



NACADA Sponsored (or authorized)
State, Province or Institutional
Drive-in
Conferences

These guidelines are ONLY for State/Province or Institutional Drive-ins that are SPONSORED by NACADA. The date, topic, place and budget must be approved by the Region Chair, any profits are kept at the NACADA Executive Office, and any overruns are paid for by the Region Account.

(These guidelines are NOT intended for for Non-NACADA sponsored or Allied Drive-ins)

**Please contact your Region Chair
or Diane Matteson matteson@ksu.edu 785-532-7816
at the NACADA Executive Office with any questions!**

**The current Region Chair list can be found at
<http://www.nacada.ksu.edu/Leadership/regdiv.htm>**

Getting Started – the Rules!

A **NACADA Sponsored** one day drive-in conference may be a good way to bring professional development opportunities to members of your region!

Contact your Region Chair for approval of dates, topics, location and budget. Your Region Chair will work with the appropriate State/Province Liaison and the Executive Office to implement this event.

Criteria:

In order for the state or province drive-in meeting to be a NACADA Sponsored event:

- The meeting must be relative to advising or its administration.
- The topic and budget for the activity must be approved by the NACADA Region Chair before publication of the event.
- The Region Chair must submit the approved budget to the NACADA Executive Office.
- The meeting is listed as a NACADA Sponsored (or authorized) event in all meeting publications, and the date must not compete with the Region Annual Conference.

Advantages & Benefits of One Day Drive in Meetings::

- Topics can be very specific to your state or area.
- Time away from the office is minimized.
- Transportation and lodging costs are minimized.
- Collaboration with nearby institutional participants can be productive.
- Registration costs can be minimal.

Advantages of Benefits of NACADA Sponsorship:

- The NACADA logo and name may be used in promotional materials.
- The Region Chair can approve e-mails to be sent to NACADA members to promote the event.
- The Region Chair may request NACADA products for promotional display purposes.

Approval Process & Funding:

- Proposal usually comes through the State Liaison and is submitted to the Region Chair.
- Before any announcements are posted, the Region Chair must approve the dates, topic and budget.
- The goal is for these events to be self-supporting. This assures that the people who benefit are the ones who fund the event.

NACADA encourages state and province drive-in meetings to bring information to a broad audience while maintaining assurance that the Association's quality standards and financial status are not placed at risk. NACADA wants to provide the flexibility and support necessary for the states and provinces to carry out these activities.

NACADA Financial Support:

- If budgeted in the Region Account, the Region Chair may choose to provide up to \$200 per state for a drive-in meeting.
- Requests for financial support must be detailed and included in the budget submitted to the Region Chair.
- A formal request must be approved by the Region Chair. Allowable expenses include
 - Speaker expenses, publicity costs, and materials costs.
 - Meeting space charges (usually offered free of charge by hosting university).
 - Meals, refreshments, or purchased giveaways are not allowable.
- If requested, the NACADA Executive Office can arrange payment of invoices directly or by calling in a credit card to the vendor

Registration Fee Collection and Disbursement

1. Registration fees should cover all conference expenses.
2. All fees are collected locally. These funds may be used to pay expenses (save a copy of receipts for the NACADA final report) or submitted at one time to the Executive Office.
3. Payment amounts by each individual must be recorded and submitted with the list of participants, their institutions, and e-mail addresses.
4. Itemized receipts for all expenditures must be submitted with the final report.
5. *Please note: NACADA funds cannot be held in accounts outside the Executive Office on December 31 of any given year per IRS reporting regulations.*

Net Income:

- a. Within 60 days of the event and prior to Dec 31 of each year (for IRS reporting) income must be forwarded to the NACADA Executive Office, along with a final report (see items to include under "Reporting").
- b. Funds are held in a state account at the Executive Office for the state's or province's use for future state or province drive-ins or activities under the direction of the Region Chair.
- c. Requests for use of these funds must be detailed and directed to the Region Chair who will follow approval procedures and then submit the request to the Executive Office.
- d. If there are no state or province activities within three years of the previous event, all monies in the state or province account will transfer on December 31 to the region account.

