

NACADA

National ACademic ADvising Association

LEADERSHIP HANDBOOK

Revised September 2002

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NATIONAL ACADEMIC ADVISING ASSOCIATION LEADERSHIP HANDBOOK

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Congratulations on your election to a NACADA Leadership position. This handbook is designed to assist you in the performance of your responsibilities as a NACADA Leader.

THE ORGANIZATION - NACADA was founded in 1979 after a group of 275 interested persons met in Burlington, VT, at the first National Conference on Academic Advising. The Association was chartered as a non-profit corporation in Vermont in 1980 and rechartered in Kansas in 1992. The Association is classified by the IRS as a 501(c)3 charitable organization educational association exempt from income tax. Gifts and contributions to the Association may be tax deductible because of this status. The Association **does** pay sales tax on all purchases **unless sales tax exemption has been approved by a particular state**. The Association functions on a January through December fiscal year and a September-August or March-February membership year.

See Appendix A for organizational chart.

RESPONSIBILITIES OF LEADERS - The position descriptions outlining the major responsibilities of each Leadership position are available on the NACADA web site. Besides the duties unique to each position, Leaders are responsible for representing their constituencies, keeping the membership informed of relevant issues through contributions to the Newsletter, participating in Meetings, nurturing new leadership, and promoting membership in the Association.

LEADERSHIP MEETINGS – Most NACADA governing units meet annually to discuss current issues affecting the Association and to conduct the business of the Association. These meetings are usually held immediately preceding, during, or following the Annual National Conference in the fall. Additional meetings may be called by the President when deemed necessary. The leaders who meet in the fall may have some expenses paid or reimbursed by the Association as detailed under "Policies".

ASSOCIATION POLICIES

A. Archives:

1. Each NACADA leader should deposit with the Association's Archives at the Executive Office any material of permanent value particularly as they leave office. (Board action-1/2/82)
2. Items should include regional calls for presentations, regional conference programs and proceedings, and all other materials related to service to the Association.

B. Meeting Attendance and Reimbursement:

1. NACADA may reimburse all reasonable costs (travel, lodging, meals) incurred by those attending and participating in special NACADA meetings. Only one "co-chair" qualifies for reimbursement.
2. NACADA shall reimburse lodging and reasonable food expenses of all eligible leaders while attending the meetings prior or following with the National Conference. Only one "co-chair" qualifies for reimbursement.
3. NACADA shall not reimburse travel expenses for current office holders and appointees attending the meetings associated with the National Conference.
4. NACADA shall not reimburse expenses related to attending the National Conference along with these meetings. (Board action-3/26/88)
5. Meeting expenses are reimbursed or paid directly at the following rates: Limited lodging at 1/2 the room rate (paid in full if room is shared with another), airfare at lowest (at least 14 day advance) excursion fare or mileage reimbursed at a predetermined rate per mile (not to exceed the airfare rate), meals for meeting days are reimbursed only with receipts up to \$35 each day (Board Action 10/95). Exceptions to the airfare policy require advance approval of the Executive Director and must include reasons for the exception and the amount of additional costs incurred.
6. Interest Group Chairs submit reports for Meetings but do not receive packets in advance of the meeting and are not eligible for reimbursement if they choose to attend the meetings.
7. Association representatives assigned to conduct Association orientation and Association update sessions at the regional conferences shall receive complimentary registration from the Region. Other expenses will be paid from the Association's General fund in accordance with the above limitations.

C. Communications:

1. In general, information to be circulated to regions, committees or commissions should be sent to the NACADA Newsletter for inclusion in the Association's quarterly publication. Use of the term "Newsletter" is reserved only for that publication. (March 26, 1993)
2. Other communications sent directly to members may be sent by the chairpersons or through the Executive Office.

D. Elections:

1. All ballots for annual elections shall be sent by first class mail or be available by electronic voting.
2. If a region chair leaves the region, the chair automatically resigns the position and the Board shall appoint a replacement to fulfill the term in consultation with the Regional Division Representatives.

E. Finances:

1. Subunits may receive funds for association services and business through the formal budget request process of the Association.

