, Executive Council, or FBLA Board of Directors, is not representing FBLA as is appropriate for a young business leader. The officer may request a hearing with the FBLA Board of Directors to present his/her case. Removal from office must be approved by the Colorado FBLA Board of Directors.

#### *Article IX. Committees*

Section 1 – Selection. The State President of Colorado FBLA shall, with the advice and consent of the Executive Council, designate committees, name their members for a period not to exceed his/her term of office, and assist these committees in their activities.

#### *Article X. Meetings*

Section 1 – Fall Leadership Conference. An annual Fall Leadership Conference (for local officers, members, and advisers) may be held each fall.

Section 2 – District Leadership Conference. An annual District Leadership Conference is to be held in the second half of the school year, no later than the first week of March in each of the designated districts.

Section 3 – State Leadership Conference. A Colorado FBLA State Leadership Conference shall be held annually prior to May 15 at a time and place to be determined by the State Chairperson-Adviser with input from the Colorado FBLA Board of Directors.

Section 4 – Meeting Procedures. Parliamentary procedure of all meetings will be governed by Robert's Rules of Order, Newly Revised.

#### *Article XI. Emblems and Colors*

Section 1 – Uniformity. The Chapter emblems and insignia shall be the emblems and insignia of the National Organization and the State Association. The official emblem and insignia item designs are described and protected from infringement by registration in the US Patent Office under the Trademark Act of 1946. The wearing or displaying of this emblem shall be governed by each state chapter of FBLA. The National FBLA Association and the Board of Directors of FBLA, Inc., emblems and insignia shall be uniform in all local and

state chapters and within special emphasis groups; they shall be those of FBLA.

Section 2 - Display. All active, associate, honorary members, and chapter advisers and sponsors shall be entitled to display and wear the National emblems and insignia.

Section 3 - Custodianship. The National Chief Executive Officer shall be custodian of all FBLA emblem and insignia items and such items may be obtained only from the FBLA National Office.

Section 4 - Colors. The official colors of FBLA shall be blue and gold.

Section 5 - Motto. The motto shall be that of the National Organization: Service, Education, Progress.

### ***Article XII. Policies***

Section 1 - Policies of Operation. Policies of operation of the Colorado FBLA chapter shall be adopted, as deemed necessary, by the State Executive Council and approved by the State Chairperson-Adviser and the Colorado FBLA Board of Directors.

### ***Article XIII. Amendments***

#### **Section 1. Introduction and Passage**

Amendments to these bylaws may be proposed by any of the following:

1. A local chapter, by sending the proposed amendment in writing, so that it is received in the state office no later than ninety days prior to the annual meeting,
2. State Executive Council
3. State Board of Directors
4. State Chairperson-State Adviser

Proposed bylaws amendments must be approved by the state board of directors, by majority vote, or by the State Chairperson-State Adviser, prior to their consideration by the voting delegates. Proposed bylaws amendments may be adopted at the annual meeting by a two-thirds vote of the voting delegates present and voting.

#### **Section 2. Notice**

Notice of the proposed amendments shall be sent to the local chapters by the State Chairperson-State Adviser no later than thirty days prior to the meeting at which they will be considered.

#### **Section 3. National Bylaws**

An amendment to the national bylaws which affects the purposes, mission or any other basic statute of the organization shall be immediately adopted into the state bylaws without vote of the membership.

### ***Article XIV. Dissolution***

Upon dissolution, all the assets of the Chapter shall remain the assets of FBLA, Inc.



## State Association Policies & Procedures

### Accommodations

Americans With Disabilities Act - reasonable accommodation will be provided upon request for persons with disabilities. Please notify the Colorado FBLA State Office during the registration process.

### Alcohol & Tobacco Policy

- Colorado FBLA's policy prohibiting alcohol use, smoking and the illegal manufacture, distribution, dispensation, possession or use of alcohol and illicit drugs is designed to promote both the health and safety of all members at all sanctioned events. Should any member or adviser be found in violation of this policy, their school district may be notified of the infraction. If the incident is in violation of Colorado or Federal law, appropriate legal action may occur.

### Award Policies

The following options are available to individuals and/or chapters involved with Colorado FBLA:

- **Administrator of the Year:** Recognizes administrators that have provided outstanding support of local, district and state FBLA. **No more than four administrators will be recognized at the State Leadership Conference.**
- **Adviser of the Year:** Recognizes chapter advisers that have provided outstanding support of local, district, state and national levels of FBLA. Winner is determined by an awards committee appointed by the State Adviser.
- **New Adviser of the Year:** Recognizes **one chapter adviser** with 5 or less years of experience that have shown outstanding potential and achievements in supporting local, district, state and/or national FBLA. Winner is determined by an awards committee appointed by the State Adviser.
- **Businessperson of the Year:** Recognizes **one** businessperson (not a school employee) that has demonstrated support of local, district and/or state levels of FBLA. Winner is determined by an awards committee appointed by the State Adviser.
- **Colorado Relief Fund:** The Colorado Relief Fund was started in 2008 in response to natural disasters around the state. To apply, visit [this link](#). To donate to the fund, visit [this link](#). The Board of Directors will approve funds at the next quarterly meeting after receiving the application.
- **Competitive Events:** All competitions available at the National FBLA level shall be offered at the state level, with recognition as listed in the competitive events policies.
- **School Counselor of the Year:** Recognizes counselors that have provided outstanding support of local, district and state FBLA. **No more than four counselors will be recognized at the State Leadership Conference.**
- **Peak Awards:** The Colorado Peak Awards were designed to further local chapter involvement in statewide activities, increase membership and boost the morale and spirit of Colorado FBLA. Those earning Peak V Award will be recognized as Gold Seal chapters at National Leadership Conference. Full guidelines can be found at the Colorado FBLA website. Peak Award submissions will be reviewed by a panel of local chapter advisers. Those within a few points of another peak or receiving a peak different than the chapter submitted point sheet will be evaluated by a second person.

- **Scholarships:**
  - [Dave Sanders Memorial Scholarship](#) – named for Dave Sanders, a business teacher who gave his life during the Columbine school shooting, this award is presented to those selected in an application process. Winner is determined by an awards committee appointed by the State Adviser.
  - [Cecelia Rothenburg Future Business Leaders Award](#) – presented to the first-place winner of the Future Business Leaders event at the State Leadership Conference
  - [CBAM Scholarship](#) - The Executive Board of Colorado Business Educators on September 18, 2015, established the scholarship to be awarded annually to deserving high school seniors. Number of scholarships and winners are determined by a CBAM committee.
  - [Alumni Scholarship](#) – This scholarship is to provide a small piece of recognition to those who contribute to the organization in a big way, but don't otherwise have the opportunity to be recognized for it. Applicants cannot be current or past state officers. Winner is determined by an awards committee appointed by the State Adviser.
- **National Programs:**
  - Business Achievement Awards
    - The Business Achievement Awards is a high school leadership development program. Students enhance leadership skills, expand business knowledge, contribute to local communities and earn recognition by immersing themselves in their school, community and FBLA programs. There are four levels: Contributor, Leader, Advocate and Capstone.
    - State Leadership Conference **eligibility is extended to all Business Achievement Award completers who have reached the Advocate and Capstone levels.**
  - Other national programs can be found on the national website: <https://www.fbla-pbl.org/divisions/fbla/fbla-education/>
- **State Competitions:**
  - [State Pin Design](#): An individual event involving an FBLA member designing a lapel pin. After chapter voting, the winning design may be used in a pin design for National Leadership Conference.
  - [State & National T-shirt Designs](#): An individual event involving an FBLA member designing a T-shirt design. After chapter voting, the winning design may be used in a T-shirt available for purchase at State and National Leadership Conferences.

### Award Recognition Policy

Award	Recognition
Administrator of the Year	Plaques to the top nominee(s) – up to 4 individuals
Adviser of the Year	Plaque to winner
Businessperson of the Year	Plaque to winner
School Counselor of the Year	Plaques to the top nominee(s) – up to 4 individuals
New Adviser of the Year	Plaque to winner
Peak Awards	Plaque to all chapter submissions; with peak plate on the plaque
Scholarships	Certificate to all winners
State Competition: State Pin Design	Certificate to winner; one pin to winner
State Competition: State T-shirt Design	Certificate to winner; one T-shirt to winner
State Competition: National T-shirt Design	Certificate to winner; one T-shirt to winner
District Competitions	Medals or pins to state qualifiers
State Competitive Events	Pin to top ten, plaque to every team member in top 4
State Competition: LifeSmarts	Certificate for national qualifiers
State Competition: Virtual Business Finance	Certificate for national qualifiers

## Board of Directors

### Meetings

The Board holds at least four meetings every year, usually in September, December, March, and May.

### Term

The Board of Directors year runs from July 1 – June 30.

### Nominating and Voting Procedures

During the last year of the Board members term, the following process will be followed:

- The State Adviser will send a call for nominations from the advisers in the district.
- The call for nominations shall be open for at least one week.
- After receiving nominations, the State Adviser will send out the ballot for electronic voting, only to the local advisers of the district.
- The ballot shall be open for at least one week for voting purposes.
- In case of a tie, the ballot will be sent to the district for a revote. If there is still a tie, the Board Chair casts the deciding vote. If the Board Chair is the position that is tied, the entire Board will vote to break the tie.
- After the ballot closes, the State Adviser will notify the winner and communicate to the advisers in the district and the Board the newly selected member.
- The process shall be completed by the end of May.

This process should be followed in the event of any empty Board seat. Those elected to an empty Board seat will serve the remainder of the term of the vacated Board member.

If a Board member changes jobs that impacts their FBLA Board of Directors participation in the middle of their term, a special election will be held to fill the position. If the position remains vacant, the Board member can finish the current Board year.

During the last year of the Administrator and Business & Industry Representatives term, the following process will be followed:

- The State Adviser will send a call for nominations from all local advisers.
- After receiving nominations, the State Adviser will send out the ballot for electronic voting to Board members.
- The ballot shall be open for at least one week for voting purposes.
- In case of a tie, the Board Chair casts the deciding vote.
- After the ballot closes, the State Adviser will notify the winner and communicate to the Board the newly selected member.
- The process shall be completed by the end of May.
- CBAM's seat is determined by a CBAM process.

### Officers

There will be three officers as a part of the Board of Directors:

- Chair.
- Chair-Elect.
- Secretary.



## Roles & Responsibilities

- Chair
  - Serve on the Board Executive Committee – to meet in between Board meetings to conduct any pertinent business.
  - Work with State Adviser to develop Board of Director agendas and motions.
  - Facilitate Board of Directors Meetings
  - Oversee all committee work.
  - Communicate with Board of Directors members on meeting topics.
  - Provide leadership to the organization.
  - Serve as an additional point of contact throughout the year.
  - Mentor the Chair-Elect
- Chair-Elect
  - Serve on the Board Executive Committee – to meet in between Board meetings to conduct any pertinent business.
  - Shadow the Chair to learn the Chair role.
- Secretary
  - Serve on the Board Executive Committee – to meet in between Board meetings to conduct any pertinent business.
  - Take official minutes during the Board and Executive Committee meetings.

## Nominations and Voting

- At each May meeting, a Chair-Elect will be elected from the existing Board of Directors members. All adult Board members are eligible to serve as the Chair-Elect. If the Chair-Elect finishes their elected Board of Directors term, they are still eligible to serve out their two-year Chair-Elect/Chair term.
- The Chair-Elect is a two-year position. The first year as Chair-Elect, the second year as Chair.
- The Secretary is a one-year position, elected at the September meeting.

## Pledge of Conduct

*The following Pledge of Conduct is for Board members, adapted from the ACTE Board of Directors Pledge of Conduct:*

Whereas, I have been selected by my peers to serve on the Colorado FBLA Board of Directors and being fully aware of the high honor bestowed upon me, I pledge to do my utmost to adhere to the guidelines established for effective Boards.

I understand that:

- Membership on the Board is a right bestowed by my colleagues to allow me to serve them, the members and our mission. I pledge to fulfill that role.
- I have a fiduciary responsibility to the membership to oversee the finances of Colorado FBLA. I pledge to read and understand the organization's financial reports and obtain any information I need to fulfill this obligation.
- The most important principle of leadership is to set the example. I pledge to always be an example of dedication, ethical behavior and fiscal responsibility and to be an enthusiastic cheerleader and booster of the organization.
- There might be issues discussed at board meetings that could damage people or the organization if discussed outside the boardroom. I pledge to maintain confidentiality of such items.
- The members are the owners of the organization and have a right to know how their organization is operating. I pledge to support operating in as open and transparent a manner as is possible, while keeping in mind that some issues must be confidential.
- I have a responsibility to fully and fairly share my opinion at board meetings, but that I also have a responsibility to support board decisions outside the boardroom. I pledge to welcome diverse



points of view, that I will feel free to disagree without being disagreeable, that I will not personalize disagreement and that I will discuss issues, not personalities.

- I have a responsibility to read and understand the bylaws, policies, financial reports, committee reports and other documents pertaining to the operations of Colorado FBLA and that I pledge to devote the time necessary to stay current and to participate in board meetings.
- I have a responsibility to avoid both the appearance and the actuality of any conflict of interest and I pledge to apprise the board of any potential areas of conflicts that I might have and to recuse myself from voting where a conflict exists.
- It is the board’s collective responsibility to set the strategic direction for Colorado FBLA. I pledge to devote myself to helping the board fulfill its strategic responsibilities. I further understand that my authority as a member of the board is only in the board room and I have no management authority or responsibility for the organization outside of my participation in board decisions.
- I pledge I will work to leave the organization better, stronger and more fiscally sound than I found it at the start of my board service.

