Region Chair Handbook

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# NACADA Region Chair Handbook

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Introduction

NACADA: The Global Community for Academic Advising was created by its members to serve as an association to support student success by advancing the field of academic advising. The association operates with a grassroots focus where its members, through its elected leaders, have input into the direction of the association.

To facilitate member involvement, the Council was developed to include three divisions representing our members. The Administrative Division, the Commission and Interest Group Division and the Regional Division make up the membership of the Council.

The NACADA websites describes the Regional Division as the division that “represents the membership within the geographic regions through the facilitation of professional development activities, networking opportunities and member recruitment and service. The Division is led by Regional Representatives and the ten Region Chairs who propose activities to support academic advisors, faculty advisors and advising administrators within their geographic regions. Region members conduct annual conferences, state, province or area drive-ins, promote NACADA membership and develop programs which fit the needs of their specific region. International members are invited to attend Region activities which best suit their professional development requirements.”

As key leaders in the NACADA association, the ten Region Chairs work with the two Region Representatives and the Region Liaison in the Executive Office to develop and implement goals which support and advance NACADA’s Vision, Mission and Strategic Goals.

Specifically, Region Chairs, working through their steering committees, lead the functions of the regions. A major function includes the facilitation of yearly regional conferences to provide local professional development opportunities for the regions.

Region Chairs are elected by popular vote by NACADA members from the region to be represented. Region Chairs serve two year terms and report to the Division Representatives. Official duties begin with the October Region Division meeting held in conjunction with the Annual Conference. The term officially begins at the end of the conference.
NACADA Vision, Mission and Strategic Goals

NACADA Vision
Recognizing that effective academic advising is at the core of student success, NACADA aspires to be the premier global association for the development and dissemination of innovative theory, research and practice of academic advising in higher education.

NACADA Mission
NACADA promotes student success by advancing the field of academic advising globally. We provide opportunities for professional development, networking and leadership for our diverse membership.

NACADA Strategic Goals
- Expand and communicate the scholarship of academic advising
- Provide professional development opportunities that are responsive to the needs of advisors and advising administrators
- Promote the role of effective academic advising in student success to college and university decision makers
- Create an inclusive environment within the Association that promotes diversity
- Develop and sustain effective Association leadership
- Engage in ongoing assessment of all facets of the Association
- Pursue innovative technology tools and resources to support the Association

NACADA Bylaws and Policies
NACADA bylaws and policies are posted on the NACADA website. Leaders should review these yearly.

Diversity
NACADA values diversity within our leadership in regard to institutional type, size and employment positions as well as to diversity in regard to ethnicity, gender identity, cultural and sexual orientation.
Region Chair Responsibilities Checklist

Steering Committee Responsibilities
- To convene and lead the Region Steering Committee
- To comply with NACADA bylaws, policies and procedures
- To review Region bylaws/operating principles with Region Steering Committee and suggest changes to voting membership
- To oversee the election or appointment of Region Steering Committee members
- To develop strategies for assessing the needs of regional constituents
- To select outcomes for Region activities that are assessed and reported to the Division Representatives
- To follow NACADA policies regarding use of the NACADA Logo
- To consult on region budget development

Communication and membership recruitment
- To understand and communicate the value of NACADA membership to advising colleagues in the region
- To maintain communication with region membership
- To work with the Region Steering Committee to plan strategies for increased NACADA membership within the region
- To serve as liaison between state, provincial and institutional advising organizations, allied member organizations and NACADA

Awards program development
- To work with the Region Steering Committee on the criteria, eligibility and selection of the award recipients for the Region awards and solicitation of nominations for the NACADA Association awards

Regional Conference Oversight
- To provide oversight of the Regional Conference

Fiscal responsibilities
- To provide oversight for the financial needs of the Region and the Region Conference

Region Division Responsibilities
- To make recommendations to the Division related to regional policies, procedures and programs
- To receive budget approval from the Region Division Representatives
- To undertake specific projects at the request of the Board of Directors, Council and/or President
- To recruit candidates for the Region Chair position
- To participate in the meetings of the Region Division at the Annual Conference
- To prepare and send written reports to the Division Representatives annually.
Timeline of Activities

Terms for incoming chairs begin at close of the Annual Conference. However, participation in Region Division teleconferences held in the spring and summer following election is encouraged.

Region specific items to add to this general timeline:
- Teleconferences with Steering Committees
- Teleconferences with Division Representatives
- Implementation/follow up dates for specific initiatives
- Awards and Scholarship promotion, due dates, etc. Sept. 1–Nov. 15 with notifications by Dec. 15 (suggested)

October
- Oct.1: Solicit candidates for open steering committee positions and post to web by Oct 30.
- Attend Division meeting prior to Annual Conference
- Participate in Annual Conference:
  - Welcome new NACADA members from region at opening reception
  - Attend one of the NACADA Orientation sessions
  - Meet with the steering committee
  - Conduct Region business meeting
  - Attend region conference chair training
  - Review or compose next year’s region budget with steering committee.
- Registration fees for Region conferences posted by Nov. 1 at the latest.
- Submit Reimbursement forms, if needed, for Division Meeting at Annual Conference.

November
- Nov 10-20: Voting for steering committee positions
- Begin on-going review and updating of Region website
- Be up to date on Region Conference plans

December
- Communication of all types (bulletins, letters) is encouraged via e-mail
- Touch bases with Region Conference Chair regarding planning
- Dec. 10: Submit Steering Committee approved budget to Region Division Representatives who review and approve by Dec. 15

January
- Register for Region Conference and make hotel and travel arrangements
- Confirm your Region Conference responsibilities with Region Conference Chair and review conference budget. See the section in the conference handbook regarding “required sessions”
- Begin assisting the planning committee for next year’s Region Conference:
  - Review and approve proposed budget and hotel contract before it is submitted to the Executive Office for final review and approval
  - Continue to promote the conference
- Choose future conference chairs/locations with the goal of being 2 years out
Timeline, cont.

