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**Business Professionals of America Advisor Leadership Handbook**

**Business and Information Technology Education Division Meridian Technology Center**

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**Purpose**

The purpose of this guide is to aid in the preparation and execution of the duties of lead advisor for the Business Professionals of America student organization chapter at Meridian Technology Center.

**This book IS:**

* A guide to aid in the assistance of needs for the student organization paperwork.
* A guide to provide examples of forms and paperwork used for communications.
* A guide to aid in the planning of student officer meetings and directions. A guide for students to understand the order and purpose of membership meetings.
* A guide to use as a supplement to the CTSO Advisor’s Handbook authored and produced by the Meridian Technology Center Student Organization Coordinator.
* A guide that will be available to all Business Professional of America Advisors at any given time.

**This book is NOT:**

* A replacement for Meridian Technology Center’s CTSO student advisors handbook.
* A mandatory guide for following. Objects, forms, communications, and examples can be modified to fit a particular situation as approved by the CTSO coordinator.
* A replacement or substitute for Meridian Technology Center’s policies and procedures set forth by Meridian Technology Center Administration and Meridian Technology Center Board of Education.

**Welcome**

First off, Welcome to the role and experience of a lifetime!

As a student organization advisor, you are responsible for your students, on-going learning, and competitions during the year. As an advisor your primary role is to lead the students down a successful pathway of success through the extra-curricular and/or co-curricular activities Business Professionals of America has to offer.

With this book come additional responsibilities and duties as lead student organization advisor. These extra duties assigned are not to overwhelm you or bog you down; there is always help and assistance available through the team of advisors you have within this department.

Please know as the lead advisor you will work closely with not only your students, but the officers and other classroom advisor students as well. Not only will you be working with more students, but also you will be working with Meridian Technology Center’s CTSO coordinator.

Please know that this guidebook is not a roadmap to success for the organization and smooth sailing of the activities involved. This book will need to be modified and updated regularly to keep up with the changes in the organization. This book is free to be modified, corrected, and changed as you see fit for the situations that arise.

 As well this book is a supplement for the CTSO Advisor’s Handbook which is authored and edited by the CTSO coordinator each year. Please reference the CTSO Advisor’s Handbook as well as this one with questions that arise.

The hope is with this additional aid and supplements the stress and anxiety managing a student organization is not seen as a daunting task but an enjoyable one.

Enjoy the year!

**Contact List for Business Professionals of America**

For contacts, please contact the appropriate person the correct order regarding matters of the organization.

**Advisors –**

Mrs. Mary Barton……………………………………………………………….377-3333 x349

Mr. Daniel Devers………………………………………………………………377-3333 x338

Mr. Les Little…………………………………………………………………….377-3333 x337

Mrs. Shelia McMurry…………………………………………………………...377-3333 x335

Mrs. Lawanta Ramsey…………………………………………………………377-3333 x339

**Local Organization Questions –**

Ms. Teri Roberts………………………………………………….……………377-3333 x219

Mrs. Linda Thompson…………………………………………………………377-3333 x320

**State Organization Questions –**

Mr. Dustin Devers………………………………………………………………405-743-5117

**Needed Information**

**#1** - **Register My Chapter** – Create or obtain a username and password to the registration system for Business Professionals of America.

Website: <https://www.registermychapter.com/bpamem/>

This is the website used for registering members, registering for conferences, competitions, and retrieving schedules for the students in the organization. Register My Chapter is the known student organization database used by the local, state and national organization to track members, invoice membership dues, and charge for conferences.

**#2** – **OKBPA.org** – Create or obtain a username and password to the state organization website, and become familiar with the overall site.

Website: <http://okbpa.org/>

This website is the site which all relevant information pertaining to local and state organization activities are posted. Information on Fall Leadership Conference, Spring Leadership Conference, Competitions, Current Events, Local Chapter Resources, and Contact information is stored. This website will come in handy when trying to find the Competitive Event guidelines, Oklahoma’s Supplemental Event Guidelines and other forms needed for competitions.

