

**SACRAO**  
**Procedures Manual for**  
**Executive Committee and**  
**Committee Chairs**

**2023-2024**

**Revised 2023**  
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# Introduction

This manual is the operational guide for the Executive Committee and other Committees of the Southern Association of Collegiate Registrars and Admissions Officers (SACRAO). The manual includes brief descriptions of responsibilities and a suggested calendar of activities to fulfill these responsibilities.

The manual is revised annually. The Executive Committee and members of SACRAO may make suggestions for revisions to the content of this manual. Recommended revisions should be submitted to the Immediate Past President, who serves as the Editor of the manual. The updated manual is shared on the SACRAO website.

## **Mission Statement**

The mission of the Southern Association of Collegiate Registrars and Admissions Officers (SACRAO) is to provide for the dissemination of information, exchange of ideas, and leadership in policy interpretation in the region. To maintain a leadership position in pursuit of this mission, SACRAO identifies and promotes standards and best practices affecting admission officers, registrars, and other academic support and student services professionals.

## **History**

SACRAO began in 1947 as an adjunct group of registrars and admissions officers who met for one and one-half days in conjunction with the Annual Meeting of the Southern Association of Colleges and Schools, a regional accrediting body. The first meeting was held in Louisville, Kentucky. In December of 1972, SACRAO elected to start meeting at a time and place determined by its Executive Committee and held its meeting in New Orleans. SACRAO was incorporated as a nonprofit professional organization in September 1986. The Annual Meeting has grown from an attendance of less than one hundred to several hundred and from the one-and-one-half day format to a three-day Annual Meeting, sometimes preceded by a day of pre-conference workshops.

Membership as of April 1, 2023, was approximately 349 institutions, 40 corporate partners, and 3 educational agencies, represented by almost 3200+ individuals, plus 5 Associate Members and 187 Honorary Members from colleges and universities in a fourteen-state (and one Commonwealth) Southern region: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

## **Purpose**

The corporation is a nonprofit, professional association whose purposes, as prescribed by the Constitution and Bylaws, are to provide for the spread of information and the interchange of ideas on problems of common interest; to contribute to the advancement of higher education in its fullest and broadest implications; to foster a friendly spirit of unity and cooperation among its members; and to function as a unifying and coordinating agency among the separate state organizations represented in SACRAO and with the American Association of Collegiate Registrars and Admissions Officers. The association, through the Annual Meeting, Newsletter, *The SACRAO Journal*, and other activities, promotes:

- The advancement and improvement of academic records, admissions, data management, enrollment services, financial aid management, international education, and registration practices through study, education, and research

- The advancement of professional knowledge and techniques by fostering the exchange of experiences and information
- The development and advancement of standards of competence in the profession

## **Strategic Plan**

### ***Goal 1***

To disseminate information and exchange ideas:

- Develop publications to inform the membership and prospective members
- Have a SACRAO representative attend state and national meetings
- Inform first-time attendees at the SACRAO Annual Meeting about SACRAO goals, structure, and meetings

### ***Goal 2***

To provide leadership in policy interpretations and implementations:

- Conduct professional workshops and sessions to keep the membership informed of current practices and changes in the profession

### ***Goal 3***

To promote standards and best practices affecting admission officers, registrars, and other academic support and student services professionals:

- Recognize individuals within the membership who have contributed to the advancement of the profession
- Provide sessions at the SACRAO Annual Meeting using internal and external experts
- Evaluate program sessions, workshops, and conferences

### ***Goal 4***

To foster a friendly spirit of unity, cooperation, and support among SACRAO members:

- Promote and provide opportunities for members to get acquainted
- Plan and advertise a SACRAO reception at the annual AACRAO meeting

### ***Goal 5***

To reflect in the activities of the organization a balanced representation of personal and professional characteristics such as professional area of responsibility, gender, ethnicity, state, and institutional type:

- Increase participation of institutions within the SACRAO region that are not members
- Increase the participation of under-represented SACRAO members within the organization

# General Policies and Procedures

Below are the general policies and guidelines for SACRAO. For additional information, consult the SACRAO President.

## **Annual Meeting**

### ***Special Guidelines***

- The President-Elect should keep the Local Arrangements Committee (LAC) chair current regarding the budgetary and physical arrangements decisions about outside presenters.
- The President-Elect should work through the vice presidents to secure the travel arrangements for outside presenters.
- Set a limit of \$2000 total to be spent on all outside presenters. This limit should be examined periodically to meet the needs of the association.
- Set a limit to be spent on audiovisual equipment. This limit should be examined periodically to meet the needs of the association.
- Plan for a 5% return to SACRAO, in addition, to a return of the advance.
- In planning the Summer Planning Meeting, avoid state association meeting dates.
- The LAC may, at its discretion, refund conference registration fees after the stated deadline and minus any stated cancellation fees for compassionate reasons, such as illness and death in the family or due to extreme weather conditions. Such refunds will be made only following the conference, and after the finance chair is confident that any budgeted returns to SACRAO can be made.

### ***Registration***

SACRAO members and conference attendees from member institutions are expected to pay the registration fee for the Annual Meeting and are not subject to a waiver of this fee. The President and President-Elect may approve waiving the registration fee for special guests and outside speakers. Honorary members receive complimentary registration. A one-day drive-in fee may be approved annually; however, one-day attendees must pay for any conference meal functions and special events. The registration fee is waived for the winner of the previous year's First-Time Attendee grand prize. The current year's Individual Multicultural / Emerging Leader and Student Pre-Professional Annual Meeting Scholarship winners pay the registration fee out of their scholarship award.

### ***AACRAO Representative***

The invited AACRAO representative at a SACRAO Annual Meeting may receive a complimentary SACRAO registration fee and room for the normal duration (*Saturday – Tuesday nights*) of the conference (*effective February 2003*).

Given the Spring 2003 decision by AACRAO's Board of Directors to expand its for-profit ventures, the SACRAO Executive Committee determined that AACRAO's for-profit ventures would be treated as any other for-profit corporation. As in the past, not-for-profit member services and professional development activity participation will be welcomed. For-profit venture representation by AACRAO will also be welcomed, yet will be treated as that of corporate participation and incur associated participation fees (*effective June 2003*).

### ***SACRAO Expenses***

SACRAO reimburses the LAC account for the following Annual Meeting expenses:



- Registration fees (or event fees if not participating in the entire conference) for SACRAO invited guests, the AACRAO representative, honorary members (if not in suspended status), and the individual recipient(s) of the Student Pre-Professional and Multicultural / Emerging Leader Scholarships
- Hotel costs of invited SACRAO guests, including the AACRAO representative
- Costs associated with the following events: Past-Presidents' luncheon, State Presidents' luncheon, *Journal* Board breakfast, President's receptions, and any EC meeting meals covered by the LAC

## Exhibitors/Corporate Partners

Companies who market their products and services to SACRAO or other similar organizations are expected to register for SACRAO as exhibitors and pay the exhibitor registration fee. The President of SACRAO must approve exceptions to this policy. Exhibitors will not be allowed to present an Exhibitor/Corporate Partner Session or co-present a session at SACRAO unless registered as an exhibitor for the conference.

## Meeting Responsibilities

Meeting/Event	Coordinator	Financial Responsibility
<b>Annual Meeting</b>		
Executive Committee (Sat.)	President	SACRAO (EC budget)
Auditing Committee (Sat. & Sun.)	Auditing Committee Chair	SACRAO (Sat. dinner)
Current and Incoming Program Vice Presidents & Committee Chairs (Sun.)	President-Elect	
EC Transition Meeting	President	
First-Time Attendee Orientation/Reception (Sun.)	Vice President States/Regionals & Membership	LAC
SACRAO <i>Journal</i> Editorial Board Breakfast (Mon. or Tues.)	Vice President for Communication and Recognition; <i>Journal</i> Editor	SACRAO
State Presidents' Luncheon (Mon.)	President	SACRAO
Town Meeting (Mon.)	President	
Business Meeting (Tues.)	President	
Past Presidents' Luncheon (Tues.)	Immediate Past President	SACRAO
Program Committee Luncheon (Tues.)	Incoming President-Elect	LAC
Conference Breakfast (Wed.)	Incoming President	LAC
Executive Committee (Wed./Thurs.)	Incoming President	SACRAO (EC budget)
LAC Luncheon	LAC Chair	LAC
Constitution & Bylaws Committee	New Immediate Past President	
Finance Committee Meeting	President	
<b>AACRAO Meeting</b>		
Executive Committee Meeting (if necessary)	President	SACRAO (EC budget)
SACRAO at AACRAO reception	President	SACRAO
<b>Summer Planning Meeting</b>		
Program Planning Meeting	President, President-Elect	SACRAO
Executive Committee Meeting	President & LAC Chair	SACRAO
<b>Throughout the Year</b>		
Nominations & Elections Committee	N&E Committee Chair	SACRAO

# **Corporate Matters**

## ***Incorporation***

SACRAO was incorporated in the State of Kentucky. Kimberly Taylor at the University of Kentucky is the registered agent. A verification report and renewal fee must be submitted annually by the SACRAO Treasurer to the Secretary of the State of Kentucky.

## ***Logo***

The current SACRAO corporate logo (*shown below*) is the official SACRAO trademark and will be used on all official SACRAO publications and engraving. The original logo was designed by staff at Phoenix Communications as a corporate partner contribution to SACRAO. In recognition of the addition of Puerto Rico to the SACRAO region in 2005, the staff at Data Supplies Inc. (DSI), as a corporate partner contribution to SACRAO, updated the logo. The logo may be used in black and white, or it can contain color. Any modifications of the logo and uses of color must be approved by the President of SACRAO or by the President's appointed coordinator for logo uses. Violations of logo specifications may result in action by the Executive Committee to withhold payment for publications and/or restrict distribution of publications. The logo, in digitized form, is held by the SACRAO President. Duke University's Publications Coordinator updated the most recent logo.



## ***Web Address***

The official web address of the association is [www.sacrao.org](http://www.sacrao.org). The Vice President for Information Technology is responsible for maintaining the website. The [sacrao.org](http://sacrao.org) domain name is maintained via MemberClicks.

## ***Tax Status***

SACRAO has a nonprofit status of 501 (c) (6).

The Federal IRS Tax ID is 56-1451843. The SACRAO DUNS number is 023579217.

In most states, tax-exempt status for state sales taxes is not permitted for SACRAO. Currently, SACRAO does not have tax-exempt status in any state.

# **Financial**

## ***Management of Financial Assets***

SACRAO's financial assets are maintained in checking and savings/money market accounts. The Local arrangements accounts are subsidiary accounts within the SACRAO treasury. Business debit cards are

designated for the Treasurer, President, President-Elect, and Immediate Past President to cover travel/conference expenses, etc. Cards are obtained from and returned to the SACRAO Treasurer.

## ***Charitable Contributions***

While SACRAO, as a non-profit association with members whose dues are largely paid by non-profit institutions, should not make a practice of redirecting its funds to charities, it is nonetheless appropriate to make a modest gift in honor of a speaker who does not accept a speaker's fee or honorarium. Such actions should be discussed by the EC prior to each annual meeting. (2010)

## ***Travel Reimbursement***

All travelers expecting to be reimbursed by SACRAO must make their plane reservations and purchase their tickets according to instructions given by the SACRAO President and Treasurer. This may include the use of the SACRAO debit card to buy airfare. The SACRAO President must approve any exceptions.

SACRAO members should arrange the most economical airfare available, consistent with the circumstances. A class of fare above standard coach will not be reimbursed unless approved in advance by the President. Travelers must make reservations at least 21 days before the trip to take advantage of the lowest fares. The President may ask travelers to make reservations and be reimbursed by the SACRAO Treasurer. Typically travel is reimbursed when travel is completed; however, the President can authorize reimbursement of pre-paid expenses such as airfare before completion of travel when the expense places the traveler under a financial burden.

If a spouse or guest is traveling with the SACRAO traveler, the ticket must be charged to the traveler's credit card.

Any side excursions or additional travel is included in the traveler's itinerary, and the entire plane ticket is charged to SACRAO. In that case, the reimbursement will be for no more than the lowest fare for a direct round trip available on the date the travel was arranged. It is the traveler's responsibility to provide documentation of this rate. The traveler will be expected to reimburse SACRAO for any additional amount.

Even though the travel may have been charged directly to SACRAO, originals of all receipts and ticket stubs or boarding passes must be attached to a travel expense report with the ticket's cost shown as a direct charge to SACRAO. Copies of itineraries are not acceptable in lieu of ticket stubs or boarding passes. If electronic ticketing is used, SACRAO members must still provide documentation from the airline or booking agency showing the ticket price.

SACRAO will reimburse automobile mileage at the applicable U.S. government rate for using personal vehicles for business purposes (2023 = \$0.66/mile) for the actual number of miles driven. Documentation of mileage, such as a copy of MapQuest/Google Maps directions, must be provided by the traveler with any mileage reimbursement request. The total mileage claimed must not exceed the cost of the lowest round-trip commercial airfare available when the trip was planned. If the trip's starting point does not have an airport so that equivalent airfare can be calculated, the nearest airport will be used as the equivalent starting point. Using personal vehicles to and from airports, including tolls, parking, etc., for SACRAO business trips are reimbursable expenses. Expenses incurred for additional lodging and meals because of travel by personal vehicle are not reimbursable. Receipts must be attached for any single expense exceeding \$25.

The use of a rental car is not reimbursable unless approved in advance by the SACRAO President. Its use should be financially or logistically advantageous to SACRAO, and a letter explaining the approval should be attached to the reimbursement request form.

If the traveler is able to use a discount airfare by traveling a day earlier or a day later than the meeting, and if the airfare saving is equal to or greater than the cost of an additional day's lodging and meals, then reimbursement will be made for the additional lodging and meals at the approved rates.

The SACRAO Executive Committee has set as a guideline the rate of \$45 per day for meals, including tips, for all individual SACRAO travel and small-group meetings such as the Nominations and Elections Committee meeting. If meal expenses exceed this daily guideline, the traveler must provide a written explanation. For larger meetings, such as Summer Planning Meetings or N&E meetings, the Federal per diem reimbursement rates shall be used. In all cases, expenses must not exceed the budgeted amount for each line item. (2010)

Receipts must be provided for any single expense exceeding \$25. When completing the travel expense voucher, the traveler should include only the meals paid for personally.

Hospitality or a business gift for a guest must be approved in advance by the President or President-Elect. Original receipts are required, including the amount, time and place, business purpose, and the business relationship to SACRAO for each person for whom a meal or gift was provided.

Usual charges for taxis, rideshares, limousines, buses, baggage, tips, parking, and business telephone calls will be reimbursed. However, they must be explained fully in the Travel Expense Report. A receipt must be attached for any single expenditure over \$25. Personal phone calls and other personal expenses are not reimbursed.

SACRAO does not provide travel insurance.

The SACRAO President must approve travel reimbursements. Travel reimbursement requests by the President must be approved by the President-Elect or, when it is not feasible for the President-Elect to do so, by the Immediate Past President.

## ***Liability Insurance***

SACRAO has liability insurance that covers all official meetings sponsored by the association. The President and the Treasurer coordinate the renewal of insurance.

## ***Music Licensing Fees***

Music licensing applications (ASCAP) must be completed prior to each meeting when music is being played as part of SACRAO-sponsored events (coordinated by the SACRAO President and the Local Arrangements Committee Chair); fees will be paid after the event by the SACRAO Treasurer. (1993)

# **Membership**

## ***Benefits of Membership***

- Corporate Membership includes access to a single (*one-time use*), all-member email list.
- All members receive newsletters and *The SACRAO Journal*.
- All members have access to the Membership information section of the website, which includes search access to the member directory.
- Access to the membership directory does not imply permission to create large-scale emails.
- E-blasts to all SACRAO members must be approved by the SACRAO president and should not be used for commercial purposes.
- Membership includes the ability to opt into or out of discussion forums.

## **Dues**

Membership dues structures are no longer included in the Constitution & Bylaws but may be revised by submitting proposed changes to the membership at the annual Business Meeting. Rules guiding the dues structures are:

- Graduate students pay a reduced rate of \$20.00
- Associate members pay a rate of \$40.00
- Educational agencies pay the same rate as SACRAO institutions
- Corporate Partners pay the same rate as SACRAO institutions or are considered active & current if they exhibit or support the prior year's Annual Meeting (2021)

## **Rate Structure**

<b>Category</b>	<b>Persons</b>	<b>Annual Dues</b>
Institutional	unlimited	\$100
Educational Agency	unlimited	\$100
Corporation	unlimited	\$100
Associate	1	\$40
Graduate Student	1	\$20

## **Deaths within Membership**

### **Death of Current SACRAO Member**

In the case of a death of a SACRAO member, the President and Secretary should be notified. The Secretary will send a sympathy card to the deceased's family and submit memorial information for inclusion in the Newsletter. The Vice President for States/Regionals and Membership should also be notified to update the membership record and status.

### **Death of Current Executive Committee Member or Past President**

The President will survey Executive Committee members to determine appropriate action. Flowers and/or a memorial contribution to the charity of the deceased member's or family's choice (*not to exceed \$100*) will be paid from the Executive Committee budget. (1994)

### **Death of Immediate Family Member of Executive Committee Member**

Flowers or a contribution may be sent at the discretion of the President in the name of the Executive Committee member and will be paid from the Executive Committee budget. If a contribution is made, the Secretary will send the Executive Committee member a card. (2007)

## **Newsletter**

Advertisements and job postings should not appear in the SACRAO Newsletter. (1993)

Three newsletters appear each year: late spring, summer, and mid-fall. An optional pre-conference newsletter may be sent prior to the Annual Meeting. All newsletters are web-based only. (2013)

# Executive Committee Responsibilities

## Description

This committee, established in the Constitution, is composed of fourteen elected officers who are voting members of the Executive Committee: President; President-Elect; Immediate Past President; Vice President for Recruitment, Admissions, and Enrollment Management; Vice President for Information Technology, Vice President for Distinct Populations and Programs; Vice President for Professional and Personal Development, Vice President for Records and Academic Services; Vice President for Topics in Higher Education; Vice President for States/Regionals and Membership; Vice President for Program and Evaluation, Vice President for Communication and Recognition; Secretary, and Treasurer. Ex-officio, non-voting members are the Treasurer-Elect; Corporate Partner Liaison, Past Local Arrangements Committee Chair; and the Local Arrangements Committee Chair for the upcoming Annual Meeting. The Committee serves as the governing board of SACRAO, acting for the membership and carrying out the wishes of the membership as expressed formally and informally.

The Committee meets twice a year: at the SACRAO Annual Meeting in February (*before and after*) and the Summer Planning Meeting in June. If necessary, a third meeting may occur at the AACRAO Annual Meeting. Videoconferencing (*two per year—April/May and September/October—since 2009*) is also held, and all members are expected to participate. Matters of urgent business requiring a vote of the Executive Committee may be handled via email or video conferencing. Motions will pass with an affirmative vote of a majority of the Executive Committee and will be recorded in the minutes of the next regularly-scheduled meeting as “Actions Taken.”

## Filling an Unexpired Term

Article IV. Section 6. of the Constitution provides for the filling of unexpired terms. Vacancies occurring before the Summer Planning Meeting may be filled by rotation of those already on the Executive Committee, depending upon the vacated position. This provides the membership with the opportunity to review this decision. As the Constitution provides, the "two from any state/regional" limit is the only stipulation the Executive Committee should try to observe when filling a position. The membership entrusts the Executive Committee with this responsibility without going to any further costs or considerations. (1994)

## Annual Meeting Responsibilities

Day	Meeting/Activity	Participants
Saturday	Executive Committee Meeting	Executive Committee Executive Committee nominees AACRAO Representative Future SACRAO bidders
Saturday	Auditing Committee	Auditing Committee members
Sunday	Program Committee Meeting ( <i>review current programs and orient new chairs with the planning process</i> )	President-Elect President-Elect nominee Program Vice Presidents Program VP nominees Program Committee Chairs Incoming Program Committee Chairs

<b>Day</b>	<b>Meeting/Activity</b>	<b>Participants</b>
Sunday	EC Transition Meeting	President, President-Elect, President-Elect nominee; incoming and outgoing EC members whose positions are transitioning
Sunday	Auditing Committee	Auditing Committee; President, President-Elect, President-Elect nominee, Treasurer, and Treasurer-Elect attend upon request
Sunday	First-Time Attendee Reception/Orientation	Executive Committee Executive Committee nominees Membership Relations Committee AACRAO Representative
Sunday	Opening Session ( <i>Presentation of Margaret Ruthven Perry Award; recognition of last year's Outstanding Presenter Award; presentation of Awards/Honorary Memberships; recognition of Multicultural/Emerging Leader Scholarship winners; recognition of Student Pre-Professional Scholarship winners; recognition of the program and standing committees; recognition of program presenters and coordinators; recognition of all past SACRAO presidents in attendance; recognition of First-Time Attendees</i> )	President President-Elect <i>The SACRAO Journal</i> Editor Recognitions & Awards Chair VP Communication & Recognition AACRAO Representative LAC Chair Secretary Keynote Speaker ( <i>if any</i> )
Monday or Tuesday	<i>The SACRAO Journal</i> Editorial Board Breakfast	VP Communication & Recognition VP Communication & Recognition nominee <i>Journal</i> Editor <i>Journal</i> Editorial Board
Monday	State Presidents' Luncheon ( <i>Outline SACRAO activities for the coming year, discuss upcoming issues, and encourage involvement</i> )	State Presidents or representative Executive Committee members President-Elect nominee AACRAO Representative Incoming LAC Chair
Monday	Town Meeting ( <i>Discussion of Business Meeting issues and gather feedback from members</i> )	Executive Committee Executive Committee nominees AACRAO Representative
Monday	President's Reception for Exhibitors, Past Presidents, Honorary Members, state association presidents, and Multi-Cultural/Emerging Leader Annual Meeting Scholarship recipients	Executive Committee Executive Committee nominees Exhibitors Past Presidents Honorary Members State association presidents Multi-Cultural/Emerging Leader Annual Meeting Scholarship recipients AACRAO Representative

<b>Day</b>	<b>Meeting/Activity</b>	<b>Participants</b>
Tuesday	Business Meeting; recognition of past-presidents, budget approval; Constitution & Bylaws changes; election of new officers; exchange of gavel and new President address; SACRAO at AACRAO reception announcement; plans for coming year; gifts and plaques	Executive Committee Executive Committee nominees AACRAO Representative Select Standing Committee Chairs
Tuesday	Past Presidents' Luncheon	Past Presidents Incoming Immediate Past President Incoming President ( <i>optional</i> )
Tuesday	LAC Breakfast or Luncheon	Current LAC & Incoming LAC
Tuesday	Working Lunch for Program Committees ( <i>work on the program for the following year</i> )	Incoming President-Elect Incoming President ( <i>optional</i> ) Incoming Program Vice Presidents Incoming Program Committees
Tuesday	President's Reception for Program and Standing Committees	Outgoing Executive Committee Incoming Executive Committee AACRAO Representative Outgoing Standing Committees Outgoing Program Committees
Wednesday	SACRAO Breakfast ( <i>Invitation to next conference and closing remarks</i> )	New Executive Committee
Wednesday	Executive Committee Meeting	New Executive Committee
Thursday	Executive Committee Meeting ( <i>if needed</i> )	New Executive Committee



# **President-Elect**

Note: The responsibilities contained here do not include those outlined in the Program Planning Calendar shown under Annual Meeting Program Preparation. These two documents should be considered together to determine all duties of the President-Elect.

The President-Elect serves for an elected term of one year, which begins at the annual business meeting, although preparatory work is required before that. This officer's primary responsibility is the program for the next Annual Meeting. The President-Elect is also the principal assistant to the President and in the absence of that officer performs all the duties of the President. The President-Elect performs other assignments that may be delegated by the President.

The President-Elect's position requires a three-year commitment and institutional support, because this officer succeeds to the presidency of the association, followed by one year as Immediate Past President. If for any reason the President-Elect cannot complete the term of office, the Nominations and Elections Committee will nominate a slate of nominees and conduct a special election to fill the vacancy for the remainder of the unexpired term.