### Term Years

District	Last Year of Term
1	2023-2024
2	2026-2027
3	2024-2025
4	2023-2024
5	2026-2027
6	2024-2025
7	2023-2024
8	2026-2027
9	2024-2025
10	2023-2024
11	2026-2027
12	2026-2027
Administrator	2024-2025
Business & Industry	2023-2024

### Voting Policy

The Board of Directors may vote using electronic means, if necessary, in between established Board meeting dates.

### Chaperone and Supervision Policy

- When attending Colorado FBLA conferences and events, advisers are expected to provide adequate supervision for his/her members. All chaperones must follow the Colorado FBLA dress code and code of conduct as outlined in this manual. Chaperones are expected to attend all workshops or meetings with the members and advisers.
- Colorado FBLA should follow the following chaperone policy:
  - 1 district/school approved adult for every 12 members at state events
  - 1 district/school approved adult for every 5 members at national events
- Chaperones must be a school approved adult. In the event that the school district has a different chaperone policy than the one outlined above, the district’s policy should be followed.
- Colorado FBLA recommends having a chaperone of each gender for overnight events where both genders attend from the school.
- At each Colorado FBLA conference, an adviser, school official or school approved adult,

must accompany the students. If there is no such person available, the chapter will not be permitted to attend the conference.

- Under no circumstances should an adviser leave the conference site without a school approved adult supervising their students.
- In some instances, a student may be traveling with another chapter to an event. The chaperoning chapter must accept full responsibility for the student and their actions. All permissions and liabilities must be arranged between the two chapters.

## Child Abuse & Neglect – Mandatory Reporters

All states have statues identifying persons who are required to report suspected child maltreatment to an appropriate agency, such as child protective services, a law enforcement agency, or a state’s toll-free child abuse reporting hotline. Colorado’s laws are listed below:

### Colorado Professionals Required to Report

#### Rev. Stat. § 19-3-304

Persons required to report include:

- Physicians, surgeons, physicians in training, child health associates, medical examiners, coroners, dentists, osteopaths, optometrists, chiropractors, podiatrists, nurses, hospital personnel, dental hygienists, physical therapists, pharmacists, or registered dieticians
- Public or private school officials or employees
- Social workers, Christian Science practitioners, mental health professionals, psychologists, professional counselors, and marriage and family therapists
- Veterinarians, peace officers, firefighters, or victim’s advocates
- Commercial film and photographic print processors
- Counselors, marriage and family therapists, or psychotherapists
- Clergy members, including priests; rabbis; duly ordained, commissioned, or licensed ministers of a church; members of religious orders; or recognized leaders of any religious bodies
- Workers in the State Department of Human Services
- Juvenile parole and probation officers
- Child and family investigators
- Officers and agents of the State Bureau of Animal Protection and animal control officers
- The child protection ombudsman
- Educators providing services through a Federal special supplemental nutrition program for women, infants, and children, as provided for in 42 U.S.C. § 178
- Directors, coaches, assistant coaches, or athletic program personnel employed by private sports organizations or programs
- Persons registered as psychologist candidates, marriage and family therapist candidates or licensed professional counselor candidates
- Emergency medical service providers

### Reporting by Other Persons

#### Rev. Stat. § 19-3-304

Any other person may report known or suspected child abuse or neglect.

### Institutional Responsibility to Report

This issue is not addressed in the statutes reviewed.

### Standards for Making a Report

#### Rev. Stat. § 19-3-304

A report is required when:

- A mandated reporter has reasonable cause to know or suspect child abuse or neglect.
- A reporter has observed a child being subjected to circumstances or conditions that would reasonably result in abuse or neglect.
- Commercial film and photographic print processors have knowledge of or observe any film, photograph, videotape, negative, or slide depicting a child engaged in an act of sexual conduct.

### Privileged Communications

**Rev. Stat. §§ 19-3-304; 19-3-311**

The clergy-penitent privilege is permitted. The physician-patient, psychologist-client, and husband-wife privileges are not allowed as grounds for failing to report.

### Inclusion of Reporter’s Name in Report

**Rev. Stat. § 19-3-307**

The report shall include the name, address, and occupation of the person making the report.

### Disclosure of Reporter Identity

**Rev. Stat. § 19-1-307**

The identity of the reporter shall be protected.

### Colorado FBLA Certification Statement

- Each year, Colorado FBLA requires members to complete a Multiple Release Form. This form absolves Colorado FBLA of responsibility for the member and allows for the distribution of a member’s name and image.
- Colorado FBLA asks that the local chapter adviser collect the completed Multiple Release Form from each attendee.
- The local chapter adviser then submits a completed Certification Form to the State Office prior to the start of the conference. The Certification form confirms that the completed Multiple Release Forms are in the adviser’s possession during the conference and that all chaperones have been approved by the school – with a background check and sexual harassment training.

### Conflict of Interest Policy

#### Application of Policy

This policy applies to board members and volunteers of Colorado FBLA. A volunteer is covered under this policy if that person has been granted significant independent decision-making authority with respect to financial or other resources of the organization. Persons covered under this policy are hereinafter referred to as “interested parties”.

#### Conflict of Interest

A conflict of interest may exist when the interests or concerns of an interested party may be seen as competing with the interests or concerns of the organization. There are a variety of situations that raise conflict of interest concerns including, but not limited to, the following:

#### *Financial Interests*

A conflict may exist if an interested party, or a relative or business associate of an interested party, directly or indirectly benefits or profits as a result of a decision made or transaction entered into by the organization.

Examples include situations where:

- The organization contracts to purchase or lease goods, services, or properties from an interested party or a relative or business associate of an interested party.
- The organization purchases an ownership interest or invests in a business entity owned by an interested party or by a relative or business associate of an interested party.

- The organization offers employment or independent contract to an interested party, or a relative or business associate of an interested party, other than a person who is already employed or contracted by the organization.
- An interested party, or a relative or business associate of an interested party is provided with a gift, gratuity, or favor of a substantial nature from a person or entity that does business, or seeks to do business, with the organization.
- An interested party, or a relative or business associate of an interested party is gratuitously provided use of the facilities, property, or services of the organization.

### ***Other Interests***

A conflict may also exist where an interested party or a relative or business associate of an interested party, obtains a non-financial benefit or advantage that they would not have obtained absent their relationship to the organization, or where their duty or responsibility owed to the organization conflicts with a duty or responsibility owed to some other organization. Examples include where:

- An interested party seeks to obtain preferential treatment by the organization for themselves, or relative or business associate.
- An interested party seeks to make use of confidential information obtained from the organization for his own benefit, or the benefit of a relative, business associate or other organization.
- An interested party seeks to take advantage of an opportunity or enable a relative, business associate or other organization to take advantage of an opportunity, which they have reason to believe would be of interest to the organization.

### **Disclosure of Actual or Potential Conflicts of Interest**

An interested party shall complete a questionnaire to fully and completely disclose the material facts about any actual or potential conflicts of interest. The disclosure statement shall be completed upon their initial association with the organization and shall be updated annually thereafter. An additional disclosure statement shall be filed at such time as an actual or potential conflict arises.

For board members, the disclosure statement shall be provided to the Chair of the Board, or in the case of the Chair's disclosure statement, shall be provided to the secretary of the Board. Copies shall also be provided to the Colorado FBLA State Adviser. In the case of staff or volunteers with significant decision-making authority, the disclosure statements shall be provided to the State Adviser. The secretary of the Board of Directors shall file copies of the disclosure statements with the official records of the organization.

### **Procedures for Review of Actual or Potential Conflicts – General**

Whenever there is reason to believe that an actual or potential conflict of interest exists between Colorado FBLA and an interested party with respect to a specific proposed action or transaction, Colorado FBLA shall refrain from proposed action or transaction until such time as the proposed action or transaction has been approved by the disinterested members of the Board of Directors of the organization. The following procedures shall apply:

- An interested party who has an actual or potential conflict of interest with respect to proposed action or transaction of the organization shall not participate in any way in, or be present during, the deliberations and decision-making of the organization with respect to such action or transaction. The interested party may, upon request, be available to answer questions or provide material factual information about the proposed action or transaction.
- The disinterested members of the Board of Directors may approve the proposed action or transaction upon finding that it is in the best interest of the organization. The Board shall consider whether the terms of the proposed transactions are fair and reasonable to the organization and whether it would be possible, with reasonable effort, to find a more advantageous arrangement with a party or entity that is not an interested party.
- Approval by the disinterested members of the Board of Directors shall be by vote of the majority of directors in attendance at a meeting at which a quorum is present. An interested party shall not be

counted for purposes of determining whether a quorum is present, not for purposes of determining what constitutes a majority vote of directors in attendance.

- The minutes of the meeting shall reflect that the conflict disclosure was made, the vote taken and where applicable, the abstention from voting and participation by the interested party.

### **Violations of Conflict of Interest Policy**

If the Board of Directors has reason to believe that an interested party has failed to disclose an actual or potential conflict of interest, it shall inform the person of the basis for such belief and afford the person an opportunity to explain the alleged failure to disclose.

If, after hearing the response of the interested party and making such further investigation as may be warranted in the circumstances, the Board determines that the interested party has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

### **Colorado FBLA Conflict of Interest Disclosure Statement**

If you are a Board Member or volunteer with Colorado FBLA, please complete the questionnaire below indicating any actual or potential conflicts of interest. If you answer "yes" to any of the questions, please provide a written description of details of the specific action or transaction in the space allowed.

**Financial Interests** – A conflict may exist where an interested party, or a relative or business associate of an interested party, directly or indirectly benefits or profits as a result of a decision made or transaction entered into by the organization.

Please indicate during the past 12 months:

Has the organization contracted to purchase or lease goods, services or property from you or from any of your relatives or business associates?

\_\_\_yes \_\_\_ no

If yes, please describe:

Has the organization purchased an ownership interest in or invested in a business entity owned by you, or owned by any of your relatives or business associates?

\_\_\_yes \_\_\_no

If yes, please describe:

Has the organization offered employment to you or to any of your relatives or business associates, other than a person who is already employed by the organization?

\_\_\_yes \_\_\_no

If yes, please describe:

Have you, or any of your relatives or business associates, been gratuitously provided use of the facilities, property or services of the organization?

\_\_\_yes \_\_\_no

If yes, please describe:

**Other Interests** – A conflict may also exist where an interested party, or a relative or business associate of an interested party, obtains a non-financial benefit or advantage that they would not have obtained absent their relationship with the organization, or where their duty or responsibility owed to the organization conflicts with a duty or responsibility owed to some other organization.

Please indicate during the past 12 months:

Did you obtain preferential treatment by the organization for yourself, or for any of your relatives or business associates?

\_\_\_yes \_\_\_no

If yes, please describe:

Did you make use of confidential information obtained from the organization for your own benefit of a relative, business associate or other organization?

\_\_\_yes \_\_\_no

If yes, please describe:

Did you take advantage of an opportunity, or enable a relative, business associate or other organization to take advantage of an opportunity, which you had reason to believe would be of interest to the organization?

\_\_\_yes \_\_\_no

If yes, please describe:

Name:

Signature:

Date:

## Competitive Event Policies & Procedures

### Eligibility

- FBLA members must have paid state and national dues to National FBLA before December 1 in order to compete at district, state, and national leadership conferences.
- If dues are paid after December 1, the member may participate in a chapter event or as a voting delegate and may attend workshops, except as defined in the Colorado FBLA Handbook.
- In order to be eligible to compete at the State Leadership Conference, the chapter must stay at the hotel blocks acquired by Colorado FBLA for the duration of the conference.
- In order to be eligible to compete at the National Leadership Conference, the chapter must stay at the hotel assigned to Colorado by National FBLA.

### District Policies and Procedures

#### Deadlines

Deadlines for District Leadership Conference will be as follows:

- December 13: Registration Deadline
- December 14-20: Late Registration is in effect, any additions or changes/substitutions will be \$10 per member
- After December 20: No changes may be made to the District Leadership Conference registration

#### District Eligibility

- Members may compete in two events; only one of which can be a "live" event. (Live event means a presentation component.)
- Each chapter can submit the following entries for live events, based on chapter membership as of December 1:
  - 1-50 members: 3 entries
  - 51-100 members: 4 entries
  - 101-150 members: 5 entries
  - 150+ members: 6 entries
- Competitors may not compete in the same event **if placed in the top ten** at a previous National Leadership Conference.

### *District Leadership Conference Online Testing*

- For all objective tests, members will take an online test.
- Directions and time frames for testing will be communicated to advisers.

### *Recognition*

- Medals or pins are awarded at District Leadership Conferences to the state qualifiers in each event.

### *State Qualifiers*

- Each district is allowed four places for objective tests and four places in live events to advance from District to State Leadership Conference in each competition.
- If a member would qualify for the State Leadership Conference in two events, the member's adviser must notify the District Adviser within ONE week of the District Leadership Conference as to which event the member wishes to enter at the State Leadership Conference.
- **Notification of the event choice should be made to district leadership. Should one member of a team choose an individual event, the chapter may substitute another eligible member; however, at least 50% of the original team must be the same: Two members of the Parliamentary Procedure team, or one member of any other team event must be retained from district to state. Also, the maximum registered number on the team must be maintained; for example, a team of three cannot be substituted in for a registered team of two. Otherwise, the next place team will be eligible for competition at the Colorado FBLA State Leadership Conference.**

### *Weather Issues*

- If weather prevents attendance at a District Leadership Conference, there is an option to attend another district leadership conference to compete. If the scores are within the top four of the DLC they attended, the student(s) qualify for State Leadership Conference, without displacing a qualifier from the District competing.

## **State Policies and Procedures**

### *Judge Definition*

In most cases, the following apply for judges:

- Not be a parent or relative of a student competing in the same event they are judging
- Be an approved past judge
- Possess knowledge in their field and event to be judged
- Be at least 5 years out of high school or in a managerial or entrepreneurial position
- Not be scheduled to judge any student they employ
- Not be a teacher, or staff member, unless they are judging an event in which no one from either their school or their school district is competing

### *Volunteer Conduct Standards/Social Media Policy*

This summary of the standards are designed to help volunteers understand the practices we expect them to employ while involved with FBLA members.