F. Inter-association relationships:

1. The National Academic Advising Association encourages cooperation and joint programming with other state, regional, or national organizations that support the purposes of the Association. (Board action-3/85)
2. Allied membership with NACADA encourages cooperation and joint programming with other organizations that support the purposes of NACADA.

G. Mailing List of Members:

1. Requests for NACADA mailing lists for purposes such as research, placement, or publications will be considered on a single use basis only. The appropriateness of providing the list will be decided by the Associate Director as well as charges and profits to be realized. Cost of the mailing lists will be based on the following: educationally related profit-making clients=market value plus postage costs; educational institution/professional educational associations=our cost, postage, plus 10%. (amended 4/86)

H. Membership:

1. Criterion for honorary membership in NACADA is that of outstanding contributions in the field of advising, to be determined by the Board of Directors. Honorary members hold all privileges except voting rights. (Board action-4/82)
2. September 1 and March 1, are the deadlines for payment of dues including charter members who wish to retain their charter status. (Board minutes-10/18/80; Rev. 10/01)
3. Institutional Memberships: The purpose of an Institutional Membership in NACADA is to provide advising information to new audiences and to promote support for academic advising. An "institution" is defined to be a single campus. Institutions will identify the person(s) who will be Official Representatives. Only the Official Representatives will be eligible for "member" rates at NACADA events (e.g. conference registrations) or for NACADA publications and services. Additional persons from the institution desiring NACADA membership must secure individual memberships.

Fees and Benefits: \$200 1 Official Representative will receive full membership benefits. 1 additional journal subscription for the institution's library 20 Newsletters sent to the Official Representative to distribute to faculty/departments. For each additional \$100, an additional Official Representative can be named, who would also receive 20 newsletters and discounts. (Board action-March 96)

4. Allied Memberships: Allied membership is open to sub-regional, statewide, provincial, metropolitan, institutional, or other organizations which have purposes consistent with the National Academic Advising Association and meet the following requirements:
 - a. Organizational Requirements:
 1. Must have goals consistent with or complementary to NACADA goals.
 2. Must have a mechanism for identification of leadership.
 3. Must have at least one individual in a leadership role with membership in NACADA.
 4. Organization must have been in existence for at least one year.
 5. Must have a desire to work cooperatively with NACADA.
 6. Must keep NACADA Region Chair apprised of organization's activities and contact person.

b. Benefits of Allied Membership:

1. Access and use of mailing lists on a reciprocal basis in accordance with current NACADA mailing list policy.
 2. Publication of activities in the Regional Communications at discretion of region chair.
 3. Permission to identify organization as "An Allied Member of the National Academic Advising Association".
 4. Inclusion of representatives of the allied member organization on Region steering and planning committees whenever possible.
 5. An expanded political base from which to advance the goals of the organization.
 6. NACADA has no legal involvement, connection, or obligation to the organization.
 7. Through the region chairs, allied members may request special funds in support of activities in the Regions.
- c. Benefits to NACADA:
1. Allows for the promotion of NACADA membership and participation at meetings of the allied member.
 2. Provides an opportunity/means for heavily populated NACADA regions to organize by state and sub-regions so that more people can be actively involved in leadership positions.
 3. Provides the audiences to whom to promote the goals of NACADA.
 4. Broadens the scope of NACADA to include others who focus on the development of students in higher education.
 5. Expands our political base to other organizations supporting student development in higher education and its funding.
 6. NACADA has no legal involvement, connections, or obligation to the organization.
- d. Application Process:
1. NACADA Region Chairs will identify and report organizations promoting academic advising within their regions that may be interested in allied membership with NACADA. Region chairs should report the organization's name, activities and contact person's name to the Executive Office.
 2. The Executive Office will follow up with the formal application (if not already sent) and a letter to the organization's leadership describing NACADA, its goals and purposes, and our desire for their organization to consider allied membership.
 3. The completed application will be shared with the appropriate region chair.
 4. The application must be accompanied by the appropriate membership fee to the Executive Office.
- e. Reporting:
1. The Regional Division Chair must report the activities of the allied member organizations to the NACADA Board of Directors annually, and the names and contact information of the Allied organization's members as requested via the Region Chairs. It is the responsibility of the Allied Member to present evidence of compliance with the guidelines to the NACADA Regional Division Representative.