Net Loss:

If a net loss occurs, those funds will be charged first against the state or province fund and then the region account.

Reporting:

A complete post-event report must be submitted to the Region Chair and to the Executive Office within 60 days after the event. The report should include copies of:

1. The completed "Authorized NACADA State and Province Drive-In Budget and Financial Summary" form
2. Registration brochure
3. An agenda
4. A review of the activity
5. A complete list of participants with addresses, phone and e-mail addresses and amount collected from each individual
6. Expenses by payee and receipts for those expenses
7. Evaluation summary

Checklist for Authorized NACADA Drive-in Meetings

- _____ 1. State/Province Liaison and Region Chair determine need, topic and site for drive-in meeting.
- _____ 2. Budget is prepared and approved by the Region Chair. (Use form: "Authorized NACADA State and Province Drive-In Budget and Financial Summary.")
- _____ 3. The Region Chair submits the approved budget and theme and lists the event with NACADA Executive Office.
- _____ 4. Program is planned, keynote speaker contracted, breakout presenters selected.
- _____ 5. Executive Office lists meeting on NACADA web site. Mailing labels or e-mail announcement is sent by Executive Office if requested by State/Province Liaison or Regional Chair.
- _____ 6. Registration applications and fees are collected.
- _____ 7. Meeting occurs.
- _____ 8. Final financial report and net income are forwarded to Executive Office within 60 days of the event.
- _____ 9. Funds are deposited in a NACADA account to be used for further state or province drive-ins and activities.

Planning the Event

The Idea! NACADA State Drive-in meetings have been centered around a wide variety of advising related topics, including current state-wide issues; increasing advising skills; collaboration between administration, advisors and faculty advisors; student persistence; as well as other issues important to your area.

Gathering support: Contact key players on your campus to explore what assistance you might expect from your institution or others in the area. These might include:

- Meeting space
- Audio-visual equipment
- Keynote speaker invitation and paying of expenses
- Publicity assistance
- Assistance with collecting fees

Committee:

Using a committee helps generate good ideas in the planning stage, divides the labor, and gives individuals an opportunity to serve their profession! You might want to consider the following and divide tasks as best suits the people you are working with:

- **Chair** – responsible for all aspects of the meeting and work of the committee.
- **Program planning** – keynote arrangements, selecting presentations, communicating with presenters.
- **Publicity** – registration information on flyers, submitted to NACADA for web information, distributing e-mail messages for dissemination on other campuses, etc.
- **Registration** – may include receiving the forms in the mail, depositing the fees, sending receipts and confirmation messages, making nametags and checking in people and distributing agendas and materials at the conference.
- **Hotel, meeting space, meal events and audio-visual** – may include hotel arrangements if necessary, reserving meeting space and catering items and audio-visual equipment and set up.

Program: Often the day's activities are centered around a keynote speech and 3 or 4 breakout sessions. You might want to send out a "**call for presentation proposals**" to members in your state and select the breakout sessions from those submissions. The activity could also be centered around a NACADA webcast with appropriate discussions following the event.

Budgeting: Complete the **NACADA STATE AND PROVINCE DRIVE-IN BUDGET & FINANCIAL SUMMARY** found at the end of this document. Review it with your state liaison and Region Chair, have the Region Chair sign off and send it to the executive office. Then the meeting can be listed on the NACADA website and publicity can be sent. Generally, the fees for these meetings are under \$40.