- Young people look to adults for examples of appropriate behavior. Volunteers must use appropriate language and model honorable behavior, such as respect, integrity, **honesty, kindness and excellence**. Profanity or sexualized language or jokes are inappropriate when working with students. Colorado FBLA strictly forbids violating any state law regarding interactions with you; for example, providing them alcohol or legal or illegal drugs, or coaxing them into illicit relationships over the Internet or otherwise.
- Volunteers must take particular care when touching youth. Most adults understand the difference between appropriate physical contact such as a handshake or pat on the back, and contact that is sexual or disrespectfully, students do not always understand the difference. Volunteers also must be cognizant of how any physical contact may be perceived.



- Interactions with students must both be appropriate and appear appropriate. It is expected that volunteers' interactions with students are at all times appropriate and professional and are strictly related to the role of business mentor/judge. It is unacceptable to seek or engage in one-to-one meetings with students at any time.
- Colorado FBLA takes the privacy of students seriously. Volunteers should always receive permission from FBLA or school staff before taking and sharing any photographs of students.
- Colorado FBLA volunteers should not actively "friend", "follow" or correspond with minor-aged students directly through common social media platforms, such as Facebook, Twitter and Instagram. FBLA volunteers should not reach out to any minor students through public platforms.
- Colorado FBLA volunteers agree to preserve the confidentiality of all student records and any confidential data or information and shall not use any of the data or information to benefit himself/herself, any entity, business or person and will not take or misuse any confidential information at any time.

The aforementioned standards do not represent a comprehensive list. Other actions not included could result in a dismissal as a volunteer.

### *Substitutions*

- Notification of the event choice should be made to the District Adviser. Should one member of a team choose an individual event, the chapter may substitute another eligible member; however, at least 50% of the original team must be the same: Two members of the Parliamentary Procedure team, or one member of any other team event can be substituted from district to state. The max number on the team at districts must be maintained.
- *Example: If the team is a team of 2 at districts, it must remain a team of 2. However, if it is a team of 2 or 3 and one member decides to drop, the remaining 1 or 2 competitors from districts may continue without a substitution.*
- Since event qualifiers are determined at the District Leadership Conferences, all substitutions must be cleared by the state adviser and must be submitted via the Event Participant Substitution Form. If submitted after the deadline, a \$10 fee will be charged.
- Voting Delegate substitutions will be allowed until the beginning of the conference.
- Are Substitutions Allowed at the FBLA Colorado State Leadership Conference?
  - INDIVIDUAL/TEAM EVENTS. Only Team Substitutions Allowed, With Exceptions. If competing as a team that does not require a pre-judged component (see below), you may substitute one (1) member of a team originally comprised of 2 or 3 members. If competing as an individual, no substitutions are allowed, and his or her spot is forfeited to the next eligible competitor.
  - INDIVIDUAL EVENTS. No. Substitutions are not allowed for individual events. If an individual cannot participate in the next level of competition, his or her spot is forfeited to the next eligible competitor.
  - PARLIAMENTARY PROCEDURE. Yes, With Exceptions. You may make substitutions if at least two (2) members of a team of four (4), or three (3) members from a team of five (5) remain on the team that advance to the next level of competition. Maximum number of substitutions allowed is two (2).
  - CHAPTER EVENTS. Yes. Substitutions are allowed for chapter events with a presentation component if the chapter participates in the next level of competition.
  - PREJUDGED EVENTS. No. Substitutions are not allowed for prejudged events. However, a team may drop a member if allowed in the event guidelines. If an individual or team cannot participate in the next level of competition, their spot is forfeited to the next eligible individual or team.
  - ROLE PLAY EVENTS. No substitutions in between the test and role play.

### *State Officer and Candidate Competition Eligibility*

- State officers and state officer candidates will be allowed to participate in one competitive event at the State Leadership Conference.
- A current state officer automatically earns a spot in the state level competition for an individual event. If the officer is a part of a team event, the entire team must compete and qualify for state competition at the district level.

### *Testing*

- If a member is in violation of dress code, the 5-point penalty will be assessed on their test score
- If a member is late to a testing event, they will have the remaining time left to take the test (example: if the member is 10 minutes late for a 60-minute test, they will have 50 minutes to take the test)

### *Recognition*

- Certificates will be available online after the conference for all competitive event participants.
- Top ten competitors/teams will be announced and come to stage for recognition. Top ten places will receive a pin.
- Plaques are awarded at the State Leadership Conference on stage to the Top 4 in each competitive event.
- Top ten placements are communicated to advisers after the conference.

### *Miscellaneous*

- Members MAY NOT compete in two events, unless one of the events is a chapter event. Competitors may not participate in the same event, **if placed in the top ten at any previous National Leadership Conference.**
- Space depending, all role plays will present a case study in a preliminary round at SLC. The preliminary round will have a weighted score. 25% of each team's overall preliminary score will be based on a team's preliminary performance score and the other 75% of each team's overall preliminary score will be based on the team's objective test score. The top overall scores from each section will present a role-play in the final round. The score in the final round will be 100% based on performance and the objective test will only be used as a tiebreaker in the final round.
- All individual, objective tests will be taken at State Leadership Conference provided there is space, while all team tests may be taken during an online testing window or on site.
- A photo ID (e.g. drivers license, school ID) and name tag will be required for competitions at State Leadership Conference.
- Competitors must complete all portions of a competition in order to be called as a finalist and qualify for the next level of competition.
- Competitor times are randomly assigned. Competitor times cannot be changed or switched with other competitors, unless approved by state staff. All competitors are required to present at every level. (A competitor cannot be added from prelim to final rounds.)
- All materials submitted become the property of Colorado FBLA.
- No observers will be allowed during the State Leadership Conference.
- Who's Who is a state only event. Since it is pre-judged, students can also compete in up to two competitive events, in addition to Who's Who, provided one of the events is a chapter event.
- If a member and/or chapter is deemed by the State Adviser or Board of Directors member to have engaged in cheating or academic dishonesty on any approved FBLA competitive event, a meeting shall be set with the member, adviser, Board member and State Adviser to determine repercussions. A member may be disqualified from their event, the entire chapter may be disqualified from their competitive events and the chapter may be banned for a period of time from competing at the discretion of the State Adviser and State Chair. If a high school member

graduates early, they may still compete in FBLA competitive events. The school, however, must accept full responsibility for the member and their actions. A letter from the school must be sent to the State Adviser prior to the registration deadline for the conference.

### National Qualifiers

- The top ten competitors/teams in each event will complete an intent form by the published deadline after the State Leadership Conference. Any competitor/team not completing an intent form by the published deadline will forfeit their spot at the National Leadership Conference to the next team in line.
- Substitutes: At least 50% of the original team must be the same: Two members of the Parliamentary Procedure team, or one member of any other team event must be retained from district to state to national. Also, the max number on the team must be maintained, a team of 3 cannot be substituted in for a team of 1. Otherwise, the next place team will be eligible for competition.

### Competitive Events Inquiry Process

The Competitive Events Inquiry Form is a tool utilized onsite at State Leadership Conference, designed to serve a purpose IF other efforts to resolve questions and conflicts have been exhausted.

Ideally, if there are concerns raised before an event begins, those concerns should be addressed and resolved prior to the event starting. At any time during a competitive event, if a competitor feels a major rule infraction has occurred, the competitor should immediately bring this to the attention of competitive events staff for immediate correction.

**Once an event is completed, the decision of the judges is final.** The inquiry process will NOT reverse any decision made by the judges but allows Colorado FBLA to examine what happened in an event from the perspective of a competitor, review how the event ran, and fix that which can be corrected for the future.

The Inquiry Form is used to address comments, concerns or questions that are not answered satisfactorily during the event. The Inquiry Form must be completed by the member and signed by the adviser.

Colorado FBLA Competitive Events staff is responsible for addressing the written feedback form, either that evening or following SLC. Generally, the results of the feedback form are discussed with the chapter adviser and a follow-up letter sent to the person completing the feedback form.

### Complaint Procedures

All official complaints must be written and sent (or delivered in person) to the State FBLA Adviser within a reasonable amount of time (10-15 days if circumstances should warrant) following the event.

A legitimate complaint consists of a written, signed statement lodged by a person or persons believing they have evidence to substantiate the complaint. This includes personnel in commercial establishments, State FBLA staff, FBLA members, FBLA advisers, and other affected persons.

In the event that no local discipline policy exists or that a school district for some reason does not enforce the policy or that the local school district would rather have the state proceed with the state discipline procedures, then Option two will be enforced.

#### First Option - School District Level

The local school district will enforce the school disciplinary procedures when a legitimate complaint has been filed against individual or chapter.

### Second Option - State Level

The affected individual and/or chapter (chapter adviser, career and technical director, and superintendent of school) will be notified by letter when an official complaint has been received within ten (10) working days following receipt of the written complaint; they will be notified of the meeting date of the hearing and requested to attend and have a right to counsel. The individual or chapter may elect not to attend the hearing.

The State FBLA Chairperson-Adviser will conduct the hearing; the State FBLA Chairperson-Adviser will determine the disposition of the complaint.

The following action may be taken:

- Case dismissed
- Letter of reprimand to school administration, chapter adviser and chapter
- Chapter and/or member may be placed on probation for a maximum of 13 months
- Chapter and/or member may be placed on suspension for a maximum of 13 months
- The correspondence will be sent by certified mail.

The school superintendent, career and technical director, and chapter adviser shall receive in writing the decision of the State FBLA Chairperson-Adviser within ten (10) working days after the hearing. Within ten (10) working days after receiving the decision, the member or chapter may appeal the decision to the State FBLA Chairperson-Adviser in writing.

Within ten (10) working days, the State FBLA Chairperson-Adviser must inform the member or chapter of the scheduled meeting date of the appeals hearing before an unbiased board. The Board will consist of three individuals who are not associated with FBLA (such as, but not limited to: college/university personnel, local school administrator, business/professional persons, and local advisory committee members). After deliberation, the decision will be made and presented to the State FBLA Chairperson Adviser.

The State FBLA Chairperson-Adviser will inform the member and/or chapter adviser, career and technical director, and the superintendent in writing of the committee's decision within ten (10) working days after the decision is made.

Last appeal means an appeal to the civil court.

**NOTE:** Probation shall be interpreted to mean a warning to the individual or chapter. Probation will not eliminate the member or chapter from participation in state or national activities or events.


Suspension shall be interpreted to mean that any member and/or chapter will not be allowed to participate in any state or national activity for a period of 13 months. Under suspension, state awards and offices for the individual and chapter for the current year shall be withdrawn.

## Dress Code Policy

All attendees must follow the Colorado FBLA dress code – advisers, members and guests

Type	Dress Code
Casual	<p>Casual Dress Code:</p> <ul style="list-style-type: none"> <li>● Pants: Full-length or capri of denim material.</li> <li>● Shirt: FBLA T-shirt, nice T-shirt, polo with no inappropriate slogans or drug/alcohol/tobacco promotion</li> <li>● Shoes: Casual shoes</li> <li>● Note: When in a swimsuit, a proper cover-up and shoes are expected from the sleeping room to the pool/water facilities</li> </ul>
Business	Colorado FBLA adopts the approved National FBLA Dress Code each year for District and State (See picture)

*Dress code infractions will be noted by Board of Directors members and communicated to chapter advisers and school leadership.*




# DRESS CODE

Projecting a professional image is vital for business leaders to demonstrate respect for clients, colleagues, and others. This policy is to provide guidance for conference attendees—students, advisers, and guests. Professional business attire is required at all general sessions, competitive events, exhibits, regional meetings, workshops, and other activities unless otherwise indicated in conference materials.

Conference name badges are considered part of the dress code and must be worn at all conference functions. For safety reasons, do not wear conference badges outside of the conference area. The dress code is gender neutral.

**ACCEPTABLE ITEMS**









**BUSINESS PROFESSIONAL**

**Business Suit**

- Suit pants and jacket
- Blouse (or) collared dress shirt
- Neckwear such as tie or scarf
- Dress shoes (or) dress boots

**Blazer**

- Dress pants, including khakis, (or) dress (or) skirt
- Blazer
- Blouse (or) collared dress shirt
- Neckwear such as tie or scarf
- Dress shoes (or) dress boots

**Dress**

- A business dress
- Dress shoes (or) dress boots

**Other Professional**

- Dress pants, including khakis, (or) skirt
- Blouse (or) collared dress shirt
- Neckwear such as tie or scarf
- Dress shoes (or) dress boots

**BUSINESS CASUAL**

- Dress pants, skirt, (or) khakis/chino-style pants
- Blouse, collared dress shirt, (or) polo shirt
- Dress shoes (or) dress boots

NOTE: Business Casual is only permitted during sessions specifically noted in conference materials.

**UNACCEPTABLE ITEMS**

The following items are prohibited in all conference areas, including competitive events.



- ⊗ Denim or flannel clothing
- ⊗ Shorts
- ⊗ Athletic clothing
- ⊗ Leggings or graphically designed hosiery/tights

- ⊗ Skintight or revealing clothing, including tank tops, spaghetti straps, and mini/short skirts or dresses more than 1" above the knee
- ⊗ Swimwear
- ⊗ Flip flops or casual sandals

- ⊗ Athletic shoes
- ⊗ Industrial work shoes
- ⊗ Hiking boots
- ⊗ Hats
- ⊗ Graphically printed clothing

No dress code can cover all contingencies, so FBLA members must use a certain amount of judgment in their choice of clothing to wear. Members who experience uncertainty about unacceptable attire should ask their local adviser, state leader, or conference staff.

FBLA recognizes that exceptions may need to be made and will work with advisers on a case-by-case basis to accommodate requests. Advisers should indicate the need for exceptions on the special accommodation portion of the registration form. Requests made after registration closes must be made in writing.