February
- Monitor Region Conference planning process with Region Conference Chairs
- Contact state/province coordinators regarding agenda for region business meeting at the Region Conference
- Prepare appreciation plaques or gifts for Region Conference Chairs
- Region Division teleconference

March and April (and perhaps May)
- Attend Region Conference and assist planning committee as needed
- Meet with Region Steering Committee
- Facilitate meeting between current and next year’s conference coordinators
- Also see “Region Chair Role in the Region Conference” section of this handbook

May
- Be sure Region Conference Chair has submitted report to Executive Office
- Appoint Region Conference Chair(s) for conference in 2 years
- Submit draft of next year’s fiscal year budget to Steering Committee for review, revision and approval

June
- Submit any Awards programs addition or changes to Executive Office for system and web updates
- Touch bases with Region Conference Chair regarding planning
- Region Division Teleconference

July
- Prepare reports on outcomes for the Region Goals for submission in Aug.
- Supplemental budget requests submitted to Region Representatives
- Approve upcoming Conference budget and submit to Executive Office

August
- Aug. 15: Submit Region reports, as requested, to Region Representatives etc.
- Touch bases with Region Conference Chair regarding planning
- Contact state/province coordinators regarding agenda items for Region business meeting at the Annual conference

September
- Region Division teleconference
- Prepare for Fall Division meeting by reviewing agenda and all NACADA Leader reports
- Prepare agenda for Region business meeting at Annual Conference
- Prepare for any state/province liaison elections
- Awards and Scholarships application suggested timeline – Sept. 1–Nov. 15 with selection complete by Dec.15
- Encourage early selection of preconference workshops for Region Conferences
Governing Structure

Bylaws or Operating Principles
Regions follow the bylaws and policies established by the Board, for the entire association. Each Region also has specific formal operating principles or bylaws which outline the details of how the Region conducts business and institutes and completes programs. The duties of the committee members, as well as specifications for electing or appointing steering committees, are included. The steering committee is responsible for reviewing and suggesting revisions of the bylaws, which are then voted on by the members of the Region.

Steering Committee Structure
Each Region is required to maintain an active steering committee (e.g. Region Steering Committee). The steering committee helps the Region Chair set region direction, provides assistance in establishing the region's budget, and provides carry-over historical perspective during transitions of regional leadership. Local responsibility and accountability are achieved by requiring regions to have a written plan and identify potential benefits for expenditures.

The Region Chair is responsible for convening and working with the steering committee members. Steering committee members may be appointed or elected according to the region’s current bylaws. Generally terms are two years although some bylaws allow an additional term. Two year terms should be rotated such that half continue each year. Terms of office may start at the spring region conference or at the fall annual conference.

Most steering committees consist of 12-18 members who are elected or appointed. One or two members represent each state or province. In some regions, the state/province liaisons also serve dual roles to cover as coordinators of various region programs, such as awards, conferences, site selection, member recruitment, communications or social media, budget, technology. Others appoint or elect additional steering committee members to fill those roles.
Elections or Appointments

To Elect:
Notify the Executive Office of the election timeline
Send announcement via the Executive Office of open positions to the Region, State or Province and include:
- Criteria for eligibility and length of term
- Timeline for applications to be received and dates of election process
- Request information to be sent directly to the Region Chair, i.e. simple resume, platform statement, picture if desired, etc.
- Gather information from all candidates and send (in one document preferably) to Executive Office for posting on the web
- Executive Office completes the election ballot and sends links for voting to the current membership of the region
- Region Chair is notified by Executive Office of the number of votes per person
- Region Chair confirms with winner their desire to accept the position
- Region Chair sends an email congratulations “blurb” to be sent to the region members by the Executive Office

To Appoint:
Appointments to Steering Committee positions are made by the Region Chair in consultation with the current steering committee, according to the region’s bylaws.
- Upon appointment, the Region Chairs sends name, institution, email, and picture if desired and position to the Executive Office for posting on web.
- Include term, i.e. 2016–2018, and date term begins and ends

Goals and Outcomes Report
The Region Chair and the steering committee work together to plan one or two goals with measureable outcomes which support the NACADA Vision, Mission and Strategic Goals. These are submitted to the Region Division in November of each year. The following August, a report of the outcomes of the work are submitted to the Region Division who communicates with the NACADA Council.

See full sized sample at end of this handbook.

The Region Goals are due Nov. 1 and include:
- Strategic Goal(s)
- Specific Desired Outcome
- Actions/Activities/Opportunities for Outcome to Occur
- Outcome Measurements & Related Data Instrument(s)

Outcomes are reported the following Aug. 15 and include:
- Progress toward Achieving Outcome
- Future Action(s) Based on Data
Membership Benefits and Recruitment

Region Chairs and their Steering Committee members are expected to know the benefits of NACADA membership and be familiar with the many resources available from the Association in order to build enthusiasm among advisors in their states/provinces for NACADA activities and membership.

Some of the major benefits of NACADA membership include:

- The NACADA Clearinghouse
- NACADA Journal
- NACADA Academic Advising Today (AAT)
- NACADA Highlights
- Publication Discounts
- Academic Advising Consultants and Speakers Services
- Position Announcements
- Annual Conferences
- Region Conferences
- Institutes and Seminars
- International Conference
- Web Events
- Research Grants
- Awards and Scholarships
- Region Awards and Scholarships
- Leadership Opportunities

Allied/Regional Activities

Region Chairs should maintain a good working relationship with allied member organizations or other advising organizations in the region. When a state, province or institutional advising group is considering allied membership, the Region Chair should be prepared to discuss the benefits and the application process. A listing of the current allied members is available on the web.
Annual Conference Meetings

Annual Conference Responsibility Overview
Region Chairs and incoming Region Chairs are required to attend the Fall Division meeting and participate as follows:
- Attend the Region Division meeting the day prior to the conference
- Attend Region Conference Chair training
- Attend leadership dinner
- Meet and greet region members at the opening reception
- Hold a region steering committee meeting, if possible
- Recognize and present plaques to the Best of Region presenters
- Conduct the Region business meeting

Region Division Meeting
The Region Chairs and the Region Division Representatives make up one of the three major divisions of the Association. This division meets at the Annual Conference and by teleconference throughout the year. As a group, decisions are made regarding programs, policies and projects to further the Association’s goals. The Region Chairs report directly to the Region Representatives, who take items of interest or proposals to the Council at the Annual Conference.

Region Business Meeting at Annual Conference
Region Chairs are required to chair their region business meeting at the Annual Conference. The agenda might include (but is not limited to) the following:
- Short introductions of leaders
- Recognition of NACADA Award winners from Region
- Overview of region structure
- Report on region initiatives and issues at the Region and Association level
- Report on past Region Conference
- Report on upcoming Region Conferences
- Region financial report
- Recruitment region leaders (Region Chair, Steering Committee, Conference Chairs, etc.)
- Encouragement of nominations for other NACADA leadership positions
- Question and answer period
- Individual state/province breakouts to discuss state/province activities (facilitated by state/province coordinator)

Travel and Reimbursements at Annual Conference
NACADA’s current policy permits reimbursement to Region Chairs for some expenses in conjunction with the Fall Division Meeting:
- Chairs travel to the conference a day early
- Chairs make lodging arrangements directly with the hotel
- Reimbursements are made for food costs up to $35 for the division meeting day
- Lodging is reimbursed at 1/2 room rate for only the night(s) related to the meeting
- Travel is not reimbursed for attendance at the fall meeting.
- Reimbursement requests are completed and returned to Executive Office with receipts in a timely manner.
- In keeping with NACADA policies, expenses for Region Chair participation in the Regional Conference are the responsibility of the chair or their institution.
Drive-in Meetings

Meetings Sponsored by NACADA

Regions often promote state drive-ins to bring NACADA experiences to enhance advising in the individual state or province. State and province liaisons work with the Region Chair to plan a successful professional development opportunity.