**#3** – **BPA.org** – Create or obtain a username and password to the national organization website. Become familiar with the layout and topics for information regarding national guidelines and information about the organization.

Website: <http://www.bpa.org/>

**#4** –**The SOURCE** – Additional Information for advisors and staff to gain additional information about Business Professionals of America. As well with the Source it is an online magazine published for the members to keep informed about the new trends in the organization.

**#5** – **Statement of Assurance Form –** make sure all advisors read, understand and sign the statement of assurance and turn this into the Oklahoma BPA state office before BPA contest events and activities begin. The state department will send an email regarding the issue.

**1st Task – Introductions / Communications Meeting**

Make sure you have all the information needed to access the afore mentioned websites. This will make your duties easier when the first days of school begin.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()**August is always a busy time for teachers with the start of school and student orientation with, enrollment paperwork, rules, regulations, etc. and etc. But the first duties of lead advisor are to schedule a time to get the entire BITE staff together and talk about what is going to happen in the year. What worked well, what did not work well, and can there be improvements. Just to make sure everyone is on the same page. As well as it is a good time for the lead advisor to remind the other advisors of due fees, due dates for membership fees, and other information regarding the organization.

**You may want to stop in at the BPA Updates Meeting during summer conference to hear from the state advisor on the new happenings of Business Professionals of America.**

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**Take good notes for future reference, and follow your meeting up with an email to everyone involved.**

1. Username and Password for all sites
2. Make sure you have all information regarding the new happenings of BPA through viable reliable sources.
3. Share that information with the group at a small meeting. Best before students arrive (Can be informal)
4. Follow up the meeting with an email and notes for everyone.

**Between August 1 – 20th**

**2nd Task – Promotional Materials / Recruitment Meeting**

Throughout the begins of the fall semester, the school or local organization will begin to receive promotional materials for the organization aimed to recruit new members or existing members back to the organization. Normally, these materials will be addressed to the previous main or lead advisor. Your job is to make, use, and distribute promotion materials to all advisors for membership recruitment. Following up with them on due dates, deadlines for membership recruitment.

As well, we normally gather the students for a department-wide recruitment push for an exciting catch to join BPA. You will need to schedule a meeting place, Lecture Hall or Fred Schultz Conference Center for this meeting.

Contact Health Career Desk for Lecture Hall, Program Administration for Fred Schultz Conference Center

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Promotion Materials used in the past are provided in this guidebook for your use.**

**Promotional Material can be obtained from the national BPA website at** [**www.BPA.org**](http://www.BPA.org)

**Idea – Door prizes usually are offered to the students for the 1st meeting and recruitment.**

1. Gather promotional material and distribute to the advisors.
2. Make promotional material relevant to the local chapter.
3. Door prizes –gathered from other advisors.
4. Have a recruitment meeting.
5. Ensure all are aware of deadlines and due dates of membership fees and continue to reinforce the deadlines and dues.

**Between 1st day of school till Membership Dues are no longer accepted. (October)**

**3rd Task – Other Student Organizations / Professional Dress**

Business and Information Technology Department is unique for the fact the students have the ability to join two (2) student organizations. Coordinate with the CTSO Student Organization Coordinator and liaison for our department to recruit for the other student organization – SkillsUSA.

As well, coordinate a professional dress / attire meeting or seminar for the students. This will give the students and opportunity to become familiar with business casual and professional dress attire, not only for Business Professionals of America, but SkillsUSA as well.

**During the Recruitment Meeting (or soon after)**

**4th Task – Officer Applications, Elections and Professional Dress**

During the recruitment period, make sure advisor introduce why, how, when and the importance of being a local officer is. CTSO Coordinator builds the leadership class from the student organization officer. Their first meeting in normally in September; officer must be elected by the time of the first leadership meeting. CTSO Coordinator sends out email communications regarding the leadership class, please keep an eye out for those communications. Create Officer Applications or use a previous version and modify it for needs of the current year. We normally have given a window of two weeks to apply for an office within the BPA Organization. Then distribute them via email or print to all advisors. Application examples are included within this guidebook.