June 2023

## District Expenses

Districts will help offset expenses to the state organization, using the following breakdown:

- Test Cost: One dollar and fifty cents (\$1.50) per registrant at the district conference is paid to the state to help defray online test costs.
- Online Registration Cost: One dollar and twenty-five cents (\$1.25) per registrant for district online registration expense, unless incurred by district budget
- Competition Rating Sheet Cost: The district will be invoiced for use of Blue Panda (\$1.00 per online rating sheet) at cost after being invoiced by Blue Panda.
- Recognition Item Cost: At-cost for recognition items (e.g. medals or pins) ordered for district competitors
- Mileage Reimbursement: For chapter visits completed by the State Officer in the district (state pays up front, District reimburses at the end of the year at \$0.30 a mile).

The district expenses listed must be paid to Colorado FBLA within one month of receiving the invoice from Colorado FBLA. **Note: Any increase from the vendor for services beyond what is listed above will be passed on to the districts.**

## Document Retention and Destruction Policy

The Document Retention and Destruction Policy identifies the record retention responsibilities of staff, volunteers, members of the board of directors and outsiders for maintaining and documenting the storage and destruction of the organization's documents and records.

The organization's staff, volunteers, members of the board of directors, committee members and outsiders (independent contractors via agreements with them) are required to honor the following rules:

- Paper or electronic documents indicated under the terms for retention in the following section will be transferred and maintained by Board of Directors within the Google Shared Drive and by the Colorado FBLA State Adviser within the FBLA folder on the CCCS Q drive or in the FBLA office or storage space.
- All other paper documents will be destroyed after seven years;
- All other electronic documents will remain in the Board of Directors folder within the Google Shared Drive;
- Non paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation; and
- No paper or electronic documents will be destroyed or deleted as required to comply with government auditing standards

## Record Retention

The following table indicates the minimum requirements for documents:

Type of Document	Minimum Requirement
Accounts payable ledgers and schedules	7 years
Audit reports	Permanently
Bank reconciliations	7 years
Bank statements	7 years
Contracts	7 years
Correspondence (general)	2 years
Correspondence (legal and important matters)	Permanently
Year-end financial statements	7 years
Insurance records, current accident reports, claims, policies	Permanently
Internal audit reports	3 years



Inventory records for products materials and supplies	3 years
Invoices	7 years
Minute books, bylaws, and charter	Permanently
Tax returns and worksheets	Permanently

## Financial Policies

### Purpose

The purpose of this document is to develop a process for oversight and monitoring of the CTSO student dollar accounts. This process will provide adequate internal controls based on the authority delegated to the CTSO State Advisor by the CTSO Governing Board in accordance with CCCS Financial Policies.

The Direct Supervisor is to review these accounting procedures with new CTSO State Advisors. These accounting procedures will be reviewed annually with the CTE Accounting Technician and State CTE Director.

### Bank Information

- Each CTSO will maintain separate accounts at the assigned financial institution. Only the CTSO Advisor/Director, their Direct Supervisor, and CTE Director should be signers on the bank accounts. The signers have ownership of their bank accounts. The CTE Operations Manager and the CTE Accounting Technician do not have rights to modify anything on the bank accounts such name change or provide access to others.
- Each CTSO will have a commercial credit card for business use
  - Each cardholder must sign a CTSO Credit Card Cardholder Agreement Form which will be kept in the CTSO accounting files
  - Only the CTE Operations Manager can change the limit of credit cards, order cards for new CTSO team members and terminate card use for departed team members. Any credit cards related issues can be directed to the CTE Operations Manager
- A review of the current institution against other institutions must occur every 3 years (last review happened in 2019)

### Budgets and P&L Review

- Each CTSO will have an annual budget reviewed and approved by their governing Board and Direct Supervisor. The budget will be filed with the accounting files.
  - The budget for the following fiscal year must be submitted for review to their Direct Supervisor no later than June 15<sup>th</sup> of the current year.
- At each Board meeting, the CTSO will review the most current Profit and Loss Statement available.

### Contracts

Work outlined in contracts **will not begin** until all appropriate documentation has been attached and Direct Supervisor has reviewed and signed the contract.

- Any contracts created that will be paid with student dollars must abide by these fiscal rules for the development of contracts:
  - All contracts signed with independent contractors are subject to annual review
  - For each contract, a new contract must be created each year
  - Vendor created contracts and any CTSO issued contract must be reviewed by the Direct Supervisor
- All Contracts must include the following documentation before work is to begin:
  - Contract (found in Q Drive: CTE>CTSO>Accounting Files)



- Contractor's Form W-9 should have an annual signature
- Copy of contractor's insurance (if applicable)
- Copy of contractor's driver license (if applicable)
- All payments of contracts must include the following before payment is sent:
  - Invoice for services
  - Signed CTSO Purchase Requisition Form

### **CTSO Loans / Money Transfers**

- Before a money transfer or loan takes place between CTSOs, a contract/agreement will be drafted to include the terms of the loan or transfer. The CTSO State Advisor and Direct Supervisor will sign the contract/agreement.

### **Employee Vacancies**

- Program Assistant: If a Program Assistant position is vacant, the Accounting Technician will serve in the Program Assistant role in the Accounting policies and procedures. (i.e., Depositing checks and entering checks into QuickBooks and Deposit Records)
- Assistant Program Director: If an Assistant Program Director position is vacant, the Program Assistant and Program Director will work together to serve the Assistant Program Director role in the Accounting policies and procedures.
- Program Director: If a Program Director position is vacant, the CTE Director will serve the Program Director role in the Accounting policies and procedures.
- Accounting Technician: If the Accounting Technician position is vacant, the Program Assistant, Assistant Program Director and Program Director will work together to ensure all accounting practices are followed.

### **End of Year Reporting**

Each CTSO is required to complete the following end of the year report annually.

- *Annual Audit:* Each CTSO will have an annual audit performed which is reviewed and approved by their Direct Supervisor
  - CTSO State Advisor will audit a random month of CTSO financials other than their own.
  - CTSO will decide which month due date the annual audit will held at the first CTSO meeting after year end.
  - Annual audit will be completed in July of the new fiscal year on a day agreed upon by all CTSO State Advisors. It is mandatory for all CTSO State Advisors to attend the annual audit.
  - Direct Supervisors will review and sign all audit findings presented by the CTSO State Advisor auditor.
- *Tax Filing:* Each CTSO (FCCLA, FFA, HOSA, TSA) will file an annual 990 or 990-EZ Form Return of Organization Exempt Form Income Tax. 1099 Vendor Reporting will be completed at calendar year end if applicable. DECA, FBLA, and SkillsUSA are filed with their respective national organization. The CTE Accounting Technician will assist CTSO's DECA, FBLA, SkillsUSA to provide financial information to the national organization usually around September.
- *End of Year Report:* Each CTSO will have an end of the year financial summary of the CTSO financial records reviewed and approved by the CTSO Governing Board.

### **Financial Record Keeping**

- Each CTSO will use QuickBooks Online as the official record keeping software
- All financial records will be retained for 7 years, currently stored in Building 900
- Record Keeping

- Physical (Some forms are not necessarily required for physical storage. Check stubs and other documentation not in electronic storage will be required to have physical storage.)
  - What to file: Student Dollar Function Forms, Purchase Requisitions (with check stub), Contracts, W-9, Taxes (including 1099s), Monthly Reconciliations
  - All files will be kept with the supporting Program Assistant or designated personnel
  - Best Practice: Keep one prior year's files, filing all of them in Building 900 at the end of the fiscal year
- Electronic
  - What to file: Student Dollar Function Forms, Purchase Requisitions (with check), Contracts, Credit Card Receipts, Cash collected receipts, W9, Annual Budget, Signed Cardholder Agreement, Taxes (including 1099s), Monthly Reconciliations, and signed copies of tax returns Form 990
  - Files will be kept on the Q drive: CTE>CTSO>CTSO Accounting Files>(Specific CTSO)
  - The Accounting Technician will set up folder templates in the Q drive toward the end of each fiscal year.

## Monthly Reconciliation

A Monthly Reconciliation will occur each month for all of the CTSO accounts.

- The CTE Program Assistant or designated personnel will record all transactions in the appropriate CTSO QuickBooks file and submit all CTSO account statements/documentation
  - All transactions include: deposits, expenses, PayPal transfers, Square transfers, and credit card transactions.
- The assigned CTSO Reconciler or contracted agency will reconcile the account in QuickBooks no later than the last day of the following month pending inquiries are timely received from CTSO team.
- The Monthly Reconciliation document will then be reviewed and signed by the following:
  - CTSO State Advisor
  - Program Director
  - CTE State Director
  - CTE Accounting Technician
- All Monthly Reconciliation documents will be kept in the CTSO accounting files (see Financial Record Keeping section)
- If under review and inadvertent non official CTSO expenses are found, the purchaser will be responsible for payment of these charges to the affected CTSO within 30 days of discovery

## Official Functions

Complete a Student Dollar Function Form if one or more of the following apply:

- When In-state travel includes an overnight hotel stay. A Student Dollar Function Form is not needed for conducting routine job duties (anything that does not include an overnight hotel stay, event with registration fees or when food is served to others as in catering or buying meals)
- When an Event attendance requires a registration fee from the participant.
- When food will be served at a meeting.

"Student Dollar Function Forms" must receive prior verification for all official functions using student dollars.

- "Student Dollar Function Form" must include the following documentation
  - General overview of the event
  - Justification for the event
  - List of attendees (due upon completion of registration)
  - Agenda
  - Projected budget

- Verification will consist of a review by the Direct Supervisor and CTE State Director to verify that the “Student Dollar Function Forms” meets established guidelines and purpose of the organization
- Alcohol is a prohibited expense for student dollars
  - Exception: Unless used in competition and strictly monitored for non-consumption
- Student Dollars cannot be used for CCCS employee travel if a Perkins ARF is in place for the same travel dates.

## **Taxes Reporting**

- CTSOs (see End of Year Reporting) are on a fiscal year basis from July 1 to June 30. Forms 990 or 990-EZ are due on November 15 for a June 30 fiscal year ending entity. If an extension is required, the extended tax return will be due May 15 of the following year (6 months after original due date.)
- The CTE Technician will submit a tax information request after year end to the applicable CTSO for Form 990 or 990-EZ reporting. Subsequent inquiries may be necessary during the tax return process.
- Form 1099-NEC reporting is due in February for the prior calendar year for payments to services rendered by contractors or individuals (i.e., speakers, presenters, photographers). Information to the CTE Accounting Technician should be provided no later than January 15<sup>th</sup>. Collection of correct W-9s should be obtained throughout the year when services are rendered and it is the responsibility of each CTSO to collect them.
- W-9s: These forms should have a dated signature no greater than 12 months within the 1099 reporting period.
- Beginning after year end June 30, 2022, all 990 or 990-EZ forms are required to be filed electronically. A pdf copy will be send to the State Advisor prior to filing. The State Advisor will sign the Form 8879 to indicate permission that the tax return is approved and ready for filing with the IRS.

## **Travel**

When any CTE staff member is traveling for work related activities without students, it is expected that they will gain approval through a Perkins ARF (Approval Request Form) and use their travel budget through Perkins for food (per diem) and travel expenses. The only blanket exception to this rule is for student conferences the CTSO is hosting (like state conference) and the contract dictates another need or if nationals requires a single payment for all students and adults present at national conference. Any other deviations from this expectation need to be approved by the Direct Supervisor for Assistant Program Director travel or CTE Director for Direct Supervisor travel prior to booking travel.

*CCCS employees are not to use Student Dollars for travel unless the rationale for travel and type of budget used is discussed with the Direct Supervisor and CTE Director and pre-approved on a Student Dollar Function Form.*

- Student dollars can only be used for travel related to student events or events that support the development of students.
- Student dollars will not be used for food unless there are students and/or other adults who support students dining.

## **Accounts Receivable Processes**

This section applies to all funds collected for association activities.

## **Credit Card Payments:**

All credit card processing will occur through PayPal, mobile point of sale (POS) app, or QuickBooks Merchant Services.

- An invoice will be created in QuickBooks and sent to the customer by the CTSO.
- The customer will enter their payment information through the pay link provided
- A receipt will be provided to the customer by the system (either through invoice paid or sales receipt)
- The credit card transaction will be recorded into the appropriate QuickBooks account

### **Incoming Checks:**

All checks will be received in the Colorado Community College System Office and handled as follows:

- Checks will be logged on Deposit Record Form and secured in a locked location by the CTSO State Advisor or CTE Program Assistant
  - If a check is made payable to someone unaffiliated with the CTSO, the check will be logged and immediately mailed back to the payer
- Deposit Record Forms and checks will be verified by one of the following entities:
  - CCCS Staff Member
  - Assigned CCCS Reconciler or CTE Accounting Technician
- The CTE Program Assistant or designated personnel will verify all deposits and make the deposit weekly
  - If checks within the locked location exceed \$10,000, an additional deposit must be made
- The CTE Program Assistant or designated personnel will record all deposits into the appropriate QuickBooks account and a receipt sent to the customer
- Deposit Record Form will be filed in the CTSO accounting files

### **Onsite Money Collection:**

- For all money collected, a receipt will be provided to the individual (if possible) and store a copy of that receipt in the CTSO accounting files.
- For incidental cash collected at conferences or other events, the CTSO State Adviser will have the amount verified by a second individual either at point of collection or via comparing receipts issued to collected cash. Cash is counted and verified by another person and recorded on the deposit record form.

### **Accounts Payable Processes**

CTE Direct Supervisors, CTSO State Advisors, and CTE Program Assistants are required to review all payables through the lens of "reasonable costs". A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost.

Reasonableness of a given cost, consideration must be given to: whether the cost is of a type generally recognized as ordinary and necessary for the operation of the non-federal entity (CTSOs are non-federal entities, please refer to Perkins Grant explanation of permissible spending).