I. National Conference:

1. Conference sites shall be selected five years in advance and a National Conference Advising Board designated by the Board shall act as a representative of the Board in the planning of the conference. The conferences will rotate between the midwest, east, and west. (Board actions-10/14/79, 4/81, 10/10/85, 11/89, 10/98)

J. Regional Conferences:

1. Region chairs are expected to attend their regional conference.
2. The NACADA Board Representative to the Regional Conference does not pay the registration fee. Therefore, that person's meals should be included in the conference budget as a fixed expense. The Regional Conference Budget may or may not include the Board Representative's lodging as an expense or complimentary by the hotel.

ASSOCIATION PROCEDURES

A. Meetings:

1. Lodging arrangements are made through the Executive Office for any special meetings. Eligible Leaders are responsible for their own reservations for the fall meetings. Roommates can be coordinated through the Executive Office.
2. Reimbursements are made based on submitted forms with appropriate receipts for all eligible claims. Forms are distributed at the Meetings.

B. Budget Process:

1. By July 1 of each year each subunit requesting operational funds for the following fiscal calendar year shall have submitted a request for funds budget to the Executive Office detailing each project for which funding is sought and its anticipated costs.
2. Requests are reviewed by the Finance Committee and recommendations for funding of approved items made to the Board at its fall meeting.

C. Communications:

1. Communication with the membership is through the NACADA Newsletter. Deadlines for submission of information are set by the Newsletter editor.
2. Electronic mail is frequently used by the NACADA Leadership. A Leadership forum is available as the "NACADALEADERS" listserv through the internet. NACADA leaders are automatically added, but may request to be removed. This network is a very efficient way to communicate with other members of the NACADA Leadership.
3. Many NACADA members communicate over the Internet through the ACADV network and other NACADA members through specific e-mail lists.

D. Executive Office Assistance:

1. Mailings: The Executive Office can handle mailings of letters or brochures to the membership or any subset thereof. This includes labeling and metering (see printing). All pre-printed self-mailer items, being sent from the Executive Office, must include the Executive Office mail permit so it will not need to be added over existing printing. Call for this information before printing. Direct costs will be charged to the appropriate account.
2. Mailing Lists: The Executive Office can provide mailing labels of electronic mail lists of members or subsets thereof for official business use. When ordering, please specify:
 - a) ORDER of labels- zip (required for bulk mailing) **OR** alpha
 - b) WHO -only current members **OR** scope of past years members
 - c) and any other subgroup designations (i.e. single state, specific commission, specific region(s), etc.
 - d) Pressure sensitive (self-adhesive) labels or ASCII format on disk or as an e-mail attachment
3. Printing: The Executive Office can have your NACADA items printed or copied before mailing. Text can be sent via computer disk, e-mail, or as camera ready copy. Self-mailer pieces are less expensive and encouraged.
4. Regional Conferences: The Executive Office will provide a contract for regional conference services to be provided to potential host hotels/facilities. The Executive Office must review hotel contracts before they are signed, can assist you with hotel negotiations, and must approve the budget in conjunction with your regional conferences along with the Region Chair before the registration fee is set. A conference chair training session is held during the NACADA national conference each year. See Regional Conference Chair Handbook.

E. Publications:

1. Journal-The NACADA JOURNAL seeks to enrich the knowledge, skills, and professional development of people concerned with academic advising in higher education. Manuscript guidelines are published in each issue. The NACADA JOURNAL is published twice each year. A subscription is a benefit of membership in the Association. Institutional subscriptions are available at \$30/year (two issues). Some back issues are available from the NACADA Executive Office. Advertisements are accepted in the Journal. All advertisements must be of professional interest or of use to NACADA members.
2. Newsletter-The NACADA newsletter, Academic Advising News, is published and distributed free to the membership on a quarterly basis. Readers are encouraged to submit items that would be of interest to other NACADA members. News about new developments in advising or successful advising programs on campus is welcome. Helpful advising hints and Association news is included.
3. Reports-Occasionally, the Association commissions specific groups to report on current issues within the profession. The reports of these groups are available through the Executive Office.
4. Monographs-The Association coordinates a series of monographs intended to stimulate action in new areas of academic advising practice and research, as well as to provide contemporary viewpoints regarding the many facets of academic advising and the Association. Monographs are available through the Executive Office.