**Officers:** President, Vice President, Secretary, Reporter, Parliamentarian

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Meridian Technology Center student organizations do not elect a treasurer; all finances are handled by the Bursar and the Finance Department.**

**Encourage the advisors to be on the lookout for good candidates. Make sure all advisors are aware of their student/students work ethic and behavior for election.**

*Each Candidate will run for office, they will not specifically specify a position. The interview committee and advisors will decide who gets what position after the election and interview process is over. This will reduce the elimination of quality candidates during the screening process.*

**Interviews:** Each of the candidates for office will go through an interview in professional. Coordinate with members of Meridian Technology Center who are not a part of the Business and Information Technology Department to conduct non-bias interview. Schedule these interviews accordingly and work with the student’s instructor for the appropriate time.

*It may be necessary for the lead advisor to schedule a meeting to talk with other instructors to give the opportunity to narrow down the scope of candidates if a large pool applies. This is on a per year judgment basis. It is not a requirement.*

1. Compose Officer Application
2. Distribute Officer Applications
3. Ensure students running for office pay dues early
4. Make sure instructors hold on to receipt for students to avoid student dues payment questions after.
5. Setup Interview Committee / Interview Dates

Between the 3rd week to the 6th week of school

**5th Task – 1st Member Meeting and Officer Induction**

Work with the other advisors to schedule a time to for a first member meeting and officer induction. Introduce the officers to the members and install them into their positions.

With the installation of the officers, a notebook is given explaining their job duties and titles. Remind the students that this is their student organization and the officer representing are in charge of the activities and meeting. Suggestions should be given to the student officers and the lead advisor is a guide to make sure the certain decisions made by students and student officer follow Meridian policies.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Meridian Technology Center encourages events be placed on the Meridian Event’s Calendar. Call Health Careers Desk or Program Administration with your room reservation within a week advance notice.**

**As well Meridian Technology Center has access to be BPA chapter website via the National website at BPA.org. Information can be posted under the meridianbpa Pages at the** [**http://www.bpa.org**](http://www.bpa.org) **website.**

Several times we have tried to create an “after-school” or “special-event” meeting for officer inductions and it has not worked. We cannot get the attendance we need, as well as, time and preparation is hard. These are notes not discouragements.

At the first meeting:

1. Officer Inductions
2. Get ideas from the student members on community service projects.
3. Get ideas for member activities that promote Meridian and well-being of the organization.
4. Announce to members, next meeting will be a membership meeting for the payment of dues to state and national organizations.

Week after Officer Elections have been selected.

**6th Task – 1st Officer Meeting and Membership Meeting for Dues**

Before the membership meeting and officer ran meeting, call an officer meeting and meet with officer about the organization and conducting of a business meeting using Robert’s Rules of Order and Parliamentary Procedure. This ensures the officer know what is expect of each of their teammates and the membership in general.

After the officers have been elected and membership drive has begun to slowdown. The Meridian Chapter of the Business Professionals of America student organization must bring the membership together and vote to pay for their dues. These dues are paid to the Oklahoma BPA to the Oklahoma Department of Career Technology Education and the National BPA.

The Secretary must take notes and use a template from the CTSO Handbook minutes book for Meridian Technology Center. These minutes have to follow the template to be approved and follow policies set forth through the Finance department. Minutes must be signed and dated.

After the meeting, minutes will be turned into CTSO coordinator.

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**Take Good Notes! Remember to follow the template for minutes!**

1. Make sure the student secretary is taking minutes.
2. Make sure a quorum is established.
3. Make sure that dues for state are motioned on and nationals are motioned on.
4. Use minutes template for finance department.
5. Turn minutes into CTSO Coordinator

After the minutes are turned in, CTSO Coodinator will prepare and produce a student activity purchase requisition for approval of the action to pay the dues for the members.

Meeting Happens by September/October
(1 week before end of dues acceptance)

**7th Task – Register Members in Register My Chapter**

After the membership meeting and dues are approved and purchase order number has been received from CTSO coordinator or Finance Department, lead advisor is able to register members into the Business Professionals of America Membership System.