### **Credit Card Purchases:**

All credit card receipt processing will occur as follows:

- Cardholder will upload their receipts (or itemized invoice with the total) and code the transactions on the online website or mobile app within 10 business days after the end of the month
  - Cardholders who fail to code transactions and/or turn in receipts for two consecutive months will lose their credit card privilege until missing items are submitted plus 1 month. Only Direct Supervisors and State CTE Director have the authority to terminate credit card privileges.
- The Direct Supervisor (PD) will approve transactions for Assistant Program Directors (APD) on the online website and the APD will approve the transactions for the Program Assistants (PA) and PD on the online website. Both PD and APD will verify that the receipts meet established guidelines and purpose of the organization and will let the CTE Accounting Technician or contracted agency know if receipt is not approved.

- Credit card transactions for food will include a list of attendees and the items discussed.
- Failure to adhere to this policy on two occasions will result in termination of credit card privilege by the Direct Supervisor.
- Transactions with missing receipts must include an explanation as to why the receipt is missing and must be signed off by Direct Supervisor.
  - Explanations must be uploaded into Wells Fargo CEO
- The CTE Accounting Technician or designated personnel will upload the credit card transactions in QuickBooks

### **Invoices:**

All invoices processing and payment will occur as follows:

- CTSO State Advisors will attach a coded CTSO Purchase Requisition Form to the invoice/supporting documentation and submit to their Program Assistant
  - Supporting documentation may include; contract or "Student Dollar Function Form"
  - If purchase falls outside of a contract or function form the invoice serves as documentation
- The Program Assistant will verify that the invoice and supporting documentation are present and will obtain signatures on CTSO Purchase Requisition Form as follows:
  - \$1,000 - \$4,999.99 - CTSO State Advisor
  - \$5,000 - \$9,999.99 - CTSO State Advisor and Direct Supervisor
  - \$10,000 or more - CTSO State Advisor, Direct Supervisor, and CTE State Director
- Upon approval, the CTE Program Assistant or designated personnel will record the transaction in QuickBooks, enter a check to be printed, and file documentation in CTSO accounting files
- CTSO State Advisors will print and sign checks. CTE Program Assistants will verify signatures and mail checks to appropriate vendors
  - Checks written to CTSO State Advisors for reimbursement will be printed by CTE Program Assistants and signed by Direct Supervisor.
  - Two signatures will be required on checks \$5,000.00 or more
  - CTE Program Assistants can print checks on behalf of CTSO State Advisor if needed

### **Reimbursements:**

All reimbursement processing and payment will occur as follows:

- CTSO State Advisors will submit a CTSO Requisition Form and supporting documentation to the Program Assistant
  - Food reimbursements will need to have a list of all attendees and the items discussed.
- The Program Assistant will obtain signatures on CTSO Requisition Form as follows:
  - \$1,000 - \$4,999.99 - CTSO State Advisor
  - \$5,000 - \$9,999.99 - CTSO State Advisor and Direct Supervisor
  - \$10,000 or more - CTSO State Advisor, Direct Supervisor, and CTE State Director
- Upon approval, the Program Assistant will record the transaction in QuickBooks, setup a check to be printed, and file documentation in CTSO accounting files
- Handwritten checks are not allowed unless prior permission has been received from the Direct Supervisor and approval has been documented.
- CTSO State Advisors will print and sign checks and CTSO Program Assistants will mail checks to appropriate vendors.
- If the reimbursement is for the CTSO State Advisor, signature approval will be from the Direct Supervisor

### **Discipline Against Violators**

All CTE employees regardless of seniority or position are required to comply with the Colorado CTSO Accounting Policies and Procedures, applicable laws, and regulations. Failure to do so will result in disciplinary action up to and including termination of employment.

## Harassment Policy

- Harassment based on race, color, religion, national origin, ancestry, sex, gender, sexual orientation or disability will be regarded as a violation of this policy.
- Harassment based on race or color can include unwelcome, hostile and offensive verbal, written or physical conduct based on, or directed at, the characteristics of a person's race or color, such as nicknames emphasizing stereotypes, racial slurs and negative references to racial customs.
- Harassment based on religion can include unwelcome, hostile and offensive verbal, written or physical conduct based on, or directed at, the characteristics of a person's religion or creed, such as comments regarding surnames, religious tradition or religious clothing, as well as religious slurs and/or graffiti.
- Harassment based on national origin or ancestry can include unwelcome, hostile and offensive verbal, written or physical conduct based on, or directed at, the characteristics of a person's national origin, such as comments regarding surnames, manner of speaking, customs, language or ethnic slurs.
- Sexual harassment of members includes unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of sexual nature. Sexual harassment may occur whether the harassment is between people of the same or different sex. Sexual harassment can include unwelcome oral, written or physical conduct, directed at, or related to, a person's gender, such as sexual gossip or personal comments of a sexual nature, sexually suggestive or foul language, sexual jokes, whistling, spreading rumors or lies of a sexual nature about someone, demanding sexual favors, forcing sexual activity by threat of punishment or offer of education reward, obscene graffiti, display or sending of pornographic pictures or objects, offensive touching, pinching, grabbing, kissing or hugging or restraining someone's movement in a sexual way.
- Harassment based on sexual orientation can include unwelcome, hostile and offensive verbal, written or physical conduct based on, or directed at, the characteristics of a person's sexual orientation, such as name-calling and imitating mannerisms.
- Harassment based on disability can include unwelcome, hostile and offensive verbal, written or physical conduct based on, or directed at, the characteristics of a person's disability condition, such as imitating manner of speech or movement; hospital or offensive acts; and/or interference with movement or access to necessary equipment.
- All advisers and members share the responsibility to ensure that harassment based on race, color, religion, national origin, ancestry, sex, gender, sexual orientation or disability does not occur at any Colorado FBLA activities or functions.

## Meeting Emergency & Crisis Policy

### Introduction

Though the likelihood and impact of crisis varies from event to event, we know that, in today's world, the risk is always present.

The Colorado FBLA Board of Directors believe that the following policy and procedures will make our participants safer and our staff better prepared so that everyone may have an enjoyable time at our state meetings and conferences.

Unfortunate events can occur quickly and without warning, so planning is a crucial first step toward a calm and effective response.

All meeting participants should use this document to be completely prepared should an emergency or crisis occur.

### Emergency Contact Plan

All meeting attendees are required to submit parent/guardian contact information as part of the medical release forms. All FBLA advisers submit the Certification Form certifying that this form is completed and they will have immediate access to this information as needed while on site and during the entire event.

## Primary Emergency Contacts

Conference personnel should have on record a list of all primary contacts (cell phone numbers) for all chapters. This will be a required part of conference registration. Conference personnel should have immediate access to this information as needed while on site and during the entire event.

## Notifying Emergency Contacts

Emergency contacts should be notified immediately – as soon as the situation is safe – should an emergency or crisis occur.

The State Adviser will guide the notification process, which could include phone calls, text messages, emails, information posted on the Colorado FBLA website or social media, or any other method of communication that he/she deems appropriate for the situation. All conference personnel should follow the directions of the State Adviser throughout the emergency notification process.

## Conference Evacuation Plan

### *Default Evacuations (Fire/Smoke Alarms)*

If you see fire or smell smoke, follow these guidelines to report the situation and exit the building:

- Remain calm. Conference facilities have sophisticated and efficient fire alarms and suppression systems and many exit doors.
- Call 911 and report the exact location of the fire if known (room number, aisle number, area description, etc.).
- When reporting a fire and no telephone is available, notify the nearest security officer or event staffer.
- Proceed calmly to the nearest emergency exit, and exit the building immediately.
- If there is an actual fire, an audible alarm will sound.
- Do not attempt to use elevators.
- Try to assist disabled or elderly persons who may need assistance exiting the building.
- Do not re-enter the building until instructed to do so by fire department or conference personnel.

### *Discretionary Evacuations*

In the event of a crisis, you may need to evacuate the building. Should that become necessary, you would receive instructions about what to do and where to go by emergency and conference personnel. In such an instance, you should follow these instructions:

- Remain calm.
- Be attentive for instructions.
- Leave the facility through the nearest exit as instructed.
- Do not take time to retrieve personal property.
- If possible, assist elderly and disabled persons.
- Do not loiter or wait for others.
- Do not try to re-enter the building.
- Listen for the “all clear” signal before attempting to return to the building.

## Emergency Procedures

### *Medical Emergency*

If you see an ill or injured person, one of the most important things you should do is request assistance in getting medical help. Medical personnel may be stationed at a first aid station located in your event area and can assist you immediately. If no personnel are stationed there, look for conference personnel or a house phone or use your cell phone to call 911.



Should a medical emergency occur, you should follow the guidelines below:

- Remain calm.
- Check for injuries.
- Do not move him/her, unless they are in danger.
- Call for help to get medical assistance immediately.
- Reassure the victim that help is on the way.
- Do not attempt to perform first aid or CPR unless you are trained and certified to do so.
- Stay with the individual until emergency personnel arrive.

### *Threats that May Result in Violence*

Every threat is treated as a serious matter. Students may be removed from an event if they have threatened another conference participant.

### **Bomb Threat**

Every bomb threat is treated as a serious matter. Most bomb threats are received by telephone. If you receive a bomb threat, keep the caller talking and get as many details as possible. This can provide important information that can help diffuse the situation and give clues to the location of a bomb.

In the event of a bomb threat, follow these instructions:

- Remain calm.
- Do not hang up on the caller. Attempt to keep the caller talking as long as possible so you can get as much information as you can.
- Listen for voice-identifying characteristics and background sounds.
- Try to remember the exact words used by the caller (e.g., location of device, explosion time, etc.).
- Try to write the conversation down.
- Have someone else call 911 and provide the dispatcher all important details.
- Follow the instructions of emergency responders.

### *Suspicious Packages*

Should you encounter a suspicious package, follow these security guidelines to report the package and keep yourself and others safe:

- Do not touch or move the package.
- Alert conference personnel of the package.
- Note and share the location and general description of the package, explaining why you found the package suspicious.
- Follow the instructions of conference personnel.

### **Severe Weather Events**

Weather can change quickly, and the best protection is to be aware of what's happening by paying attention to severe weather alerts and news/weather outlets. Follow these guidelines for severe weather events.

### *Earthquake*

If you are inside a building:

- Stay where you are until the shaking stops. Do not run outside. Do not get in a doorway, as this does not provide protection from falling or flying objects, and you may not be able to remain standing.
- Drop to the ground onto your hands and knees so the earthquake doesn't knock you down.
- Cover your head and neck with your arms to protect yourself from falling debris.

- If you are in danger from falling objects, and you can move safely, crawl for additional cover under a sturdy desk or table.
- If there is low furniture or an interior wall or corner nearby, and the path is clear, these may also provide some additional cover.
- Stay away from glass, windows, outside doors and walls, and anything that could fall, such as light fixtures or furniture.
- Hold on to any sturdy covering so you can move with it until the shaking stops. Stay where you are until the shaking stops.
- If you are outdoors when the shaking starts, move away from buildings, streetlights, and utility wires. Once in the open, drop to the ground, cover your head and neck, and remain as still as possible. Stay there until the shaking stops. This might not be possible in a city, so you may need to duck inside a building to avoid falling debris.
- If you are in a moving vehicle, stop as quickly and safely as possible and stay in the vehicle. Avoid stopping near or under buildings, trees, overpasses, and utility wires. Proceed cautiously once the earthquake has stopped. Avoid roads, bridges, or ramps that the earthquake may have damaged.

### *Tornado*

- Go the lowest building level. If there is no basement, go to the center of a small interior room on the lowest level (closet, interior hallway) away from corners, windows, doors, and outside walls. Put as many walls as possible between you and the outside.
- Get under a sturdy table and use your arms to protect your head and neck.
- Do not open windows.

If you are not in a sturdy building, there is no single research-based recommendation for what last-resort action to take because many factors can affect your decision. Possible actions include:

- Immediately get into a vehicle, buckle your seat belt, and try to drive to the closest sturdy shelter. If your vehicle is hit by flying debris while you are driving, pull over and park.
- Take cover in a stationary vehicle. Put the seat belt on and cover your head with your arms and a blanket, coat, or other cushion if possible.
- Lie in an area noticeably lower than the level of the roadway and cover your head with your arms and a blanket, coat, or other cushion if possible.

### *Winter Weather and Storms*

- Stay indoors during winter storms.
- Walk carefully on snowy, icy walkways.
- Dress properly for cold weather to prevent frostbite and hypothermia.
- Keep dry. Change wet clothing frequently to prevent a loss of body heat. Wet clothing loses all of its insulating value and transmits heat rapidly.
- Do not drive if the conditions are unsafe.

### *Thunderstorms and Lightning*

- Use a battery-operated weather radio for updates from local officials.
- If needed, use flashlights, not candles.
- Avoid contact with corded phones and devices, including those plugged into electricity for recharging. Cordless and wireless phones not connected to wall outlets are OK to use.
- Avoid contact with electrical equipment or cords.
- Avoid contact with plumbing. Do not wash your hands or take a shower. Plumbing and bathroom fixtures can conduct electricity.
- Stay away from windows and doors, and stay off porches or balconies.
- Do not lie on concrete floors, and do not lean against concrete walls.
- Avoid natural lightning rods such as a tall, isolated tree in an open area.

- Avoid hilltops, open fields, the beach, or a boat on the water.
- Take shelter in a sturdy building. Avoid isolated sheds or other small structures in open areas.
- Avoid contact with anything metal.
- If you are driving, try to safely exit the roadway and park. Stay in the vehicle, and turn on the emergency flashers.