Attendance at the SACRAO Annual Meeting in February and the SACRAO Summer Planning Meeting in June is required. Expenses for the Summer Planning Meeting are generally paid by SACRAO. Institutional support of release time, secretarial assistance, e-mail access (Internet), and telephone access are other valuable assets for this position. A recognized degree of leadership, experience, expertise and communication skills are required for this position.

## ***Responsibilities***

The President-Elect is responsible for the following:

- Chairing all Program Committee meetings
- Serving as liaison with the Local Arrangements Committee and coordinating Program Committee plans for the Summer Planning Meeting and the Annual Meeting
- Arranging meeting rooms and other accommodations for the Program Committee
- Developing and monitoring planning calendar and deadlines
- Collecting and assembling program reports
- Editing the final program for the Annual Meeting, whether printed or in the conference app
- Meeting with the Finance Committee to review the current budget and project needs for the year of their presidency
- Register for the free [AACRAO State & Regional Fundamentals Online](#)
- Join the [State & Regional ACRAOS Leadership Group](#)
- Attending the Summer Planning Meeting and the SACRAO meeting in February
- Attending the AACRAO meeting in April is preferred, though not required
- Planning the SACRAO at AACRAO reception for the year of their presidency

## ***Calendar***

### **December, prior to election**

- Communicate with the current President and request a complete set of documents for program planning
- Draft a Program Planning Timetable for the year and send it to the program vice presidents and President for input

- Invite incoming program vice presidents, committee chairs, and members to special meetings held during the Annual Meeting in February. Incoming vice presidents and chairs should attend the Sunday meeting for current chairs. Incoming program vice presidents, chairs, and committee members should attend Tuesday's working program planning luncheon
- Highlight & encourage online completion of the "I'm Available" form at the Annual Meeting in February.

### **January, prior to election**

- With an introduction from the current P-E, contact the SACRAO VP for Information Technology for URLs for next year's annual meeting program planning (*Session Proposals page, P-E only page, Conference Admin module*)
- Email the revised Program Planning Guide and Program Proposal web page for the program planning meeting on Sunday with the incoming VPs and program chairs
- Email copies of the revised Program Planning Guide ahead of the Tuesday program planning working luncheon
- Email a link to the Program Proposal web page for program planning and highlight it at the Tuesday meeting
- Email agendas for the Sunday meeting and Tuesday program planning working luncheon for program committees and vice presidents. For last-minute prospective committee members, be also prepared to share
- Email letter to program Vice Presidents, chairs, and committee members including; 1) committee roster, 2) agendas for Sunday meeting and Tuesday lunch, 3) program planning guidelines, 4) program planning Timetable, 5) responsibilities of current program committees and chairs at this annual meeting

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Act as a facilitator at the Sunday meeting for program vice presidents and committees and at the Tuesday working lunch. Share evaluation information from the prior year's sessions, if available
- Immediately following the Annual Meeting, compile information from the "I'm Available" forms received and contact members who indicated an interest in being on a program committee for the current year
- Send revisions to the list of program committee members to the President, program vice presidents, and chairs immediately after the February meeting; Coordinate submission of the revised list for the May Newsletter with the President
- Register for the free [AACRAO State & Regional Fundamentals Online](#)
- Join the [State & Regional ACRAOS Leadership Group](#)

### **March**

- Compile a list of Session Coordinator volunteers, suggested program topics, and presenters from the "I'm Available" forms. Send the list to program chairs and vice presidents. Include any additional information from the prior meeting's program evaluation. Be sure to include a session proposal for the previous year's winner of the Margaret Ruthven Perry award for the Professional Development Committee
- Request full session evaluation report from VP for Program and Evaluations. Summarize the results and suggestions and share them with program VPs and chairs to help shape the program for the next conference
- Send an e-blast to the membership calling for session proposals and presenters for the next annual meeting. Note prominently on the main SACRAO webpage the deadline for session proposals and include a link to the online "I'm Available" form

- Submit an article on program plans for the next Annual Meeting for the May Newsletter (*deadline around April 10*)

### **April**

- Receive final report from LAC Chair of most recent Annual Meeting
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Attend the Workshop for State/Regional Officers at the annual AACRAO meeting
- Send a communication to Program Committee Chair(s) and vice presidents on the continued program development for the next Annual Meeting
- Finalize details for the Summer Planning Meeting with the President and the LAC Chair. If needed, prepare to stay one additional day to meet individually with the President
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee

### **May**

- Submit nominations for SACRAO Honorary Membership and other SACRAO recognitions and awards

### **June**

- Confirm the Summer Planning Meeting dates with the LAC Chair for the following year when you are President
- Coordinate and moderate the program planning phase of the Summer Planning Meeting (*meeting includes program vice presidents and Executive Committee members*). Discuss guidelines for paid presenters, if needed
- Attend the Executive Committee meeting and share a copy of the tentative program after the planning phase is complete
- Submit preliminary program agenda and topics to the Newsletter Editor for the July e-Newsletter (*deadline generally June 10*)

### **July**

- Submit AACRAO leadership nominations (*deadline generally August 1*)
- Complete data entry from the June Summer Planning meeting; mark each session Selected, Not Selected, Alternate, and assign dates and times (*dd/mm/yyyy and ##:## am or pm format*); Alert LAC and SACRAO VP for Information Technology to "turn on" the Preliminary Conference Program tab on the website

### **August**

- Follow up on the program with program vice presidents and chairs, and report status to President
- Submit nominations for AACRAO Honorary Members and for SACRAO recognitions and awards

### **September**

- If possible, reserve space for SACRAO @ AACRAO reception (*at least explore options*). Food and beverage are at the expense of the member. SACRAO stopped paying for SACRAO @ AACRAO receptions in 2018
- Submit an article to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)
- Begin to develop plans for the next year as President

### **October**

- Continue to update the preliminary online program as changes and additions come in

- Submit names of Program and Standing Committee Chairs for the next year (*deadline approximately October 15*)
- Coordinate submission of information for the registration website with the LAC Registration Chair
- Send confirmation emails to all coordinators and presenters. (*Depending on the progress of the program development, this may be done in November or early December*)
- Coordinate reporting of audio-visual requests, room assignments, and physical arrangements with the appropriate person from the LAC
- Copy the President-Elect nominee on appropriate communications from this point forward

### **November**

- Work with the LAC chair to ensure session Coordinators and Presenters are registered for the conference
- Get from the President and LAC chair a final list of current committee members (*program, standing, LAC*) for including in the conference program app and slide decks
- Confirm all payment and travel arrangements for presenters
- Begin to develop the program and submit information to program vice presidents and committee chairs for verification. Also, send a timetable to those who will provide you with program information
- Contact the LAC Chair to coordinate graphics for the Annual Meeting program

### **December**

- Participate with the President, Past President, and Treasurer in Audit Committee work on year-end financial statements and next year's budget
- Working with the President, determine the dates for a SACRAO Executive Committee meeting at AACRAO, if needed, and the Summer Planning Meeting
- Send incoming program vice presidents and committee chairs dates for the upcoming Summer Planning Meeting and travel guidelines
- After conferring with the President, provide the LAC chair with a list of complimentary Annual Meeting registrations and what SACRAO will provide (*name tag, registration, meal functions, etc.*); Send a confirming letter to participants
- Provide a complete set of documents for program planning to the President-Elect nominee
- Purchase gift/plaque for the outgoing President and gifts for others as appropriate (*i.e., Local Arrangements Chair*); the SACRAO logo should be used on all engraving. Money for this purchase may be from SACRAO or LAC budget
- Participate in a video conference with the Finance Committee to discuss next year's budget
- Begin collecting Executive Committee data for the Executive Committee list and Annual Meeting program (name, title, institution, institution address, phone, fax, e-mail, home address, home phone, and birthday)
- Make travel plans for the Annual Meeting. Plan to arrive on Friday to coordinate last-minute program changes and special meetings. Coordinate with the President-Elect nominee to determine if an additional day is needed for an individual meeting to facilitate planning for the coming year

### **January**

- Email copies of the Annual Meeting program to the Executive Committee, Program Committee Chairs, and special guests (*keynote speaker, AACRAO representative, etc.*)
- Email the program (*if it is available*) to State Presidents, again soliciting ideas for discussion at the Annual Meeting luncheon and throughout the year
- Work with the President-Elect nominee to explain the program planning process
- Arrange space for the Executive Committee meeting, if held during the annual AACRAO meeting

- Prepare a draft agenda for the EC meeting following the last session of the Annual Meeting (Wednesday noon through Thursday morning) and distribute it to Executive Committee members, asking for input
- Have stationery printed for distribution at Annual Meeting, if desired
- Prepare a new EC roster, including all information collected
- Coordinate with the Evaluations Committee Chair on how and when to provide program lists and labels for the Session Coordinator packets. List to include: Session Code, Title, Day/Time, Coordinator Name, and Presenter Names. Labels for Session Coordinator packets to include: Session Code, Title, Day/Time, Room, and Coordinator Name

## **February**

- Coordinate with LAC Chair and VP for Program & Evaluation to share program changes within the conference app and vocally during the large meeting announcements
- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with chairs of all standing and special committees and appropriate vice presidents to review responsibilities for the coming year
- If needed, meet with the President-Elect following the Wednesday/Thursday EC meeting.
- Consult with the outgoing President to select President's Award for Outstanding Professional Presentation. See additional related responsibilities in Appendix E

# **President**

The SACRAO President serves a one-year term, which follows the one-year term as President-Elect. The President's duties begin at the annual Business Meeting. A recognized degree of leadership, experience, and expertise is required for this position. Institutional support is necessary for the term as President, followed by a term as Immediate Past President.

## ***Responsibilities***

The President is primarily responsible for the following:

- Chairing the Executive Committee
- Supervising all activities of SACRAO, including chairing the Finance Committee and managing association assets (*including LAC budgets*) and other responsibilities according to guidelines published in this manual
- Presiding at all general meetings of SACRAO
- Implementing all provisions of the Constitution and Bylaws
- Appointing Committee Chairs and members for the following year (*year as Immediate Past President*)
- Representing SACRAO at the Annual Meeting of the American Association of Collegiate Registrars and Admissions Officers (AACRAO) and appropriately addressing other activities and initiatives from the national organization.
- Attending the Summer Planning Meeting and the SACRAO meeting in February
- Attending the AACRAO meeting in April is preferred, though not required; SACRAO generally pays expenses for attending the AACRAO meeting
- Responding to the recommendations of the Audit Committee and other committees
- Maintaining contact with Past-Presidents

## ***Calendar***

### **February**

- See duties for February at the end of the term as President-Elect
- Follow up with the Nominations and Elections Chair on submitting N&E ballot to VP for Information Technology to ensure that a report of the results will be available by the Summer Planning Meeting
- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Write appropriate thank you notes/letters of appreciation to outgoing program committee members, keynote speakers, exhibitors, presenters, etc. (*Coordinate this immediately after the Annual Meeting with the Immediate Past President*)
- Communicate with the President-Elect about notes/changes from the Annual Meeting
- Appoint a Local Arrangements Chair for meeting two years hence and send a letter of appointment. Appointment of LAC chair may be made in concert with state association leadership of state hosting meeting
- Update the AACRAO and SACRAO websites with new Executive Committee information
- Immediately following the Annual Meeting in even years, write a letter to be given to the new Treasurer-Elect to facilitate the transfer of authority so that the Treasurer-Elect may have access to accounts and conduct the financial responsibilities of the position
- Ensure the Business Meeting minutes are completed immediately so the new Treasurer can get their name on the bank account (*even years only*)
- Prepare a list of state association annual meeting dates and tentatively determine which SACRAO Executive Committee members will represent SACRAO at the annual meetings of state associations
- Communicate with state association presidents about SACRAO participation in state meetings

- Send an email to SACRAO CPA requesting that CPA contact the President directly in case of discrepancies or concerns
- Remind vice presidents and committee chairs that the President must authorize requests for payment or reimbursement before being forwarded to the Treasurer
- Follow-up on action items from February Executive Committee meeting
- Notify AACRAO Annual Meeting News Editor of plans for SACRAO reception
- Develop a list of state presidents and presidents-elect, meeting dates, and address information.
- Coordinate the notification of President's Outstanding Presenter Award recipient(s) and ordering of certificate(s)
- Post the Outstanding Presenter Award to the winner's membership history record
- Determine the dates for a SACRAO Executive Committee meeting at AACRAO and the Summer Planning Meeting, if needed
- Appoint (or reappoint) *Journal Editor* (send copies of duties/calendar from SACRAO Procedure Manual). Incumbents of this position may serve up to three years in the position. Update the SACRAO leadership roster on the AACRAO state and regional website: <https://www.aacrao.org/who-we-are/state-regional>
- Submit President's article to VP for Communication and Recognition for the May Newsletter
- Communicate, as appropriate, with state association presidents regarding SACRAO representatives at state meetings, copying the Executive Committee member(s) from that state. If the state is not represented on the Executive Committee, inquire regarding issues that state president wants to be addressed
- Coordinate final planning and correspondence for the SACRAO reception at the annual AACRAO meeting
- Send travel information on the Summer Planning Meeting to the Executive Committee, Program Committee Chair(s), the Past LAC Chair, and the LAC Chair for the next Annual Meeting, including ticketing and reimbursement policies. Include a form to collect information on arrival and departure times and modes of transportation. Stress the importance of SACRAO travel and reimbursement policy, specifically focusing on spouse/guest attendance
- Email the agenda for the Executive Committee meeting if scheduled during the annual AACRAO meeting

### **March**

- [Update the SACRAO Leadership Roster](#) with AACRAO (*responsibility shared with Secretary*)

### **April**

- Preside at the SACRAO Executive Committee meeting if held during the annual AACRAO meeting
- Represent SACRAO at activities for state/regional presidents and at other AACRAO functions (*functions generally are compliments of AACRAO, but reservation must be made by SACRAO President*); attend Pre-Conference Workshop for State/Regional Officers (*travel expenses to AACRAO covered by President's travel budget*)
- Confirm participation of AACRAO representative at the next annual SACRAO meeting. Ensure the AACRAO representative knows that, if speaking at SACRAO Opening Session, this time is set aside for a 5-minute AACRAO greeting, not an AACRAO update
- Arrange and conduct a video conference with EC members to follow up on items from the annual meeting EC meetings and program planning (*may occur in May*)
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee (*deadline late summer*)
- Submit nominations for SACRAO Honorary Membership and for SACRAO recognitions and awards
- Ensure that Treasurer sends a quarterly financial report to Auditing Committee if requested; include progress on implementing recommendations of the Auditing Committee and any financial situations

## **May**

- Email an agenda for the summer Executive Committee meeting; Collaborate with President-Elect about the agenda for the program meeting and the LAC Chair for social functions, rooms, meals, and airport transportation
- Collect travel plans for Summer Planning Meeting; notify LAC Chair
- Discuss the preliminary conference budget with LAC Chair and Treasurer before the SPM

## **June**

- Attend Summer Planning Meeting and preside at Executive Committee meeting
- Follow-up on action items from the Executive Committee meeting
- Attend annual meetings of state associations as invited (*travel expenses covered by SACRAO President's travel allowance; state meeting registration and lodging typically covered by state association*). Volunteer to do a program session. Update (*as needed*) and deliver the "SACRAO Greetings" state meeting script available from the Immediate Past President. Distribute this script to all Executive Committee members serving as SACRAO representatives at state meetings. The first meetings (*Florida & Alabama*) tend to start in late June
- Submit AACRAO leadership nominations
- Respond in writing to the Audit Committee. Send the chair a copy of the response and the current EC Manual

## **July**

- Submit President's article to the Newsletter Editor for the July e-Newsletter
- Ensure the Treasurer sends quarterly financial reports to the Auditing Committee (*see April*)
- As needed, communicate with the Local Arrangements Chair regarding Annual Meeting preparation
- Act as a resource for President-Elect concerning the program and participants and for committee and task force chairs as activities are conducted
- [Request an AACRAO Rep](#) to bring greetings to the membership and present 1-2 sessions.

## **August**

- Renew SACRAO liability insurance (*responsibility shared with Treasurer*)
- Review N&E Committee plans
- Request an AACRAO Representative to bring greetings from the association and to present a session; This request can be submitted online at: <https://www.aacrao.org/who-we-are/state-regional/aacrao-representative-form>

## **September**

- Contact the Chair of the N&E Committee to discuss issues related to the performance of the Executive Committee over the past year and to address perceived needs and challenges facing the organization and the Executive Committee for the immediate future; Discuss any critical skill sets required for certain key positions, such as Treasurer-Elect, Vice President for States/Regionals and Membership and Vice President for Information Technology (This conversation is meant to allow for constructive dialog between the Executive Committee and the N&E Committee prior to the N&E Committee deliberations on officer nominations)
- Submit President's article to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

## **October**

- Arrange and conduct video-conferencing with EC members to follow up on action items from SPM and receive reports on Annual Meeting program plans and LAC budget/plans



- Correspond with Program Committee Chair(s) and vice presidents, asking for recommendations for committee chairs for the coming year and soliciting ideas/issues of concern for the coming year
- Correspond with all standing and program committee members, asking if they want to continue next year, change to another committee, or don't want to serve in the coming year
- Discuss the appointment of program chairs and members with the President-Elect nominee and request input
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*) and grants (*generally due December 1*)
- Begin a series of video-conferencing with the President-Elect and LAC Chair regarding conference plans
- Ensure that the treasurer sends a quarterly financial report to the Auditing Committee if requested (see *April*)

### **November**

- Solicit budget needs from vice presidents and committee chairs that have budget lines
- In conjunction with Program Vice Presidents, appoint chairs for the program and standing committees, confirming agreement by phone or email; Send the list to President-Elect
- Update membership information in MemberClicks by adding the year and position on the committee and ensuring all committee members are active with their institutions. This information must be updated as soon as possible so the conference program can pull the info from MemberClicks
- Write to Executive Committee nominees, inviting them to attend Saturday Executive Committee meeting as observers; advise of the dates and times for the February, April, and June meetings and which expenses are covered by SACRAO
- Remind EC members to submit all travel/reimbursement requests in time to be paid in December
- Contact the AACRAO representative to finalize details regarding attendance at the SACRAO meeting
- Provide the LAC Chair and the Registration Chair, a list of the AACRAO representative and other special guests, etc.
- Contact standing committee chairs and encourage them to meet with their respective committees at the time designated before the Annual Meeting (*usually Sunday afternoon*) to discuss responsibilities during the Annual Meeting

### **December**

- Determine program and standing committee members for the coming year, using recommendations from state associations, responses from current members, recommendations from new and previous chairs, and information from "I'm Available" forms; Strive for diversity of gender, ethnicity, 2-year/4-year, professional/graduate, and public/private. Send lists to the President-Elect and P-E nominee; Confirm appointments in writing to each chair and member
- When names are received from the VP for Distinct Populations and Programs, send emails of congratulations to Multicultural/Emerging Leaders scholarship winners, and communicate with LAC Chair to clarify that Multicultural/Emerging Leaders scholarship winners pay their registration fee out of their scholarship awards
- When names are received from the VP for Professional and Personal Development, send emails of congratulations to Student Pre-Professional scholarship winners, and communicate with LAC Chair to clarify that Student Pre-Professional scholarship winner's registration is waived
- Video conference with the Finance Committee to prepare next year's annual budget
- Purchase plaques for outgoing Executive Committee members (*shared responsibility with the VP for Communication & Recognition*); SACRAO logo must be used on engraving
- Contact state association presidents to verify the information for the program; advise when the State Association President's luncheon will be held and that they will receive an invitation from the SACRAO President.

- Invite state association presidents and the AACRAO representative to the luncheon for state association presidents with Executive Committee to be held at the Annual Meeting
- Finalize plans (*in conjunction with the LAC Chair*) for the President's receptions
- Send invitations to the Monday night President's Reception for exhibitors, past presidents, honorary members, state association presidents, the AACRAO representative, and current and incoming Executive Committees. NOTE: These invitations can be e-mailed in January
- Make arrangements with N&E Chair and VP for Information Technology to have the N&E ballot online and voting open in time for the Annual Meeting; Establish deadlines such that N&E results may be reported at Summer Planning Meeting

### **January**

- When names are received from the VP for Professional and Personal Development, send letters notifying Student Pre-Professional Scholarship winners, and communicate with LAC Chair that their registration fee is waived
- No later than January 10: E-mail preliminary agendas for the Executive Committee meeting, luncheon for state association presidents, Town Hall meeting, Business Meeting, and breakfast meeting to the Executive Committee and others on the agendas. E-mail the agenda for the annual Business Meeting to standing committee chairs on the agenda (*Auditing, Resolutions, SACRAO Journal Editor, and Nominations and Elections*)
- Have everything ready for Annual Meeting; Make last-minute checks with President-Elect, Local Arrangements Chair, and Audit Committee
- Inform presidents of state associations bidding for the Annual Meeting site when and where bids are to be presented to the Executive Committee; request the name of the person who will present the bid
- Contact next year's Constitution and Bylaws Committee (*serve as Chair during the term as Immediate Past President*) and schedule a meeting during the annual SACRAO meeting
- Ensure that Treasurer sends a quarterly financial report to the Auditing Committee if requested

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Preside at Executive Committee meeting, Opening Session, Luncheon for State Association Presidents, Town Hall, Business Meeting, and other meetings as appropriate; Attend luncheon for past SACRAO presidents; Host appreciation receptions
- Meet with next year's Constitution and Bylaws Committee during the Annual Meeting
- Schedule other meetings as necessary to coordinate the future business of association
- Consult with incoming and immediate past presidents to select President's Award for Outstanding Professional Presentation (See additional related responsibilities in Appendix E)

# **Immediate Past President**

The term of the Immediate Past President begins at the close of the Annual Meeting following their year of service as President.