Make sure before you submit the invoice that all information and students names are correct.

Website: <https://www.registermychapter.com/bpamem/>

Use your advisor login and password. Make sure you assign all advisors for the Meridian Technology Center chapter for both Secondary and Post-Secondary division. All advisors may have both high school and adult students.

Once information and students are correct you can submit the registration for billing. Make print-outs of all registration paper and invoices and submit copies of all of the information to CTSO Coordinator for her records as well.

Remember you can only register students who have paid for membership through Meridian Technology Center’s bursar.

The invoice amount on the registration system must match the purchase order amount from the CTSO Coordinator and the student organization funds purchase order form. The totals have to be exact.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Make sure you print information from the registration system for disputes in future references.**

Happens before Registration Closes
(November)

**8th Task – Fall Leadership Conference (Optional)**

Optional – Meridian Technology Center normally does not attend Fall Leadership Conference. It is reserved for the local officers to learn more about their positions.

If you want to attend, registration is required and transportation will need to be arranged.

Follow Meridian Policies in regards to transportation and field trip requests. Transportation Forms are available on the common drive of Meridian’s camps or can be obtained from the Meridian Technology Center’s Content Management System.

Again, if you want to attend, BPA student organization meeting will need to be scheduled and the membership will need to vote on this event. As well minutes will need to be taken, signed, and submitted to the CTSO coordinator.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Access the Meridian Technology’s field trip forms and policies from the Content Management System from the Meridian Technology Center’s website. https://cms.meridiantech.edu**

1. Decide whether officers are going to attend
2. Have a meeting to approve minutes and expenditures
3. Turn information into CTSO coordinator
4. Register Officers in the Register My Chapter system.

Fall Leadership Conference is held in October

**9th Task – Community Service Project**

Suggest to the officer about a community service project for the fall. We try to work our community service projects in around other student organization community service projects as well. Make sure you speak with other student organization advisors and not duplicate a community service project. Lead advisor is able to talk with the CTSO Coordinator for the advise or ideas. We normally limit 1 community service project per semester; to not inhibit student’s time in class and classroom.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Meridian Technology Center has BPA, SkillsUSA, FCCLA, and HOSA for student organizations around the campus. More information can be obtained within the CTSO Advisor Guide Handbook.**

Remember that community service projects and activities are a decision of the students. Allow the students to find ideas and make decision for community service projects. As lead advisor, make sure the community service project meets Meridian Technology Center’s policies and procedures.

Meridian Technology Center will be implementing a school-wide community service project that may cover some or all of the community service projects requirements for the student organization.

1. Make sure students have decided on a community service project.
2. Make sure the community service project meets policies.
3. Make sure the community service project is not duplicated with any other student organization.

Happens in the Fall Semester

**10th Task – Competition Guidelines Watch / Event Competition Spreadsheet**

Keep an eye out for the National Competition Guidelines and make sure the other advisors know when they come out and are able to be printed. Encourage students to look at the competitive guidelines and select a competition.

National Guidelines are found at the National Business Professionals of America website at <http://www.bpa.org>

A login is required to download this specific content. Use the appropriate login information for the specific site. This information is the same information used for the website.

As well as with the National guidelines for the competitions, Oklahoma has made some changes and variations to the contests; please download the Oklahoma specific guideline changes at Oklahoma Business Professionals of America website at <http://www.okbpa.org>

Remember national guidelines are followed when no information is available within Oklahoma Supplement.

For state contest rules, the Oklahoma Supplement is followed. Any changes are Oklahoma contest specific.

Create a spreadsheet on the common drive for the other advisors to inform each of the student’s competition so there are no duplications of competitions. If there are duplicates there can be local runoffs.

Keep in contact via email with the other advisors so that all people are aware of what is going on within the local organization with competitions and students. The advisors shall work as a team to provide all information to everyone so that we are all on the same page.