A NACADA sponsored meeting is one where NACADA is originating the meeting and a budget has been approved by the Region Chair, who then submits the budget to the Executive Office for review and oversight. Funds are kept in NACADA accounts at the Executive Office from meeting to meeting.

Procedures:
- Appoint chairperson(s) for the meeting
- Chairperson prepares the budget using the State Drive-in Handbook
- Chairperson submits budget to the Region Chair for approval
- Region Chair submits approved budget to the Executive Office Liaison
- The meeting details can then be published on the NACADA website
- Complete report and send to Region Chair and Executive Office

Support from the Executive Office:
- Permission to use NACADA logo for marketing purposes
- Free access to NACADA members via the Executive Office for promotional purposes
- Free listing on NACADA website for promotional purposes, including simple webpage for info, registration forms and location information
- Executive Office personnel, when available, will speak with only travel expenses charged. (no honorarium)
- One NACADA item (publication or promotional item) provided free for door prize
- Ability to purchase NACADA items for door prizes
- Assistance with meeting planning
- Access to conference planning handbook
- Assistance with financial management of conference
- Review and signing of contracts (building, speaker, entertainment, hotel, etc.)
- Payment of approved invoices
- Maintenance of funds in a state account
- Report state account funds to Regional Chair
- Assistance with online survey for evaluation purposes
Other State and Province Meetings

**Allied Member Meetings (not sponsored by NACADA)**

A non-NACADA sponsored meeting is an advising meeting held by an allied member organization where a budget is *not* submitted to the Executive Office for approval or oversight and funds are not kept in the NACADA accounts. Allied Membership fees have been paid. NACADA is *not* involved in any way and has no liability.

**Procedures:**
- Make sure the Allied Organization Member fees have been paid to NACADA
- Inform the Region Chair of the dates, location and program outline of the meeting
- Contact the Executive Office at matteson@ksu.edu with information/requests regarding the activities of the organization in relation to the items listed below

**Support from the Executive Office:**
- Free listing on NACADA website for promotional purposes with a link to their website
- Access to NACADA members via e-mail through the Executive Office and use of NACADA mailing lists on a reciprocal basis in accordance with current NACADA mailing list policy
- Identification of the organization as "An Allied Member of the National Academic Advising Association"
- If requested, Executive Office personnel, when available, will speak with no honorarium fee. Only travel costs charged
- Ability to purchase NACADA items for door prizes or distribution at a discount

**State, Province or Institutional Advising Meetings (not sponsored by NACADA)**

This is an advising meeting held by a group where a budget is *not* submitted to the Executive Office for approval or oversight and funds are not kept in the NACADA accounts and is *not* related to NACADA in any way.

**Procedures:**
- Consider dates that do not conflict with Region Conference
- Inform the Region Chair of the dates, location and program outline of the meeting
- Contact the Executive Office with information/requests regarding the activities of the organization and support from NACADA

**Support from the Executive Office:**
- Free listing on NACADA website for promotional purposes with link to their website if requested
- If requested, Executive Office personnel, when available, will speak with no honorarium fee–only travel costs charged
- Ability to purchase NACADA items for door prizes or distribution at a discount
- One or two email messages, sent to NACADA members.
Region Financial Responsibilities

The Region Chair and the Steering Committee

- Prepare and submit an annual region budget to the Division Representatives
- Monitor region expenditures by carefully reviewing all reports sent by, or requested from, the Division Representatives or the Executive Office
- Ensure the cost effective utilization of NACADA funds

Region Chairs are responsible for three budgets

1. Region Budgets used for region wide activities and projects
2. Region Conference budgets used for the spring region conference
3. NACADA-sponsored state and province drive-in conferences budgets

In line with the organizational structure and the philosophy of NACADA, regions have flexibility in handling the financial needs associated with their operation. This flexibility is intended to encourage creativity, broaden incentives to have successful conferences, and to increase membership.

Regions will use funds from conference proceeds to fund Region activities.

- Regions are expected to maintain at least $3000 in their accounts as a cushion for unexpected expenses
- After all bills are paid for the Region Conferences, if there are excess funds, they will be deposited in the Region Accounts (approximately July 15 of each year)
- Region Account balances at the end of the year (Dec.) will be carried over to the next fiscal year up to a maximum of $15,000
- Region Account funds in excess of $15,000 will be transferred to the NACADA general account
- It is expected that this system will be self-supporting

All expenditures must be approved by the Division Representatives through the budget approval process and region's steering committee based on these guidelines. No expenditures may be approved by only one person.

The money in the region accounts is governed by the general policies and procedures of NACADA. The accounts reside in the Executive Office, and the Executive Office handles the general accounting.
Financial Responsibilities, cont.

1. Region Budget

Timeline
- Before Dec.1 of each year, the Region Chair, in conjunction with the region's Steering Committee, develops a proposed itemized operating budget for the following fiscal year (January-December)
- Before Dec.10, each Region Chair sends the region budget for the following fiscal year to Regional Division Representatives. This should include projects that will be completed only if there are sufficient Region funds
- By Dec.15, the Region Division Representatives review, suggest changes if needed, and approve the budget
- The approved budget is kept on file in the Executive Office

Reporting
The Region Chair is responsible for:
- Tracking expenditures and the timely submission of receipts to the Executive Office
- Reviewing the account reports posted on the web by the Executive Office
- Submitting budget reports to the region's constituency, both at the yearly Region Conference and at the region business meeting at the Annual Conference

Overdrawn Account
The goal of every region is to maintain at least $3000 in its account at all times. If a region's account falls below $3000 at the end of the fiscal year, state/province accounts will be used to replenish the account. If no state funds are available, the NACADA General Account will replenish the account up to $3000. Region Chairs should not expect their accounts to be routinely replenished. Those region's expenditures and budgeting process will be closely re-evaluated by the Region Division Representatives, who will implement special guidelines to monitor the region's spending for the next two years.