## ***Responsibilities***

The Immediate Past President is responsible for the following:

- Revising the SACRAO Procedure Manual to include policy changes from action taken at each Executive Committee and/or Business Meeting, and distribute copies to the next Executive Committee, N&E Committee, and others as appropriate
- Serving as a member of the Executive Committee and acting as an advisor and consultant
- Chairing the Constitution and Bylaws Committee
- Chairing the Site Selection Committee
- Coordinating roster of Past Presidents, maintaining contact throughout the year, and planning the luncheon for Past Presidents at the Annual Meeting
- Mentoring new members
- Completing other duties as assigned by the President
- Attending the SACRAO Annual Meeting in February and the Summer Planning Meeting in June

## ***Calendar***

### **February**

- See duties for February at the end of the term as President
- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- While at the Annual Meeting, solicit hosts for upcoming SACRAO Annual Meetings
- Send follow-up letters or emails to those who indicated an interest in hosting a SACRAO meeting, and include bid specifications and an electronic copy of the LAC Manual
- Send appropriate thank you letters/notes to persons who contributed to the activities at the Annual Meeting; Coordinate with the incoming President immediately following the meeting
- Send congratulatory letters to new Honorary Members and other award recipients as appropriate

### **March**

- Notify state association presidents and Executive Committee members from states in the designated region (*in the SACRAO site rotation plan*) of the annual bid and selection process; Bids will be accepted as far out as five years in advance (*see Site Selection Committee and Appendix B*)
- Submit information to the Newsletter Editor for the May Newsletter, including an announcement regarding site rotation and the bid/selection process

### **April**

- Receive final report from Local Arrangements Chair of most recent Annual Meeting
- If attending the AACRAO Annual Meeting and if held, attend the SACRAO Executive Committee meeting
- Solicit information from Constitution and Bylaws Committee regarding any proposed changes
- Submit nominations for the SACRAO Executive Committee and Nominations and Elections Committee
- Submit nominations for Honorary Membership and other awards
- Make a follow-up contact to those interested in hosting SACRAO Annual Meeting, getting specific information about hotels and possible activities

## **June**

- At the Summer Planning Meeting, remind members of the EC and others of the deadline for receiving changes/additions to the Procedure Manual (*usually late November*)
- Present a draft of proposed changes to the Constitution and Bylaws to the Executive Committee for discussion at the Summer Planning Meeting
- Present a report on proposed SACRAO sites at the Summer Planning Meeting
- Submit nominations for AACRAO leadership positions
- Send feedback on SACRAO site proposals to the representatives proposing; Include instructions on proceeding with negotiations
- Submit information to the Newsletter Editor for the summer e-Newsletter (*deadline generally July 10*), including an invitation for members to propose changes to the SACRAO Constitution and Bylaws

## **August**

- Submit nominations for AACRAO honorary members
- Send draft hotel contracts to the Site Selection Committee for review, and communicate recommendations back to the member working with the hotel

## **September**

- Submit an article on proposed revisions to the Constitution and Bylaws and update on site selection to the Newsletter Editor for the November Newsletter

## **October**

- Email the current Procedure Manual to the Executive Committee and appropriate chairs for revisions; require edits by November 15
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)
- Receive bids for the Annual Meeting three years hence and invite representatives to present bids at the SACRAO Executive Committee meeting on Saturday before Annual Meeting

## **December**

- Contact Local Arrangements Committee Chair for the location of the luncheon for Past Presidents
- Present final hotel contracts to the President for signature
- Finalize revisions to the SACRAO Procedure Manual

## **January**

- Contact Past Presidents of the association by email and invite them to the annual meeting; include information about the Tuesday Luncheon, general information about conference registration, and the link to the conference website
- Update the past-presidents spreadsheet and send it to the President for use the following year
- Coordinate plans for the Past-Presidents' Luncheon with the LAC Chair; Invite Past Presidents and the current President by email; The President-Elect is not typically invited because they are leading the Program Working luncheon, often at the same time as the Past Presidents' Luncheon. Invite P-E if there is no conflict
- Print proposed changes to Constitution and Bylaws for distribution at the annual Business Meeting (*approximately 25-50 copies – to be scattered about/not per person*)

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of Executive Committee section*)
- Ensure the updated Procedure Manual is available online (members only-behind login)

- Provide a link to the revised SACRAO Procedure Manual to members of the next year's Executive Committee and next year's program and standing committee chairs.
- Present proposed changes to Constitution and Bylaws at the annual Town Meeting and Business Meeting
- Host luncheon meeting for Past Presidents attending the Annual Meeting. Include simple agenda of "round-robin" updates and notes to be read by those not in attendance
- Provide as much information as possible to the incoming President-Elect (Minutes, Treasurer's Reports, etc.)
- Sometime during the year, prepare a short (*five-minute*) video presentation in which you talk about the highlights of your year as President of SACRAO. Send the tape to your successor, along with those from prior IPPs

# **Program Vice President for Recruitment, Admissions, and Enrollment Management (RAEM)**

This SACRAO Program Vice President serves for an elected term of two years that begins at the close of the Annual Meeting. This office is elected in even-numbered years.

## ***Responsibilities***

This Program Vice President is responsible for the following:

- Coordinating and supervising the affairs of SACRAO in the professional areas of recruiting, admissions, enrollment management, retention, special services, and financial aid
- Serving as a member of the Executive Committee
- Coordinating program activities relative to these professional areas
- Serving as a member of the Program Committee, under the direction of the President-Elect, overseeing the activities of the RAEM Program Committee; historically, this committee was formed from two previous separate committees and should have a disproportionately large number of sessions
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

See Annual Meeting Program Preparation for a more detailed calendar of program planning.

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet throughout the conference with Chair(s) and the Program Committee members that report to this position
- Meet with President-Elect and Program Vice Presidents to plan next year's program

### **March**

- Ensure Program Committee members and Chair(s) are submitting proposals per the timeline

### **April**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

### **May**

- Work with Program Committee Chair(s) for this area, assisting the President-Elect with program session idea ratings and preparing information for Summer Planning Meeting
- Contact the VP for Program and Evaluation to secure RAEM conference evaluations in preparation for the June meeting

### **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*)

## **July**

- Submit nominations for AACRAO leadership positions

## **August**

- Assist in securing commitments from presenters for pre-conference workshops and program session participants; Then act as the program liaison to the President-Elect
- Submit nominations for AACRAO honorary membership

## **September**

- Serve as liaison between Program Committee members, Committee Chair(s), and President-Elect to finalize session commitments
- Submit news and information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)

## **December**

- Serve as a liaison between the Program Committee Chair(s) and the President-Elect to send reminders to program participants, ensuring all have received copies of the tentative program, the November Newsletter, and the registration information

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with President-Elect, Program Vice Presidents, and Program Committee Chair(s) before the Annual Meeting (*Sunday afternoon*) begins. Work with Program Committee Chair(s) throughout the conference to oversee sponsored sessions
- Consult with your Program Committee Chair(s) to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President
- Send thank you notes to committee members and program session participants

# **Program Vice President for Distinct Populations and Programs (DPP)**

This SACRAO Program Vice President is a two-year term whose office is assumed at the close of the annual conference. This office is elected in odd-numbered years.

## ***Responsibilities***

This Program Vice President is responsible for the following:

- Coordinating and supervising the activities of SACRAO in the professional areas of access and equity, campus-to-campus affairs, international affairs, veteran affairs, and athletic affairs
- Serving as a member of the Executive Committee
- Coordinating program activities relative to these professional areas
- Serving as a member of the Program Committee under the direction of the President-Elect, overseeing the activities of the DPP Program Committee
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

See Annual Meeting Program Preparation for a more detailed calendar of program planning.

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet throughout the conference with Chair(s) and the Program Committee members that report to this position
- Meet with President-Elect and Program Vice Presidents to plan next year's program

### **March**

- Ensure Program Committee members and Chair(s) are submitting proposals per the timeline

### **April**

- Submit information to the Newsletter Editor for the May Newsletter (*deadline generally April 10*)
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Membership and other recognition awards

### **May**

- Work with Program Committee Chair(s) for this area, assisting the President-Elect with program session idea ratings and preparing information for Summer Planning Meeting
- Contact the VP for Program and Evaluation to secure DPP conference evaluations in preparation for the June meeting

### **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*)



## **July**

- Submit nominations for AACRAO leadership positions

## **August**

- Assist in securing commitments from presenters for pre-conference workshops and program session participants; Then act as the program liaison to the President-Elect
- Submit nominations for AACRAO honorary membership

## **September**

- Serve as liaison between Program Committee members, Committee Chair(s), and President-Elect to finalize session commitments
- Submit news and information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*deadline generally November 1*)

## **December**

- Serve as a liaison between the Program Committee Chair(s) and the President-Elect to send reminders to program participants, ensuring all have received copies of the tentative program, the November Newsletter, and the registration information

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with President-Elect, Program Vice Presidents, and Program Committee Chair(s) before the Annual Meeting (*Sunday afternoon*) begins. Work with Program Committee Chair(s) throughout the conference to oversee sponsored sessions
- Consult with your Program Committee Chair(s) to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President
- Send thank you notes to committee members and program session participants

# **Program Vice President for Professional and Personal Development (PPD)**

This SACRAO Program Vice President serves for an elected term of two years that begins at the close of the Annual Meeting. This office is elected in odd-numbered years.

## ***Responsibilities***

This Program Vice President is responsible for the following:

- Coordinating and supervising the activities of SACRAO in the areas of professional and personal growth of the membership
- Serving as a member of the Executive Committee
- Coordinating program activities relative to these professional areas
- Serving as a member of the Program Committee, under the direction of the President-Elect, overseeing the activities of the PPD Program Committee
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

See Annual Meeting Program Preparation for a more detailed calendar of program planning.

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Meet throughout the conference with Chair(s) and the Program Committee members that report to this position
- Meet with President-Elect and program vice presidents to plan next year's program

### **March**

- Ensure Program Committee members and Chair(s) are submitting proposals per the timeline

### **April**

- Submit information to the Newsletter Editor for the May Newsletter (*deadline generally April 10*)
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

### **May**

- Work with Program Committee Chair(s) for this area, assisting the President-Elect with program session idea ratings and preparing information for Summer Planning Meeting; Be sure to save one PD program session slot for the previous year's Margaret Ruthven Perry Award winner
- Contact the VP for Program and Evaluation to secure PPD conference evaluations in preparation for the June meeting

### **June**

- Attend Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*)
- Include a call for poster sessions

- Update the online poster session form (*check the deadline, who receives an email, etc.*)

## **July**

- Submit nominations for AACRAO leadership positions.

## **August**

- Assist in securing commitments from presenters for pre-conference workshops and program session participants; Then act as the program liaison to the President-Elect
- Call for posters – send info to state/regional association presidents, asking them to share; send to LAC about this opportunity for local non-members
- Submit nominations for AACRAO honorary membership

## **September**

- Serve as liaison between Program Committee members, Committee Chair(s), and President-Elect to finalize session commitments
- Submit information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)
- Provide expense information needed for setting workshop fees to the President-Elect

## **October**

- Send the initial poster submissions to the *Journal* Editor for Editorial Board review
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)

## **December**

- Serve as a liaison between the Program Committee Chair(s) and the President-Elect to send reminders to program participants, ensuring all have received copies of the tentative program, the November Newsletter, and the registration information
- Send reminders to pre-conference workshop and program session participants making certain that all have received copies of the tentative program and the November Newsletter
- Send the second set of poster submissions to the *Journal* Editor for Editorial Board review
- Inform poster presenters of the status of their submissions. Inform LAC of the number of posters; Student Pre-Professional Scholarship applications are due December 15; Consult with PD Committee members and select recipients. Inform the SACRAO President, President-Elect, and LAC Chair; The President will notify recipients; The VPPD should congratulate recipients and provide them with information regarding conference registration and activities inviting their participation; Inform the LAC Chair of any hotel reservations that need to be made for the scholarship recipients

## **January**

- Ensure that poster presenters are registered for the conference and planning to attend
- Remind the LAC chair that each poster presenter should have a registration packet

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with President-Elect, Program Vice Presidents, and Program Committee Chair(s) before the Annual Meeting (*Sunday afternoon*) begins. Work with Program Committee Chair(s) throughout the conference to oversee sponsored sessions
- Consult with your Program Committee Chair(s) to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President

- Send thank you notes to committee members and program session participants
- Check that all poster presenters are set up on the day of poster sessions

# **Program Vice President for Records and Academic Services (RAS)**

This SACRAO Program Vice President serves for an elected term of two years that begins at the close of the Annual Meeting. This office is elected in odd-numbered years.

## ***Responsibilities***

This Program Vice President is responsible for the following:

- Coordinating and supervising the affairs of SACRAO in the professional areas of records and academic services
- Serving as a member of the Executive Committee
- Coordinating program activities relative to these professional areas
- Serving as a member of the Program Committee, under the direction of the President-Elect, overseeing the activities of the RAS Program Committee
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

See Annual Meeting Program Preparation for more detailed calendar of program planning.

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Meet throughout the conference with Chair(s) and the Program Committee members that report to this position.
- Meet with President-Elect and Program Vice Presidents to plan next year's program

### **March**

- Ensure Program Committee members and Chair(s) are submitting proposals per the timeline

### **April**

- Submit information to the Newsletter Editor for the May Newsletter (*deadline generally April 10*)
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Membership and other recognition awards

### **May**

- Work with Program Committee Chair(s) for this area, assisting the President-Elect with program session idea ratings and preparing information for Summer Planning Meeting
- Contact the VP for Program and Evaluation to secure RAS conference evaluations in preparation for the June meeting

### **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*).

## **July**

- Submit nominations for AACRAO leadership positions.

## **August**

- Assist in securing commitments from presenters for pre-conference workshops and program session participants; Then act as the program liaison to the President-Elect
- Submit nominations for AACRAO honorary membership

## **September**

- Serve as liaison between program participants, committee Chair(s) and President-Elect to finalize session commitments

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*deadline generally November 1*)

## **December**

- Serve as a liaison between the Program Committee Chair(s) and the President-Elect to send reminders to program participants, ensuring all have received copies of the tentative program, the November Newsletter, and the registration information

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with President-Elect, Program Vice Presidents, and Program Committee Chair(s) before the Annual Meeting (*Sunday afternoon*) begins. Work with Program Committee Chair(s) throughout the conference to oversee sponsored sessions
- Consult with your Program Committee Chair(s) to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President
- Send thank you notes to committee members and program session participants

# **Program Vice President for Topics in Higher Education** **(THE)**

This SACRAO Program Vice President is a two-year term whose office is assumed at the close of the annual conference. This office is elected in even-numbered years.

## ***Responsibilities***

This Program Vice President is responsible for the following:

- Coordinating and supervising the activities of SACRAO in the topics relevant to the organization in higher education, including current trending topics, new legislation and updates to existing legislation, federal regulations, and important topics among the states, regionals, accreditors, and systems
- Serving as a member of the Executive Committee
- Coordinating program activities relative to these professional areas
- Serving as a member of the Program Committee, under the direction of the President-Elect, overseeing the activities of the THE Program Committee
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

See Annual Meeting Program Preparation for a more detailed calendar of program planning.

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Meet throughout the conference with Chair(s) and the Program Committee members that report to this position
- Meet with President-Elect and Program Vice Presidents to plan next year's program

### **March**

- Ensure Program Committee members and Chair(s) are submitting proposals per the timeline

### **April**

- Submit information to the Newsletter Editor for the May Newsletter (*deadline generally April 10*).
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Membership and other recognition awards

### **May**

- Work with Program Committee Chair(s) for this area, assisting the President-Elect with program session idea ratings and preparing information for Summer Planning Meeting
- Contact the evaluation chair to secure THE conference evaluations in preparation for the June meeting

### **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*)

## **July**

- Submit nominations for AACRAO leadership positions

## **August**

- Assist in securing commitments from presenters for pre-conference workshops and program session participants; Then act as the program liaison to the President-Elect
- Submit nominations for AACRAO honorary membership

## **September**

- Serve as liaison between Program Committee members, Committee Chair(s), and President-Elect to finalize session commitments
- Submit news and information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*deadline generally November 1*).

## **December**

- Serve as a liaison between the Program Committee Chair(s) and the President-Elect to send reminders to program participants, ensuring all have received copies of the tentative program, the November Newsletter, and the registration information

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Meet with President-Elect, Program Vice Presidents, and Program Committee Chair(s) before the Annual Meeting (Sunday afternoon) begins. Work with Program Committee Chair(s) throughout the conference to oversee sponsored sessions
- Consult with your Program Committee Chair(s) to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President
- Send thank you notes to committee members and program session participants



# **Vice President for Information Technology**

This Vice President serves for an elected term of two years that begins at the close of the Annual Meeting. This office is elected in even-numbered years.

## ***Responsibilities***

This Vice President is responsible for the following:

- Coordinating and supervising the affairs of SACRAO in the professional areas of information technology
- Serving as a member of the Executive Committee
- Attending the Summer Planning Meeting and the SACRAO meeting in February
- Serving as the primary manager of the SACRAO website:
  - Serves as the SACRAO webmaster and coordinates updates to the website
  - Liaison between each year's Local Arrangements Chair and Registration Chair to establish each year's Annual Meeting site
  - Oversee technical changes to the SACRAO Job Board; The job board itself operates autonomously, updated directly by end users
  - Oversee postings to the SACRAO website, as needed, for applications, forms, and the SACRAO *Journal* and quarterly newsletter links
- Serving as the primary manager of the SACRAO OneDrive storage
  - Maintain folders and member access as needed
  - Provide incoming Executive Members and Program Chairs with instructions for using
  - Update access for Executive Members and Program Committee chair after Annual Meeting

## ***Calendar***

See Annual Meeting Program Preparation for a more detailed calendar of program planning. A separate Web Maintenance and Planning Calendar follow in the next section.

### **January**

- Check the website for bad links and outdated information. If their first year in the position, meet with their predecessor for instructions on website accessibility, updates, and maintenance.

### **February**

- During the Annual Meeting:
  - Attend appropriate meetings (*see table under Annual Meeting Responsibilities at the beginning of Executive Committee section*)
  - Meet with incoming LAC Chair(s) to discuss web issues
  - Work with the LAC Chair throughout the conference to oversee IT-related needs.
  - Consult with IT Program Committee Chair to select a nominee for the President's Award for Outstanding Professional Presentation and submit a nomination to the incoming President
- Following Annual Meeting:
  - Meet with President-Elect and Program Vice Presidents to plan next year's program
  - Update SACRAO webpages, including the Executive Committee membership information
  - Update any changes to the Constitution & Bylaws, Meeting History, and Service Award list pages (*most of this is included in the SACRAO membership directory*) when the updated information from the Secretary is received
  - Update security access to OneDrive folders with incoming and departing Executive and Program Chair members

- Coordinate web responsibility/access transfer between President-Elect and President-Elect nominee, and ensure notifications from the "I'm Available form" are sent to the P-E nominee
- Coordinate web responsibility/access between VPSRMs (*every other year*)
- Check committee descriptions on the website and update them as needed
- Upload the new *Journal* in .pdf format to the SACRAO website
- Post recent Nomination & Elections updated forms to the website, if available
- Post PAE Individual Multicultural / Emerging Leader Scholarship materials to the website, if available

### **March**

- By March 15 (*generally*), upload the new Recognition & Awards form to the SACRAO website

### **April**

- Submit news and information to the Newsletter Editor for the May Newsletter (*deadline generally April 10*)
- If attending the AACRAO annual meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for Honorary Membership and other recognition and awards
- Check the website for bad links and outdated information

### **May**

- Upload Newsletter to the SACRAO website

### **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*)
- Submit news and information to the Newsletter Editor for the July Newsletter (*deadline generally June 10*)

### **July**

- Submit nominations for AACRAO leadership positions
- Check the website for bad links and outdated information

### **August**

- Upload the Newsletter to the SACRAO website
- Submit nominations for AACRAO honorary membership

### **September**

- Submit news and information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

### **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)
- Coordinate with the LAC for the new Conference and Registration modules to the SACRAO website
- Update the past, present, and future conferences webpage when the President signs the contract for a future site
- Check the website for bad links and outdated information

### **November**

- Upload the Newsletter to the SACRAO website

## **February**

- Attend appropriate meetings during the Annual Meeting (see table under *Annual Meeting Responsibilities at the beginning of the Executive Committee section*)

## **Web Maintenance Calendar**

### **January**

- (*President-Elect nominee*): Work together to prepare an update to the “I’m Available” form before the Annual Meeting
- (*VP for States/Regionals and Membership*): Work with VPSRM nominee to explain the membership module of the SACRAO website
- (*VP for Information Technology*): Check the website for bad links and outdated information

### **February**

- (*VP for Communication & Recognition*): Request Criteria and Nomination forms for Distinguished Service Award and Honorary Membership
- (*N&E Chair*): Request Nominations & Elections nominee names, vitae, and photos for web ballot
- (*Secretary*): Request update of Constitution and Bylaws (*if needed*) and honorees list
- (*VP for Communication & Recognition*): Request a PDF version of the *SACRAO Journal*
- (*VP for States/Regionals and Membership*): Request Honorary Member, new EC roster, Corporate Partner, dues structure, and other “static” membership updates
- (*VP for Information Technology*): Post new N&E form, if available
- (*VP for Information Technology*): Meet with upcoming LAC, Registration, and Information Technology Chairs to discuss web needs
- (*VP for Information Technology*): Post updates from Annual Meeting
- (*VP for Information Technology*): Check committee descriptions annually and update them as needed
- Upload the new *Journal* in .pdf format to the SACRAO website

### **March**

- (*Secretary*): Post the draft minutes of the business meeting on the website
- (*VP for Communication & Recognition*): Request individual Multicultural Scholarship form and instructions
- (*VP for Information Technology*): Post Multicultural / Emerging Leader Scholarship materials to the website, if available

### **April**

- (*N&E Chair*): Request “Turn off” date for web balloting
- (*VP for States/Regionals and Membership*): Assist with invoice setup
- (*VP for Communication & Recognition*): Publish the link to the Spring newsletter
- (*LAC Chair*): Request new Conference and Registration web content for the next conference
- (*VP for Information Technology*): Check the website for bad links and outdated information

### **July**

- (*VP for Information Technology*): Check the website for bad links and outdated information

### **August**

- (*VP for Communication & Recognition*): Publish the link to the Summer newsletter

## **October**

- *(VP for Information Technology)*: Update the past, present, and future conferences webpage when the President signs the contract for a future site
- *(VP for Information Technology)*: Check the website for bad links and outdated information

# **Vice President for Communication and Recognition**

Description: This SACRAO Vice President is a two-year term whose office is assumed at the close of the annual conference. This office is elected in odd-numbered years. The VP for Communication & Recognition must have strong skills in desktop publishing, have access to institutional staff with these skills, or be able to contract out the design of these publications. Time management skills are also crucial for this position.

## ***Responsibilities***

This Vice President is responsible for the following:

- Serving as a member of the Executive Committee
- Serving as the Newsletter Editor
  - Soliciting and coordinating the receipt of materials for the newsletter from the SACRAO Executive Committee, Program and Standing Committee Chairs, and State Association Presidents
  - Composing and distributing (by email) the Newsletter to the membership three times each year and arranging with the VP for Information Technology for these publications to be posted on the SACRAO website
- Coordinating and supervising the activities of the SACRAO *Journal*, Newsletters, Scholarships, and Recognition and Awards
- Serving as an ex-officio member of the *Journal* Editorial Board
- Coordinating the activities of the Recognition and Awards Committee with Chair(s)
- Coordinating the activities of the Scholarship Committee with Chair(s)
- Together with the Scholarship Committee, solicit nominations and select up to two recipients for the Student Pre-Professional Scholarship
- Together with the Scholarship Committee, solicit nominations and select up to four recipients for the Individual Multicultural / Emerging Leader Scholarship
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February
- During the conference responsibilities:
  - Taking/Collecting pictures for the Newsletter; these pictures could include:
    - Executive Committee - both current and new
    - Guest speakers - at the opening session and plenary
    - First-time attendee orientation
    - Winner of Margaret Ruthven Perry Distinguished SACRAO Journalism Award and Presidents' Outstanding Presenter Award winners, those receiving honorary memberships, distinguished service awards, Multicultural/Emerging Leader Scholarships, Student Pre-professional Scholarships, and Certificate of Appreciation
    - Poster presentations (if applicable) during the group session
    - SACRAO social events
    - State President's Luncheon – at the luncheon
    - SACRAO *Journal* Editorial Board - at the breakfast meeting
    - "SACRAO resolution" at the business meeting
    - Past presidents after Business Meeting and before Tuesday's luncheon
    - Working lunch of program committees - Tuesday lunch meeting - and a group shot of chairs
    - All receptions, including President's receptions, SACRAO Big Event, and Corporate Partners in the exhibit area
  - Invitation to next meeting at Wednesday breakfast

NOTE: General practice has been to publish pictures that do not include alcoholic beverages.