Make sure as well to check with Teri Roberts on competing in events that are relevant and related to your courses teaching.

Event Guidelines and Supplement Released October/November

**11th Task – Prepare and Coordinate Local Competitions**

Local competitions may not be needed and vary. Coordinate with the guidelines provided my National BPA, the Oklahoma Supplement to the National Guidelines.

Happens Late December / Early January

**12th Task – Pre-judged Events / Online Testing Candidates**

Make sure all students know if their event is a pre-judge or pre-qualifying event and if they have to submit their contest information online for pre-judging.

BPA pre-judged events are posted on the National BPA website at <http://www.bpa.org>

Each contestant will need their contestant ID and the password setup for them during registration at the membership registration system.

Online testing liaison will need to know who is testing for the Oklahoma Business Professionals of America state conference. Online testing is normally open early February and closes two weeks after and is closed one month before state contests.

The EEC instructor is Meridian Technology Center’s testing liaison. Coordinate with this individual on the scheduling and logistics of online testing for students.

Normally a list of students and their test should be given 1 week in advance.

Due by End of January

**13th Task – Spring Membership Meeting / Register Spring Enrolled Students**

With Meridian’s open-entry and open-exit, some new students may enroll in January. Meridian does allow these students to have the chance to join a student organization. As lead advisor, call another meeting with the officers and the membership to vote an approve adding these members to the organization.

We also allow students who “forgot” and would like to join a student organization to join as well.

After the membership meeting and dues are approved, lead advisor is able to register members into the Business Professionals of America Membership System.

Make sure before you submit the invoice that all information and students names are correct.

Website: <https://www.registermychapter.com/bpamem/>

Use your advisor login and password. Make sure you assign all advisors for the Meridian Technology Center chapter for both Secondary and Post-Secondary division. All advisors may have both high school and adult students.

Once information and students are correct you can submit the registration for billing. Make print-outs of all registration paper and invoices and submit copies of all of the information to CTSO Coordinator for the records as well.

Remember you can only register students who have paid for membership through Meridian Technology Center’s bursar.

The invoice amount on the registration system must match the purchase order amount from the CTSO Coordinator and the student organization funds purchase order form. The totals have to be exact.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()Make sure you print information from the registration system for disputes in future references.**

Due by Middle of January

**14th Task – State Conference Registration / Membership Meeting / Field Trip Requests / Permission Slips**

There is a lot of planning that goes on before state leadership conference and it is difficult to juggle. Having to prepare students and contest materials as well as prepare documents for the trip and arrange stays can be stressful. However, CTSO Coordinator is able to help with hotel arrangements.

When preparing for state leadership conference, you will need a variety of items to make sure the trip is following Meridian Policies. Remember Meridian Technology Center policies on out-of-district field trips must be turned in and approved no less than 10 days before departure date. Out-of-District Field trip forms are found on the CMS.

Website: <https://cms.meridiantech.edu>

Prepare and distribute Permission Slips, Rules, Regulations, Student Code of Conduct for BPA and Student Conduct for Meridian Technology Center during a meeting called by the advisor and ran by the advisor for all students who are attending the BPA state conference.

Permission Slip Samples are provided with the Out-of-District Field Trip form on the CMS. You are allowed to modify it as needed. Make sure you have permission slips developed for both high school students and adult student. Most likely there will be a mixture of both students within the group.

Meridian’s rules are followed at all times on a school event. Refer to the handbook and policies and procedures book for specifics. BPA Student Code of conducts is posted on the website under the SLC or State Conference tabs. Meridian’s Code of Conduct form is found in the Advisor Student Organization Guidebook composed and complied by CTSO coordinator.

Relay motel/hotel information to CTSO coordinator. The CTSO coordinator is the one who will prepare the POs for the hotel. Only CTSO coordinator is allowed to enter into a contract with the motel/hotel or make commitments, make sure the CTSO Coordinator is aware of the motel/hotel accommodations. CTSO Coordinator has a form for motel/hotel room assignments.