Fundable Activities
The Guidelines for Region Account Expenditures do not include maximum expenditures for a particular activity. However, regions are strongly encouraged to set their own limits based on specific region needs. Care needs to be taken not to include items in the region account that more appropriately belong in the region conference budget. The Region Chair and Region Conference Chair must work closely with the Executive Office in designing the regional conference budget. To be consistent with the guidelines used by Board of Directors, the region budget should not include the Region Chair's travel expenses to the Region Conference. However, if there is a complementary room earned from the hotel, it would be acceptable to assign that room to the Region Chair.
Financial Responsibilities, cont.

Region Budget, cont.

Region Budget items may include, but are not limited to:

- Expenses related to new member recruitment
- Region steering committee meetings
- Region lapel pins
- Underwriting support for state or other drive-in meetings
- Expenses related to services to members, particularly those members who do not come to conferences
- Thank you gifts
- Handouts for meetings
- Best of Region funding to Annual Conference
- Region awards, grants and scholarships
- Region specific initiatives or projects, especially focusing on underrepresented populations
- Region or state specific initiatives to disseminate advising information to members and non-members (publications, workshops, etc.)
- Support for lodging for conference chairs if there are not complementary rooms negotiated in hotel contract
- Support for the upcoming conference chair(s) to attend annual conference
- Support for Region Chairs or steering committee members to attend state or province meetings
- Region grants to Allied Organizations
- Region grants to fund state drive-ins
- State/province funding requests for meetings or other projects are should be included in the Region Budget planning process and approved by the Region Chair/Region Steering Committee. See the State/Province/Institutional Handbook for specific details regarding drive-in meetings

Supplemental Budgeting

In general, the budget that has been prepared and approved by the Region Chair and Region Steering Committee and the Region Division Representatives in the fall should reflect expenditures for the coming calendar year. In the unlikely event that a budgeted category needs more funding or a project is added during the year, the Region Chair, with the Steering Committee’s approval, submits a completed supplemental budget request form to the Region Division Representatives. The Region Chair may proceed with the special project upon receiving approval of the Region Representatives. As a matter of practice, approved supplemental project expenditures must occur before Nov.15.

Sponsorships/Partnerships

All sponsorships and partnerships must be approved by the Executive Director to be consistent with IRS and liability issues.
2. Region Conference Accounts and Budgets
Region Conference Budgets are developed by the Conference Chairs with input by the Region Chair. The budget is submitted to the Region Chair and Executive Office Region Liaison for final approval and subsequent payment.

A Region Conference Account is maintained in the Executive Office for each region conference. All purchases and deposits are made using this account. Expenditures can occur before the conference income is collected. At the end of the Conference season, usually around July 15th, the Region Conference Account is closed out into the Region Account.

The Region Conference Budget is developed by the Region Conference Chair and committee and needs preliminary approval by the Region Chair. The Region Chair then submits the approved proposed budget to the Region Liaison at the Executive Office for review and final approval. This should take place before the conference registration fees are published.

Reimbursement requests for budgeted activities/supplies are sent directly to the Region Liaison at the Executive Office by the Conference Chair or conference committee chairs. If the conference spending exceeds conference income, the Region Account is responsible for payment of overages. Complete conference budget guidelines are outlined in the Region Conference Chairs Handbook.

3. State/Province Accounts and Budgets
NACADA Sponsored state or provincial budgets are submitted to and approved by the Region Chair, who forwards it to the Region Liaison at the Executive Office. If the state or province activities are such that NACADA is ultimately financially responsible for its actions (NACADA sponsored), the state or province's funds are maintained in a separate sub-account at the Executive Office and are supervised by the Region Chair. Any profits from state/province meetings are returned to the sub-account.

NOTE: Allied member organizations are not sponsored by NACADA and there are no financial connections or liability between NACADA and the Allied member organization.

Reimbursement Requests
Timely requests for reimbursements should be made for previously budgeted items. All reimbursements will be made by the Executive Office in strict accordance with established NACADA policies and procedures (e.g. limits, receipts, etc.)
Communication

Region Chairs and the steering committee members communicate with each other and with members of the region in a variety of ways.

**E-mail communication to Region members**
A monthly region membership list is sent to each *Region Chair*. This information is to be used ONLY for the chair to contact individual members regarding participation in committees, projects, etc., and to use for statistical purposes such as determining the participation and membership levels of parts of their region, etc. Conference participation lists and membership lists are not published on the web for general viewing. Also, the on-line NACADA Directory provides a way to search by region, states, provinces, or names, if you need to find member contact information.

The Region Chair may request lists for specific committee chairs if it is necessary for the functioning of their particular area of responsibility. The lists may not be used to promote any commercial product or service, to promote specific candidates for election to NACADA offices, or to publicize or share with other organizations, unless approved by the Region Liaison.

E-mail messages to be sent to all or a substantial portion of members of a region or state/province should be written and sent to the Executive Office Region Liaison, who will coordinate the dissemination of these messages in accordance with NACADA guidelines. These should be sent in a Word document or in the body of the email at least 1-2 days prior to the distribution date.

**Regional Division Listserv**
Region Chairs are included in the “regionaldiv” listserv. This is used by the ten Region Chairs, five incoming chairs, the Regional Division Representatives, and the Executive Office to make announcements and discuss issues of importance to the regions. Any member of the listserv can initiate a discussion.

**Social Media communication to Region Members**
NACADA Regions create blogs, Facebook, twitter, and other media to communicate with members. Links may be made to the Region webpages, but a region steering committee member must be responsible for updating and maintaining accuracy of the information posted. Please contact the Region Liaison for standard naming.
Communications, cont.

Highlights
NACADA distributes a monthly "Highlights" electronically to all members. A link to the Region websites and/or Region Conferences website is routinely included. It is generally sent 3–5 days prior to the first of the month.

Academic Advising Today
NACADA also publishes the quarterly Academic Advising Today. A link to Region information is included, especially publicizing the Region Conferences. Review the content of your webpages to make sure everything is up to date, submit web updates to matteson@ksu.edu. AAT is published Feb 1, June 1, Sept 1 and Dec. 15.

Teleconference Options
Steering committees may benefit from using the cost effective NACADA teleconference system.

To reserve the teleconference system
- Send a request to the Executive Office Liaison at matteson@ksu.edu with
  - Date and time (indicate time zone) and approximate length
  - Name of committee who will be using the line
  - Approximate number of people who will join you
- Note: the same pin number is not consistently used for region business. The codes and meetings sometimes overlap. Thus DO NOT ASSUME that because you have used the same codes previously, that you do not have to contact the Executive Office to schedule a new meeting
- Please let the office know if the meeting is cancelled.
- Instructions will be sent via email, with the approved pin number.
Communication, cont.

Updating Web pages
It is recommended that either the Region Chair or the Region Communication Coordinator take responsibility for sending updates for these pages to avoid the confusion of having many different people contacting the Executive Office. On the Conference pages, the Conference Chair or a designated Committee Member should be responsible.

