



Certified Student Travel Organization Standards and Application Process

August 2019
SYTA Annual Conference
Birmingham, AL

Presented by:

Michael Bowers, CEO

William J. Caldwell, CPA

Lisa S. Curtin, COO



Specializing in Student Travel Safety



syta.org

Update on CSTS



As discussed over the past year, SYTA has acquired the Center for Student Travel Safety (CSTS), a non-profit independent C-3 organization, that will work in partnership with SYTA to administer the Certified Student Travel Organization program.

SYTA has also re-branded the Center with a new logo.





A Little about Me- Mike Bowers

I'm still a part of CSTS in a consulting role.

As for my private consulting practice, in April of 2019, I established Travel Safety Solutions, LLC.



A Bit About Us...



Caldwell CPAs is privileged to be part of the CSTO certification process. Here's a bit about us...

William J. Caldwell, CPA

- 30 years of audit experience
- Former Adjunct Professor at American University
- CEO of Caldwell CPAs
- Consultant to the Tourism Industry on topics related to tax planning and best practices in managing your business

Lisa S. Curtin, COO

- 20+ years in the tourism industry, from client to tour operator
- Developed Risk Management and Safety Assessments as a tour operator
- Conducted crisis simulations
- Managed tour operations and media during 9/11 and DC Sniper as well as other situations including a bus fire with passengers on board

Presentation Agenda

1. Review the 32 CSTO standards, 2 new
2. A deeper dive on a few standards and what is expected
3. An introduction into the Application Process
4. The Certification Process and Visit



CSTO Standards Competency Labels:

Competency Label	Area of Focus
ADM	Business Administration
BUS	Motorcoach Operations
CUS	Customer Service
CRP	Crisis Response Plans
HTL	Hotels and Overnight Accommodations
MED	Medical Related
RST	Restaurant and Dining Facilities
SAF	Safety Related
SEC	Security Services



CSTO Mandatory Standards:

Competency Label	Area of Focus
1. ADM *	Minimum Student & Revenue
2. ADM	Background Check, Organization's Principals
3. ADM	Consumer Protection Education
4. ADM *	Business License and Mailing Address
5. ADM	Laws, Regulations and Licensing
6. ADM	Organization Insurance
7. ADM	Code of Ethics
8. CRP	Crisis Response Plan and Training
9. CRP	Crisis Response Simulation Training

* - Some change to the standard

CSTO Elective Standards 1 – 9

(Must meet 16 of 22) :

Competency Label	Area of Focus
1. ADM	Non-Discrimination and Harassment Policy and Training
2. ADM	Child Abuse Prevention Plan
3. BUS	Seat Belt Usage
4. BUS	FMCSA Safety Briefing
5. BUS	Motorcoach Facility and Equipment Assessment
6. CUS	Tour Satisfaction Survey
7. CUS	Family Assistance and Support
8. HTL	Emergency Evacuation Briefing
9. HTL	Accommodation Property Assessment

CSTO Elective Standards 10 – 18

(Must meet 16 of 22) :

Competency Label	Area of Focus
10. MED	Health Information Management
11. MED	American Disability Act (ADA) Specialist
12. MED	Health Information Portability and Accountability Act Specialist
13. RST	Dining Facility Assessment
14. SAF	Staff Background Checks
15. SAF	Swimming Safety
16. SAF	First Aid, CPR and AED Training
17. SAF	Incident Reporting and Response Procedure
18. SAF	Annual Incident Analysis



CSTO Elective Standards 19 – 22

(Must meet 16 of 22) :

Competency Label	Area of Focus
19. SAF	Lost Tour Participant Protocol
20. SAF	Advice for Teacher Leaders
21. SAF *	Attraction and Venue Best Practices
22. SEC	Security Organization Assessment



Practical Examples

SAF – Advice for Teacher Leaders

The Travel Organization must establish a process to share effective best practices on tour when clients are leading their own travel group. The SYTA “Notice to Teacher Leaders” can be used or an alternate document developed by the Travel Organization.



Practical Examples

SAF – Advice for Teacher Leaders

Application: On any trip or program where the chaperones are selected by the Client Organization.

On-Site Certification Visit and Self-Declaration Requirements

Written Documentation:

- ✓ List of tour guides by name for the review period (*Information used only for the certification process*)
- ✓ Valid annual training records
- ✓ Annual Training program

On-site Certification Visit:

- ✓ During the on-site Certification visit, review list of all appropriate staff, tour leaders and guides hired by the Travel Organization, and certify they participated in current year's annual training.
- ✓ Review annual training material and presentations.
- ✓ Random cross-check of Tour records to training records



Practical Examples

CRP – Crisis Response Plan and Training

The Travel Organization must have in place a current crisis plan to effectively respond to and manage a critical situation. The Travel Organization must conduct annual training of all staff, appropriate for their job duties and responsibilities.



Practical Examples

Application: Core business requirement and applies to guided and non-guided tours.

On-Site Certification Visit and Self-Declaration Requirements

Written Documentation:

- ✓ Crisis Response Plan listing actions the Travel Organization would take in the event of a foreseeable emergency or crisis.
- ✓ Training material(s) used for annual training.

Confirmation of annual training to Travel Organization staff.

On-site Certification Visit:

- ✓ Leadership explanation of Crisis Response Plan training.
- ✓ Staff interviews centered on knowledge of training and understanding of plan.
- ✓ Validate training records.
- ✓ Copy of plan.