### Lockdown Procedures

In some circumstances, it will be safer for those in a room or building to remain inside. Should conference personnel determine the need for you to go under a lockdown, you should follow these guidelines to stay informed and protect yourself:

- Remain calm.
- Follow the instructions of conference personnel.
- Be attentive for instructions.
- Go into an interior room with few windows, if possible.
- Close the door and remain quiet.
- Barricade the door if materials are available.
- Assist any elderly or disabled persons.
- Do not try to leave the room or building.
- Stay in your assigned area.
- Listen for the “all clear” sign given by conference personnel before attempting to leave the room or building

### Continuity of Leadership

Should the State Adviser of Colorado FBLA be unable to perform his/her duties under the guidelines of this plan, the following leadership succession is in place.

Persons are listed in the order of succession with the first position listed being first in line, the second position listed being second in line, etc.

- CCCS Business, Marketing, Entrepreneurship & Finance Program Director
- CCCS Assistant Director for Program Quality, if present
- CCCS Associate Vice Chancellor of Career and Technical Education, if present
- Chair of Colorado FBLA Board of Directors
- CCCS FBLA Program Assistant
- State Officer Team Adviser

### Communicating the Plan

Emergency contacts, evacuations plans, lockdown procedures (or a link) should be included in the programs of all state events.

### General Safety Tips

#### *For Advisers:*

- Before traveling to the meeting, collect parental consent forms and emergency contact forms from members and bring these forms with them to the event. Keep them handy by carrying them in a binder or folder.
- Take a digital photo of each member traveling to the meeting using a phone or camera. Have the photos readily available either on phone or on a flash drive. In the unlikely event that a member becomes lost, the photos will help convention staff and local authorities to locate him or her.
- Remind members of the general safety tips and emergency procedures included in this document.

## *For Student Members*

### Hotel Safety

- Read the emergency instructions on the back of the hotel room door. Familiarize yourself with the fire escape route.
- Count the number of doors between the room and the nearest exit.
- Do not leave the door open, and always use the dead bolt.
- Do not open the hotel door to anyone you don't know. Call the front desk to verify hotel staff, security guards, and others requesting entrance to the room.
- If encountering questionable individuals, report them to the front desk.
- Do not say your room number in public.
- Do not leave valuables out in the open. Many hotels provide lock boxes for security.
- Keep the room key with you at all times.

### Parking Safety

- Always lock car and/or bus doors.
- Do not leave valuables in view inside the car or bus.
- Do not store an extra key under the car/fender, etc.
- If locking valuables in your vehicle, hide them in the vehicle before arrival at the parking lot/garage.

### Public Transportation Safety

- Use call boxes or emergency intercoms that are available.
- Be aware of emergency exit and fire extinguisher locations.
- Keep belongings on your person at all times.
- Follow the instructions of drivers and conductors.

### General Safety

- Go for the RED.
  - R = React: Take information around you seriously. Pay attention.
  - E = Evaluate: Judge the level of threat to your safety or the safety of others.
  - D = Decide: Decide if you need to take immediate action or seek help.
- Do not wear Colorado FBLA badges or nametags outside of Colorado FBLA events.
- Travel in groups.
- Refrain from visiting with strangers.
- Make sure your adviser knows where you are.
- Be aware of what's happening around you.
- Carry a cell phone. Make sure people closest to you know how to reach you. Make sure you know how to reach other members of your group, including chapter members, chaperones, and your adviser.
- Report emergencies immediately.
- Locate emergency exits and fire alarms.

## **Non-Discrimination Policy**

Individuals affiliated with Colorado FBLA shall not discriminate or harass on the basis of sex, gender, race, color, age, creed, national or ethnic origin, ancestry, physical or mental disability, familial status, veteran or military status, pregnancy status, religion, genetic information, gender identity, sexual orientation, or any other protected category under applicable local, state or federal law (also known as "civil rights laws"), in connection with employment practices or educational programs and activities. Individuals shall not retaliate against any person who opposes discrimination, harassment or retaliation or participate in any complaint or investigation process.

## Payment Policy

All chapters are encouraged to pay invoices received in a timely manner. A 10% late fee will be assessed on the amount owed once the payment deadline has passed. Chapters that have not paid in full by the first day of the conference will not receive their registration packets and hotel rooms.

## Reimbursement Policies

Funds are available to cover approved travel, lodging and food expenses for Colorado FBLA staff, contractors, officers and Board of Directors according to the following policies.

- Travel reimbursements will be processed according to agreements for Colorado FBLA positions such as Judge Coordinator and State Officer Team Adviser.
- Travel reimbursements will be processed after receiving a W-9 and completed Travel Reimbursement Form
- Mileage will be reimbursed at \$0.30 a mile

## State Officer Reimbursement

- State Officers and their advisers are eligible for travel reimbursement.
- State Officers and their advisers are not allowed to double dip. If a state officer rides with their adviser, only one may claim reimbursement. If a state officer or their adviser receives reimbursement from their district, they may not claim reimbursement from Colorado FBLA.
- Uniform: An official FBLA blazer will be provided by the state organization, with an option to buy the blazer for \$100 at the end of the term. A polo shirt will also be provided to the officer. Name badges will be provided for officers.
- Registration: Complimentary registration will be provided by Colorado FBLA for each officer at the Colorado Fall Leadership Conferences and the State Leadership Conferences.
- Mileage: Mileage will be reimbursed at \$0.30 per mile. Officers will only be reimbursed if a Travel Authorization Form is completed and submitted **and the reimbursement form is submitted within a week after the event**. Mileage is only reimbursed between home and the event.
- Meals: Most meals will be provided to state officers during mandatory meetings. Meals are not available for reimbursement the night before a meeting. If meal reimbursement is required, the state per diem will apply.
- Hotels: For mandatory state officer meetings requiring an overnight stay, a hotel room will be provided. For day meetings, hotel rooms will be provided for officers living more than three (3) hours from the site of the meeting for the night before the meeting. Hotel rooms will be provided by Colorado FBLA at an approved hotel, preferably at the government rate. Hotel rooms must be requested no later than 2 weeks before the meeting date. Any other hotel reimbursements will need pre-approval, no later than 2 weeks before the date of travel. Special circumstances where it would be more cost effective to spend the night than to drive back and forth for back-to-back meetings may be considered.
- Supplies: Check with the Colorado FBLA State Adviser and State Officer Team Adviser on supplies reimbursement. Any supplies reimbursement must be pre-approved.
- At least \$120 is provided by the district to be put toward state officer expenses – NLC, officer uniforms, etc
- Two hundred dollars (\$200) may be paid to each state officer to offset part of the cost of being an officer upon completion of assigned officer duties. The reimbursement form must be completed by the officer after State Leadership Conference and no later than May 31<sup>st</sup> after their officer term. The State Adviser and State Officer Team Adviser will determine the eligibility of the officer to receive the \$200, based off officer performance throughout the year.
- Up to five hundred dollars (\$500) may be paid to the National Officer Candidate to help defray campaign costs.

## Expenses Covered by the Officer

- Expenses during the SLC at which the officer is selected
- Business cards, if desired

- Any pictures made for publicity purposes
- Expenses to the National Leadership Conference and National Fall Leadership Conference, which is optional but recommended
- Internet access to check e-mail and complete projects through Google
- Postage, if applicable
- Personal cell phone bills
- Uniform expenses, except the blazer, polo shirt and business casual pants
- Replacement name badges, if needed
- Business attire, with reimbursement as stated
- Expenses for attending a conference or event outside any assigned
- No member shall be denied the right to serve as a state officer because of limited finances. It is the responsibility of the local adviser to notify the State Adviser and State Officer Team Adviser of a potential candidate in this situation.

### Board of Directors Reimbursement

- Board of Directors members are eligible for travel reimbursement
- Board members are not allowed to double dip. If a Board member receives reimbursement from their employer, they may not claim reimbursement from Colorado FBLA.
- Mileage: Mileage will be reimbursed at \$0.30
- Meals: Most meals will be provided to Board members during mandatory meetings. If meal reimbursement is required, the state per diem will apply.
- Hotels: Hotels: For meetings requiring an overnight stay, a hotel room will be provided. For day meetings, hotel rooms will be provided for Board members living more than three (3) hours from the site of the meeting for the night before the meeting. Hotel rooms will be provided by Colorado FBLA at an approved hotel, preferably at the government rate. Hotel rooms must be requested no later than 2 weeks before the meeting date. Any other hotel reimbursements will need pre-approval, no later than 2 weeks before the date of travel. Special circumstances where it would be more cost effective to spend the night than to drive back and forth for back-to-back meetings may be considered.

### Reimbursement Instructions

- Reimbursements will be made only if the officer or board member exemplifies good conduct and completes all assignments in a proper and prompt manner.
- Requests must be submitted within one week of the date incurred or reimbursement may be denied.
- A completed W-9 must be on file for reimbursements to be processed.
- Dated receipts, if applicable, are to be submitted with the reimbursement form.

All situations cannot be covered by the rules. In some cases, a judgment may need to be made by the State Adviser and/or State Officer Team Adviser. Their decision is final. The decision will be made first in concern for the state organization's treasury, then with the consideration of the person involved. Thank you for your cooperation and understanding in stretching our funds.

Any donations or sponsorships that officers or board members secure to help defray expenses or the operation of the state would be beneficial and greatly appreciated!

### Refund Policy

- No individual registration refunds are processed after the regular registration deadline posted for each event.
- Any chapter overpaying for an event will need to request the refund in writing.

## State Officer Policies and Procedures

### Qualifications and Procedures

Each candidate must be a member in good standing in an FBLA chapter at the school in which he/she is enrolled. *Candidates must have taken or be currently enrolled in a business or business-related course.*

- A school may have no more than (3) three candidates for an office. An unlimited number of candidates may come from a district.
- Candidates **MAY** compete in any speaking, interview or presentation events at the state level. Candidates may only participate in ONE competitive event at State Leadership Conference.
- **Candidate must have completed or must be currently enrolled in a business course.**
- Candidate must have been approved by his/her local adviser and local chapter.
- Candidate must have at least one full school year remaining.
- Candidate must have a minimum of a 2.5 GPA.
- Candidates must have completed one year of high school before applying.
- Each candidate for state office must submit all required paperwork to the State Adviser by the state registration deadline.
- Each candidate for state office must hold or have held an s/elective office in his/her local chapter or a similar office in an organization.
- Each officer candidate must be able to attend a mandatory state officer training the summer following installation. Candidates and their advisers must be able to attend the following mandatory meetings if selected for office:

Month	Event
May	New State Officer Team and Adviser Meeting
June	FBLA State Officer Meeting
June	CTSO State Officer Training
August	Chapter Officer Training
Monthly	Monthly Membership Meetings (online)
Fall	District Officer Training
September	State Officer Team and Adviser Meeting
September/October	Colorado Fall Leadership Conferences
December	State Officer Team and Adviser Meeting
March	State Officer Team and Adviser Meeting
January / February	Attend District Conference as requested by FBLA Board Members
April	State Leadership Conference

**State Conference takes precedence over prom/athletics or other activities. This is not negotiable!**

### State Officer Candidates

Each chapter may run three (3) members for state office. State officers are selected at the State Leadership Conference. The Executive Vice President position is reserved for a candidate running for a national office.

It is not too early to start planning! Organization is of great importance if accurate and efficient information outlining the positive characteristics and goals of a candidate is to be available. Scheduling of specific tasks, which need to be completed is a good idea so that the ideas and plans will be accomplished in a neat and thorough manner. By having a set schedule and sticking to it, all of the materials will be finished before the date for application, and there won't be a mad rush at the last minute.

### Phase 1: Application Process



Interested members will apply through the online application process for a state office by the established deadline.

- State Officer Application and Candidate Agreement Form with appropriate signatures
- **One-page** resume (without personal information beyond a name – no address, phone number or email)
- Professional headshot photo
- Recommendation from the local FBLA adviser
- Unofficial transcript to confirm GPA Verification and business course enrollment
- Signed Code of Conduct Form (and publicity release)
- A two minute or less elevator speech promoting FBLA
- A professionally written article relating to FBLA's motto (service, education and/or progress) submitted to the Colorado FBLA Today newsletter.
- State officer candidates and their advisers will complete a virtual interview prior to the State Leadership Conference, within the time frame given by the State Officer Adviser.
- State officers wishing to run for a state/national office a second time must obtain the signature approval of the state officer team adviser and the state adviser.

The candidates for office must be present at the Colorado FBLA State Leadership Conference to be eligible for official selection. All candidate applications for state officer positions will be reviewed by an appointed Selection Committee at the State Leadership Conference.

### National Officer Candidates

Qualifications for running for a selected National Office (Mountain Plains VP, President, Secretary, Treasurer, or Parliamentarian):

- Submission of all Colorado State Officer materials
- Selected by the Colorado Selection Committee at the State Leadership Conference to represent Colorado
- Final Selection Committee rating scores for the National Officer Candidate are to be within the range of the incoming selected Executive Officers
- Candidates for Executive Vice President must be approved by a committee interview. The committee will be made up of no more than 5 people: Colorado FBLA State Adviser, Colorado FBLA State Officer Team Adviser, Business & Industry Representative, Colorado FBLA State President, Colorado FBLA Executive Vice President
- If (all the above criteria is met and there is) more than one candidate for a national office, the Selection Committee will select one person to represent Colorado at the National Conference.
- If selected to represent Colorado as a National Officer Candidate, the office title will be Colorado Executive Vice President. If elected as a national officer, the student can serve as a liaison to the state officer team, but not required to attend all activities.
- National Parliamentarian: Colorado may submit one candidate for this position. A candidate must be selected by the Selection Committee, as stated above. This candidate must score 75% or above on the Parliamentary Procedure test at the state level. National Parliamentarian candidate is not eligible for Colorado FBLA Executive Vice President.

### *Phase 2: Knowledge Test*

All candidates will take a 50-question test comprised of multiple-choice questions regarding facts about FBLA and the information included in the Colorado FBLA Handbook, as well as other FBLA resources. This test will be given on-site at the State Leadership Conference.