NACADA's web pages are designed to be quickly opened, easily read, and compliant with standards set forth for remaining accessible to all (ADA requirements). To accomplish this, there are standardized page layout templates. This includes having information presented in a specific number of fonts and colors and using graphics which do not impede quick opening of documents and which keep the page sizes within a reasonable range.

Posting Information and Updates to the website:

- Review and update region pages regularly
- Send all updates and additions, directly to Diane Matteson at matteson@ksu.edu.
- Allow at least 3 days before information is to be posted. While the EO strives to post items quickly, the workload does not always allow this
- Copy and paste the web address of the page to be replaced, appended, updated, or corrected into the e-mail request
- Send all text in MS Word, please. You may bold or italicize text for emphasis
- Send all graphic images in .gif or .png format at 72 dpi (dots per inch) resolution
- Send all photographs or pictures in .jpg at 72 dpi resolution
- Most graphics and images should be resized down to fit a 1024x768 monitor resolution, meaning no more than approximately 4–5 inches wide and 2–3 inches tall at that resolution

Using Graphics and Images:

- Pictures or graphics that have been inserted into Word documents can be used.
- Simple graphics and pictures are preferred. At the present time, we do not have staff time available to create elaborate designs, graphics, or collages of images on our web pages and keeping them small and simple does help with the opening time of the pages and accessibility for all.
- Send forms and documents for downloading in BOTH Portable Document Format (.pdf) format and Word, whenever possible.

The NACADA Executive Office staff will continue to work to make the maintenance of the web pages as quick and easy as possible. Your assistance with optimizing your text content and images before sending them to us will expedite that process.

Questions? contact Diane Matteson at matteson@ksu.edu
Conference Responsibilities

Region Conferences
The Region Chair is ultimately responsible for the activities of the Region, so certain involvement in planning the Regional Conference is necessary. While the major responsibilities for the conference are undertaken by the Conference Chairs and the Conference Committee, the Region Chair may help in various areas and will maintain oversight. The degree of involvement may vary from region to region, but usually involves the following duties:

Selection of the Conference Sites
Region Conference Sites should be rotated around the state/provinces so that all have a chance to host a conference in their vicinity and the opportunity for leadership development is spread throughout the region members.

Selection of the Conference Chairs
The selection of the conference chairs should be a thoughtful process involving the Region Chair and the Region Steering Committee. Consider workloads, leadership qualities, available support from the chair(s) institution, etc. It is highly advised to appoint co-chairs rather than one chair.

- Appointment should be made two years in advance. Future conference chairs should serve on the previous year’s planning committee and the region Steering Committee. All conference chairs should review the Region Conference Coordinators Handbook at least a year and one-half in advance so that they may begin the planning process.

- Upon selection, the chair should review the responsibilities and duties of both the Region Chair and Conference Chairs as outlined in the NACADA Region Handbooks. Agreement on expectations for communication and division of responsibilities with the conference chairs on all aspects of the conference, particularly the timeline for specific duties, should be outlined.

Selection of the Keynote Speaker
Though the conference committee will take a lead in this process, the Region Chair must approve the Keynote Speaker selection and contract before invitations or contracts are offered to assure NACADA policies and procedures are followed. Refer to the appendix for more information regarding this process. At this time, keynote speaker honoraria is limited to $500.
Conference, cont.

Planning Meetings
Though the Region Chair does not need to attend regular conference steering committee meetings, the Region Chair should communicate with the Conference Chair on a regular basis to keep the Region Steering Committee apprised of the progress of the planning. Conference planning meetings may be conducted via teleconference or face-to-face. Often a combination is used by the Conference Committee. Here are some suggested target times to meet:

- Regularly scheduled teleconferences using a cost-effective system available from the Executive Office
- At the Region meeting prior to the conference
- If the budget allows, at an on-site planning meeting in the spring or fall prior to the conference.
  - Some NACADA hotel contracts allow for complementary or reduced rate rooms for an overnight stay if needed
- At the Annual Conference (during Conference Chair Training and other opportunities)

Contracts
The Executive Office must review and sign all contracts with hotels, caterers, speakers, transportation, and entertainment. The EO should review the audio-visual bid and may need to see the Hotel Banquet Event Orders.

Conference Budget
Region Chairs should review and approve the conference budgets which are then submitted to the Executive Office Liaison, who gives final review and approval. The budget must be approved before the registration fee can be set and published, ideally before Sept. 1.

Commercial Presenters at Conferences
As NACADA has grown, it has begun to attract the attention of more commercial entities that see the business value of reaching NACADA members. NACADA has provided a means for commercial entities to reach the participants at conferences through exhibit options and attendant "Exhibitor presentations" whereby exhibitors may demonstrate or explain their products to a group of participants at one time. However, some persons representing commercial entities are submitting presentation proposals through the regular channels, being accepted, and then touting their products to unknowing conference participants who have paid to attend these sessions that they presumed were free from commercials. These situations have initiated a policy regarding such proposals. See NACADA Operating Policy (OP01) on NACADA’s website under About Us.
Conference, cont.

During the conference, the Region Chair
- Assists in organizing and executing the NACADA Orientation session
- Participates in the Welcome and Highlights
- Participates in the “Conversation with NACADA Leadership” session
- Attends the “Writing for NACADA” session.
- Conducts the region business meeting

Board of Directors/ Executive Office Visitors
A member of the NACADA Board of Directors and the Executive Office will attend each Region Conference. Their travel expenses are covered by the Association budget. The region need only waive their conference registration fee. Lodging is paid by the Association.

In return, the visitors are willing to help present a NACADA orientation session and will bring greetings and a report from the Association. Some may also be willing to keynote or do a concurrent session. The Board of Directors visitor usually leads the “Conversations with NACADA Leaders” session and region chairs is expected to attend.

Follow-Up
Region Chairs are responsible for being sure the Region Conference Chairs:
- Ask the Executive Office to pay for big ticket items rather than use a personal credit card
- Submit all reimbursement requests in a timely manner throughout the conference and at least by June 30
- Submit the final conference report to the Executive Office within 30 days following the conference and funds are remitted to the Executive Office
Awards, Scholarships and Grant Programs

Designing the Program
Regions sponsor various awards, scholarships and grants based on the diverse needs of their regions. The Steering Committee determines the type of awards and scholarships, the criteria and selection details. The funds are allocated in the region budget.