The Application and Certification Process



Step One: Certification Process Workshop

- Certification workshops will be held online in Fall/Winter 2019 to go over the standards, application and documents required to achieve certification.
- Applicants must attend at least one workshop prior to submitting their applications.
- Certification workshops will be recorded and available online.



Step Two: Apply



- Applications will be submitted online to the Center for Student Travel Safety.
- The application fee is \$275.00 for SYTA members and \$500.00 for non-members and is valid the entire time the application is active.
- Once your application is submitted, it will be reviewed by CSTS staff and if approved, will move forward in the certification process.
- Certifications will be given quarterly and applications must be received 90 days prior to the quarter.
- Certifications completed by March 31 will be given in April, certifications completed by June 31, will be given in July...

The Certification Process

Applicants have three options to apply for CSTO certification:

Option #1. My organization has achieved all required standards and required documentation to successfully seek certification.

Option #2. My organization has achieved most of the required standards and plans to seek certification within the next 6 months.

Option #3. My organization has achieved some of the required standards and plans to seek certification within the next 12 months.

Option #1 = I am ready!

Organizations choosing Option #1 means that your organization **at the time of application submission** meets all Mandatory Standards and at least sixteen of Elective Standards.

Choosing this option requires that you:

- Complete and sign the application and Code of Ethics
- Pay application fee
- Include all documents required to meet the Standards
- Provide availability for certification visit at place of business



Option #2 & #3

Count me in but I need more time!

Organizations choosing Options #2 & #3 means that your organization is committed to becoming a Certified Student Travel Organization, but you need more time. The reasons may be varied such as bandwidth to gather documents or refine processes.

If you are committed to achieving your CSTO, it's important to apply as soon as possible so that your organization is in queue to complete the certification process. Your application date determines the maximum active time frame for your application. For example, if you choose Option #2, and your application date is November 1, 2019, the application will remain active until April 31, 2020. This means that anytime between November 1, 2019 and April 31, 2020, you may submit required documentation and have your certification visit.

Certification Process

Using Option #1 as an example, you can expect this timetable of events.

- ✓ Applicant attends workshop and submits application
- ✓ CSTS Staff reviews application and processes application fee
- ✓ Application with all supporting documents submitted to the Center
- ✓ Within 21 days- application further reviewed by CSTS staff who will check for completion and perform an initial review of required documentation
- ✓ Electronic letter sent back to applicant notifying of acceptance of application or notification of missing documents with due date to submit
- ✓ CSTS to notify Caldwell CPAs that applicant is ready for certification review

Certification Process continued...

- ✓ Within three days of Caldwell CPAs notification that applicant is ready to move forward, Caldwell CPAs will send electronic notification to applicant that review process has begun and will coordinate a date with the applicant for the certification visit at place of business.
- ✓ Caldwell CPAs reviews submitted documents and sends applicant a “ready to move forward” letter or list of discrepancies. The latter would contain a due date for submission and that date could correspond to the date of the certification visit.
- ✓ Caldwell CPAs conducts on site review, and then sends notification to the Center that applicant is ready for certification.
- ✓ Caldwell CPAs invoices Center for services and Center invoices applicant.
- ✓ The entire process, if all documents are complete and certification visit is successful at first go, will take 90 days or less.

CSTO Renewal Process

Certified organizations will renew their certification every three years, following the same application process as the initial certification. Applications must be submitted 90 days prior to the organization's renewal date to maintain their certification.

For example, a CSTO with a renewal date of January, must submit their application and required documentation by October 1, and complete their certification visit (onsite) by the end of December in order to maintain their January certification.



CSTO Certification Fees



The certification process is divided into two steps: **application** and **certification visit (onsite)**.

The **application** fee is \$275 for SYTA members and \$500 for non- members. This fee is payable upon submission of the application.

The **certification** fee is \$2500 and includes consultation* with the independent reviewer, travel expenses such as airfare and lodging for onsite visits, the CSTO Certificate and CSTO marketing materials. This fee is payable upon completion of the certification process and must be paid before certification credentials are awarded.

Please note that the validating agency cannot consult on the “how to’s” for creating safety assessments or safety management plans. A resource guide of industry consultants to help tour operators through the validation process will be available through the Center.

CSTO Renewal Fees

Certified Student Tour Operators are required to renew their certification every three years.

The **renewal application** process fee is waived for SYTA members and \$250 for non-members, **if the renewal application is submitted 90 days prior to the expiration of their current certification.** This fee is payable upon submission of the application.

If certification lapses, the formerly certified operator must go through the application process as if applying for the first time. Refer to the previous slide for the fee schedule.

The renewal **certification** process fee, at this time, is \$2000 and includes consultation with the independent reviewer, travel expenses such as airfare and lodging for onsite visits, the CSTO Certificate and CSTO marketing materials. This fee is payable upon completion of the certification renewal process and must be paid before certification renewal is awarded.

For More Information

For more information on the CSTO certification process, please visit Mike, Bill or Lisa at the Center for Student Travel Safety booth or at SYTA Central.

Stop them in the halls, discuss over meals or on the dance floor. Ask questions. We are here to help.

And now, do you have any immediate questions?

Contact Information



Michael Bowers – mike@travelsafety.solutions

William J. Caldwell – bill@caldwellcpas.com

Lisa S. Curtin – lcurtin@caldwellcpas.com

www.caldwellcpas.com and www.travelsafety.solutions

301-941-8090

509-280-1040

Visit the Caldwell website and click on the Tourism tab for more information about our Firm.

Thank you for your time today. We are thrilled to partner with you on this fantastic journey toward becoming a Certified Student Travel Organization!