Four newsletters are published each year:

- A **spring newsletter (May)** to include articles from:
  - Any member of the Executive Committee who wishes to contribute an article
    - At a minimum, submissions are required from the President, President-Elect, Secretary (*summary of minutes from Annual Meeting, link and approved changes to the Constitution & Bylaws*), and the Treasurer (*financial statement from the previous year and approved budget for the current year*)
  - Contributions from State organizations
  - SACRAO Journal Editor soliciting contributions
  - Annual Meeting Photos
  - Other information that can be included (depending on the timing of processes):
    - Call for awards and recognition
    - Nominations & Elections *Call for Nominations*
    - Resolutions List
    - PAE Scholarship and Student Pre-Professional Recipient articles, feature articles on Margaret Perry Award and Presenter Award Recipients
    - Honorary Members
    - Previous Evaluations Chair (*overall and top sessions*)
    - 'Save the Date' for the next SACRAO Conference
    - Member articles and new member institution highlights
- A **summer newsletter (July)** to include articles from:
  - Any member of the Executive Committee who wishes to contribute an article
    - At a minimum, submissions are required from the President, Past-President (*Constitution & Bylaw Changes*), President-Elect (*list of tentative session titles for next conference*), Treasurer, VP for States/Regionals, and Membership on membership renewal status
    - Encourage submissions from all program Vice Presidents relative to next year's conference
  - Contributions from State organizations
  - SACRAO Journal Editor soliciting contributions
  - Summer Planning Meeting Photos
  - Other information that can be included (depending on the timing of processes):
    - Nominations & Elections *Call for Nominations*
    - PAE Scholarship and Student Pre-Professional Recipient *Call for Nominations*
    - 'Save the Date' for the next SACRAO Conference
    - Member articles and new member institution highlights
- A **fall newsletter (November)** to include articles from:
  - Any member of the Executive Committee who wishes to contribute an article.
    - At a minimum, submissions are required from the President, President-Elect (*Program Highlights for the upcoming conference*), Past-President (*Constitution & Bylaw Changes*), Treasurer
  - Report from Local Arrangement Chair
  - 'Save the Date' for the next SACRAO Conference
  - Nominations & Elections announcement of nominations
  - Contributions from State organizations
  - SACRAO Journal Editor soliciting contributions
  - Other information that can be included (depending on the timing of processes):
    - Member articles and new member institution highlights

- A **preconference newsletter** (*late January, adjusted based on annual conference dates*):
  - This newsletter focuses strictly on the upcoming conference & not published online
  - Coordinate with President and President-Elect whether it should be sent to all members (*to generate more interest*) or only those who have registered for the conference
    - Highlight exciting sessions
    - Highlight plenary speakers
    - Highlight the social event
  - Travel & Hotel Information
    - Airport
    - Weather
  - Information on local area such as attractions, food, shopping
  - Reminder to download the conference app
- Managing the technology and procedures used by the association to communicate with the membership via email
  - Maintain listserv software, as needed, with target populations
  - Coordinate with President and President-Elect to send requested emails

Note: The Executive Committee voted that advertisements and job postings should not appear in the SACRAO Newsletter. (1993)

## **Calendar**

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*). Take pictures as noted above and encourage conference attendees to send you pictures for possible inclusion in the Newsletter and on the website
- Distribute deadlines for upcoming issues if already established, including May
- Distribute publication deadlines at the Luncheon for State Association Presidents (*April 1, June 1, and October 1 for the May, July, and November Newsletters, respectively*); Remind State Presidents that we like to receive state reports for each Newsletter
- Meet with the *Journal* Editorial Board
- Give a pdf version of the *SACRAO Journal* (*one .pdf of the full Journal, plus one .pdf of each article published in that edition*) to VPIT for web posting
- Collect news and information to be published in the May Newsletter, including the winners of the Student Pre-professional Scholarships announced at the recent SACRAO Annual Meeting; If possible, include comments from the Scholarship winners about the impact of the SACRAO Annual Meeting on their professional growth and involvement
- Collect news and information to be published in the May Newsletter, including the winners of the Individual Multicultural / Emerging Leader Scholarships announced at the recent SACRAO Annual Meeting; If possible, include comments from the Scholarship winners about the impact of the SACRAO Annual Meeting on their professional growth and involvement
- Confirm that nomination forms and information on the SACRAO website have been updated with appropriate future deadlines and ask the President to solicit nominations at the Business Meeting
- Review descriptions in the SACRAO Manual and jointly develop committee calendar/timetables in conjunction with chairs of the Recognition and Awards and Scholarships Committees
- Get a list of Recognition and Awards and Scholarship Committees membership from President/Past-President and work with the respective committee chairs to contact committee members to introduce themselves, outline duties and timetables, and solicit additional committee members if necessary

- Get the scanned signature of the President-Elect to be used on Outstanding Presenter awards.
- Please introduce yourself to Paradigm, a corporate partner; They often provide certificates and covers for free for Committee Chairs, LAC committee, and Program Chairs

### **March**

- Send out a request for Spring Newsletter content to all parties and begin assembling
- Work with President to order Outstanding Presenter Certificate(s); This is ordered from Paradigm Inc. free of charge; You will need to capture an electronic signature image to include on the certificate(s); Our contact at Paradigm is Elizabeth: [elizabethk@paradigm-corp.com](mailto:elizabethk@paradigm-corp.com); Please refer to the Recognition and Awards DropBox for the Certificate Order Forms

### **April**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Obtain status report on the *Journal* to be published prior to the Annual Meeting; assist Editorial Board as necessary
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee

### **May**

- Obtain approval from the President and President-Elect for the Spring Newsletter before publishing on the SACRAO website
- Arrange with VP for Information Technology to post the May Newsletter on the SACRAO website home page; Copy the President on this email
- Send an email letting members know that the newsletter is available on the SACRAO website and that they must log in to view it; You may also attach a pdf copy of the newsletter to the email if you and/or the President wish.
- Work with the VP for Information Technology to make any necessary updates to the Student Pre-Professional Scholarship form and Multicultural / Emerging Leader Scholarship form; Share with other Executive Committee members who will represent SACRAO at state meetings so they can promote the scholarships

### **June**

- Attend the Summer Planning Meeting
- Notify Executive Committee, State Associations, etc. of the deadline for the Summer Newsletter; Take pictures for inclusion in the Summer Newsletter; Include information on Student Pre-Professional Annual Meeting Scholarship and the Individual Multicultural / Emerging Leader Scholarship in the newsletter
- Have Awards and Scholarship Committee Chairs email committee members reminding them of any general information and timeline for the selection of awards; This email should also encourage the committee to help solicit nominations and their requirements for selecting recipients
- Submit nominations for AACRAO leadership positions

### **July**

- Collect August Newsletter information from all parties and begin assembling; Include website links to all nomination forms for scholarships and awards

### **August**

- Obtain approval from the President and President-Elect for the Summer Newsletter before publishing it on the SACRAO website



- Arrange with VP for Information Technology to post the May Newsletter on the SACRAO website home page; Copy the President on that email
- Send an email letting members know that the newsletter is available on the SACRAO website and that they must log in to view it; You may also attach a pdf copy of the newsletter to the email if you and/or the President wish; Arrange with the VP for Information Technology to post the Summer Newsletter on the SACRAO website home page; Copy the President on this email
- Encourage Executive Committee members attending Fall state meetings to send photographs for inclusion in the November Newsletter
- Notify Executive Committee, State Newsletter Editors, etc., of the deadline for the November Newsletter
- Send an email blast inviting nominations for the Distinguished Service Award, Honorary Membership, and Certificate of Appreciation and for both Student and Multicultural/Emerging Leader Scholarships

### **September**

- Collect November Newsletter information and photographs from all parties and begin assembling
- Remind members of the December 1 deadline to apply for the Student Pre-Professional Scholarship
- Remind members of the October 15 deadline to apply for the Individual Multicultural/ Emerging Leader Scholarship
- Submit nominations for SACRAO Honorary Membership and other recognition awards

### **October**

- Send all parties a request for Fall Newsletter content and begin assembling
- Obtain status reports on the *Journal* and assist Editorial Board as necessary
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)
- Request committee members to review criteria, forms, and procedures for changes
- After the October 15 deadline, research and validate information on final nomination forms received for Honorary Membership and Certificate of Appreciation; Copy and paste information from the nomination and any roles held with SACRAO (*found in MemberClicks*) into a separate word document for each type of award; Distribute nominations to Recognition and Awards committee chair, who will share with the committee for decision/voting
- After the October 15 deadline, research and validate information on final nomination forms for Distinguished Service Award (*DSA*) using guidelines in the table after Recognition and Awards Committee description; Copy and paste information from the nomination form and any roles held with SACRAO (*found in MemberClicks*) into a word document
- Distribute nominations to the Committee Chair, who will share them with the committee for decision/voting
- Individual Multicultural / Emerging Leader Scholarship applications are due October 15; After the October 15 deadline, copy and paste information from the nomination/application and any roles held with SACRAO (*found in MemberClicks*) into a word document; Distribute to the committee chair, who will share with the committee for selection
- Send information on Individual Multicultural / Emerging Leader Scholarship winners to the SACRAO President, who will send letters of congratulations and coordinate with the LAC Chair and Treasurer an internal transaction paying the registration fee from the scholarship award
- Submit nominations for the SACRAO Executive Committee
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*).

## **November**

- Obtain approval from the President and President-Elect for the Fall Newsletter before publishing on the SACRAO website
- Arrange with the VP for Information Technology to post the November Newsletter on the SACRAO website home page; Copy the President on this email
- Send an email letting members know that the newsletter is available on the SACRAO website and that they must log in to view it; You may also attach a pdf copy of the newsletter to the email if you and/or President wish
- Present final recommendations for Honorary Membership and Certificates of Appreciation to the Executive Committee for approval via e-mail and/or conference call
- Present final recommendations for Distinguished Service Award to the Executive Committee for approval via e-mail and/or conference call
- Remind the President to contact members receiving Distinguished Service Award, Honorary Membership, and Certificate of Appreciation, notifying them of the honor, inviting them to attend the SACRAO Annual Meeting, and requesting submission of a photo and bio for posting at the annual meeting; Sometimes the President might ask the VP to draft an email; Some prefer to do it themselves or make personal phone calls to Honorees
- Notify the Vice President, States/Regionals, and Membership of any Honorary Membership recipients to be added to the database

## **December**

- Student Pre-Professional Scholarship applications are due December 1; After the December 1 deadline, copy and paste information from the nomination/application into a word document. Distribute to the Committee Chair, who will share with the committee for selection
- Send information on Student Pre-Professional Scholarship winners to the SACRAO President, who will send letters of congratulations and coordinate with LAC Chair and Treasurer an internal transaction paying the registration fee from the scholarship award
- Confirm the budget for plaques and certificates with President
- As of October 2022, corporate partner Atlas Flags will provide plaques in return for in-kind credit towards their sponsorship; The order should be placed in mid-December to guarantee arrival in time for the annual meeting. Adam Bright ([adam.bright@atlasflags.com](mailto:adam.bright@atlasflags.com)) is our contact; Confirm the number and types of plaques and certificates to be ordered and place an order; Typically, plaques are ordered for all Distinguished Service Awards, Honorary Membership, and all out-going Executive Committee members; Plaques should be shipped directly to the conference site; Either arrange to have them shipped to someone local who will be driving to the conference (*LAC chair or another member of EC*) or the hotel (*get instructions from LAC chair*)
- Paradigm Incorporated (*diploma printing corporate partner*) will print certificates for SACRAO (*including covers*) for free. Contact Nicole Chattoo, [nicolec@paradigm-corp.com](mailto:nicolec@paradigm-corp.com)
- Certificates are ordered for Certificate of Appreciation, Local Arrangements Committee Chair (*if not already being awarded a Certificate of Appreciation*), outgoing committee chairs (*Certificate of Recognition*), Local Arrangements committee Members (*Certificate of Service*) and any other certificates deemed necessary by the President; Note: Outstanding Professional Presentation Award winners from the previous year should have been sent over the summer
- Work with the President and President-Elect to order a Plaque for the President (*with gavel attached*)
- Remind *Journal* Board Editor to order framed *Journal*/Award for the Perry Award winner
- Remind LAC that a method to display winner photos and bios at the Annual Meeting is needed; Send the list of Honorary Recipients to LAC
- Confirm receipt of photos and bios from all recipients

## **January**

- Ensure that scholarship recipients have registered for the conference and have secured accommodations
- Provide names of scholarship recipients to LAC Chair for hotel reservations for the annual conference
- Early January, order plaques (*from Atlas Flags*) and certificates (*from Paradigm*) to allow time for production and shipping; With lead times longer than in prior years, it is suggested these orders be placed in December
- Certificates and plaques are generally sent to the LAC chair or another local Executive Committee member who will be driving to the conference at least two weeks prior to the event
- Prepare award winners' photos and biographies for display at the Annual Meeting
- Prepare a final report for the Executive Committee and Business Meetings
- Contact the successor to obtain contact information and update Nomination forms; Update the Recognition and Awards nomination form and submit changes to VP for Information Technology for posting on SACRAO website; The deadline for Distinguished Service Award nomination is October 15; The deadline for Honorary Membership and Certificate of Appreciation is October 15th

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of Executive Committee section*)
- At the Opening Session of the Annual Meeting, present plaques/certificates to recipients
- Send successor all files, nomination form, email text, etc.
- Send thank you notes to committee members
- Give a report at the annual Business Meeting, recognizing the two Student Pre-Professional Scholarship recipients; Make appropriate contacts prior to the Annual Meeting to ensure that recipients are in attendance
- Give a report at the annual Business Meeting, recognizing the four Individual Multicultural / Emerging Leader Scholarship recipients; Make appropriate contacts prior to the Annual Meeting to ensure that recipients are in attendance
- Assist scholarship recipients in getting reimbursed for conference expenses (*up to the scholarship amount*)

# **Vice President for Program and Evaluation**

Description: This SACRAO Program Vice President is a two-year term whose office is assumed at the close of the annual conference. This office is elected in even-numbered years.

## ***Responsibilities***

- Coordinate and supervise the activities of SACRAO in the areas of program and conference evaluations
- Serve as a member of the Executive Committee
- Prepare and maintain the MobileUp app and instructions for evaluation
- Solicit feedback about the sessions and the conference MobileUp app
- Assist the President-Elect with the program and assign session coordinators
- Serve as a member of the Program Committee under the direction of the President-Elect
- Provide a summary report for the evaluations

## ***Calendar***

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Work with the current Evaluations Chair to understand the existing evaluation forms, process, and software
- Note suggestions from the outgoing Evaluations Chair and new Executive Committee for possible changes to next year's questions or process
- Coordinate with the new President-Elect on software for next year's Annual Meeting planning
- Get log-in for MobileUp from the outgoing Vice President for Program and Evaluations
- Using evaluation feedback, assist the President and President-Elect with selecting a nominee for the President's Award for Outstanding Professional Presentation

### **April**

- Submit information to the VP for Communication & Recognition for the May Newsletter (*deadline generally April 10*). Provide a personal photograph, if needed
- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

### **May**

- Prepare for the Summer Planning Meeting of the Executive Committee by preparing a summary report

### **June**

- Communicate with the incoming Executive Committee with regard to MobileUp and processes
- Attend Summer Planning Meeting and identify Wi-Fi
- Submit reports to Executive Committee; Distribute drafts of assessment questions and ask for Executive Committee input
- Submit nominations for AACRAO leadership positions
- Submit information to VP for Communication & Recognition for the July Newsletter

### **August**

- Submit nominations for AACRAO honorary membership

## **September**

- Submit information to VP for Communication & Recognition for the November Newsletter

## **October**

- Begin loading the schedule for the Annual Meeting into MobileUp app
- Finalize the design of Annual Meeting program session and conference evaluation software
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)

## **December**

- Begin testing the MobileUp app with multiple smartphones (*iPhone, Android, etc.*)
- Coordinate with the President-Elect and design different reports to be used at the Annual Meeting
- Coordinate with President-Elect and LAC to begin encouraging members to download the MobileUp app

## **January**

- Prepare report(s) for the Executive Committee and Business Meetings as appropriate

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Present a report of the current Annual Meeting evaluations at the Executive Committee meeting following the Annual Meeting
- Prepare a final written report for the President-Elect and the Executive Committee; provide a report to the new Evaluations Vice President for presentation at Summer Planning Meeting
- Submit a summary article to VP for Communication & Recognition for the May Newsletter
- Make a report, as appropriate, at the Annual Business Meeting

# **Vice President for States/Regionals and Membership**

This Vice President serves for an elected term of two years that begins at the close of the Annual Meeting. This office is elected in even-numbered years.

## ***Responsibilities***

This Vice President is responsible for:

- Improving the many relationships that SACRAO has with the state organizations in its boundaries
- Increasing the number of the various memberships in SACRAO
- Maintaining and updating the membership database
- Sending dues invoices to the membership, collecting and recording dues, and forwarding checks to the Treasurer
- Coordinating efforts to build the membership of SACRAO
- Planning and coordinating, in conjunction with the Membership Relations Committee, the First Time Attendees' Orientation/Reception at the Annual Meeting
- Updating membership data in the membership database via the website
- Working with the VP for Information Technology to maintain and update the membership database module, including the payment of dues.
- Completing special projects assigned by the President
- Attending the Summer Planning Meeting and the SACRAO meeting in February

## ***Calendar***

### **February**

- If the first year in the position, meet with your predecessor for instructions on processing web-based membership records; If in the second year, train your successor
- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Attend and assist with First-Time Attendee Orientation/Reception (*coordinate if continuing in position*)
- Meet with Membership Relations Committee (*outgoing and incoming*) to evaluate First-Time Attendee Orientation/Reception
- Assure the new Executive Committee roster, Honorary Members, Corporate members, dues structure, and other membership changes are updated through the website

### **March**

- Prepare membership materials to be sent to institutions that are not SACRAO members
- Contact institutions that have not paid dues
- Update 'Dues & Applications' and 'Benefits' sections of the website as necessary

### **April**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held; Observe any special sessions or services provided by AACRAO for First-Time Attendees
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit information to the Newsletter Editor for the May Newsletter; include updates on new institutional members (*deadline generally April 10*)
- Submit nominations for SACRAO Honorary Membership and other recognition awards

## **May**

- Receive the Membership Relations Committee's revisions to the First Time Attendee Orientation/Reception materials
- Prepare dues notifications and invoices to all member institutions, corporations, educational agencies, associates, and student members by mid-May; Payment deadline is September 15

## **June**

- Attend the Summer Planning Meeting at SACRAO's expense (*see travel section*). Begin planning for First-Time Attendee Orientation/Reception at the Annual Meeting
- Update the membership database as dues payments and membership forms are received; Batch checks and mail them to the Treasurer; Include a payment report with each mailing; This is a continuous process, especially heavy from June through September
- Direct potential new members to the membership application on the web; This is a continuous process, but June is ideal for mass notifications
- Submit an article to the Newsletter Editor for the July e-Newsletter (*deadline generally July 10*); Include information on dues payment deadlines, membership updates, and recruiting new members
- Submit nominations for AACRAO leadership positions

## **August**

- Submit nominations for AACRAO honorary membership
- Outline the First-Time Attendee Orientation/Reception program and enlist assistance from other Executive Committee members as needed

## **September**

- Contact former institutional members who have not renewed dues; Respond to inquiries about membership; This, too, is a continuous process
- Submit information to the Newsletter Editor for the November Newsletter (*deadline generally September 10*). Include plans for orientation/reception for first-time attendees
- Send a second invoice to institutions with unpaid dues

## **October**

- Send final notification invoices to institutions with unpaid dues; Notify those in arrears for two years that they will be dropped from SACRAO membership unless dues are received by December 1
- Direct new Members to update member information through the website
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*).

## **November**

- Coordinate plans for Orientation/Reception with the Membership Relations Committee Chair
- Send an e-mail blast to the membership requesting a review of their online directory information
- Send e-mail messages to contact members of unpaid institutions
- Make phone calls to contact members of unpaid institutions
- Assist the LAC with continuing to update membership once online registration opens; Many discover, upon registering, that they are not individual members or that their information has not been updated; This begins in November and continues until the conference

## **December**

- MemberClicks will automatically inactivate institutions that have not paid dues when their grace period ends; No action needed

## **January**

- Send invitations to First-Time Attendee functions (*get list from Registration Committee Chair*); Compile responses and communicate to the Chair of the Membership Relations Committee
- Print First-Time Attendee Orientation materials (if applicable)
- Contact the Membership Relations Committee Chair to finalize the First Time Attendee Orientation and Reception plans
- Work with VPSRM nominee (*if applicable*) to explain membership management in MemberClicks and communicate any set-up issues to the VPIT

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Coordinate First-Time Attendee Orientation/Reception at Annual Meeting
- Give a report at the annual Business Meeting
- Meet with the Membership Relations Committee (*outgoing and incoming*) to evaluate First-Time Attendees' Orientation/Reception
- Send thank you notes to the Membership Relations Committee members
- Send letters of notification of service/appreciation to the supervisors of those serving on the Membership Relations Committee
- If second year, introduce your successor to MemberClicks membership management and ensure full knowledge of member database procedures

## ***Solicitation of New Members***

The Vice President for States/Regionals and Membership gathers prospect lists from a number of sources that include:

- AACRAO members in the SACRAO region who are not SACRAO members
- Institutional members of state associations that are not SACRAO members
- Suggestions from the SACRAO Executive Committee, Membership Relations Committee, and presidents of state/regional associations
- Other

The Vice President for States/Regionals and Membership sends letters of invitation with membership information to prospective institutions.

Prospects will submit an application and dues to the Vice President for States/Regionals and Membership, who then sends a welcome letter and forwards dues to the Treasurer.

## ***Membership Renewal***

To solicit membership renewals, the Vice President for States/Regionals and Membership will:

- Write an article for the Newsletter
- Send renewal notices to the current membership
- Send a letter to non-renewals
- Send cancellation of membership with a letter offering future renewal
- MemberClicks will automatically inactive institutional memberships if they are past due and the grace period has expired. Institutions rejoining within one year must clear past delinquent accounts. The past due amount is forgiven for institutions out more than one year.
- **Waive the annual dues for new institutional and individual members joining after the Annual Meeting**
- Coordinate with the LAC Chair and Corporate Partner Liaison the adjustment of Corporate Partner annual dues invoices for those who choose to sponsor the annual meeting. Sponsorship level includes



annual dues amount regardless of sponsorship level for the year. (*Ongoing whenever a Corporate Partner decides to sponsor the annual meeting*)

# **Secretary**

The Secretary serves for an elected term of two years that begins at the close of the Annual Meeting. The Secretary is elected in even-numbered years. Special requirements for the person holding this office include having the ability to take copious notes and transcribe an accurate report of committee deliberations.

## ***Responsibilities***

The Secretary is responsible for:

- Recording the Minutes of the Annual Meeting (*Executive Committee Meetings, Opening Session, Luncheon for State Association Presidents, Town Hall Meeting, Business Meeting, and SACRAO Breakfast*) and distributing to the Executive Committee; include minutes of urgent business approved via email or teleconference as "Actions Taken"
- Distributing the revised copy of the Constitution and Bylaws, if changes are made at the Annual Meeting, to the Executive Committee and N&E Committee Chair
- Distributing a list of Honorary Members and Award Recipients to the Executive Committee
- Recording and distributing the Minutes of the Executive Committee meetings at the annual AACRAO meeting (*if held*) and the Summer Planning Meeting
- Awareness: Archival materials from 1949-2013 are housed at Troy University-Dothan's Department of Wiregrass History and Culture. For information, contact [wiregrassarchives@troy.edu](mailto:wiregrassarchives@troy.edu); phone: 334-983-6556 x 21327; fax: 334-983-6327. The URL for the archives is <https://www.troy.edu/about-us/dothan-campus/wiregrass-archives/inventories/017.html>
- Maintaining an indexed Dropbox folder of Minutes of previous meetings (*this folder should be shared with the next SACRAO Secretary*)
- Sending sympathy cards to families of deceased members and submitting memorial information for inclusion in the SACRAO Newsletter
- Performing other duties as requested by the Executive Committee, such as preparing and sharing communications, reports, and files
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February

## ***Calendar***

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Serve as Recorder/Secretary for the Opening Session, Luncheon for State Association Presidents, Town Hall Meeting, Business Meeting, SACRAO Breakfast, and all the Executive Committee meetings (*incoming Secretary assumes responsibility for all meetings that follow the annual Business Meeting*)
- Meeting minutes must be completed immediately after the annual meeting and sent to the President and Treasurer to aid in transferring banking authority; Consider preparing draft minutes of the Business Meeting in advance to facilitate this
- Provide a letter to the new Treasurer affirming election results to facilitate transfer of authority for bank accounts
- Prepare an updated copy of the Constitution and Bylaws and a revised list of Honorary Members and Award Recipients; Distribute updated copies to the Executive Committee and N&E Committee Chair; The VP for Information Technology is responsible for updating this information on the SACRAO website

### **March**

- [Update the SACRAO Leadership Roster](#) with AACRAO (*responsibility shared with the President*)

- By March 15, prepare and distribute to the Executive Committee the minutes and proceedings of the Executive Committee meetings (*usually prior to and following the Annual Meeting*), Opening Session, Luncheon for State Association Presidents, Town Hall Meeting, Business Meeting, and Breakfast Meeting; give a deadline for receipt of revisions (*Proceedings for these meetings should be forwarded to the outgoing Executive Committee; The Executive Committee elected at the annual Business Meeting should, for continuity, get proceedings from all meetings*)
- Send the Minutes of the Business Meeting to the VP for Information Technology

#### **April**

- Provide brief Executive Committee and Business Meetings summaries to the Newsletter Editor for the May Newsletter
- Distribute revisions to Minutes for the February Executive Committee, Business Meeting, etc. prior to the Executive Committee meeting, if held during AACRAO
- If attending the AACRAO Annual Meeting, serve as Secretary for the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

#### **May**

- By May 15, prepare and distribute Executive Committee Minutes from teleconference or meeting, if held, during the annual AACRAO meeting; Give a deadline for receipt of revisions; Send a summary of these minutes to VP for Information Technology

#### **June**

- Distribute revisions to the Minutes for the April Executive Committee meeting prior to the Summer Planning Meeting
- Attend Summer Planning Meeting at SACRAO's expense (*see travel section*) and serve as Recorder/Secretary; Assist President-Elect as necessary during Program Committee meeting
- Submit nominations for AACRAO leadership positions

#### **July**

- By July 15, prepare and distribute the Executive Committee Minutes from the June meeting; Give a deadline for receipt of revisions; Send summaries of the Summer Planning Meeting and the Executive Committee meetings to the VP for Information Technology
- Capture all annual documents for archiving in Dropbox for:
  - Executive Committee Agenda and Minutes
  - Minutes of other committees or groups
  - Annual Meeting program booklet (*electronic version*), if available
  - Revised SACRAO Constitution and Bylaws, if applicable
  - Committee reports and rosters
  - Roster of State Association Presidents
  - Calendar of Program Committee activities for the coming year
  - Orientation brochures for new members, officers, and any other pertinent manuals distributed
  - Copies of the previous year's editions of the SACRAO Newsletter
  - *SACRAO Journal*
  - Financial Statements
  - Other publications/documents of historical significance

## **August**

- Submit nominations for AACRAO honorary membership
- Distribute revisions to the Minutes of the June Executive Committee meeting

## **September**

- Submit a detailed summary of the Minutes from the last Business Meeting to the Newsletter Editor for the November Newsletter; Include complete Minutes if space permits; Be prepared to provide the complete Minutes to SACRAO members who request them

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*).