The Online Awards Application System
- The online system accepts nominations and distributes information to the evaluation committees
- The online system allows people from all over the region to participate in the evaluation process
- Awards applications portal links are published on the region web pages
- Email messages from the Region Leadership are sent to Executive Office for announcing timeline, award details, etc. (opening dates, closing dates approaching, list of winners, etc.)
- Current awards set ups in the system can be updated easily by contacting the Executive Office

Planning
- Region Bylaws or Operating Procedures usually identify categories, targeted populations, amount and types of financial or other recognition, etc.
- Awards/scholarships or grants that are based on the funds raised at the current year’s conference need to be included in the budget at the beginning of the year. Then, if money is available, applications can be opened. The funds must be distributed in the current budget year. Therefore, winners must be solicited, evaluated, and selected in time for registering for the conference in October or early November

Defining Awards/Scholarships/Grants
- Awards are given for merit. The applicant/nominee must have specific skills or qualities that are outlined in the criteria
- Scholarships and Travel Scholarships are for attendance at specific NACADA events
  - The criteria for eligibility are usually directed to special populations
  - The registration fee is transferred to the conference account within the Executive Office at the time of registration
  - A few scholarships also include travel expenses. The maximum amount is determined and individuals will need to submit receipts and a reimbursement request after the event
- Grants are usually a specific dollar amount and applications are reviewed for merit. These grants are determined by the Region usually go beyond simple conference registrations

Distinguishing Region Awards from the National Awards
- Titles should be “Region ___ Excellence in Advising for ______”
- Use the term “Region ___ Student Scholarship,” rather than Graduate Student Scholarship
- Use the term “Region ___ Grant and list the type

Adding a new award/scholarship/grant
- Budget for the expenses of the new award
- Name the award according to the current protocol
- Describe the targeted audience and list criteria required (position, # of years, member, etc.)
- List the recognition (certificate, plaque, free conference registration)
- List how many can “win” and how many “certificate of merits,” if any
Awards Selection

The Awards Chair sends a list of readers and chairs to the executive office for User ID and password assignment. The Executive Office sends the following email to the Awards Chair for distribution to the Readers.

We have been asked to add your name to the Region ____ Awards and Scholarships Reader and/or Chair lists. In order to access the applications/nominations which are submitted for your region, you will need a user ID and a password. Please make note of this for future reference!

Your User ID and your password is listed in the chart below.

<table>
<thead>
<tr>
<th>ID</th>
<th>Password</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>999</td>
<td>Bsmith</td>
<td>Bob Smith</td>
<td><a href="mailto:bobsmith@usa.edu">bobsmith@usa.edu</a></td>
</tr>
<tr>
<td>4</td>
<td>Asannes</td>
<td>Amy Sannes</td>
<td><a href="mailto:6isthebest@msu.edu">6isthebest@msu.edu</a></td>
</tr>
</tbody>
</table>

The awards system can be accessed using your user ID and password at http://www.nacada.ksu.edu/conferences/awards/EV10Login.php

Reader access:
Readers will be able to read the Award/Scholarship applications and uploads. They will be able to rate and make comments on each submission. These rankings and comments will be combined with the other evaluations for the Committee Chair(s).

Committee Chair access:
Committee Chair responsibility will be to review the combined scores and comments for each application/nomination. You will have access to applications/nominations, uploads and all contact information for the nominated individuals and their nominators. NOTE: Your User ID and password will be the same for both levels of access.

You may access the site at any time, thus choosing to evaluate the applications/nominations as you go along or at the end of the submission time in one group. However, you may only rank and make comments about an application/nomination one time. When you submit the evaluation, you may not go back and change rankings or comments. If there is a conflict of interest that prohibits you from objectively evaluating an application/nomination (i.e. it is YOUR application/nomination, or your boss’s), then please indicate Abstain.

Committee Chairs: Please contact your readers about the exact due dates for completing the evaluations

Thank you for your participation in the region program. Recognition of quality advising helps not only the recipient, but also helps to promote the importance of advising in relation to student success. Your thoughtful comments will aid greatly in this endeavor.

If you have any questions about the use of this application/nomination system, feel free to e-mail Diane Matteson in the Executive Office at matteson@ksu.edu or call 785-532-7816.
Sample Forms

Region Budget Sample .......................................................... 25
Region Conference Budget Sample .................................... 26
State/ Province Budget Form .................................................. 27
Region Reimbursement Form ................................................. 28
Region Goals, Outcomes Report Sample .............................. 29
# NACADA Region SAMPLE Budget: Jan 1 to Dec 31, _____ (year)

## Region Funds for this year

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account balance Jan 1 (cannot exceed $15,000)</td>
<td>$12,800.00</td>
</tr>
<tr>
<td>Projected Conference Income</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>Hold in Reserve (as cushion if projected income is low)</td>
<td>$(3,000.00)</td>
</tr>
</tbody>
</table>

**Total funds** $15,800.00

## Projected Expenditures: (Be as detailed as possible)

### New member recruitment
- $400.00

### Project # 1: Rep at state drive-ins to promote membsh
- $400.00

### Project # 2: "NACADA your campus" campaign
- $-

### Region Goals & Outcomes Projects
- $3,310.00
  - Goal #1: "Crossing Borders" project
    - (to promote interstate/province activity) $-
  - Goal #2: Expand Leadership Development Project
    - (4 total mentor/mentee pairs selected) $-
  - Other: $500 grants x 4 states/prov drive-ins $2,000.00
  - Other Regionwide Projects: $-

### Region Steering Committee meetings
- $1,135.00
  - Teleconf: ($3.90/pers/hr) 4mtg x 15 pers $235.00
  - Meet at Region Conference: Dinner & meeting $350.00
  - Meet at Annual Conference: Dinner & meeting $350.00
  - Handouts at Region Meeting at Annual Conference $200.00
  - Other: $-

### Region Awards/Scholarships/Grant Programs
- $5,900.00
  - Excellence in Advising (2 x reg fee + plaques) $550.00
  - Excellence in Faculty Advising (2) $550.00
  - Excellence in Advising Administration (2) $550.00
  - Excellence In Advising - New (2) $550.00
  - Presenter Scholarship (5 x $140) $700.00
  - Student Scholarships (8 x $100) $800.00
  - Region Conf Travel Scholarship (4 x $300) $1,200.00
  - Annual Conf Travel Scholarship (2 x $500) $1,000.00
  - Other $-

**Total Expenditures** $10,745.00

## Balance to carry over for next year

$5,055.00

---

Submitted with Steering Committee approval by:______________

Date Submitted:__________________

Approved by Regional Division Reps:______________date:_________
## NACADA Region CONFERENCE Budget  SAMPLE