Publicity:

- Your local institutions can help you send out e-mails, postcards or flyers to all advisors and administrators who would be interested in attending.
- In addition, at your request, NACADA may:
 - List your meeting on our State Conferences section of the NACADA webpage.
 - Post a flyer on the webpage for others to print and post at their institutions.
 - Send out your e-mails to all current members from your state.
- You compose the e-mails, perhaps with attached flyer, etc. and send via e-mail to matteson@ksu.edu when you want it sent out. Save the Date, Presentation Proposal Request (if used), Registration Now Open and a reminder e-mail can be sent at your request.
- If you are mailing information, you will need to do that from your institution and submit printing and postage receipts if you need to be reimbursed out of the NACADA drive-in budget account. You may request mailing addresses of members from NACADA.
- Press releases to your campus and surrounding area regarding the keynote speaker or other persons or sessions of interest can be sent.
- Also, you might request that the student newspaper send a reporter to write an article regarding the days' topics and events.

Pre-Registration procedures:

- You prepare a registration form which includes the location, date and time; the cost; the method of payment accepted; the deadline for registrations, whether or not there is a late fee or walk-ons accepted, where to send the fee, etc.
- Information about the program that will help them decide to come!
- It is best to request that all payments be made before the conference. Usually checks are requested. If your university will let you process credit cards, you may offer that option, but generally it is not recommended. PO's are not accepted for these meetings.

Location & parking, etc:

- Reserve appropriate space on your campus.
- Make sure the meeting rooms are ADA compliant.
- Include parking directions with any publicity.

Food: Generally lunch is included in the registration fee. If costs are low enough, you may also want to include a continental breakfast and a coffee break. When making arrangements, plan for space that can "grow" if your registration numbers exceed what you anticipate. Work with your caterer to see when the deadline is to change guaranteed numbers.

Audio-Visual: If speakers need lcd projectors, arrange for those at your institution. Presenters generally bring their own computers. It is also a good idea to either have a committee member or a technician from your institution who will help set up this equipment. Confirm with presenters exactly what equipment will be available for them.

Executing the Event

Signs, supplies, and printed agendas:

- You may need to produce a few signs to direct participants to your meeting.
- If your presenters have information that you have agreed to disseminate, you may need a simple folder. Sometimes these need to be ordered ahead and sometimes these are donated by the institution or the chamber of commerce.
- Agendas can be photocopied and distributed at the meeting. Check on how much lead time you will need if you are having them printed by someone else. Generally, it is best to keep these simple and done just previous to the event to accommodate any last minute changes.

Keynote speaker arrangements:

- A letter of invitation should be sent, along with a 'speaker contract' that outlines the arrangements for the day.
- If there is a payment to be made, outline how and when that payment will come. NACADA can write checks if requested in advance.
- If travel expenses are to be paid, outline those exact arrangements.
- If a hotel room needs to be reserved, you may do this and have NACADA call in a credit card to pay for it if needed.
- The week before the event, confirm all details with the keynote speaker.
- Arrange for someone to meet the keynote speaker, either at the airport or at the hotel the morning of the event if appropriate.

Presenter arrangements:

- When selected, send a message to them describing time, place, whether or not they need to bring their own computer or lcd projector and deadline for registering and paying for the event.
- Confirm whether or not they will have co-presenters.
- Confirm the description and title you will be printing in on the agenda or publishing on the website.
- Let them know who to contact if they have questions. Include a cell phone in case they need to contact someone after they start traveling.

Registration:

- You may need to prepare some signs on easels to point the way to the registration area.
- Organize volunteers and make a schedule for when they should be at the table.
- Prepare information about what the volunteers should tell the participants as they check in.
- Get a petty cash fund if needed for cash payments, receipt books if needed.
- Following the conference, prepare a report with names of people, their institutions and e-mails and the amount they paid to send to the NACADA executive office. If there were walk-ons and no-shows, indicate this on the list as well.

Feedback: Prepare an evaluation sheet for attendees to complete and turn in at the conference.

The day of!

Who's in charge?