Candidates will want to review all aspects of the FBLA organization including the history, organizational chart, pledge, leadership goals, and insignias, as well as the State Officer Handbook.

### *Phase 3: Selection Committee*

State officer candidates will be sequestered together for the first day of the selection process and leadership

activities at the State Leadership Conference.

Leadership activities for officer candidates at or before the State Leadership Conference will include but are not limited to the following:

- An individual interview with selection committee members
- Team building activities
- Session rehearsals with multimedia company

Questions That Might Be Asked of an Officer Candidate

- Why do you think you are qualified to be a (district/state/national) officer?
- What does FBLA mean to you and how has FBLA played an important part in your life?
- How are you at assuming responsibility?
- What are some of the qualities a leader must have? Do you have them? Explain.
- What is the one main purpose of FBLA?
- Describe your relationship with your Chapter Adviser, and will he or she be able to help you in completing your duties as a State Officer?
- How will you balance missing school, work, or athletics?
- What is your best asset? What is your worst trait?
- Give four adjectives that best describe you. Why?
- Describe how you will present if something important is taking place at your school and you are asked to be at a special state officers' meeting?
- What is your favorite thing to do when you have spare time?
- If you could change one thing in FBLA, what would you change?
- How can the state officers in FBLA promote the national projects?

#### *Phase 4: Notification of Selection*

**Candidates will be announced during the Closing Awards Session during State Leadership Conference.**

#### **Selection Committee**

A Selection Committee will be responsible for choosing the State Officers by utilizing rubrics for the application materials and confidential discussions. There is an [online Selection Committee Application](#) for those interested. Each district needs to select a member to serve on the Selection Committee at the State Leadership Conference; this can either be done by the District State Officer or the Board Member for that District. In order to be eligible, a member:

- Must be a one-year (+) member of FBLA;
- May not be from the same chapter as an officer candidate;
- May compete at the State Conference and MUST BE available for committee work during the first two days at the conference (their event will be scheduled around the committee times).

#### **State Officer Candidate Guide**

Refer to the State Officer Candidate Section of the State Officer Handbook as the official guideline for all aspects of running for state office. Specific officer duties are outlined in this guide, as well as responsibilities of the officer and his/her adviser. Advisers are urged to read this guide carefully and to encourage qualified members to run for state office. State officers receive a program of leadership training that is a valuable experience. A copy of the handbook can be located on the Colorado FBLA website, State Officer page.

#### **State Officer Meetings**

There will be at least four Colorado FBLA State Officer Meetings during the year that the officer and his/her adviser will be required to attend, along with other conferences/meetings. Following is a summary of each

meeting.

- The first meeting is held after the state leadership conference. All state officers and advisers are required to attend this meeting. The purpose of this meeting is to become acquainted with some of the responsibilities and activities of a state officer and adviser. Topics include state structure, board policies, calendar of events, and general information pertinent to the year as a state officer. All district and state activity dates must be confirmed.
- June Training: This overnight meeting is held for state officers only. During this meeting, the Program of Work is developed, NLC planning and team bonding is the main item on the agenda.
- CTSO State Officer Training: All state officers will participate in this CTSO State Officer Training. The purpose of this training is to meet other CTSO state officers and learn about general CTE initiatives.
- September Meeting: All state officers and their advisers are required to attend this meeting. The purpose of this meeting is to review fall leadership conference and confirm the state officer travel for district conferences.
- Colorado Fall Leadership Conference and/or CTSO Leadership Kickoff: All state officers are required to attend the fall conference held in their officer year.
- December Meeting: All state officers and their advisers are required to attend this meeting. The purpose of this meeting is to begin plans for the State Leadership Conference.
- March Meeting: All state officers and their advisers are required to attend this meeting. The purpose of this meeting is to finalize plans for the State Leadership Conference.
- All state officers are required to meet one/two day(s) prior to the state conference.

### State Officer Team Policies and Procedures

- All state officers are expected to appear in uniform or professional attire at all State and District Conferences, Executive Council meetings, and other activities as specified by the State Chairperson and/or State Adviser.
- The District State Officer's chapter adviser is also the District Adviser.
- The District State Officer and District Advisers are responsible for the District Leadership Conference, along with the Board member representing the same district. **Each district team will create a project plan, submitted to Colorado FBLA by the September Board of Directors Meeting.**
- All state officers and advisers may be required to attend a meeting in the summer to receive training in planning Fall, District, and State Leadership Conferences.
- If no state officer is selected from the district, responsibility of the District Leadership Conference is on the Board of Directors member and district officers, with the assistance of chapter advisers in the district.
- State officers are responsible for providing input for the State Leadership Conference.
- All state officers should attend one Fall Leadership Conference. State officers will only attend their District Leadership Conference, unless requested by the District Board of Directors member to attend. Expenses will be paid by the requesting district.
- A Colorado national officer will be reimbursed by Colorado FBLA for in-state expenses approved by the State Adviser.
- All state officers should make a minimum of two local chapter visitations with costs to be reimbursed by local chapters.
- Expenses are reimbursed from state FBLA funds.

### State Adviser Travel

The State Adviser may travel to local chapters for the purpose of promoting FBLA and supporting career and technical education. Any travel expense that is not covered by the Colorado Community College System, the State Adviser may use student dollars or submit a reimbursement request through Colorado FBLA.

## Travel Policy

Members of Colorado FBLA are expected to travel with their adviser or school approved adult to all Colorado FBLA events.

## Whistleblower Policy

Colorado FBLA Board Members, adviser and general membership have an obligation to conduct the organization's business in an ethical manner and in compliance with applicable laws. The purpose of this policy is to provide protections to those reporting misconduct and establish a process for reviewing reports of inappropriate conduct within the organization, including, but not limited to, misuse, misappropriation or misreporting of Colorado FBLA funds or its physical assets, questionable auditing or accounting practices, mismanagement of a program, resources, or causing harm to the public interest because of an abuse of authority or violation of law.

### Disclosure of Whistleblower Information

A Whistleblower complaint may be filed, either verbally or in writing, regarding knowledge or good faith suspicion of a Colorado FBLA Board member, adviser or member misusing, misappropriating, or misreporting funds or its physical assets, engaging in questionable auditing or accounting practices, mismanaging a program, department, or resources, or causing harm to the public interest by abuse of authority or violation of law. The report may be submitted to any of the following: (1) the Board Member; (2) the State Adviser; or (3) the CCCS Business, Marketing, Entrepreneurship, Finance Program Director. All Whistleblower complaints will be reported to the Colorado CTE Director at CCCS, as well as the CCCS CTE Business, Marketing, Entrepreneurship, Finance Program Director.

### Responsibilities Upon Receipt of Whistleblower Complaint

Upon receipt of a Whistleblower complaint, the recipient will acknowledge receipt of the complaint, determine whether or not the reporter wishes to remain anonymous, and advise them of the process under this policy.

The recipient of the complaint may consult with Colorado FBLA State Adviser, Colorado CTE Director and any other relevant CCCS staff to evaluate the Whistleblower information provided and determine whether an investigation is warranted. Once this preliminary review is conducted, the reporting party will be notified as to whether an investigation will occur.

### Investigation

Anonymous reporters must timely respond to questions and requests for information that are sent to them. A failure to timely respond will result in inconclusive findings.

Colorado FBLA Board members shall cooperate fully with any investigation initiated pursuant to this policy. Any FBLA entity engaged in conduct intended to impede an investigation may be subject to corrective and/or disciplinary action, up to and including termination of duties with Colorado FBLA.

The reporting party should refrain from gathering evidence that they would not otherwise be permitted to access.

Once an investigation is complete, the Colorado FBLA State Adviser, CCCS CTE Business, Marketing, Entrepreneurship, Finance Program Director or his/her designee will evaluate any recommended action.

If the Colorado FBLA State Adviser or CCCS CTE Business, Marketing, Entrepreneurship, Finance Program Director is the subject of the complaint, the complaint shall be forwarded to the CCCS Colorado CTE Director or CCCS for review and further action.

Reports involving criminal implications will be reported to local law enforcement and/or the relevant prosecutorial office.

For misconduct that is substantiated through the investigation process, the wrongdoer(s) may be subject to corrective and/or disciplinary action, up to and including termination of Colorado FBLA duties.

### **Retaliation Prohibited**

Except as provided below, no disciplinary action, shall be threatened, initiated or administered on account of the reporter's disclosure of information or on account of the reporter's providing information in response to a subpoena or other legal process. This shall not apply to:

1. A reporter who discloses information that he or she knows to be false or who discloses information with disregard for the truth or falsity thereof;
2. A reporter who discloses information which is confidential under any provision of law.

### **Filing a Retaliation Complaint**

A retaliation complaint may be filed and will be addressed in the same manner as outlined in this procedure for other whistleblower complaints.

### **Policies and Procedures Revisions**

Policies and procedures will be reviewed each year in the summer by a committee of Board members, state officers and advisers. Recommendations will be presented at the September Board of Directors meeting. A two-thirds majority vote of the FBLA Board of Directors will be required for any revisions of policies and procedures.

*Adopted September 26, 1990, by the FBLA State Board of Directors  
Amended September 2022 by the FBLA State Board of Directors*



## Ceremonies and Services

The procedures for ceremonies which follow are given only as suggestions and guidelines. Appropriate additions and omissions in the ceremonies can and should be made to conform to local structures. While many chapters are established with the assistance of an installation team from a nearby FBLA chapter, such a procedure is not required. However, a visiting installation team does contribute to the occasion and should be encouraged when possible. Special guests, the chapter advisory board, and school officials are often invited to attend ceremonies.

## Ceremony Settings

In general, the following setting is recommended for the Chapter Installation Ceremony and the Induction of New Members Ceremony; individual tables for the four speakers representing the written words--Future, Business, Leaders, and America; and one long rectangular table for the president, adviser, or installation official.

Many chapters have impressive candlelight ceremonies. Candles lend a soft light to the setting as well as provide a method of sealing the pledges. Chapters are encouraged to use candles of various colors to represent certain offices as specified in some of the ceremonies. The candle on the table of the installing official should be the tallest candle used.

Background music adds a distinct quality to the effectiveness of the ceremony. Appropriate music may be used throughout the entire ceremony or during certain parts of the program, such as during the reading of the Creed or at the end of the ceremony.

In more formal ceremonies, the officers and members may, if so desired, be attired in robes such as choir or graduation robes. Otherwise, appropriate business attire is recommended.

At the conclusion of the ceremonies, members may be presented with membership cards and pins and keys if they have been purchased.

The following copy of the Creed has been marked for reading by phrases for use during ceremonies: believe education is the right of every person.

- I believe the future / depends on mutual understanding and cooperation / among business, industry, labor, / religious, family and educational institutions, / as well as people around the world. / I agree to do my utmost / to bring about understanding and cooperation / among all of these groups.
- I believe every person / should prepare for a useful occupation / in a manner that brings / the greatest good to the greatest number.
- I believe every person / should actively work toward improving / social, political, community and family life.
- I believe every person / has the right to earn a living / at a useful occupation / and that this right should not be denied / because of race, color, creed, sex or handicap.
- I believe every person / should take responsibility / for carrying out assigned tasks / in a manner that brings credit to self, / associates, school, and community.
- I believe I have the responsibility / to work efficiently and to think clearly. / I promise to use my abilities / to make the world a better place for everyone

## Chapter Installation

This ceremony should take place before a large group such as a school assembly, group of business students, or a special meeting to which parents and business people are invited. Seat the installation team on a stage or a raised platform.

Materials needed (may substitute colored ribbons or flowers):

- Tall candle
- Candles: white, gray, green, violet, blue, yellow, orange, and red
- Official charter
- Names of charter members

**Installing Official:** (*standing*) FBLA is a national organization for business students who are preparing for careers in business or business education. I have been authorized to conduct the installation of (school name), into the national chapter of Future Business Leaders of America, Inc.

FBLA is designed to promote future business leaders. It is fitting, as we begin this new chapter, that we consider what these words mean to our organization.

*Future:* Our daily educational experiences and our involvement in leadership activities prepare us for the future—a time to accept challenges. In FBLA, we will find the tools to prepare for the future. We will profit from the experiences of others, those who have preceded us, as well as our teachers and others with whom we associate. Our studies and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

*Business:* We realize the importance of education and training in business methods and procedures. We appreciate the roles of business and education in our daily lives.

*Leaders:* The future of our country depends on the quality of leadership. Leadership implies honor, foresight, tact, competence, dependability, discretion, and integrity. A leader must listen, withstand criticism, and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of FBLA, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

*America:* If America is to remain a world leader, intelligent young men and women are needed to guide our country by studying America's past and analyzing her present. The initiative and success of leaders in business will help shape the future of America. Through FBLA, we will strive for leadership in the field of business, thereby helping to strengthen America.

*(At this point in the ceremony, it may be helpful to provide a brief history of FBLA.)*

Our organization has a definite and worthwhile list of goals. I should like to ask (*name of assistant installing officer or member of installation team*) to read these goals.

**Installing Official:** Will the new officers of the (school) chapter of FBLA please rise and remain standing as I announce each officer. (*Installing officer calls name and title of each officer.*)

You have been chosen from among the members at (name of school) as officers for the coming year. You have been selected because your members have faith in your ability and confidence that you will fulfill the duties of your office. I challenge you to accept the responsibility that has been given to you.

Please raise your right hand and repeat after me. *I, as an officer of the (school) chapter of FBLA do solemnly promise that I will fulfill the responsibilities of my office to the best of my ability, and that I shall carry them*



*out in accordance with the bylaws of FBLA, Inc.*

*(While lighting the tall candle)* By lighting this candle, I seal the vow you have taken and vest in you the authority of your office.

*(Speaking to all members)* You have heard the vows that these officers of your chapter have taken. In your presence, I now declare them officially installed as officers of the (school) chapter of FBLA for the year 20\_\_.