Official NACADA Budget form - Revised Aug 2014

### Step 1: Insert VARIABLE (MEALS & MATERIALS) costs

*Always include service charge and tax in each cost*

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Cost (For 1 person)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Namebadge and holder (.33 if purchased from Exec. Office)</td>
<td>$0.33</td>
</tr>
<tr>
<td>2</td>
<td>Meal or reception #1 (describe) RECEPTION FOOD/Entertain/Rental</td>
<td>$15.00</td>
</tr>
<tr>
<td>3</td>
<td>Meal #2 (describe) Continental Breakfast (date)</td>
<td>$20.00</td>
</tr>
<tr>
<td>4</td>
<td>Meal #3 (describe) Lunch</td>
<td>$27.00</td>
</tr>
<tr>
<td>5</td>
<td>Meal #3 (describe) Continental Breakfast (date)</td>
<td>$20.00</td>
</tr>
<tr>
<td>6</td>
<td>Break(s) Rarely affordable FYI</td>
<td>$5.00</td>
</tr>
<tr>
<td>7</td>
<td>Folders or Bags</td>
<td>$5.00</td>
</tr>
<tr>
<td>8</td>
<td>Handouts at conference including printed programs</td>
<td>$6.00</td>
</tr>
<tr>
<td>9</td>
<td>Session evaluations (approx 12 per person x 5 cents = 60 cents)</td>
<td>$.60</td>
</tr>
<tr>
<td>10</td>
<td>Other (describe)</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Bank Charges for Credit Cards averages out to $5 per person</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

This is the cost for meals & materials for each person: $98.93

### Step 2: Insert FIXED Costs

(Costs incurred regardless of how many people attend – estimate high)

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference Committee Expenses</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>Teleconferences ($3.90 per hour per line for NACADA system)</td>
<td>$300.00</td>
</tr>
<tr>
<td>Conference Committee Appreciation Dinner</td>
<td>$350.00</td>
</tr>
<tr>
<td>Transport/Lodging/Meals for meeting (only w/ approval of Region Chair)</td>
<td>$600.00</td>
</tr>
<tr>
<td>Small tokens of appreciation</td>
<td>$200.00</td>
</tr>
<tr>
<td>Keynote Speaker</td>
<td>$950.00</td>
</tr>
<tr>
<td>Honoraria (cannot exceed $500)</td>
<td>$500.00</td>
</tr>
<tr>
<td>Lodging/Airfare/mileage/meals</td>
<td>$450.00</td>
</tr>
<tr>
<td>Publicity</td>
<td>$100.00</td>
</tr>
<tr>
<td>Promotional items or flyers to hand out at Annual conference</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Rentals:</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>Audio-visual Rental - Check hotel contract, get bids, donated from school?</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>Facility/Meeting room Rental - Check hotel contract.</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Entertainment:</td>
<td>$500.00</td>
</tr>
<tr>
<td>Band/Tour</td>
<td>$500.00</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Supplies:</td>
<td>$60.00</td>
</tr>
<tr>
<td>Signs</td>
<td>$30.00</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>$30.00</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Complimentary Registrations</td>
<td>$420.00</td>
</tr>
<tr>
<td>Regional Conference Chair(s)</td>
<td>$280.00</td>
</tr>
<tr>
<td>Executive Office Rep and Out-of-Region Board Rep</td>
<td>$140.00</td>
</tr>
<tr>
<td>No other individuals qualify for complimentary registration....................</td>
<td></td>
</tr>
<tr>
<td>Other Costs:</td>
<td>$740.00</td>
</tr>
<tr>
<td>Small tokens of appreciation</td>
<td></td>
</tr>
<tr>
<td>Best of Region AWARD 1 presenter - $500, 2 or more $750</td>
<td>$740.00</td>
</tr>
<tr>
<td>Pre-Conference Workshops</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

These are the total FIXED Costs: $8,220.00

### Step 3: Insert estimated attendance

<table>
<thead>
<tr>
<th>Attendance Estimate</th>
<th>Early Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Column B)</td>
<td>(Col C)</td>
</tr>
<tr>
<td>150</td>
<td>153.73</td>
</tr>
<tr>
<td>200</td>
<td>140.03</td>
</tr>
<tr>
<td>300</td>
<td>126.33</td>
</tr>
</tbody>
</table>

The Executive Office will calculate late fees and non-member fees. Grad Student/Retiree fees will be $100. It is highly encouraged that total registration fees not exceed $140.

*Registration should be no higher than $140.
*Food and AV are the highest costs.

This sample is actually very realistic.

Prepared by NACADA 9/26/2014
<table>
<thead>
<tr>
<th>State/Province:</th>
<th>Region:</th>
<th>Drive-In Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinator(s):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Held:</td>
<td>Final Number of Participants:</td>
<td></td>
</tr>
</tbody>
</table>

### INCOME:

<table>
<thead>
<tr>
<th>Description</th>
<th>Budgeted</th>
<th>Actual Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting registration fees:</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>_____ registrants @ $_____ each</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Donations (list donors)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>NACADA grant funds received</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other income</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL INCOME:</strong></td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

### EXPENSES:

<table>
<thead>
<tr>
<th>Description</th>
<th>Budgeted</th>
<th>Actual Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting registration brochure printing</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Meeting registration brochure postage</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Office supplies (envelopes, paper, etc.)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Nametags</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Agenda/meeting materials (including copying charges, folders, etc.)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Lunches: _____ lunches @ $_____ each</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Meeting Room Rental</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Audiovisual Equipment Rental</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Speaker honorarium/gift</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Speaker travel expenses</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other expenses (list below)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

**DRIVE-IN BALANCE**: $________

The final report should include copies of:
- This completed page.
- Registration brochure
- Agenda
- Review of the activity
- Participants list with addresses, email, amount collected for each person
- Expenses by payee & receipts for those expenses
- An evaluation summary

**Meeting registration fees:**
- Registrants: _______ @ $____ each
- Total: $________

**Donations (list donors):**
- Total: $________

**NACADA grant funds received:**
- Total: $________

**Other income:**
- Total: $________

**TOTAL INCOME:**
- Total: $________

**EXPENSES:**
- Total: $________

**DRIVE-IN BALANCE**: $________

**Questions?** – matteson@ksu.edu

---

**Fall 2014**
NACADA REGION Reimbursement Form

<table>
<thead>
<tr>
<th>Date</th>
<th>Region</th>
<th>Office Use Only:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Account:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Code:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Memo:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other:</td>
</tr>
</tbody>
</table>

- Activity (describe):
  - Submitted by:

<table>
<thead>
<tr>
<th>Supplies: (describe and attach receipts)</th>
<th>(28) $__________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts: (describe and attach receipts)</td>
<td>(40G) $__________</td>
</tr>
<tr>
<td>Printing: (describe and attach receipt)</td>
<td>(11) $__________</td>
</tr>
<tr>
<td>Lodging: (attach hotel receipt)</td>
<td>(05) $__________</td>
</tr>
</tbody>
</table>

**Travel:** *NOTE: If coach airfare is less than mileage, reimbursement is at the airfare rate.*

- By Air: Attach receipts for plane, luggage & airport parking
  - From:__________ To:__________
  - $__________
  - *NOTE: NACADA will reimburse at coach airfare rate purchased 14 days in advance.*

- By Car:
  - From:__________ To:__________
  - Total miles (roundtrip) = ________ x .56
  - $__________

- Ground transportation: Attach receipts: taxi, shuttle, tolls, etc.
  - From:__________ To:__________
  - $__________

- Individual Meals:
  - $__________

- Group Meals: (DESCRIBE please!)
  - $__________

**TOTAL:** $__________

Please be specific about reimbursement check – if we need to divide it between you and your institution, specify exact amounts to each party.