F. Supplies

1. Association stationery and envelopes are available from the Executive Office for use by leaders for Association communications. The Executive Office can also provide "camera-ready" NACADA logos for use on official NACADA publications.
2. Of course, institutional contributions of supplies in support of Association activities is greatly appreciated. However, if necessary, NACADA will reimburse institutions' NACADA leaders for supplies used in the conduct of NACADA official activities if requested and approved in your NACADA annual budget.

G. Collaborative Relationships with External Organizations

1. The Executive Office will propose appropriate organizations with which to seek partnerships to the Board of NACADA. The Board will agree on a priority list relative to the selected organizations and recommend other appropriate organizations for consideration. Potential contacts within the selected organizations should be identified.
2. The Executive Office will initiate a contact with the organizations approved by the Board to discuss possible ways the organizations could collaborate/partner.
3. A proposal for a particular collaborative agreement will be drafted after conversations with appropriate members of the Board from both organizations.
4. NACADA will provide support for collaborative efforts through the Executive Office budget. All requests for funds should be submitted in the form of a proposal to the Executive Office.
5. All collaborative agreements must have a NACADA member listed as the official contact. This contact person (or designee) is responsible for supporting and implementing the agreement in collaboration with the staff in the NACADA Executive Office. (Board vote, October, 1999)

H. Surveys

1. To reduce duplication and be more economically responsible, any NACADA group wishing to survey all or part of the NACADA membership will need to submit a survey component through the regular budgeting process. The Executive Office will ascertain whether or not the information to be gathered could be accomplished in a combined survey instrument and forward the document to the Executive Office.
2. If the same goal(s) can be accomplished by a combined survey, surveys will be combined. If it is not possible to combine survey questions, separate surveys will be budgeted.
3. Only those surveys approved via this process will be conducted (or costs reimbursed to the various institutions).
4. Any survey that is appropriate for the full membership should be included in the newsletter mailing or conducted online through the NACADA web site.
5. Assimilation, production, publication, collection, compilation, and report distribution will be handled by the NACADA Executive Office. (Board vote, March, 1996)

HISTORY OF THE NATIONAL ACADEMIC ADVISING ASSOCIATION

From its beginning the leadership of NACADA has been committed to the belief that the membership's commitment is to academic advising as a process rather than to individual academic advisors. Through that commitment, the Association's original statement of purpose is as true today as it was at NACADA's creation in 1979: The purpose of the National Academic Advising Association is to promote the quality of Academic advising in institutions of higher education, and to this end, it is dedicated to the support and professional growth of academic advising and advisors.

The University of Vermont, through the leadership of Toni Trombley, sponsored the first National Conference on Academic Advising on October 17-19, 1977, in Burlington, Vermont. There, 275 educators gathered to share their enthusiasm for, frustration with, and commitment to the improvement of academic advising. This conference laid the foundation for a succession of annual national and regional conferences. Task forces formed during this conference continued the focus on Academic Advising and began to lay the groundwork for the Association. The Association was officially named at the second national conference in Memphis, Tennessee, in 1978 and incorporated in the State of Vermont in May of 1979. The new Association's by-laws were ratified at the third national conference in Omaha, Nebraska, in 1979 and the first membership drive yielded 429 charter members. 1979 brought the first elected Executive Cabinet and the establishment of the newsletter. In 1981, the Association produced its first Journal. Numerous other member services have evolved in the years since, inspiring membership growth at a rate of 12-14% annually. An Executive Office was established at Kansas State University in 1990 and the organization was re-chartered as a Kansas Corporation in 1992 with 501(c)3 status.

APPENDICES

A: NACADA ORGANIZATIONAL CHART

B: ASSOCIATION BY-LAWS