## **December**

- Remind the membership that the prior year's Business Meeting minutes are available online, with instructions to log in and view them; If edits are needed, they should be emailed to the Secretary

## **January**

- Write the Executive Committee and Standing Committee Chairs requesting that written and electronic copies of reports be provided to the Secretary when they are made at the Annual Meeting

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Serve as Recorder/Secretary for the Saturday Executive Committee meeting, Opening Session, Luncheon for State Association Presidents, Town Hall Meeting, Business Meeting, SACRAO Breakfast, and Wednesday Executive Committee meeting, if continuing on the Executive Committee; If the incumbent of this position changes at the Annual Meeting, the incoming Secretary assumes responsibility for all meetings that follow the Business Meeting
- The outgoing secretary provides the incoming secretary with all minutes from the previous two years, plus older files as available
- The outgoing secretary sends minutes from Annual Meeting Executive Committee and other events by March 15

# **Treasurer**

The Treasurer serves for an elected term of two years that begins at the close of the Annual Meeting. The Treasurer must work closely with the SACRAO President, President-Elect, Immediate Past-President, Vice President for States/Regionals and Membership, and LAC Finance Chairs.

Special requirements for this office holder include:

- Knowledge of computer and banking services in order to print and maintain bookkeeping software, financial statements, and reports.
- Institutional or personal computer support to maintain and process financial records.
- Convenient access to a branch of Wells Fargo.

## ***Responsibilities***

The Treasurer is responsible for:

- Receiving the annual dues for SACRAO membership, deposited automatically via PayScape, or paid by check
- Paying the expenses of SACRAO according to SACRAO guidelines or upon approval by the President
- Filing corporate income tax statements, including returns from the Annual Meeting (*currently handled by the independent auditors*) and filing the annual report with the Commonwealth of Kentucky Secretary of State
- If requested, preparing quarterly (*April 30, July 15, October 15, and January 15*) financial statements and transaction reports for the Auditing Committee
- Preparing a complete financial report, including documentation, at the end of the fiscal year, which will be audited along with QuickBooks reports and electronic files by the Auditing Committee
- Coordinating banking services, debit cards, credit card services, and corporation insurance and serving as the official SACRAO corporate address
  - In addition to the primary SACRAO checking and savings accounts, the treasurer also oversees two LAC accounts, one for meetings held in even-numbered years and one for meetings held in odd-numbered-years
- Monitoring and coordinating activity of the Local Arrangements Committee Treasurer; ensuring books are closed by Summer Planning meeting and banking resources are mailed to the SACRAO Treasurer within one month thereafter, along with an electronic copy of the LAC's transaction files
- Arranging an annual independent audit and providing a copy of the auditor's report to the Auditing Committee
  - An Audit engagement letter is on file for 2008-2023; renewal is annual
- Attending the Summer Planning Meeting in June and the SACRAO Annual Meeting in February
- Coordinating with the Treasurer-Elect in the outgoing year to ensure a smooth transition

## ***Calendar***

### **January, prior to election**

- As Treasurer-Elect, work with the outgoing Treasurer to become familiar with MemberClicks, PayScape, and other tools used by the Treasurer. Transfer passwords for all corporate business, banking, and [treasurer@sacrao.org](mailto:treasurer@sacrao.org) accounts, and establish new passwords, if necessary
- Initiates contact with the internal auditor prior to leaving office; introduce Treasurer-Elect

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)

- Coordinate with the outgoing Treasurer for access to the SACRAO bank accounts. Update address and signature cards as necessary for new Treasurer and President-Elect, and remove outgoing Treasurer and Immediate Past President; Also, update LAC account signature cards as necessary when the account is transferred to alternate year LAC
- Remove the former Treasurer's access only after the incoming Treasurer feels comfortable with the new responsibilities
- File annual report with Commonwealth of Kentucky Secretary of State

### **March**

- Submit final financial statement (*prior fiscal year*) and approved budget (*new fiscal year*) to VP for Communication & Recognition for the May e-Newsletter (*deadline generally April 10*)
- Obtain a final financial report from Annual Meeting LAC Chair or Treasurer from the preceding annual meeting; Request a return of the checkbook and debit card for the LAC account and transfer any remaining balance to the primary SACRAO accounts minus the \$5,000 seed money for the next LAC
- Coordinate the annual audit with our independent auditor so that the IRS Form 990 can be completed by the May deadline and the audit reported on at the Summer Planning Meeting; External auditors usually file for an extension

### **April**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Members and other recognition awards
- April 15 - quarterly financial statement due to Auditing Committee, if requested

### **May**

- May 1 – Membership renewals are sent; Plan for additional time to address questions and receive and process check renewals
- Post dues payments, deposit checks, and update files (a continuous process – all year round)
- May 15 - deadline for filing the Federal Income Tax form; The CPA/auditor will usually file appropriate extension paperwork to complete the return in June or July
- Work with LAC Chair and President to ensure that a Conference Budget will be ready for preliminary review at SPM

### **June**

- Prepare financial statements and attend the Summer Planning Meeting of the Executive Committee.
- Request the LAC Treasurer/Finance Chair to report all income and expenses for the previous calendar year to use in filing federal income tax; An accounting of income and expenses should accompany any return to SACRAO or request for additional funds
- Submit nominations for AACRAO leadership positions

### **July**

- July 15 - quarterly financial statement due to Auditing Committee, if requested. Include electronic copies of the annual tax return and audit
- Submit information to VP for Communication & Recognition for the July e-Newsletter (*deadline generally July 10*)
- The Treasurer will provide the Auditing committee access to the One Drive folder(s) or other SACRAO-utilized cloud-based platform folder(s) containing the financial records/documents for the Local Arrangements Committee (LAC) and the Jennings & Cook Final Audit Report by mid-July

## **August**

- Renew SACRAO liability insurance. Insurance is with Traveler's

## **September**

- Submit information to the VP for Communication & Recognition for the November Newsletter (deadline generally September 10)

## **October**

- October 15 - the quarterly financial statement is due to Auditing Committee, if requested
- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (generally due November 1)
- Ensure PayScape account for conference registrations is tied to the associated checking account; LAC Chair should be provided as a point of contact on the account

## **December**

- Transition the account for the Annual Meeting LAC one and a half years in advance of the conference; Arrange for completion of the signature card for the new account, to usually include the Treasurer, Treasurer-Elect, LAC Chair, and LAC Treasurer
- Monitor the LAC accounts (a continuous process – all year round)
- Prepare budget recommendations for next year. In conjunction with the current President, contact Vice Presidents and committee chairs for budget proposals
- Checks and accompanying documents that have not cleared by the end of the calendar year should be included with the month it cleared

## **January**

- Prepare December 31 financial statements, proposed budget, and any changes to dues structure for next year for presentation to the membership at the annual Business Meeting
- The Treasurer will provide the Auditing committee access to the One Drive folder(s) or other SACRAO-utilized cloud-based platform folder(s) containing the financial records/documents for the SACRAO Association by early January. The Auditing Committee will review these documents mid-to-late January
- Request the LAC Treasurer/Finance Chair to report all income and expenses for the previous calendar year to use in filing federal income tax. An accounting of income and expenses should accompany any return to SACRAO or request for additional funds
- Outgoing year - Coordinate with the Treasurer-Elect to ensure smooth transition of duties and records

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Meet with the Auditing Committee to audit the general ledger, authorizations for expenditures, bank statements, and checkbook, both the SACRAO main account and the LAC account for the previous calendar year. Provide committee members with copies of the annual audit
- Present a financial report, proposed budget, and any changes to dues structure to the membership at annual Business Meeting
- Meet with the LAC Treasurer of next year's conference to review procedures for transactions, records-keeping, bank accounts, etc., consistent with the Treasurer's procedures and acceptable to the Auditing Committee. Coordinate with LAC Finance chair to review and maintain the bank account used for collecting registration payments
- Receive the latest Executive Committee Procedure Manual update from the Immediate Past President

## **Treasurer-Elect**

The Treasurer-Elect is a non-voting member of the Executive Committee and serves for an elected term of one year, which begins at the annual business meeting. The Treasurer-Elect's position requires a three-year commitment and institutional support as this officer succeeds in becoming the association's Treasurer for a two-year term. Should the Treasurer-Elect not be able to complete the term of office, the Nominations and Elections Committee will nominate a slate of nominees and conduct a special election to fill the vacancy for the remainder of the unexpired term.

### ***Responsibilities***

It is the expectation of the Treasurer-Elect to shadow the treasurer for the year. The Treasurer-Elect should be actively involved in the Executive Committee meetings to gain knowledge of SACRAO business processes and practices. Ideally, the Treasurer and Treasurer-Elect will meet several times throughout the year to pass on knowledge of SACRAO business processes and procedures and discuss/show the tools utilized in the role.

Special requirements for this office holder include:

- Knowledge of computer and banking services to print and maintain bookkeeping software, financial statements, and reports is preferred. Alternatively, a willingness to learn
- Logical and communicative decision-making
- Transparency, accountability, and willingness to work as part of a team
- Institutional or personal computer support to maintain and process financial records
- Ensure a successful and smooth transition within the financial operations of the association
- Convenient access to a branch of SACRAO's banking institution (*currently Wells Fargo*)

Attendance at the SACRAO Annual Meeting in February and the SACRAO Summer Planning Meeting in June is required. SACRAO pays expenses for the Summer Planning Meeting. Institutional support is essential for this position.

## ***Calendar***

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Coordinate with Treasurer for access to the SACRAO bank accounts

### **April**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Members and other recognition awards.

### **May**

- Work with Treasurer, LAC Chair, and President to ensure that a Conference Budget will be ready for preliminary review at SPM
- Assist with posting dues payments, deposit checks, and update files (a continuous process – all year round)



## **June**

- Assist with the preparation of financial statements and attend the Summer Planning Meeting of the Executive Committee
- Submit nominations for AACRAO leadership positions.

## **July**

- In conjunction with the Treasurer, submit information to VP for Communication & Recognition for the July e-Newsletter (*deadline generally July 10*)

## **September**

- Submit information to VP for Communication & Recognition for the November Newsletter (*deadline generally September 10*)

## **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*)

## **January**

- Work with the Treasurer to prepare December 31 financial statements, proposed budget, and any changes to dues structure for next year for presentation to the membership at the annual Business Meeting
- Outgoing year - Coordinate with Treasurer to ensure smooth transition and setup of accounts.

## **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- Meet with the Auditing Committee for audit of general ledger, authorizations for expenditures, bank statements, and checkbook, both for the SACRAO main account and the LAC account for the previous calendar year; Provide committee members with copies of the annual audit.
- Meet with the LAC Treasurer of next year's conference to review procedures for transactions, records-keeping, bank accounts, etc., consistent with the Treasurer's procedures and acceptable to the Auditing Committee; Coordinate with LAC Finance chair to review and maintain the bank account that is used for collecting registration payments.
- Receive the latest update of the Executive Committee Procedure Manual from the Immediate Past President.

# **Corporate Partner Liaison (CPL)**

The president appoints the Corporate Partner Liaison (CPL) for a term of three years. The CPL is required to be an active institutional member of SACRAO, have previous experience as a Local Arrangements Committee (LAC) Chair, LAC corporate partner liaison, past-president, or other engagement with corporate members and serves as a non-voting Executive Committee member.

## ***Responsibilities***

The CPL will be responsible for:

- Maintaining and building relationships with existing corporate partners
- Cultivating relationships with new corporate partners supporting emerging technology and trends in admissions and registrar fields
- Maintain regular communication with corporate partner contacts
- Maintain, within the MemberClicks SACRAO membership database, key information concerning corporate partner contacts, their records of participation in the annual meeting, and sponsorship levels
- Provide corporate partner information to the annual meeting LAC and Corporate Partner (CP) Chair to assist them with determining appropriate sponsorship levels based on the meeting location and budget
- Advise the annual meeting LAC and CP Chair on corporate partner participation and serve as a resource for each annual meeting LAC and CP Chair
- To secure the best service and pricing, maintain a list of conference service providers and related costs at each annual meeting
- Coordinate, with the LAC Chair and Vice President for States/Regionals and Membership, the adjustment of Corporate Partner annual dues invoices for those who choose to sponsor the annual meeting; Sponsorship level includes annual dues amount regardless of sponsorship level for the prior year (*Ongoing whenever a Corporate Partner decides to sponsor the annual meeting*)

Attendance at the SACRAO Annual Meeting in February and the SACRAO Summer Planning Meeting in June is required. SACRAO pays expenses for the Summer Planning Meeting.

## ***Calendar***

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- After the Annual Meeting, review corporate partner registrants and ensure the Memberclicks membership database is updated appropriately; Update membership expiration date to the following year, if corporate sponsorship includes annual membership dues (*this should be done prior to membership renewal notices going out in May*)

### **April**

- Provide updates to the Newsletter Editor for the May Newsletter
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

### **June**

- Attend Summer Planning Meeting at SACRAO's expense (*see travel section*); Assist President-Elect as necessary during Program Committee meeting
- Submit nominations for AACRAO leadership positions

### **August**

- Submit nominations for AACRAO honorary membership

### **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*).

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).
- After the Annual Meeting, review corporate partner registrants and ensure the Memberclicks membership database is updated appropriately; Update membership expiration date to the following year, if corporate sponsorship includes annual membership dues (*this should be done prior to membership renewal notices going out in May*)

# **Past Local Arrangements Committee Chair (PLAC)**

The Past Local Arrangement Chair (PLAC) is required to be an active institutional member of SACRAO and have previous experience as a past LAC chair.

## ***Responsibilities***

The Past Local Arrangement Chair will be responsible for:

- Serving as a non-voting member of the Executive Committee
- Acting as an advisor, consultant, and mentor for both the current and incoming LAC chairs

Attendance at the SACRAO Annual Meeting in February and the SACRAO Summer Planning Meeting in June is required. SACRAO pays expenses for the Summer Planning Meeting.

## ***Calendar***

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)

### **April**

- Provide updates to the Newsletter Editor for the May Newsletter
- Submit nominations for the SACRAO Executive Committee and the Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Member and other recognition awards

### **June**

- Attend Summer Planning Meeting at SACRAO's expense (*see travel section*); Assist President-Elect as necessary during Program Committee meeting
- Submit nominations for AACRAO leadership positions

### **August**

- Submit nominations for AACRAO honorary membership

### **October**

- Submit nominations for AACRAO Awards of Recognition for State/Regional Professional Activity (*generally due November 1*).

### **February**

- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*).

# **Local Arrangements Chair**

Local Arrangements responsibilities are performed by a committee which generally includes 20-30 people. The Chair of the Local Arrangements Committee (LAC) is responsible for coordinating the numerous activities related to the Annual Meeting with the exception of planning the program, which is the responsibility of the President-Elect.

## ***Responsibilities***

The responsibilities of the LAC Chair include:

- Serving on the Executive Committee as an ex-officio non-voting member beginning in February the year before the Annual Meeting is coordinated
- Attending the Summer Planning Meeting a year and a half (*approximately 20 months*) prior to the Annual Meeting for which responsibility has been accepted
- Appointing Chair and members for hospitality, registration, exhibits, finance, and other subcommittees
- Consulting with the SACRAO Treasurer to ensure that LAC finances are handled in a manner consistent with the accounting procedures of the organization
- Following guidelines of conference special details as outlined in the General Policies and Guidelines of SACRAO
- Hosting the Summer Planning Meeting for the Executive and Program Committees at the conference hotel (*approximately eight months before the Annual Meeting being coordinated*)
- Coordinating Summer Planning Meeting room assignments with the President (*see travel section*), as well as travel information, meeting rooms, and meal plans and communicating to President and President-Elect in adequate time to inform all who will attend
- Preparing an estimated conference budget and presenting it for approval to the Executive Committee at the Summer Planning Meeting
- Monitoring the progress of LAC subcommittees, which includes continuous contact with Subcommittee Chairs to ensure timetables and responsibilities are being met
- Scheduling LAC meetings to update information and to assign possible additional duties; detailed Minutes should be maintained for future reference and as information for President, President-Elect, and the LAC for the next Annual Meeting
- Participating in conference calls with the President and President-Elect, as necessary, to finalize Annual Meeting planning
- Determining the distribution of complimentary rooms in coordination with the President and working to ensure the hotel's provision of special services for VIPs
- Representing the LAC on the Program and Executive Committees; continual contact is critical
- Serving as a resource to the next LAC Chair at a briefing session during the Annual Meeting
- Sending letters/notes of appreciation within two weeks after the Annual Meeting
- Submitting a final report to the next LAC Chair, the President, President-Elect, Immediate Past President, and Executive Committee concerning finances, registrations, general observations, problems, and recommendations, as soon as financial accounts are closed but no later than the annual AACRAO meeting in April
- Updating the LAC Manual and forwarding the updates to the next LAC Chair, the President, President-Elect, and Immediate Past President

# **Calendar**

NOTE: A more detailed LAC planning calendar can be found in the LAC Manual. The timelines are suggested but are dependent on the individual LAC circumstances.

## **Two Years Prior to Meeting:**

### **February**

- Appointment by SACRAO President
- Begin interviewing/selecting Subcommittee Chairs
- Send dates to VP for IT for inclusion on the Conference tab of the SACRAO website
- Work with President and Past-President to finalize all hotel and conference center contracts; Ideally, contracts should be in place two years out
- Thoroughly familiarize yourself with hotel and conference center policies and costs to ensure adequate and accurate planning during the next two years

### **June**

- Attend Summer Planning Meeting (*expenses covered by SACRAO*)
- Submit nominations for AACRAO leadership positions

### **July**

- Identify LAC Committee Chairs (*20 months in advance*) and assign duties as listed in the most recent LAC manual
- Begin working with LAC Publicity Chair and local convention and visitor's bureau to prepare publicity to be presented at the prior year's annual meeting

### **August**

- Submit nominations for AACRAO honorary membership and SACRAO recognitions and awards

### **September**

- Develop the LAC logo to be included in the conference program and *SACRAO Journal* at the prior year's annual meeting

### **November**

- Provide anticipated budget costs for the Summer Planning Meeting to the President and Finance Committee so that the Summer Planning and the Executive Committee Travel lines will be accurate in the budget
- Ensure the \$5,000 advance is in the LAC account from SACRAO to cover initial LAC expenses and work with SACRAO Treasurer to assume responsibility for the LAC account
- Finalize publicity for the February meeting; Secure volunteers to work the publicity booth at the annual meeting; Collect promotional materials and door prizes

### **December**

- Finalize the appointment of Committee Chairs
- Begin work on the Conference website, with input from VP for IT

## **Year Prior to the Annual Meeting being coordinated:**

### **January Prior to Conference**

- Draft preliminary conference budget

### **February Prior to Conference**

- Receive briefing by current LAC Chair and closely observe subcommittees at work; Adjust preliminary conference budget accordingly; Arrange for committee chairs to “shadow” their counterparts at the annual meeting
- Attend appropriate meetings during the Annual Meeting (*see table under Annual Meeting Responsibilities at the beginning of the Executive Committee section*)
- Promote the next SACRAO conference at exhibit during Annual Meeting and make a presentation at SACRAO Breakfast

### **March Prior to Conference**

- Hold a Local Arrangements Committee Meeting in spring, ideally to include a tour of the conference facility and hotel
- Bring up the Conference Website shell with initial information about the area and the hotel

### **April Prior to Conference**

- If attending the AACRAO Annual Meeting, attend the SACRAO Executive Committee meeting, if held
- Submit promotional information about Annual Meeting to the Newsletter Editor for the May Newsletter (*deadline generally April 10*)
- If budgeted, order complimentary, promotional shirts for the Executive Committee members so that shirts may be worn during various state meetings; Distribute shirts at Summer Planning Meeting
- Submit nominations for the SACRAO Executive Committee and Nominations and Elections Committee
- Submit nominations for SACRAO Honorary Membership and other recognition awards

### **May Prior to Conference**

- Work with the President and President-Elect to finalize plans and the budget for the summer planning meeting

### **June Prior to Conference**

- Host Summer Planning Meeting at SACRAO’s expense (*see travel section*). Attend Program and Executive Committee meetings and present the proposed LAC budget to the Executive Committee
- Enhance the conference website with a tour, transportation, and tentative schedule information
- Assist President-Elect in checking the Preliminary Conference Program section
- Finalize preliminary conference budget
- Submit an article to the Newsletter Editor for the Summer e-Newsletter (*deadline generally July 10*)
- Submit nominations for AACRAO leadership positions

### **August Prior to Conference**

- Begin working with the hotel to ensure the room reservation system will be ready to link to the website in October
- Ensure that registration, finance chairs, Treasurer, and VPIT, begin work on the conference registration system and PayScape for an October go-live
- Ensure the Corporate Partner chair prepares exhibitor information, including contract and sponsorship details
- Submit nominations for AACRAO honorary membership

### **September Prior to Conference**

- Submit an article to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)

### **October Prior to Conference**

- Go live with conference registration and hotel by the end of the month; Continue expanding the website with more information
- Send an e-blast to the membership announcing the conference and opening registration and hotel reservation system by Nov 1, and send promotional materials to prospective Corporate Partners
- Conduct another Local Arrangements Meeting in the fall

### **November - December Prior to Conference**

- Weekly monitoring of all aspects of LAC
- Send an e-postcard in December

### **January of Conference Year**

- Weekly teleconferences with the President, President-Elect and regular contact with committee chairs
- Send an e-blast reminder to membership about conference registration deadline
- Closely monitor conference registrations and room reservations; Arrange for extra rooms or an overflow hotel if necessary; As appropriate, extend deadlines for “early bird” registration and hotel room reservations (*if possible*)
- Secure names of scholarship recipients from VP for Communication & Recognition for hotel reservations/registrations for the annual conference

### **February of Conference Year**

- Send Annual Meeting web content to VP for Information Technology
- All LAC committees serve in designated roles during conference
- Host lunch meetings of current and incoming LACs; chairs meet with counterparts to discuss responsibilities
- LAC Finance Chair meets with upcoming LAC Finance Chair to go over PayScape setup and reporting
- Attend the Executive Committee meetings (*Saturday and Wednesday/Thursday*).