- **Write check to:**
- **Send check to:**

- ☐ Receipts attached?  ☐ Email of submitter: __________________________

---

**Email:** this form & receipts to matteson@ksu.edu or FAX: this form & receipts to: (785) 532-7732 or Mail: NACADA/ Diane Matteson 2323 Anderson Ave, Ste 225, Manhattan, KS 66502

### Region Chairs submit Aug 15, 2014

**Region Chair and Region Number:** Tom Mabry, **Region 10**  
**Reps:** Art Farlowe and Amy Sannes  
**Mission:** NACADA promotes student success by advancing the field of academic advising globally. We provide opportunities for professional development, networking, and leadership for our diverse membership.

<table>
<thead>
<tr>
<th>NACADA Strategic Goal(s)</th>
<th>Specific Desired Outcome (What you want to occur as a result of your efforts; what you want someone to know, do, or value)</th>
<th>Actions/Activities/Opportunities for Outcome to Occur (What processes need to be in place, or activities need to occur, to achieve desired outcome)</th>
<th>Outcome Measurements &amp; Related Data Instrument(s) (How you will specifically measure for the outcome and any instruments you will specifically use e.g. survey, focus group)</th>
<th>Progress toward Achieving Outcome (Only completed in Aug. reporting)</th>
<th>Future Action(s) Based on Data (Data-informed decisions) (Only completed in Aug. reporting)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide professional development opportunities that are responsive to the needs of advisors and advising administrator</td>
<td>Increase funding for travel scholarships to the Regional and Annual Conference. Target = 15 scholarships ($575 each - $8625 total). Note: Current total is 10 scholarships. Develop long-term budget strategy for sustainment. Geographic distances and current institutional funding levels in region demand additional NACADA support for our membership.</td>
<td>Review and revise Region scholarship criteria (eligibility, application requirements, post-conference reporting, etc.). Identify strategies to improve promotion of scholarship opportunities to increase number of applications received.</td>
<td>Complete review of scholarship criteria by 15 Jan 2014. Publish new guidelines and start promotion by 15 Jan 2014. In addition to existing communication platforms, use new Region 10 Facebook page, Linkedin and new Region 10 “E-Gazette” to promote and increase scholarship applications.</td>
<td>Region 10 awarded a total of 19 travel scholarships. Nine to the 2014 Region 10 conference in Jackson, WY and 10 to the 2014 Annual Meeting in MN. Promotion through the Region 10 Facebook page, Region 10 “blast” e-mails and other promotion significantly increased the application pool and quality of submissions.</td>
<td>Region 10 will continue to award travel scholarships based on overall application merit and with geographic equity (goal = at least one per State). Future budgets will plan for the award of at least 15 scholarships total. Additional scholarships will be a top budget priority if additional funds become available.</td>
</tr>
<tr>
<td>Develop and sustain effective Association Leadership</td>
<td>Expand the current Region 10 Mentoring Program</td>
<td>Review feedback from current pilot Mentor Program. Revise Mentor Program Handbook, if required. Promote program to recruit additional mentor program participants.</td>
<td>Current Mentor Program chair submits report to Steering Committee by 15 Jan 2014. SC completes review by 1 Feb 2014. Mentor Handbook revised, if required, by 15 Feb 2014. Facebook, Linkedin, “E-Gazette” and NACADA website used to advertise and recruit new mentor pairs.</td>
<td>The Region 10 mentor program has been very successful! Two more mentor-mentee cohorts were formed this year! The Mentor Handbook has been updated and serves as a wonderful guide for mentor-mentee sessions. Monthly reporting is still a work in progress – mentoring sessions are taking place but the Program Coordinator isn’t yet receiving monthly reports regularly from all mentors, as required.</td>
<td>The Region is working to expand the pool of qualified mentors. We have more members looking for mentoring than we have mentors. Fortunately, several current mentors have agreed to take on additional mentees so no one has been turned down. We’ll continue to promote to program through our Facebook page, Region 10 “blast” e-mails and the new semi-annual newsletter. The Steering Committee will also conduct focused recruiting of mentors at the regional and annual meeting.</td>
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**Reporting Due Dates:** Columns 1 through 4 are to be completed by November 1 each year; columns 5 and 6 are to be completed by August 15 each year. **FOR NOV 2013-2014 THESE REPORTS WILL BE SENT TO COUNCIL REPS, JP REGALADO, AND CHARLIE NUTT.**
NACADA’s Ten Regions

- Northeast Region 1
- Mid-Atlantic Region 2
- Mid-South Region 3
- Southeast Region 4
- Great Lakes Region 5
- North Central Region 6
- South Central Region 7
- Northwest Region 8
- Pacific Region 9
- Rocky Mountain Region 10

Region 1: Connecticut, Maine, Massachusetts, New Hampshire, New York, Quebec, Rhode Island, Vermont, New Brunswick, Newfoundland and Labrador, Nova Scotia

Region 2: Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania, Virginia

Region 3: Kentucky, North Carolina, South Carolina, Tennessee, West Virginia

Region 4: Alabama, Caribbean, Florida, Georgia, Mississippi, Puerto Rico

Region 5: Illinois, Indiana, Ohio, Ontario, Michigan, Wisconsin, Nunavut

Region 6: Iowa, Manitoba, Minnesota, Nebraska, North Dakota, Saskatchewan, South Dakota

Region 7: Arkansas, Kansas, Louisiana, Missouri, Oklahoma, Texas

Region 8: Alaska, Alberta, British Columbia, Idaho, Montana, Oregon, Washington, Yukon Territory, Northwest Territories

Region 9: California, Hawaii, Nevada

Region 10: Arizona, Colorado, New Mexico, Utah, Wyoming

NACADA Executive Office
Kansas State University
2323 Anderson Avenue, Suite 225
Manhattan, KS 66502-2912
Phone: (785) 532-5717 Fax: (785) 532-7732
E-Mail: nacada@ksu.edu
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