- Clearly define which person or persons have authority to make changes in set-ups, audio-visual arrangements, order more meals or approve additional charges to the meeting. The facility will want to have only 1 or 2 people directing any changes.
- **Registration Desk**
 - Have at least two tables and 3-4 clerks: three for pre-registered attendees and one for walk-ons.
 - Stock the registration tables with registration packets, printed name tags/badges, badge holders, meal tickets, ribbons, etc.
 - Stock the walk-on table with a cash box, change fund, blank registration forms, receipts, blank name tags, and registration packets.
- **Advising Materials Display**
 - You may want to reserve a table for a display of advising materials,
 - You may request NACADA brochures and a door prize to be sent by the Executive Office.
- **Announcements at the General Sessions**
 - Have one person responsible for compiling and getting this information to the proper authority to make the announcements.
- **Meal Tickets**
 - If meal tickets are required for a function, make sure several persons are available to collect them at the proper time. You may choose to check name badges instead.
- **VIP Guests and Speakers**
 - Have one person responsible to host each guest or speaker. This person should:
 - confirm the assigned accommodations before the person arrives on-site
 - double check ground transportation from the airport and from the hotel to the meeting site.
 - make sure any special requirements (dietary restrictions, early departure, etc.) are met.
 - greet speaker and ask if there are tasks they can complete.
 - show them the meeting room and confirm AV arrangements are accommodated.
 - introduce the speaker to campus officials or NACADA officers as needed. They may need a ride back to the hotel or airport.
 - If they are local, this will be greatly simplified!
 - **Checking Meeting Rooms, AV .**
 - Have someone assigned to check for proper set-ups (types of chairs, tables, audio-visual equipment in room, lighting and heat) at least 30 minutes prior to each session. Check to make sure any necessary signs are placed in appropriate spots, etc.,

Confirming the food arrangements:

- A committee member should be in contact with the caterer to confirm numbers, location of items, and timing of service. Check number of chairs set, allowances for overflow, etc.

Registering on-site:

A committee member should arrange for 2 or 3 people to be at the registration desk to hand out materials and nametags. After the initial check –in, perhaps only 1 or 2 need to be at the registration desk to answer questions.

- Post signs leading to registration area if needed.
- Set up the registration table(s) in an appropriate area.
- Put the nametags in the holders and lay them out on the tables.
- You may want to check people off as they arrive.
- Have a few blank registration forms available for those who have not registered prior.
- Keep a list of those who do not come (no-shows) and those who register the day of the conference (walk-ons).
- If you need to give presenters any special information, mark their badges appropriately.
- Let the volunteers know exactly what to hand out, if there are any messages and what to do if they need to contact a committee member.
- Have one person designated to take any on-site payments and give receipts. If you anticipate anyone paying with cash, you may need to have a small amount of change.
- Leave information at the table regarding what to do in a medical emergency.

Welcoming participants:

- Volunteers should be strategically placed to help participants find the correct room(s) and feel welcome. This will be more or less complicated depending on the location of your meeting. Sometimes campus buildings are hard to navigate if you are new to campus.

Getting feedback:

- Distribute the evaluation or feedback requests to participants either as they arrive or in the various rooms that have sessions offered. Committee members should gather these forms and compile a report of the program based on these comments.

Resting on your laurels – after the final report is submitted!

All NACADA Events must consider and abide by the following:

DIVERSITY

NACADA defines diversity from a very broad perspective, which includes diversity in regard to ethnicity, gender, gender identity, and sexual orientation as well as diversity in regard to institutional type, size, and employment position. Involvement in the association also is viewed broadly including leadership at many levels (within the division units, at the division level, at the Council level, at the Board of Directors level, and with the various work groups, ad hoc committees, Advisory Boards, and task forces), serving on the Consultants' Bureau, writing for the NACADA Journal, NACADA Academic Advising Today, and the NACADA Clearinghouse, or presenting at state, allied member, regional, and national conferences.

Notice of Nondiscrimination

NACADA does not discriminate on the basis of age, race, creed, gender, sexual orientation, national origin, disability or marital status.

W:\REGIONAL DIVISION\State and Drive-in Meetings 2003 and above\State Drive-in Conference Handbook Fall 2010.pdf