### **Year following Annual Meeting:**

#### **March After Conference**

- Prepare and mail “Thank You” notes

#### **April After Conference**

- Close accounts
- When the LAC Treasurer closes out the books for the year and submits a check to the SACRAO treasurer, the checkbooks and any debit cards should follow within 30 days
- Present final report to President, President-Elect, Immediate Past President, and the Executive Committee

#### **May After Conference**

- Update LAC Manual and distribute it to the next LAC Chair, the President, President-Elect, and Immediate Past President



# Committees

The various committees of SACRAO are the means by which SACRAO functions. The level and quality of activity of committee members directly affect the success of SACRAO. The Association has a strong tradition of active, able participation on its committees by volunteers from the membership.

## **Auditing Committee**

This is a standing committee, established in the Bylaws, that is responsible for developing the procedures and guidelines to be followed by the Treasurer and LAC Finance Chairs in carrying out the financial affairs of SACRAO. The Committee annually reviews SACRAO's financial records, including LAC records, and submits its findings to the membership at the Annual Meeting. The President appoints the Auditing Committee Chair and its members for one year. The Treasurer serves as an ex-officio member of the Committee. If a Committee member cannot fulfill assigned duties, the Chair may recommend to the President, an individual to fill the vacancy.

Members of the Auditing Committee should hold no other elected or appointed position within SACRAO during the year of service on the Auditing Committee (*this includes N&E, LAC, EC, and/or Program Chair*).

## ***General Responsibilities of the Chair***

The Chair of the Auditing Committee is responsible for:

- Acting as a liaison between the Auditing Committee and the Executive Committee
- Attending the Annual Meeting, including the Executive Committee meetings, as requested
- Presenting an annual report and the auditor's report to the membership at the Business Meeting
- Conducting committee business

## ***Specific Committee Duties***

The Chair must attend the Annual Meeting in February and may schedule a time for the committee to meet during the conference. The committee members will receive an email with the meeting date, place, and time and advance information about the issues to be discussed. The President, Treasurer, and incoming chair are copied on the email and are invited to attend the meeting.

The Treasurer will provide the committee access to the One Drive folder(s) or other SACRAO-utilized cloud-based platform folder(s) containing the financial records/documents for the Local Arrangements Committee (LAC) and the Jennings & Cook Final Audit Report by mid-July. The Auditing Committee will review these documents in early August, and the chair summarizes the findings to the SACRAO President and the Auditing Committee members.

The Treasurer will provide the committee access to the One Drive folder(s) or other SACRAO-utilized cloud-based platform folder(s) containing the financial records/documents for the SACRAO Association by early January. The Auditing Committee will review these documents mid-to-late January. The chair will submit the Auditing Committee Report, which includes findings from the August meeting to the SACRAO president before the conference and present the report at the annual meeting.

The Auditing Committee will sample the following items:

- Checks against receipts
- Checks against bank statements
- Financial statement balances against bank statements

- Invoices against deposits
- Computer printouts of deposits and checks against actual checks, deposits, and receipts
- General condition (organization) of the records

In addition to the required annual review, the Committee may, at its discretion, conduct a quarterly review of the financial records and report findings to the Executive Committee. The Committee Chair may request from the Treasurer electronic copies of documentation of sample transactions for consideration by the Committee.

Committee recommendations will be recorded and given to the President, who will request the Chair to present them to the SACRAO membership. The Executive Committee will discuss the recommendations at its next meeting and, if appropriate, implement the action or put the issue to a vote by the membership at the next Annual Meeting.

As appropriate, the Chair may submit articles on the committee's activities for inclusion in the Newsletter. The VP for Communication & Recognition shall notify the Chair of deadlines for each edition.

Copies of all correspondence will be sent to the President, Treasurer, and appropriate Executive Committee members or committee chairs. SACRAO electronic letterhead may be requested from the Secretary, if needed.

The Chair will send thank you notes to committee members immediately after the Annual Meeting.

The outgoing Chair will ensure the new Chair has electronic access to all minutes, working notebooks, records, etc., by March 1. The new Chair will receive an electronic *SACRAO Procedures Manual for Executive Committee and Committee Chairs* from the Immediate Past President. The outgoing Chair is encouraged to be available as needed to respond to inquiries from the new Chair.

## **Constitution and Bylaws Committee**

This is a standing committee, established in the Bylaws and chaired by the Immediate Past President, responsible for reviewing the Constitution and Bylaws and recommending changes to the membership at the Annual Meeting. Suggested changes come from membership concerns or evolve from committee deliberations.

## **Distinct Populations and Programs**

This committee is responsible for developing program sessions and workshops relating to access and equity, campus-to-campus affairs, international affairs, veteran affairs, and athletic affairs. This committee reports to the Program Vice President for Distinct Populations and Programs.

## **Federal Advocacy**

The President appoints this committee to assist SACRAO and provide guidance in regard to federal regulations and other federal initiatives and reports to the President.

## **Finance Committee**

This committee is a standing committee established in the Bylaws and comprised of the President, President-Elect, Immediate Past President, and Treasurer, with the outgoing Treasurer as ex-officio. It oversees the financial activities of SACRAO, develops the annual budget for approval by the Executive Committee, annually reviews the investments and directs the Treasurer on how to manage the CDs, and proposes and recommends

to the Executive Committee changes in policy and procedures related to budgeting, approval of expenditures, investments, and dues.

## **Local Arrangements Committee**

This standing committee, established in the Bylaws, is responsible for planning and carrying out all activities related to the Annual Meeting, except for the program. The committee's charge includes financing (including an advance from the SACRAO Treasurer), hotel arrangements, hospitality, equipment, registration, and exhibits. The committee works with the President and the President-Elect, who oversees the program for the Annual Meeting. The Chair serves as an ex-officio member of the Executive Committee. The Local Arrangements Committee usually numbers well over twenty people, serving on six or more subcommittees.

## **Membership Relations Committee**

This committee is a standing committee appointed by the President, responsible for assisting the Vice President for States/Regionals and Membership in increasing membership in SACRAO and planning and coordinating the First-Time Attendee (FTA) Orientation/Reception at the Annual Meeting.

### ***Calendar for the Chair***

#### **February**

- Two weeks before the conference, obtain FTA email addresses from the LAC registration chair; Send FTAs a welcome email and notification of the FTA orientation/reception
- Plan orientation reception with Vice President for States/Regionals and Membership
- Purchase drawing prizes for FTA questionnaire winners
- Attend and assist with FTA Orientation/Reception at the Annual Meeting
- Meet with the Vice President for States/Regionals and Membership and Membership Relations Committee (*outgoing and incoming*) to evaluate FTA Orientation/Reception and begin planning for next year

#### **March**

- Assist in identifying prospective members and send names and addresses to the Vice President for States/Regionals and Membership

#### **April**

- Attend the Annual Meeting of AACRAO, if possible; Observe any special sessions or services provided by AACRAO for First-Time Attendees

#### **May**

- Review materials used at the most recent FTA Orientation/Reception; Send proposed changes to the Vice President for States/Regionals and Membership.

#### **November**

- With the Vice President for States/Regionals and Membership, finalize plans for the FTA Orientation/Reception at the upcoming Annual Meeting

#### **January**

- Draft and email all identified new SACRAO attendees (*obtain the list from LAC*), reminding them of the special events for first-time conference attendees; Attach the *First Time Attendee Handbook* (*obtained*

from the outgoing committee chairperson or Vice President for States/Regionals and Membership and online)

- Coordinate a schedule with the other committee members so the Member Relations table will be staffed during the conference

## **February**

- Attend and assist with FTA Orientation/Reception at the Annual Meeting
- Meet with Vice President for States/Regionals and Membership and the Membership Relations Committee (*outgoing and incoming*) to evaluate the FTA Orientation/Reception for future planning

# **Nominations and Elections Committee**

This is a standing committee established in the Bylaws and elected by the membership. The Chair is the candidate receiving the largest number of votes in the previous year's election and who served as Chair-Elect for that year. This committee meets via video-conferencing in the fall.

## ***Responsibilities***

The five committee members are responsible for:

- Canvassing the membership for nominees for expiring Executive Committee positions and the Nominations and Elections Committee for the next year
- Selecting a slate of well-qualified individuals as representative of the diverse membership as possible
- Presenting the slate for the membership's consideration at the Annual Meeting
- Submitting candidates, including biographical sketches, for the Nominations and Elections Committee online ballot, which will be made available to the membership by the start of the annual meeting

## ***Calendar for the Chair***

### **October of Chair-Elect Year**

- Chair-Elect observes the selection process of nominees for next year's ballot and is prepared to supervise the process in the Chair's absence

### **December of Chair-Elect Year**

- Chair-Elect writes N&E nominees asking for biographical profiles of professional activities for the online ballot; arranges for a group photo at Annual Meeting

### **January of Chair-Elect Year**

- Chair-Elect sends a draft of the nomination form to the President for review; Verify offices to be filled for next year
- Chair-Elect sends N&E nominee names, vitae, and photos to VP for Information Technology for web ballot so that online voting may begin at the Annual Meeting (*web balloting deadline generally May 31*).

## **February**

- Work with the VP for IT to request a *Call for Nominations* along with the directions for voting on the website and notify the membership of the September 1 deadline (*adjust the date if September 1 is on the weekend*)
- Attend Annual Meeting and distribute information to conference attendees regarding online voting for the N&E Committee; Promote online voting at the meeting
- Record and plan for any revisions to the Constitution and Bylaws that may affect the nomination and election process

## **March**

- Send article to the Newsletter Editor for inclusion in the May Newsletter (*deadline generally March 10*).
- Set up a database for nominations as they are received; Nominations should be sorted by name, office, and state and include on the report: admissions/records background, level of institution (*4-year/2-year/professional school*), public or private institution, ethnicity, and gender.

## **April**

- Write a *Call for Nominations* message for an email blast to the membership by the VP for Communication and Recognition. This should include a reminder about the September 1 nomination deadline and the directions for the voting process (*adjust the date if September 1 is on the weekend*)

## **May**

- Turn off web balloting after the May 31 N&E voting deadline

## **June**

- Tabulate the results of the N&E committee ballot; Notify SACRAO President of the top four nominees prior to the Executive Committee Summer Planning Meeting; include a voting summary (*number of votes cast with historical data for comparison*)
- Communicate with those elected to the N&E Committee (*top four*); notify the one with the highest number of votes of the election as Chair-Elect; inform the first alternate of this position; Include a calendar for the committee's work and survey the members for a fall meeting; Set the meeting date as soon as possible to avoid later calendar conflicts
- Communicate with those on the N&E Committee ballot who were not elected
- NOTE: If an elected member becomes ineligible between the election and the meeting, the alternate will fill the vacancy

## **July**

- Work with the VP for IT to get an additional *Call for Nominations* message on the website and an additional e-blast and remind the membership of the September 1 deadline (*adjust the date if September 1 is on the weekend*)
- Arrange a video conference meeting for all committee members
- Notify N&E Committee members of the date/time/link for the meeting

## **September**

- Close nominations after the September 1 deadline
- Confirm with the Vice President of States/Regionals and Membership that all nominees' institutions are current in their SACRAO dues
- Following the nominations deadline date, notify nominees of their nominations; Send each nominee confirmation of the position(s) for which the nominee has been nominated and the appropriate job description(s) (*including position calendar*); Notify each member by email or phone that has either accepted, declined, or is still undecided about a position they have been nominated for; Each group will have a different email forwarded to them
- Send a summary of the nominations received to the N&E Committee members, President and President-Elect
- Consult with the President to discuss issues related to the performance of the Executive Committee over the past year and to address perceived needs and challenges facing the organization and the Executive Committee for the immediate future; Discuss any critical skill sets required for certain key positions, such as Treasurer, Vice President for States/Regionals and Membership, and Vice President for Information Technology; This conversation is meant to allow for constructive dialog between the

Executive Committee and the N&E Committee prior to the N&E Committee deliberations on officer nominations

- Contact candidates being considered for an officer position and ask that they be available on the date of the N&E Committee Meeting for a telephone confirmation if selected

### **October**

- Supervise meeting of N&E Committee; encourage Chair-Elect to make observations for preparations for next year; The Chair-Elect should be prepared to supervise the process in the Chair's absence; Ensure that all provisions in the Constitution and Bylaws regarding the nominations and elections process are followed
- Seek a balanced slate of officers (*type of institution, gender, race, state*). Choose alternates (*if possible*) for all officer positions and one for the N&E Ballot
- Get telephone confirmation from officer nominees selected before the committee meeting concludes
- Notify the SACRAO President and President-Elect of nominees for the Executive Committee and the slate of N&E candidates
- Following the meeting, communicate with the officer nominees and those selected to be on the slate of N&E Committee ballot
- Communicate with those not selected, thanking them for their willingness to serve
- Send the membership an email blast announcing the slate of officers and N&E Committee ballot names

### **November**

- Send thank you letters to the current committee members
- Send the slate of Executive Committee nominees and N&E Committee ballot names to the Newsletter Editor for inclusion in the November Newsletter to satisfy the constitutional provision requiring that the membership receive thirty days notification before the vote at the annual Business Meeting (*deadline generally September 10*).

### **December**

- Contact the President for the order of business at the annual Business Meeting

### **February**

- Present report at the annual Business Meeting
- Send N&E Committee procedures and other information to the new Chair

## **Professional and Personal Development Committee**

The Professional and Personal Development Committee is a program committee that reports to the Program Vice President for Professional and Personal Development. The committee is responsible for developing programs and workshops addressing professional growth and development, personal and professional issues and their interactions, staff development, and office and staff management issues. Other topics to address include professional concerns, such as legal issues, that span the areas represented in SACRAO's membership. The Committee may also engage in research related to the professional growth of SACRAO members and may deal with matters related to the work of SACRAO members. The chair assists with the recruitment and logistics of the annual meeting poster presentations, as needed.

## **Recognition and Awards Committee**

This is a standing committee appointed by the President, responsible for refining the guidelines and criteria for the Executive Committee's use in selecting individuals for formal recognition (*Distinguished Service Award*,

*Certificate of Appreciation, and Honorary Membership*). The committee solicits nominations from the membership from February to October 15 for the Distinguished Service Award, February to October 15 for Honorary Membership and Certificates of Appreciation, screens candidates according to established criteria, and recommends candidates for approval by the Executive Committee at their June Summer Planning Meeting, or by conference call in the fall. The Chair sends the nominations, including copies of the nomination forms, to the Executive Committee for review prior to the meeting. Awards are presented at the Opening Session of the Annual Meeting. This committee reports to the Vice President for Communication and Recognition.

Consideration for the Distinguished Service Award and Honorary Membership is based on contributions of institutional members only. While one of these awards may be presented to a corporate member who was formerly an institutional member, consideration for the award must be based solely on points earned while that individual was an institutional member.

Suppose an approved nominee becomes ineligible for Honorary Membership between the Summer Planning Meeting and the February conference when the Honorary Member status is conferred. In that case, the Honorary Membership status is rescinded. Individuals employed by organizations eligible for SACRAO Corporate Membership cannot be considered for Honorary Membership (*until such employment ceases*). The benefits of Honorary Membership are suspended if an Honorary Member becomes employed by an organization eligible for SACRAO Corporate Membership.

### **Point System Guide for Distinguished Service Award (DSA)**

This guide will determine the minimum qualifications for distinguished service to SACRAO. A minimum of 100 points must be earned through service. Exceptional contributions to SACRAO and/or the Admissions/Records profession may carry 0-50 points.

<b>Activities</b>	<b>Points per Year of Service</b>
President	20
President-Elect	15
Immediate Past President	15
Vice President	10
Secretary/Treasurer	10
VP for Communication & Recognition/SACRAO <i>Journal</i> Editor	10
Member-at-Large	6
LAC Chair/MOSIS LAC Chair	10
MOSIS Program/LAC Chair	8
Committee Chair (Program, Standing)	5
Committee Member (Program, Standing)	3
Session Presenter	4
Session Coordinator	2
Attend Annual Meeting	1
Publications	4
Exceptional Contributions	0 - 50

## **Records and Academic Services**

The Records and Academic Services Committee is a program committee that reports to the Program Vice President for Records and Academic Services. The committee is responsible for developing programs and workshops relating to:

- Academic Records

- Academic Progress and Graduation
- Academic Affairs
- Articulation agreements, transfer credit evaluation, non-traditional credit evaluation, military/veterans credit evaluation
- Commencement exercises, diploma practices
- Issues related to adult learners, the military and veterans (*including certifications*), students with disabilities, online and other distance education programs, certificate programs (*both undergraduate and graduate*), and learning communities
- Registration (*term, program, block, yearly*), orientation, academic advising support, degree audit, facilities management, event and academic scheduling (*policy, tools, processes*)
- Grading systems and processes, records management and retention, determination of academic standing, credentials fraud, records security, transcript practices, enrollment certification, athletic eligibility, veteran certification
- Federal and accreditation compliance issues
- Admissions publications
- Academic policies
- Academic catalogs, curriculum, and catalog management systems
- Academic calendaring
- Course/class schedules and bulletins, final exam schedules
- Student directories
- Office policy and procedures/documentation
- Communication strategies and tools

## **Recruitment, Admissions, and Enrollment Management**

The Recruitment, Admissions, and Enrollment Management Committee is a program committee that reports to the Program Vice President for Recruitment, Admissions, and Enrollment Management. The committee is responsible for developing programs and workshops relating to recruiting, admissions, enrollment management, retention, special services, and financial aid.

## **Resolutions Committee**

This is a standing committee appointed by the President responsible for preparing resolutions on issues and concerns and presenting them to the membership at the Wednesday Breakfast meeting.

## **Scholarship Committee**

The President appoints the Scholarship Committee and reports to the Vice President for Communication and Recognition. This committee would be responsible for awarding all scholarships. This committee solicits and reviews applications for the Student Pre-Professional Annual Meeting Scholarship and selects (*typically two*) recipients annually. This committee also solicits and reviews applications for the Individual Multicultural / Emerging Leader Annual Meeting Scholarship and selects (*typically four*) recipients annually.

## **The SACRAO Journal**

The general purpose of *The SACRAO Journal*, an annual publication, is to provide an opportunity to share with the SACRAO membership the interchange of ideas on topics of common interest.



The journal aims to publish articles on technological advances, innovative uses of computer software, new developments and best practices in records, admissions and enrollment management, and management theory. The *Journal* format is designed to encourage new writers to publish their manuscripts.

Preference is given to articles authored by SACRAO members. Active *Journal* Editorial Board members may not submit articles for publication; book reviews and commentaries by Board members may be published at the discretion of the Editor.

## ***Editorial Board***

The Editorial Board consists of six or more members appointed annually by the President. The Vice President for Communication and Recognition serves as an ex-officio member of the Board.

The SACRAO *Journal* Editorial Board, established in the Bylaws and appointed by the President, is responsible for publishing the official journal of SACRAO. The Board is responsible for:

- Soliciting and screening articles for the *Journal* and recommending revisions
- Exercising editorial control in publishing the *Journal* according to standards and procedures approved by the Executive Committee
- Selecting the Margaret Ruthven Perry Distinguished SACRAO Journalism Award for best-published article
- Informing the recipient of Margaret Ruthven Perry Distinguished SACRAO Journalism Award of expectation to present at the next Annual Meeting
- Reviewing and selecting the poster presentations for the annual meeting

## ***Responsibilities of the Editor***

The *Journal* Editor is appointed to a one-year term by the President and may be reappointed annually for a maximum of three years. The Editor reports to the Vice President for Communication and Recognition.

The *Journal* Editor has responsibility for:

- Serving as Chair of the Editorial Board
- Acknowledging the receipt of manuscripts and forwarding copies to Board members
- Contracting with the online publisher [ISSUU](#) and reading all proofs
- Obtaining emails for members, honorary members and friends of SACRAO from the Vice President of States/Regionals and Membership and emailing the publication
- Monitoring the content of the *Journal*
- Designing the *Journal* cover, including appropriate use of the SACRAO logo
- Producing the *Journal*, including the calendar
- Serving as the liaison between the *Journal* Board and the Vice President for Professional Development
- Reviewing the poster presentation submissions for the annual meeting
- Reporting to the Executive Committee through the Vice President for Professional Development

The *Journal* Editor makes a direct impact on the image of SACRAO and the professionalism of its membership. The *Journal* reflects the expertise of contributing authors, endorses valid research, and nurtures creativity and innovation. The *Journal* articulates the ideas and issues in the SACRAO professions and higher education.

The Editor and the Editorial Board must possess the skills and knowledge to evaluate research, professional writings, and the relevance of subjects submitted in manuscripts. The Editor, with assistance from the Editorial Board, must be able to judge scholarly writing and make constructive criticisms to ensure the quality of the *Journal*. The Editor should have institutional support for performing the substantial duties of the Editor.

# ***Calendar for the Editor***

## **November of Prior Year**

- The SACRAO President appoints an editor, and the Editorial Board

## **February**

- Meeting of the Editorial Board at the annual SACRAO meeting, at a Monday or Tuesday breakfast meeting
- Editor solicits articles/manuscripts from the membership
- Editor submits articles to the Newsletter Editor for the May Newsletter requesting manuscripts for potential publication (*deadline generally April 10*). A “call for manuscripts” also may be sent through an e-blast to the membership

## **March**

- The Editor writes to highly-rated presenters at Annual Meeting to request manuscripts for the *Journal* (*Obtains session evaluations from the Evaluations Committee Chair*)

## **April**

- Editor submits a report, through the Vice President for Professional Development, to the Executive Committee regarding progress and confirms the projected budget (*contact Treasurer, if necessary*)

## **May**

- Editor sends copies of articles to Editorial Board for their critique as they are received

## **June**

- Editor submits a report, through the Vice President for Professional Development, to the Executive Committee regarding the status of the *Journal*
- Editor submits an article to the Newsletter Editor for the July e-Newsletter (*deadline generally June 10*)

## **July**

- Editor secures proposal for publishing the *Journal*

## **August**

- First drafts are ordinarily due August 31

## **September**

- Editor submits article to the Newsletter Editor for the November Newsletter (*deadline generally September 10*)
- Editor notifies authors of articles regarding the acceptance status of their articles
- *Journal* Board reviews first drafts and submits suggested revisions to authors by September 30

## **October**

- Editor begins finalizing articles with Editorial Board

## **November**

- Authors submit final drafts by November 30
- Works with the Program VP for Professional and Personal Development and the *Journal* Board to approve poster presentations for the annual meeting

## **December**

- Editor prepares articles for forwarding to the publisher. All copy should be delivered to the publisher by December 30
- Editor requests membership emails from Vice President for States/Regionals and Membership
- Works with the Program VP for Professional and Personal Development and the *Journal* Board to approve poster presentations for the annual meeting

## **January**

- Publisher prepares *Journal*; When appropriate, make arrangements with the VP for Communication & Recognition.
- Editorial Board selects a recipient of the Margaret Ruthven Perry Distinguished SACRAO Journalism Award, and Editor prepares the framed certificate (*usually includes issue cover also*) for presentation at the Annual Meeting
- Editor emails *Journal* to membership in time to be received just prior to the Annual Meeting
- Editor sends PDF of *Journal* to the VP for Information Technology, for addition to *Journal* Archives on the SACRAO website
- Editor sends a press release following publication to institutions of authors, Chronicle of Higher Education, AACRAO, and other outlets
- Editor submits annual report to the Executive Committee through the VP for Communication & Recognition

## **February**

- Editor presents *Journal* Award at the Opening Session of the Annual Meeting and makes a brief report at the Business Meeting

## ***Solicitation of Manuscripts***

A call for manuscripts should be printed in the SACRAO Newsletter and made at the Annual Meeting. The Editor should work with the President-Elect, Vice Presidents, and Chairs of Program Committees in contacting Annual Meeting presenters to invite them to submit their presentations for publication. It is hoped that the Editorial Board will have ten manuscripts for consideration at any time.

### **Format of Manuscripts**

Manuscripts must be prepared and submitted according to instructions in the *SACRAO Journal* on the "Information for Authors" page.