*(Speaking to officers and members, and particularly to chapter president)* By authority of FBLA, Inc., I am pleased to present you with the official charter of your chapter. *(Reads the charter.)* By virtue of this charter, this chapter now becomes a part of the national organization. You now have the privilege and the responsibility of operating under the name Future Business Leaders of America, and as a part of the state chapter and the national organization. The responsibility of making the (school) chapter a success rests with its members and officers.

**Installing Official:** The FBLA chapter president, (name of president), will give the oath of membership to the charter members of the chapter. *(Chapter officers turn and face audience.)*

**Chapter President:** The secretary will now read the names of the charter members of (school) chapter of FBLA. As the names are read, the members will please rise and remain standing until all members have been presented.

**Chapter Secretary:** *(Reads slowly the name of each charter member. Charter members stand as their names are called and remain standing until the oath has been administered.)*

**Chapter President:** Each of you, please raise your right hand and repeat the oath of membership in unison after me. *I do solemnly promise to uphold the aims and responsibilities of FBLA and, as an active charter member, I shall strive to develop the qualities necessary to become a leader in business and in the community in which I live.*

As president of the (school) chapter of FBLA, I declare you duly inducted as charter members.

**Installing Official:** (Name of assistant installing official or member of installation team) will lead members in reciting in unison the FBLA Creed.

## Officer Installation

**Installing Official:** Will the newly elected (or selected) officers of the (school) chapter of FBLA please come forward as I announce your office. (*Installing official lights white candle.*) Lighting the tallest candle symbolizes the chapter in its entirety with all its members working together. With this symbol we shall charge each officer to do the job for which he/she has been s/elected.

(Name of parliamentarian), parliamentarian. (*Parliamentarian comes forward.*) You have been named parliamentarian of the (school) chapter of FBLA. As parliamentarian, it will be your responsibility to monitor all formal chapter meetings so that they are conducted within the framework of parliamentary procedure. Through your efforts, the chapter meetings will be conducted in an orderly fashion, resulting in the efficient disposition of business. Do you accept this responsibility?

**Parliamentarian:** I do.

**Installing Official:** I now declare you in the name of FBLA, the parliamentarian (*gray candle is lit by white candle*). This gray candle symbolizes the achievements possible when chapter meetings are conducted in an orderly fashion.

(Name of historian), historian. (*Historian comes forward.*) You have been s/elected historian of the (school) chapter of FBLA. As historian, it will be your responsibility to maintain records of the chapter, including a report of activities, awards, and publicity. Through your efforts, people see the progress and activities of your chapter. Do you accept this responsibility?

**Historian:** I do.

**Installing Official:** I now declare you in the name of FBLA, the historian (*green candle is lit by white candle*). This green candle symbolizes the satisfaction that can be derived from preserving the past and recording the present, while preparing for the future.

(Name of reporter), reporter. (*Reporter comes forward.*) You have been s/elected reporter of the (school) chapter of FBLA. As reporter, your job will be to report meetings and other newsworthy activities of the chapter through the proper channels. Do you accept this responsibility?

**Reporter:** I do.

**Installing Official:** I now declare you in the name of FBLA, the reporter. (*Reporter selects violet candle from table, and installing official lights it with white candle.*) This violet candle symbolizes the inspiration and enlightenment that can be brought by reporting the activities of the FBLA chapter of (school).

(Name of treasurer), treasurer. (*Treasurer comes forward.*) You have been s/elected treasurer of the (school) chapter of FBLA. In electing you to this office, the members have shown their faith in your business ability and your honesty. Do you promise to keep accurate records of all money received and spent and to present orderly reports upon proper requests?

**Treasurer:** I do.

**Installing Official:** I now declare you in the name of FBLA, the treasurer. (*Treasurer selects blue candle from the table and installing official lights it with white candle.*) This lighted blue candle symbolizes the trust and confidence that the members have in your ability to safeguard all funds.

(Name of secretary), secretary. (*Secretary comes forward.*) You have been s/elected secretary of the (school)

chapter of FBLA. Accepting this office obligates you to be present and keep a record of what takes place at every meeting. Do you accept this responsibility?

**Secretary:** I do.

**Installing Official:** I now declare you in the name of FBLA, the secretary. *(Secretary selects yellow candle from table, and installing official lights it with white candle.)* This yellow candle symbolizes constancy in attendance and in keeping members informed of the chapter's progress.

(Name of vice president), vice president. *(Vice president comes forward.)* You have been s/elected vice president of the (school) chapter of FBLA. Your duty will be to assume the responsibilities in the absence of the president. Will you strive to carry out the duties of this office?

**Vice President:** I do.

**Installing Official:** I now declare you in the name of FBLA, the vice president. *(Vice president selects orange candle from table and installing official lights it with the white candle.)* This orange candle is the symbol of the harmony and faithfulness that should characterize your efforts in working with the president to carry out the ideals of the chapter.

(Name of president), president. *(President comes forward.)* The members of the (school) chapter of FBLA have bestowed upon you a great honor in electing you the president. Your major responsibilities are to lead and encourage this chapter in all its activities. It is your duty to preside at all meetings and see that they are conducted in accordance with the constitution and correct principles of parliamentary practice. Do you accept this responsibility?

**President:** I do.

**Installing Official:** I now declare you in the name of FBLA, the president. *(President takes red candle from the table and installing official lights it with the white candle.)* This red candle is the symbol of your duties and obligations to the chapter and its members.

*(Addressing members of the chapter.)* In your presence, I now declare them officially installed as officers of the (school) Chapter of FBLA for the coming year. *(Candles are blown out.)* You may be seated.

*(The newly elected president is called forward, and with a few appropriate remarks, the installing official presents the gavel to the new president who closes the meeting.)*

## New Member Induction

**Guide:** Mr. or Ms. President, these candidates have expressed a desire and meet the requirements to become members of the (name) chapter of FBLA.

**President:** *(to the candidates)* We accept you as candidates for membership in the (name) chapter of FBLA. Before you become members, however, let us consider the meaning of the words in the name of our organization.

*Future:* Our daily educational experiences and our involvement in leadership activities prepare us for the future—a time to accept challenges.

In FBLA, we will find the tools to prepare for the future. We will profit from the experiences of others, those who have preceded us, as well as our teachers and others with whom we associate. Our studies and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

*Business:* We realize the importance of education and training in business methods and procedures. We appreciate the roles of business and education in our daily lives.

*Leaders:* The future of our country depends on the quality of leadership. Leadership implies honor, foresight, tact, competence, dependability, discretion, and integrity. A leader must listen, withstand criticism and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of FBLA, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

*America:* If America is to remain a world leader, intelligent young men and women are needed to guide our country by studying America's past and analyzing her present. The initiative and success of leaders in business will help shape the future of America. Through FBLA, we will strive for leadership in the field of business, thereby helping to strengthen America.

**President:** You have just heard the meaning of the letters used in our title. We are a national organization for business students who are preparing for careers in business and business education.

FBLA is based on a definite set of goals, including development of competent, aggressive business leadership; creation of more interest and understanding of American business enterprise; and participation in worthy undertakings for the improvement of business and citizenship.

As you accept and strive to achieve these goals you will gain the greatest benefit possible from your membership in this chapter. Welcome to the (school) chapter of FBLA, Inc. You are now officially accepted as members in good standing, entitled to your full rights and responsibilities.

## New Member Installation Ceremony

### Methods of Presentation

- Many chapters make a large emblem on construction or tag board. They then cut out the different pieces and affix them to the tag board with Velcro or tape.
- Another option is to create a PowerPoint presentation of the FBLA Crest Ceremony

As an officer speaks about each part, they place the “puzzle” of the crest. Once the ceremony is done – you will have a completed crest!



### Script

Chapter President: *(Raps the gavel once for the group to come to order)*

Welcome to the Induction Ceremony for Future Business Leaders of America (FBLA).

FBLA’s mission is to inspire and prepare students to become community-minded business leaders in a global society through relevant career preparation and leadership experience.

I would like to start by introducing each of our local chapter officers. *(Have each officer stand as the Chapter President introduces each officer by name and title).*

Thank you, officers.

Would our chapter secretary please bring those members who would like to join our chapter forward?

Chapter Secretary: *(Guides New Members to the front of the room as a group)* Mr. or Madam President: These candidates have expressed a desire to become members of the *(name)* chapter of Future Business Leaders of America (FBLA).

Chapter President (to the candidates). We accept you as candidates for membership in the *(name)* chapter of Future Business Leaders of America. Before you become members, however, let us consider the three parts of our brand known as the delta.

*(Reporter Displays Delta below)*



The Delta represents:

- FBLA's commitment to the ideals of service, education, and progress.
- FBLA's three divisions: Middle School, High School, and Collegiate.
- The change and progress our student members experience as part of FBLA.
- The importance of each piece of the whole coming together to achieve success.

Let's take a closer look at the three words on our crest, starting with service.

Chapter Vice President:

The word "service" donates the idea that every individual should be interested in a take responsibility for promoting better social, political, and family life.

*The "SERVICE" element of the crest is displayed by the Chapter Reporter.*

Community Service activities help the chapter get involved using our business leadership skills to contribute directly to the school and community.

Members recognize the importance of being responsible citizens and form networks with business and community leaders.

They also gain the experience of managing a project outside of the classroom environment.

Our FBLA national service project is the March of Dimes. We have had a successful partnership for more than 45 years. During that time, our members have raised over \$15 million dollars.

Chapter Treasurer:

The word "education" is symbolic of the idea that education is the right of every individual.

*The "EDUCATION" element of the crest is displayed by the Chapter Reporter.*

Education activities increase a members' knowledge of various business careers, providing valuable career orientation and goal setting opportunities. Guest speakers, panel discussions, and business-related presentations are used as instructional tools in chapter meetings and activities. Field trips and business tours demonstrate first-hand what has been discussed in the classroom or at a meeting. Many chapters develop special events to observe American Free Enterprise Day which is November 15. Some of the activities that they plan include job shadowing, mock interview experiences, and special business guest speakers.

Chapter Parliamentarian:

The word "progress" represents the challenges of tomorrow which depends on mutual understanding and cooperation of business, industry, labor, religious, family, and educational institutions and by people of our own and other lands.

*The "PROGRESS" element of the crest is displayed.*

Our members are making progress by partnering with business, education, and civic organizations to earn scholarships, partnerships, and opportunities.

Chapter Vice President:

Now, let's focus on the words that make up our name, beginning with Future.

The word "future" reminds us that the future of the world depends upon the quality of leadership that we are able to produce and we in FBLA will be the business leaders of the future. We must learn to recognize the situation in which our individual talents will be useful.

*The "FUTURE" element of the crest is displayed by the Chapter Reporter.*

In FBLA, we will find the tools to prepare us for the future. We will profit from the experiences of others, those who have preceded us, as well as our advisers and others with whom we network. Our studies and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

**Chapter Secretary:**

The world of "business" is our world. To be successful in business, a person must be educated both formally and informally in business methods and procedures and in the basic principles of our economic system and government.

*The "BUSINESS" element of the crest is displayed by the Chapter Reporter.*

We realize the importance of education and training in business methods and procedures. We embrace the entrepreneurial spirit and free enterprise system that makes the American Dream accessible and possible for everyone. We appreciate the role of business in our daily lives.

**Chapter Treasurer:**

The word "leaders" represent the search for knowledge in order for us to become better citizens. This knowledge will prepare us for the great task of leadership ahead.

*The "LEADERS" element of the crest is displayed by the chapter reporter.*

**Optional Additional "Leaders" Message:** The future of our country depends on the quality of Leadership. Leadership implies honor, vision, innovation, dependability, tact, competence, discretion, and integrity. A leader must listen, withstand criticism, and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of Future Business Leaders of America, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

**Chapter Vice President:**

Finally, we think about America. The future of America depends on our generation. We should pledge ourselves to use the abilities that we have to make America a better place for everyone.

*The "AMERICA" element of the crest is displayed by the Chapter Reporter.*

If the United States is to remain a world leader, intelligent young men and women are needed to guide our country by studying our past, analyzing our present, and preparing for the future.

The initiative and success of leaders in business will help us shape the future of America. Through FBLA, we will strive for leadership in the field of business, thereby helping to strengthen our great nation.

**Chapter President**

All the words together stand for Future Business Leaders of America. The crest stands for our organization which provides opportunities for each member to become a leader of tomorrow.

*Raps the gavel and presenting members are seated.*



## Optional Conclusions to the FBLA Crest Ceremony

### Recite the FBLA Pledge

**Chapter President**

**Please rise, raise your right hand, and join me in reciting the FBLA Pledge:**

*Wait for all members to stand.*

*Display the FBLA Pledge or distribute copies if possible.*

**I solemnly promise to uphold the aims and responsibilities of the Future Business Leaders of America and, as an active member, I shall strive to develop the qualities necessary in becoming a responsible business leader.**

### Recite the FBLA Creed

**Chapter President**

**Please rise and join me in reciting the FBLA Creed:**

*Wait for all members to stand.*

*Display the FBLA Creed or distribute copies if possible.*

**I believe education is the right of every person.**

**I believe the future depends on mutual understanding and cooperation among business, industry, labor, religious, family and educational institutions, as well as people around the world. I agree to do my utmost to bring about understanding and cooperation among all of these groups.**

**I believe every person should prepare for a useful occupation and carry on that occupation in a manner that brings the greatest good to the greatest number.**

**I believe every person should actively work toward improving social, political, community and family life.**

**I believe every person has the right to earn a living at a useful occupation.**

**I believe every person should take responsibility for carrying out assigned tasks in a manner that brings credit to self, associates, school and community.**

**I believe I have the responsibility to work efficiently and to think clearly. I promise to use my abilities to make the world a better place for everyone.**

*Finally, many chapters present new members with certificate of membership or a FBLA pin.*