Finally, make sure transportation is arranged for the group. Van reservations are taken care of by Operations Administrative Assistant, bus reservations by Transportation Supervisor.

In addition, make sure medical forms are in-place for each student participating and whoever is in what vehicle their medical form is present with the advisor/driver of that vehicle.

Before leaving campus, students should be assigned to a vehicle and a list turned into the office before departure. As well, on the day of the event a text message, phone call or email shall be sent to the office staff, or supervisor notifying them of students, present or absent for accountability purposes.

1. Prepare Out-of-District Field Trip Form
2. Prepare specific permission slips for both secondary and post-secondary students.
3. Prepare Code of Conduct Forms for both BPA and Meridian
4. Call a Meeting
5. Go over Rules, Regulations, Permission Slips and details of the trip with the students attending.
6. Get with CTSO Coordinator on Room Reservations / Hotel/Motel accommodations.
7. Reserve or Verify Transportation Needs with appropriate staff.
8. Check and obtain medical forms for all students attending.
9. Vehicle List of Students to the office.

Due by End of February

**15th Task – State Conference Results / Postings**

Everyone at Meridian gets excited to know who wins within a student organization during locals, districts, regional, state, and national conference. One task for the lead advisor during the Business Professionals of America State Leadership conference is to record the results for all students competing in contests at state. All results should be taken during the Post-Secondary and Secondary awards sessions and then relayed back to the school on arrival. This is an unofficial result, but also allows the others to be aware of what a great job, students and advisors did at a conference or contest.

Normally, take paper and pen/pencil to each of the sessions with you and record as results are given. Later in the week or month official results will be posted and you can make sure that results are properly presented. Another reason we record the results a conference is we have a record of who will attend nationals and CTSO Coordinator can begin the planning / preparation process for travel to Nationals.

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**Bring pen and paper to the award sessions to record results.**

Once conference is over and everyone is back to Meridian Technology Center. We normally send an All Staff email praising student successes via email. As well, reward the students by publicly displaying their trophies and winning on the edge of the front desk as client, members, other students, and staff walk by.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()**

**Ask the students to leave their trophies and winning displays at school for display at front desk for a week.**

1. Bring Pen and Paper to Awards. Record Results
2. Send results in to CTSO coordinator so that to congratulate winners in an all-staff email.
3. Arrange and Display trophies and winnings on front desk by Sandy

Due of Awards Sessions (PS/S)

**16th Task – National Conference Registration / Travel Arrangements / Advisor Assignments**

After winning at State and completing information for state, nationals should be easy. You will want to follow a very similar process with the national conference preparation. Creating permission slips, scheduling transportation to and from the airport (locally).

Most preparation; however, will be handled by CTSO coordinator. CTSO Coordinator will handle preparing airfare (if needed) and hotel. She will be presenting the information on a proposal to Dr. Doug Major, Superintendent for approval.

The earlier you can do this the better. Airfare and hotel prices rise and fill-up fast. So time is of the essence.

As lead advisor still prepare permission slips, make sure you have agendas for the conference, and know where each student is to be. Because the advisors going may have students from other classes, be aware of competition guidelines and rules.

Normally call a meeting with the state 1st place winner and talk about what is going to happen at nationals, and ask if they have questions. And, yes, have fun!

You will need to prepare a tentative guideline and agenda with flight times, hotel information, and activities planned for the parents, guardians, etc.

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**Work with CTSO coordinator, closely on preparations for National Conference.**

Due of End of March / Early April (PS/S)

**17th Task – National Conference Results / Postings**

Remember about displaying and rewarding the students for the great work at nationals too.

Once conference is over and everyone is back to Meridian Technology Center. We normally send an All Staff email praising student successes via email. As well, reward the students by publicly displaying their trophies and winning on the edge of the front desk as client, members, other students, and staff walk by.

**![C:\Users\danield\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\WOPGVDXX\MP900448452[1].jpg]()**

**Bring pen and paper to the award sessions to record results.**

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**Ask the students to leave their trophies and winning displays at school for display at front desk for a week.**

Due of End of National Conference (PS/S)