## ***Margaret Ruthven Perry Distinguished SACRAO Journalism Award***

This award is presented annually to the author of the paper that the Editorial Board selects as the best paper published in the *SACRAO Journal*. Margaret Ruthven Perry, the first Editor of the *Journal*, initially established the award. The award was named in her honor after completing her service as Editor.

## **Site Selection Committee**

This is a standing committee consisting of Past-Presidents and SACRAO LAC Chairs appointed by the President and chaired by the Immediate Past President. It is responsible for soliciting bids for SACRAO meetings. The committee works with local SACRAO members to solicit bids from hotels, negotiate terms, and present a contract to the Executive Committee for review and ultimate approval. The committee may also recommend a LAC Chair. Target dates for signing SACRAO contracts are three years out.

## Site Rotation Plan

In February 1994, the SACRAO Executive Committee approved a three regions plan. These are Eastern (FL, GA, NC/SC, PR, VA/WV), Central (AL, KY, MS, TN), and Western (AR, LA, OK, TX). West Virginia was added to the Eastern region in 2016.

<b>Western</b>	<b>Eastern</b>	<b>Central</b>
AR, LA, OK, TX	FL, GA, NC/SC, PR, VA, WV	AL, KY, MS, TN
<b>Rotation Years for Bids</b>		
2004 (Fort Worth, TX)	2005 (Myrtle Beach, SC)	2006 (Lexington, KY)
2007 (Little Rock, AR)	2008 (Williamsburg, VA)	2010 (Chattanooga, TN)
2009 (New Orleans, LA)	2011 (Atlanta, GA)	2012 (Covington, KY)
2013 (San Antonio, TX)	2014 (Raleigh, NC)	2015 (Mobile, AL)
2016 (Oklahoma City, OK)	2017 (St. Pete Beach, FL)	2018 (Murfreesboro, TN)
2019 (Baton Rouge, LA)	2020 (Alexandria, VA)	2021 Virtual Conference
2022 (Little Rock, AR)	2023 (Charlotte, NC)	2024 (Lexington, KY)
2025 TX?	2026 FL or WV?	2027

The Immediate Past President will contact state associations in the designated regions to invite them to submit bids for the conference four years hence. Bids will usually be reviewed by the Executive Committee at the Annual Meeting. Bids may also be reviewed at the Summer Planning Meeting. If there are no bids from the designated region, states in the next region in the rotation plan are invited to bid.

## Topics in Higher Education

This committee is responsible for developing program sessions and workshops relating to the organization in higher education, including current trending topics, laws, legal and policy, and important topics among the states, regionals, and systems. This committee reports to the Program Vice President for Topics in Higher Education.

# Annual Meeting Program Preparation

## Program Committee

This committee, appointed by the President, comprises the President-Elect as Chair; the Vice President for Program and Evaluations; the Program Vice Presidents, and other members of SACRAO organized in a series of program committees. It is responsible for planning and presenting the program sessions and pre-conference workshops at the Annual Meeting. Based on feedback from evaluation forms from the prior year and general knowledge of the issues facing our profession, the committee identifies topics and participants for program sessions. It also develops a schedule for the Annual Meeting program. Program Committees and the reporting Vice Presidents are:

- Program Vice President for Distinct Populations and Programs
  - Distinct Populations and Programs Committee
- Program Vice President for Professional and Personal Development
  - Professional and Personal Development Committee
- Program Vice President for Records and Academic Services
  - Records and Academic Services Committee
- Program Vice President for Recruitment, Admissions, and Enrollment Management
  - Recruitment, Admissions, and Enrollment Management Committee
- Program Vice President for Topics in Higher Education
  - Topics in Higher Education Committee

These committees normally meet during or at the close of the annual SACRAO meeting to begin program planning for the following Annual Meeting. The Committee Chairs may also meet during the annual AACRAO meeting. The Chairs meet at SACRAO's expense, as part of the SACRAO Summer Planning Meeting, at the site of the next Annual Meeting.

## ***Duties of Program Chairs***

There are six Program Committee Chair(s) appointed by the President and reporting to the appropriate program Vice Presidents. The program committee chair leads a committee of approximately 8-10 members, whose primary responsibility is to propose and plan Annual Meeting sessions, workshops, fireside chats, and forums.

The Program Committee Chair solicits program ideas from committee members and other SACRAO members, compiles those program proposals with the appropriate Vice President, and presents them at the summer program planning meeting. Once sessions are selected, the Chair must coordinate the committee's activities in soliciting program participants, completing program data files, and continuing to monitor program sessions at the Annual Meeting.

Given the nature of the various committee charges and the overlap between session proposals during the program planning process, another committee might more appropriately sponsor a session proposed by one committee. It is understood that such program sessions might be moved under another committee during the summer planning meeting, and that committee would then take over the responsibility for that session.

Responsibilities of the Chair require attendance at the SACRAO Annual Meeting after appointment as Chair and the Annual Meeting for which the sessions are being planned. At these meetings, the committee chair will be expected to attend appropriate program planning meetings as the President-Elect calls.

## ***Calendar for Chairs***

The information given below is a general guideline. Timing will depend on the method of program development being used. The President-Elect will distribute a detailed calendar at the program planning meetings during the Annual Meeting.

### **February**

- I'm Available Forms will be linked within the conference app and mentioned during the Business Meeting and SACRAO Breakfast
- Initial meeting of the President-Elect, vice presidents, and committee chairs
- Luncheon meeting of the President-Elect, Program Vice Presidents, Committee Chairs, and committee members to begin planning the next Annual Meeting program

### **April**

- Work with committee members and submit proposals together on the SACRAO website, or follow the guidance of the President-Elect

### **May**

- In consultation with their committee chair, the Program Vice Presidents ranks all preliminary program session topics and sends information to President-Elect
- President-Elect emails summary of all program proposals to Committee Chairs and Program Vice Presidents for review prior to Summer Planning Meeting

### **June**

- President-Elect and Program Vice Presidents select sessions and finalize topics and time slots for the Annual Meeting; Meeting to be held at SACRAO expense
- Committee Chairs contact committee members with program selections from the Summer Planning Meeting; Remind committee members of the deadline for entering final program session information in the online program planning module
- Program participation should be confirmed to presenters and session coordinators (*send copy to President-Elect*)

### **August**

- Committee chairs enter final program session information into the database

### **September**

- First draft of program distributed by President-Elect, Program Vice Presidents, and Committee Chairs
- Each Committee Chair will assign a committee member to oversee and coordinate each program session

### **October**

- President-Elect sends confirmation letters and job descriptions to all Presenters and Coordinators

### **February**

- Brief meeting of President-Elect, Program Vice Presidents, and Committee Chairs before the Annual Meeting
- Committee chairs monitor program sessions and workshops to insure all participants are in attendance and all needs are met
- Assist the Vice President in selecting your committee's most outstanding presenter nominee
- Program Vice Presidents and Committee Chairs send thank-you notes to Presenters and Coordinators

# **Program Development Guidelines**

When developing program proposals, contact the proposed presenters to discuss the proposed topic and determine their willingness to participate and attend the meeting if the proposal is approved at the Summer Planning Meeting in June. Ensure the participants understand this is a proposal and that you will notify them in late June of the decisions reached at the Summer Planning Meeting.

When contacting participants for a session, ask if they have already agreed to participate in another session at the Annual Meeting. If so, thank them for their participation and contact someone else. If an individual wants to commit to your session instead of the first one, you must contact the other committee member immediately so that they can select another participant. (*See Participant Criteria and Duplicate Participants*)

Use of SACRAO members in the program is encouraged, and their respective institutions are expected to cover all of their travel expenses to the Annual Meeting. If non-SACRAO members are recruited as presenters, SACRAO does not normally provide expenses for them. All exceptions (*and exceptions are extremely rare*) must be approved in advance of any commitment by the President-Elect and the President.

Presenters should be encouraged to use audio-visual aids and upload the presentation and any supporting documentation in the conference app, following the guidelines provided. SACRAO will provide audio-visual equipment, but presenters typically bring their laptops. Presenters must understand that limited resources will prevent SACRAO from responding to last-minute requests. In addition, SACRAO does not reimburse presenters for the cost of handouts. The President-Elect will confirm equipment needs with the Presenters.

The committee proposing the workshop and the vice president to whom that committee reports will handle pre-conference workshop proposals.

## ***Participant Criteria***

SACRAO wants to allow members to hear a variety of programs and presenters and to maximize participation among members. For this reason, there are some guidelines for the selection of participants:

- Participants (*presenters and session coordinators*) should participate in only one session.
- Exceptions: The same person may participate in one workshop and one session, in a session and a forum or fireside chat or user group, or two sessions if the second one is a continuation of the first.
- Sessions need both a coordinator and presenter(s).
- Panels should have three presenters and a coordinator.

## **Duplicate Participants**

It is important to solve problems with duplicate presenters as soon as possible after the Summer Planning Meeting. To assist in this process, the President-Elect will provide the vice presidents and chairs with a list of duplicate presenters after the Summer Planning Meeting. It is the responsibility of the chairs to work out these problems with the individual participant and then notify the committee member of appropriate action. In some instances, two chairs may need to work together to solve a problem that affects more than one committee.

## ***Suggestions for Committee Members***

### **Pre-conference**

Before the conference, committee members should:

- Make travel arrangements that will enable you to attend all scheduled meetings
- Develop two or more program ideas, including title, description, type of presentation, and possible presenters

- Plan to participate in all meetings set by the President-Elect, Vice President, and Committee Chair

### **Program Development**

Plan to contact your session participants at least five times during the year:

- Soon after the Annual Meeting to confirm interest in developing a session
- After the summer planning conference to, let them know the session status
- During the fall semester to, remind them of the commitment
- Near the end of December to ask if any assistance is needed
- One week prior to the conference, as a last-minute check

Don't be discouraged if a participant is suddenly unable to attend. Make your Chair aware of the problem and immediately seek a replacement.

Ask participants to confirm to you in writing (*via email*). You will be more likely to get the correct information and less likely to have cancellations.

Make one last call to all participants within one week of the Annual Meeting to ensure no problems have surfaced.

### **Annual Meeting**

Check to make sure participants have arrived.

Suggest that participants check their presentation rooms and let you know if they will need anything that is not there.

### ***Tips for Developing a Successful Session***

Don't offer the same program again next year. Even though the program was superb, please give it a different emphasis or use at least one new presenter.

Watch listservs for program topics and potential presenters.

Most programs should be of interest to a broad audience, such as both public and private, two-year and four-year, etc.

Make sure the title is catchy but descriptive. Many members decide which session to attend based solely on the program title. Similarly, session descriptions should clearly and concisely describe the topics and issues to be addressed.

As a committee, offer a variety of presentation types—workshop, forum, professional presentation, etc.

If you have several programs centered on one topic, such as Distance Education, make sure their content differs.

If a corporate partner is a presenter, there must also be a SACRAO institutional presenter, and the presentation must focus on the type of service or product generically. It cannot be a "sales pitch" for a particular product or service. If space allows, an "exhibitor track" of program sessions will be available to exhibitors on a first-come, first-serve basis. Those sessions can be used for any purpose the exhibitor wishes. Exhibitor track timeslots are paid for through the LAC, which determines whether (*and how many*) exhibitor track timeslots are available. A company must be an exhibitor at an Annual Meeting to qualify to pay for an exhibitor track session timeslot.



Consider having at least two presenters for a session so you don't have to cancel the session should one presenter be unable to attend. Also, if one presenter turns out to be weak, the second presenter should be able to carry the session through.

Watch for excellent programs at state meetings and other professional meetings and consider them for a SACRAO session.

### ***Tips for Selecting an Outstanding Presenter***

During the conference, attend sessions with similar or related topics to those you intend to propose for next year, looking for possible presenters.

Look for persons who ask good questions, provide knowledgeable responses, and articulate comments. These are good presenter possibilities for next year.

If you have not heard of a presenter, verify with someone who knows the person to confirm good presentation skills.

Make sure the person regularly attends SACRAO. If they do not, be very careful to get a commitment to attend the meeting.

Explain SACRAO's "one presentation per person" rule. It's OK for a person to be on multiple "proposed" sessions, but by the end of the Summer Planning Meeting, they can only be a presenter at one session. Make sure the person has not been contacted to participate in another session. SACRAO strives to have each person involved in only one session.

If the speaker presented this year, check their evaluations.

Do not schedule the same person as a Coordinator and a Presenter.

If you are having difficulty finding a presenter, consider contacting a SACRAO officer, committee chair, or state association president. You might also consider putting a request on a list-serve.

### ***Suggestions for Committee Chairs***

A few weeks after the Annual Meeting, send a message to each of your committee members, reminding them of their responsibilities and offering assistance if needed. Ask each committee member to propose at least three sessions.

As programs are submitted, please send a letter to coordinators and presenters thanking them for being willing to participate in the session, should it be selected. Tell them to contact you immediately if they have not been asked to participate. This will help you sort out problems very early.

Have a few names in the back of your mind to suggest as coordinators for last-minute cancellations.

If a committee member is volunteering to do a program, you are responsible for ensuring that person is a good presenter. If not, make sure other presenters are also on the program.

Use email for quick responses.

Proofread descriptions for content and grammar. Proofread titles for clarity. Edit where necessary.

**Cautions**

Don't volunteer to solve problems for committee members, such as finding coordinators. You will have enough work to do as it is.

Some people will volunteer to do programs because it eliminates most of the work of finding and tracking presenters. It is up to you to ensure this will be a good program.

Some people will want to repeat the same program because it is easy. Check attendance and evaluations to make sure this is a good suggestion. Also, consider some modifications.

Some people do not contact participants. Make sure you emphasize the importance of this step, and then follow up.

# Appendix A: Constitution and Bylaws

## ***Constitution***

### **Article I. Name**

The name of the corporation shall be the Southern Association of Collegiate Registrars and Admissions Officers, Inc., hereinafter also referred to as SACRAO.

### **Article II. Purposes**

The corporation is a non-profit, professional association whose purposes shall be to provide for the spread of information and the interchange of ideas on problems of common interest; to contribute to the advancement of higher education in its fullest and broadest implications; to foster a friendly spirit of unity and cooperation among its members; and to function as a unifying and coordinating agency among the separate state organizations represented in SACRAO, and with the American Association of Collegiate Registrars and Admissions Officers. SACRAO shall encourage and promote cooperation with the state/regional associations within SACRAO and assist in their separate meetings and professional development activities.

Specifically, the association shall promote and advance the improvement of academic records, admissions, data management, enrollment services, financial aid management, international education, and registration practices through study, education, and research; advance professional knowledge and techniques by fostering the exchange of experiences and information; and develop and advance standards of competence in the profession.

In the event of the dissolution of the corporation, after all debts of the corporation are paid, any remaining assets will be donated to charitable organizations for the advancement of higher education as determined by the Executive Committee.

### **Article III. Membership and Voting**

#### ***Section 1. Institutional Membership***

Institutional membership shall be open to employees of any collegiate institution located in the states of Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia or West Virginia, as well as the Commonwealth of Puerto Rico.

The employees should have job responsibility in at least one of the following areas: academic records, admissions, data management, enrollment services, financial aid management, international education, and registration.

The institution must be accredited as a collegiate-level degree-granting institution of higher education, or be approved as a candidate for accreditation, by an accrediting body recognized by the U.S. Department of Education. Institutions meeting the above conditions may enter SACRAO by submitting to the Vice President for States/Regionals and Membership a written request. Institutions not meeting these qualifications may become members upon approval of the Executive Committee.

Any state/regional association desiring to have its state(s) added to the membership of SACRAO must petition the Executive Committee of SACRAO. The petitioning state/regional association's request must be approved by the Executive Committee and later by a majority vote of the members present at the Annual Meeting.

#### ***Section 2. Honorary Membership***

Individuals no longer eligible for institutional membership in the Association may be recommended for continued affiliation as honorary members. This honor is reserved for persons retiring or leaving the Association who made significant contributions to the profession and to the Association. A membership fee is not required of honorary members. This membership is non-voting.

If an honorary member becomes eligible for active or corporate SACRAO membership, the benefits of honorary membership will be suspended until the individual is no longer eligible for active or corporate membership.

### *Section 3. Educational Agency Membership*

State Educational Boards or Agencies of Higher Education, within the SACRAO borders, may apply for educational agency membership. This membership is non-voting.

### *Section 4. Corporate Membership*

Organizations that are not collegiate or state-related educational boards or agencies may apply for corporate membership. This membership is non-voting.

### *Section 5. Graduate Student Membership*

Graduate students interested in pursuing careers in the profession are eligible to apply for graduate student membership. This membership is non-voting.

### *Section 6. Associate Membership*

Individuals who are not otherwise eligible for any other membership in SACRAO and who desire to participate in its activities may apply for associate membership. This membership is non-voting.

### *Section 7. Voting*

Voting is limited to institutional members. An institutional member is one for whom current institutional membership dues have been paid.

## **Article IV. Executive Committee Duties, Responsibilities and Elections**

### *Section 1. Executive Committee*

The Executive Committee shall be composed of fourteen officers, the Chair of the Local Arrangements Committee for the upcoming Annual Meeting, the Chair of the Local Arrangements Committee for the next consecutive Annual meeting, the Chair of the Local Arrangements Committee for a past Annual meeting, the Corporate Partner Liaison, and the Treasurer-elect. Executive Committee members must be institutional members of the Association.

The fourteen officers are: President; President-Elect; Immediate Past President; Secretary; Treasurer; Vice President for Communication and Recognition; Vice President for Information Technology; Vice President for Program and Evaluation; Vice President for States/Regionals and Membership; Program Vice President for Distinct Populations and Programs; Program Vice President for Professional and Personal Development; Program Vice President for Records and Academic Services; Program Vice President for Recruitment, Admissions and Enrollment Management; and Program Vice President for Topics in Higher Education.

Voting members of the Executive Committee are the officers. The Chair of the Local Arrangements Committee for the upcoming Annual Meeting, the Chair of the Local Arrangements Committee for the next consecutive Annual meeting, the Chair of the Local Arrangements Committee for a past Annual meeting, the Corporate Partner Liaison, and the Treasurer-elect are non-voting.

The President shall be the Chair of the Executive Committee. The Committee shall have those duties specifically assigned in the Constitution and Bylaws and in the Executive Committee operational manual. In addition, it shall consult with the President on important policy matters. Members of the Executive Committee must be institutional members of the Association.

### *Section 2. Terms of Office*

The term of office shall be one year for the President, the President-Elect, and the Immediate Past President.

The term of office shall be two years for the Secretary; Treasurer; Vice President for Communication and Recognition; Vice President for Information Technology; Vice President for Program and Evaluation; Vice President for States/Regionals and Membership; Program Vice President for Distinct Populations and Programs; Program Vice President for Professional and Personal Development; Program Vice President for Records and Academic Services; Program Vice President for Recruitment, Admissions and Enrollment Management; and Program Vice President for Topics in Higher Education.

The following officers shall be elected in even-numbered years: Treasurer-Elect; Secretary; Vice President for Information Technology; Vice President for Program and Evaluation; Vice President for States/Regionals and Membership; Program Vice President for Recruiting, Admissions and Enrollment Management; Program Vice President for Topics in Higher Education.

The following officers shall be elected in odd-numbered years: Vice President for Communication and Recognition; Program Vice President for Distinct Populations and Programs; Program Vice President for Professional and Personal Development; Program Vice President for Records and Academic Services.

All officers shall assume office at the close of the Annual Meeting at which they are elected.

The President shall assume office after serving as President-Elect. All officers shall be elected at the Annual Meeting. A simple majority of active members present and voting shall be necessary for election. Any officer who completes a full term in office may not be re-elected immediately to that office, but may be elected to a second and final term after being out of office for at least one calendar year. Past Presidents of the Association, however, may not be re-elected to serve on the executive committee.

In the event a position of the Executive Committee is discontinued, the change of the position shall be effective with expiration of the term for the incumbent.

The president appoints the Corporate Partner Liaison (CPL) for a term of three years, and a past LAC chair for a term of one year.

### *Section 3. Duties of Officers*

A. The President shall implement all provisions of the Constitution and Bylaws of the Association; shall preside at all meetings of the Association at which present; shall act as Chair of the Executive Committee; and shall be responsible for the supervision of all Association activities.

B. The President-Elect shall be the principal assistant to the President; shall coordinate the Annual Meeting program; shall perform all of the duties of the President in the absence of that officer; and shall perform other assignments, which may be delegated by the President.

C. The Immediate Past President shall chair the Constitution and Bylaws and SACRAO Site Selection Committees and perform other duties, which may be requested by the Executive Committee.

D. The Vice Presidents shall have the following responsibilities:

1. The Program Vice President for Recruiting, Admissions and Enrollment Management shall be responsible for coordinating the affairs of the Association in the professional areas of recruiting, admissions, enrollment management, retention, special services, and financial aid. This Vice President

shall serve as a member of the annual Program Committee and shall be responsible for coordinating program activities relative to these professional areas.

2. The Program Vice President for Topics in Higher Education shall be responsible for coordinating the affairs of the Association in the topics that are relevant to the organization in higher education, including current trending topics, laws, legal and policy and important topics among the states, regionals and systems.
  3. The Program Vice President for Distinct Populations and Programs shall be responsible for coordinating the affairs of the Association in areas of access and equity, campus to campus affairs, international affairs, veterans, and athletic affairs. This Vice President shall serve as a member of the annual Program Committee and shall be responsible for coordinating program topics relative to distinct populations and programs.
  4. The Program Vice President for Professional and Personal Development shall be responsible for activities relating to professional and personal growth of the membership and to issues of the profession. This Vice President shall serve as a member of the annual Program Committee and shall be responsible for coordinating program topics relative to professional, personal and staff empowerment, research and poster sessions, and state and regional relations.
  5. The Program Vice President for Records and Academic Services shall be responsible for coordinating the affairs of the Association in the professional areas of academic affairs, academic progress and graduation, academic records and registration. This Vice President shall serve as a member of the annual Program Committee and shall be responsible for coordinating program activities relative to these professional areas.
  6. The Vice President for Information Technology shall be responsible for coordinating the affairs of the Association in the professional areas of information technology.
  7. The Vice President for States/ Regionals and Membership shall be responsible for liaison between the Association and state/regional members and issues related to membership. This Vice President solicits and collects the annual dues, forwards funds to the Treasurer, and updates membership records.
  8. The Vice President for Program and Evaluation shall be responsible for assisting the President-Elect, and evaluations will fall under this vice president.
  9. The Vice President for Communication and Recognition shall be responsible for the scholarship committee which would be responsible for awarding all scholarships. The *Journal* editor reports to this vice president and is selected by the President. The journal editor can serve up to three years. The Vice President of Communications and Recognition serves as the Newsletter editor. Recognition and Awards committee reports to this vice president who will serve as ex officio member for the scholarship and recognition and awards committee.
- E. The Secretary shall keep the minutes of the Annual Meeting and meetings of the Executive Committee; shall be responsible for the management of the archives of the Association; and shall perform other duties, which may be requested by the Executive Committee.
- F. The Treasurer shall record the payment of annual dues; shall be responsible for the payment of expenses of the Association; shall secure the approval of the President before payment; shall prepare financial statements for the Executive Committee; and at the close of the fiscal year shall prepare a complete financial report. This report shall be audited by the Auditing Committee appointed by the President, and the report of the Auditing Committee shall be presented to the Executive Committee and to the Association. The Treasurer shall perform such other duties as may be requested by the Executive Committee.
- G. The Treasurer-Elect is a non-voting member of the Executive Committee and serves for an elected term of one year, which begins at the annual business meeting. The Treasurer-Elect's first year is to learn the processes and procedures related to the position of Treasurer, along with other duties, as assigned. This officer succeeds to become the Treasurer of the association for a two-year term, at which point they become voting members of the Executive Committee.
- H. The Corporate Partner Liaison (CPL) is a non-voting member of the Executive Committee and serves for an appointed term of three years, which begins at the annual business meeting. The CPL will be responsible for maintaining and building relationships with existing corporate partners as well as cultivating relationships with

new corporate partners, based on emerging technology and trends in admissions and registrar fields. The CPL will advise the annual meeting LAC and CP Chair on corporate partner participation and serve as a resource for each annual meeting LAC and CP Chair.

I. The Past Local Arrangement Chair (PLAC) is required to be an active institutional member of SACRAO and have previous experience as a past LAC chair. The Past Local Arrangement Chair serves as a non-voting member of the Executive Committee and acts as an advisor, consultant, and mentor for both the current and incoming LAC chairs.

#### *Section 4. Election of the Executive Committee*

The slate of nominees for the SACRAO officer positions proposed by the Nominations and Elections Committee shall be submitted to the membership in writing at least thirty (30) days in advance of the Annual Meeting. The Nominations and Elections Committee will make every reasonable effort to reflect among the selected candidates a variety of personal and professional characteristics represented in the membership such as professional area of responsibility, gender, ethnicity, state and institutional type. No state shall be represented by more than three voting members on the Executive Committee in any given year, except in a case where a member who was elected by the membership moves to another state which is already represented by three voting members.

#### *Section 5. Unexpired Terms*

With the exception of the office of President-Elect, the Executive Committee shall have the authority to fill any vacancy by the appointment of another member for the remainder of the unexpired term. In the event of a vacancy in the office of President-Elect, the Nominations and Elections Committee shall nominate a slate of nominees for the office and conduct a special election to fill the vacancy for the remainder of the unexpired term. Any individual elected or appointed to serve an unexpired term shall be eligible to serve a succeeding full term or terms, as provided for in the constitution.

### **Article V. Amendments**

The Constitution may be amended at any Annual Meeting or by online vote by majority vote of eligible institutional members voting, provided the substance of the proposed amendment shall have been submitted to the membership in writing at least thirty (30) days in advance of the Annual Meeting or of the closing of online voting. If not proposed in advance, the amendment shall require a two-thirds vote of the members voting.

## ***Bylaws***

### **Article I. Meetings**

#### *Section 1.*

The Annual Meeting of the Association shall be held at a time and place to be fixed by the Executive Committee.

#### *Section 2.*

Special meetings of the Association may be called by the Executive Committee upon written notice to the general membership at least thirty (30) days prior to the called meeting.

#### *Section 3.*

Meetings of the Association shall be conducted in accordance with the current edition of Robert's Rules of Order, Newly Revised. Prior to each meeting of the Association, the President shall appoint a Parliamentarian whose role shall be to assist the chair in questions of meeting order and parliamentary procedure.

## **Article II. Membership/Dues**

### *Section 1. Membership Year*

The membership year of the Association shall be from July 1 through June 30.

### *Section 2. Dues*

Changes to the dues for institutional, educational agency, corporate, graduate student, and associate members will be submitted to the membership for approval at the Annual Meeting by the Executive Committee.

### *Section 3. Membership Renewal*

Renewal notices shall be mailed to the membership by June 1, with dues payable on or before October 15.

## **Article III. Fiscal Year**

The fiscal year of the Association shall be from January 1 through December 31.

## **Article IV. Committees and Appointments**

### *Section 1.*

A five-member Nominations and Elections (N&E) Committee shall be elected by the membership. N&E Committee members must be institutional members of the association. Election shall be from a pool of eight candidates proposed by the membership and selected by the Nominations and Elections Committee. No state shall be represented by more than two candidates including the incoming chair. The Nominations and Elections Committee will make every reasonable effort to reflect among the candidates selected the variety of personal and professional characteristics represented in the membership such as professional area of responsibility, gender, ethnicity, state, and institutional type. The election, to be concluded no later than May 30, shall be conducted by the Chair of the Nominations and Elections Committee, who is also responsible for tabulating the votes and reporting the results to the membership. Among the four candidates receiving the largest number of votes, the individual receiving the highest vote total will be the Chair-Elect. The Chair-Elect will assume the role of Chair in the second year to provide continuity. Except for the Chair-Elect, no member shall be eligible to serve again on the Nominations and Elections Committee until five years have elapsed from the end of the year's service. This same provision shall apply to the Chair-Elect after serving as Chair. After election to the committee membership and during service on the committee, a member shall not be eligible for nomination to an association office nor become eligible by resigning from the committee. Past Presidents of the Association may not serve on the Nominations and Elections Committee.

### *Section 2.*

The President shall appoint a Chair for the Local Arrangements Committee for the next consecutive Annual Meeting.

### *Section 3.*

An Auditing Committee shall be appointed by the President for each Annual Meeting. This Committee shall review the books of the organization to include Treasurer and LAC for the preceding year.

### *Section 4.*

A Finance Committee, composed of the President, the Immediate Past President, the President-Elect, the Treasurer, the Treasurer-Elect, and the Corporate Partner Liaison, shall oversee the fiscal activities of the Association. The outgoing Treasurer shall serve as an ex-officio member of this Committee.

### *Section 5.*



A Constitution and Bylaws Committee shall be appointed by the President, chaired by the Immediate Past President, to recommend any necessary changes which need to be brought before the Association.

**Section 6.**

A Federal Advocacy Committee shall be appointed by the President to assist SACRAO and provide guidance in regards to federal regulations and other federal initiatives.

**Section 7.**

A Recognitions and Awards Committee shall be appointed by the President and will report to the Vice President for Communications and Recognition.

**Section 8.**

A Scholarship committee shall be appointed by the President and will report to the Vice President for Communications and Recognition.

**Section 9.**

A SACRAO *Journal* Editorial Board shall be appointed by the President.

**Section 10.**

The President may appoint other committees as necessary.

**Article V. Amendments**

These Bylaws may be amended at any Annual Meeting by majority vote of members present and voting, provided the substance of the proposed amendment shall have been submitted to the membership in writing at least thirty (30) days in advance of the Annual Meeting. If not proposed in advance, amendment shall require a two-thirds vote of the members present and voting.

To allow for input from those who may not be able to attend the annual meeting, bylaws may also be amended by online vote of the SACRAO membership. Online votes are subject to the requirement of thirty (30) days notice prior to the vote, or the amendment shall require a two-thirds majority of the votes cast.

# Appendix B: Annual Meeting Bid Requirements and Recommendations

## Preparing a SACRAO Bid

Proposals to host a SACRAO Annual Meeting should include the support of the host state or regional organization (*such as CACRAO or FACRAO*), the proposed location, usual weather conditions for February, and the names of nearby SACRAO member institutions that have agreed to help with local arrangements.

Proposals should highlight special features or attractions of the area or the annual meeting facility.

The Immediate Past President chairs the Site Selection Committee. The following comments may be useful as proposed annual meeting locations are being considered.

**Bids must guarantee the following minimum requirements:**

### **Summer Planning Meeting**

- Complimentary or discounted accommodations for the Summer Planning Meeting are usually held in early- to mid-June. This meeting generally requires 18-20 person lodging rooms for two nights.
- Meeting room space should be included. SACRAO does not encourage attendance nor provide complimentary meals or lodging for spouses/guests.
- Care should be taken to select dates that do not coincide with state association meetings.

### **Local Arrangements Committee Chair**

This person must be able to serve for three years (*two as Chair and one as Immediate Past-Chair*), be located in or near the host city, and have given evidence of exceptional organizational skills through participation at state or regional levels. Essential talents are the ability to identify good workers and delegate responsibility. A good LAC Chair does not do it alone.

### **Hotel Facilities**

- Hotel name, address, phone, and contact person
- SACRAO usually meets during the first two weeks of February (*Sunday thru Wednesday, with 3-day buffers at the start and end for those wishing to arrive early or stay late*); Note: Because hotels are less accommodating post-pandemic, the Executive Committee (6/2023) is providing flexibility to include any dates from February to early March, if needed. On the other hand, we do not want to get too close to our national association's (AACRAO) conference dates.
- The number of available bedrooms, with a reserved block of about three-hundred fifty (350) lodging rooms, with potential overflow nearby
- Proposed costs for single rooms, double rooms, and suites which are within the approved government rates for the host state
- Online hotel registration system for inclusion with conference registration information; Include policy for room release date and payment policy for holding room
- Complimentary suites for the President, President-Elect, and LAC Chair, and other complimentary

- VIP rooms as agreed by hotel/local arrangements and written into the contract
- Complimentary rooms policy or proposal (*Complimentary rooms are usually granted upon reservation of a certain number of lodging rooms.*) Note: *Post-pandemic, our events planner has informed us that hotels provide fewer consolations and a stricter room-to-space ratio.*
- Internet address or toll-free number for reservations, available beginning in early November; Include the cancellation deadline and any pre-payment requirements
- Overflow hotel space availability, procedure, and rates
- Friday night move-in for LAC, including LAC Chair suite, LAC room, Presidential Suite, and President-Elect Suite
- President and President-Elect suites are available through Noon on Thursday
- An appropriately sized hospitality area should be made available; Depending on the facility, it can work best to use a room that is not also being used as a sleeping suite, such as a meeting room that is otherwise not needed
- Alcohol and food from outside should be allowed in the hospitality room; If the hotel can provide catering for hospitality, doing so may decrease the liability risk if the hotel supplies the alcohol, but it usually increases the cost
- Complimentary parking and in-room internet connections should be negotiated for guests when feasible

### **Meeting Facilities**

- Area for registration in a conspicuous location, with outlets for electrical hookups and internet access
- Convenient and secure room for Physical Arrangements Committee meetings and storage (*registration equipment, possibly A/V equipment*)
- Rooms for use by Evaluations and LAC Committees (*LAC Fri – Weds*)
- Sunday space for 2-3 concurrent workshops, registration area, Program Chairs/VPs meeting, First- Time Attendee Orientation/Reception, full evening reception, and an opening session (*after workshops, before the reception*)
- Available meeting rooms by size (*150-200, 100-149, 50-99, 30-49, under 30*)
- Breakout rooms (*at least 10-12*) at each time slot during the day on Monday, Tuesday, and Wednesday morning with a minimum of 5 rooms with a capacity of at least 75-100; Ability to convert 3- 5 rooms to workshop style
- An assembly room (*theater style*) for 700 for the opening session, Business Meeting (*Tuesday 10 A.M.*), and Wednesday Invitation Breakfast
- Ballroom dining for 600 at tables of 6-10 each
- Exhibit hall for 35-40+ exhibitor booths (*approx. 10'x10' each*); This space should not conflict with other meetings and must include space for hospitality service areas; After-hours security must be available, and all standard charges must be specified in the contract, along with what is included in the cost (*setup, tables, chairs, electricity, etc.*)
- Charges for meeting rooms (*SACRAO will generally not expect to pay for meeting rooms*)
- Saturday afternoon Executive Committee meeting, plus hospitality suite
- Space in the hotel or nearby for special lunches for Monday and Tuesday at Noon (*State Association Presidents and Past-Presidents, LAC Committees*)
- Tuesday Noon space for program committee meeting/luncheon
- Wednesday afternoon and Thursday morning meeting room for Executive Committee

## **Audio Visual**

SACRAO has (1) regularly secured the services of a private firm/outside provider to manage the majority of the session needs (*refer to the Physical Arrangements section for specifics*) or (2) utilized the hotel's in-house AV company or convention center. Ensure this firm can provide services in the meeting facility and ascertain if any charges are involved.

## **Additional Considerations**

- Preference will be given to hotels/facilities with comprehensive services and of such size that SACRAO will be the dominant activity
- The annual meeting rates should be available a few days before and after the meeting for attendees arriving early or departing late
- The ability to bring in A/V equipment or the names of approved providers and rates
- Space and policy for holding corporate partner equipment until the setup
- Availability and cost of duplicating facilities
- Ability to use a master account to bill charges to the LAC
- Support from the local convention and visitor's bureau or chamber of commerce to assist with promotional materials
- Distance from the airport to the annual meeting facility
- Availability, distance, and cost of transportation between hotel and airport (*include names of companies*); The host city should be easily accessible by air or via connections from a southern hub (*e.g., Atlanta, Charlotte, Cincinnati, Dallas, Houston, or Memphis*). The availability of alternate means of transport (*train, bus, interstate highway, etc.*) is a plus.
- Preference is to avoid Super Bowl and Valentine's Day weekends, but sometimes exceptions are made

**NOTE:** Contracts are normally signed, and room blocks are set three years out. This has not been the case since the pandemic began, and we are trying to get back to this. The contract should include a room block review clause allowing SACRAO to adjust the room block up (*subject to availability*) or down 10% eleven to six months before the meeting.

The Immediate Past President will contact state associations in the designated regions to invite them to submit bids for the conference four years hence. Bids will usually be reviewed by the Executive Committee at the Annual Meeting. Bids may also be reviewed at the Summer Planning Meeting. If there are no bids from the designated region, states in the next region in the rotation plan are invited to bid.

## **Need help?**

SACRAO works with an event planner. If you need assistance in developing a proposal:

*Annette Moudry*

*Sedulo Events*

[info@seduloevents.com](mailto:info@seduloevents.com)

O: 712-384-2783 | CST

C: 319-331-6666

## Site Rotation Plan

In February 1994, the SACRAO Executive Committee approved a three-region plan. These are **Eastern** (FL, GA, NC/SC, PR, VA, WV), **Central** (AL, KY, MS, TN), and **Western** (AR, LA, OK, TX).

<b>Western</b>	<b>Eastern</b>	<b>Central</b>
AR, LA, OK, TX	FL, GA, NC/SC, PR, VA, WV	AL, KY, MS, TN
<b>Rotation Years for Bids:</b>		
2004 (Fort Worth, TX)	2005 (Myrtle Beach, SC)	2006 (Lexington, KY)
2007 (Little Rock, AR)	2008 (Williamsburg, VA)	2010 (Chattanooga, TN)
2009 (New Orleans, LA)	2011 (Atlanta, GA)	2012 (Covington, KY)
2013 (San Antonio, TX)	2014 (Raleigh, NC)	2015 (Mobile, AL)
2016 (Oklahoma City, OK)	2017 (St. Petersburg, FL)	2018 (Murfreesboro/Nashville, TN)
2019 (Baton Rouge, LA)	2020 (Alexandria, VA)	2021 (virtual)
2022 (Little Rock, AR)	2023 (Charlotte, NC)	2024 (Lexington, KY)
2025	2026	2027

## Annual Meeting Historical Information

### **Room Pick-up**

<b>Year</b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>	<b>Sunday</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Total</b>
1989		10	204	296	304	272	29	11	1,126
1990		8	150	300	300	300			1,358
1991	1	11	168	293	291	250	23		1,037
1992			151	285	298	268	22		1,024
1993		16	219	344	343	307			1,229
1994	2	17	208	295	296	266	26	2	1,112
1995	1	12	226	312	313	312	31	2	1,209
1996			119	302	315	268	34	2	1,040
1997		22	267	454	451	408	55		1,657
1998		36	250	364	360	337	45		1,392
1999	1		196	370	373	375			1,315
2000		19	226	392	395	365	35		1,432
2001		25	155	271	268	259	22		1,000
2002		9	130	331	335	269	19		1,093
2003	1	29	202	396	407	357	31	2	1,425
2004		40	209	355	355	318	33		1,310
2005		25	100	350	350	250	25		1,100

2006		21	169	307	306	265	22		1,090
2007 <sup>^</sup>		25	200	350	350	225	25		1,175
2008	6*	69	252	443	441	408	49	4**	1,672
2009		33	144	287	284	261	29		1,038
2010		18	65	274	292	252	21	2	924
2011#		20	114	303	314	251	21		1,023
2012									
2013									
2014		13	124	361	361	344	38		1,241
2015		22	142	316	321	284	33		1,118
2016		12	118	319	331	294	32	3	1,109
2017		32	232	429	427	405	43	5	1,573
2018		11	103	254	256	239	17		880
2019		12	116	309	313	291	22		1,063
2020	1	30	221	344	345	326	39	4	1,310
2021	Virtual	-	-	-	-	-	-	-	-
2022		5	48	145	150	140	10		498
2023		6	88	228	229	224	7		782

<sup>^</sup> room block is provided as room pickup was not available

\* includes 2 from Wednesday \*\* includes 1 from Friday

# 2011 230 nights in other hotels (1-Fri., 27-Sat., 68-Sun., 68-Mon., 64-Tues., 2-Wed.)

## Location and LAC Chair

Year	City/State	Hotel	LAC Chair	Institution	Attend*
1989	Tulsa, OK	Kensington and Grandview	Leanne Brewer	Tulsa Junior College	510
1990	Charleston, SC	Omni	Terry Davis	University of S Carolina	673
1991	Lexington, KY	Hyatt Regency Lexington	Paul Taylor	Lexington Community College	625
1992	Birmingham, AL	Wynfrey at Riverchase Galleria	Jerry Smith	Jacksonville State University	601
1993	Ft. Worth, TX	Radisson Plaza	Jack Thornton	Tarrant County Jr College	677
1994	Norfolk, VA	Norfolk Waterside Marriott	Bruce Cunningham	Old Dominion University	663
1995	Jackson, MS	Holiday Inn-Downtown	Jayne Perkins	Millsaps College	670
1996	Ponte Vedra Beach, FL	Marriott at Sawgrass Resort	Debbie Carver	Daytona Beach Community College	563
1997	Louisville, KY	Galt House	Ray Stines	University of Louisville	702
1998	Corpus Christi, TX	Omni Bayfront	Bill Morris	University of Texas-Pan American	556
1999	Savannah, GA	Hyatt Regency Savannah	Marsha Welch	Floyd College	669
2000	Memphis, TN	The Peabody	Glenn Munson	Rhodes College	635
2001	Oklahoma City, OK	Westin	Rick Skeel	University of Oklahoma	565
2002	Birmingham, AL	Birmingham Sheraton	John Fletcher	Auburn University	608
2003	Biloxi, MS	Beau Rivage Resort Hotel	Patti Holloway	Mississippi Gulf Coast Community College	651
2004	Ft. Worth, TX	Radisson Plaza	Chris Stevens	Tarrant County College	592
2005	Myrtle Beach, SC	Radisson – Convention Center	Dorinda Harmon	College of Charleston	700
2006	Lexington, KY	Hyatt Lexington	Chuck Morgan	Berea College	647
2007	Little Rock, AR	Peabody Hotel	Tammy Rhodes	Arkansas Tech University	601
2008	Williamsburg, VA	Williamsburg Lodge; Woodlands; Inn	Sallie Marchello	College of William and Mary	658
2009	New Orleans, LA	Astor Crowne Plaza	Robert Doolos	Louisiana State University	499

<b>Year</b>	<b>City/State</b>	<b>Hotel</b>	<b>LAC Chair</b>	<b>Institution</b>	<b>Attend*</b>
2010	Chattanooga, TN	Marriott; Sheraton Read House; Chattanooga Convention Center	Tim Amyx	Volunteer State Community College	497
2011	Atlanta, GA	Sheraton Atlanta Downtown Hotel	Katherine Sweeney	Augusta State University	595
2012	Covington, KY	Northern KY Convention Center	Kim Taylor	Northern Kentucky University	489
2013	San Antonio, TX	Westin La Cantera	Shelby Stanfield	University of Texas	554
2014	Raleigh, NC	Marriott City Center & Sheraton Raleigh (split block)	Michelle Johnson	North Carolina State University	673
2015	Mobile, AL	Renaissance Mobile Riverview Plaza Hotel; Mobile Convention Center	Landon Waid	University of Alabama	500
2016	Oklahoma City, OK	Renaissance Oklahoma City Convention Center Hotel	Rick Edgington	Northern Oklahoma College	500
2017	St. Pete Beach, FL	TradeWinds Island Grand Resort	Karen J. Beckett	University of Miami	511
2018	Murfreesboro, TN	Embassy Suites by Hilton Hotel & Conference Center - Nashville SE	Megan Mitchell	Austin Peay State University	527
2019	Baton Rouge, LA	Hilton Baton Rouge Capitol Center	Brian Antie	Louisiana State University	432
2020	Alexandria, VA	Hilton Alexandria Mark Center	Hope Reynolds	Virginia Tech Carilion School of Medicine	499
2021	Virtual Conference	NA	Steve McLeod (EC as LAC)	Harding University	847
2022	Little Rock, AR	Little Rock Marriott	Chris Riggins	University of Central Arkansas	404
2023	Charlotte, NC	Charlotte – Concord/Golf Resort & Spa	Heather Hill	Western Carolina University	539
2024	Lexington, KY	Hilton Lexington/Downtown & Central Bank Center	Nathan Congleton	University of Kentucky	

\* Individual Members & Individual Corporate Partners

# Appendix C: Multicultural / Emerging Leader Award Individual Scholarships

To increase the involvement of SACRAO members from under-represented populations, SACRAO offers up to four individual awards, a maximum of \$1250 each, based on self-nomination or nominations from the SACRAO membership. Individuals nominated must be persons in the SACRAO region who are members of an under-represented population and who deserve recognition for their contributions to their state associations. The application process for the individual awards begins immediately after each annual meeting. The scholarships must be used the year they are received; they may not be carried over to the following year.

The Vice President for Communication and Recognition should provide SACRAO Expense Reimbursement Vouchers (*available online*) to the scholarship winners. The scholarship winners should send the completed vouchers and receipts to the Vice President for Communication and Recognition, followed by the President for reimbursement authorization. The President will forward these documents to the Treasurer for payment.

A sample application for the Individual Multicultural / Emerging Leader Annual Meeting Scholarship follows. The schedule for the selection process appears in the responsibilities of the Vice President for Communication and Recognition.

***Sample Application: Individual Multicultural / Emerging Leader Annual Meeting Scholarship***

## APPLICATION/NOMINATION

### Individual Multicultural / Emerging Leader Annual Meeting Scholarship

These awards are for emerging leaders in the admissions and records profession and professionals from under-represented populations in the SACRAO region who show promise for advancing multicultural participation and activities or are seen as emerging leaders within their state organization and SACRAO.

Recognition will be based on many factors, including the following:

- Professional success at the institutional level
- Professional involvement at the state level
- Participation in multicultural activities and programs (not required but helpful)
- Promise of further involvement in the activities of SACRAO

#### APPLICATION INSTRUCTIONS:

- The individual may complete the application, the AACRAO State President, the designated Professional Access and Equity representative of the state/regional association, or members of SACRAO.
- Complete this application in its entirety. Consideration will only be given to applicants with completed applications. Award selection will be based solely on the information provided on this application.
- If additional space is needed to complete the application, please type or print on a separate page and reference the appropriate question or section to which you respond.
- Please return completed applications to: xxx, SACRAO Vice President for Communication and Recognition, (*insert address here*)



- DEADLINE: December 15. Late applications will not be considered.

**I. Nominating Body (check one) SELF \_\_\_ OTHER \_\_\_**

Name of Person Submitting Nomination (If Other) \_\_\_\_\_

Email address: \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone Number \_\_\_\_\_

State/Regional Organization \_\_\_\_\_

Title/Institution \_\_\_\_\_

**II. Information on Nominee**

A. Name \_\_\_\_\_

B. Email address \_\_\_\_\_

C. Address \_\_\_\_\_

D. City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E. Telephone Number \_\_\_\_\_

F. Profession \_\_\_\_\_

G. Title/Institution \_\_\_\_\_

**Career History**

Please describe your professional career to date (*dates and places of employment, titles*). Elaborate on any special training, projects, promotions, and/or recognitions relevant to your application.

**State Association Participation and Activities**

Please describe your activities within your state ACRAO organization (*committee work, conferences attended, leadership roles, etc.*).

**Personal Activities**

Please feel free to describe any personal education, involvements, and/or achievements which may be relevant to your application.

**SACRAO**

Please describe your interest in SACRAO and comment on the likelihood that you may be able to participate in SACRAO activities beyond the following year.

**Additional Information**

Please feel free to add anything else that may be relevant to your application. The Committee would particularly like your ideas/suggestions for improving multicultural involvement and activities within state and regional professional organizations.

# Appendix D: President's Award for Outstanding Professional Presentation

It is awarded after the annual meeting to the SACRAO member who is judged to have presented the best session at the annual meeting. Consideration is given to delivery, preparation, relevancy, and session attendee evaluations.

The recipient will receive a plaque or framed certificate and a \$50 prize, recognized in the Newsletter and at the opening session of the next annual meeting, and submitted as a session proposal for AACRAO. Effective 2023, if the session is selected for AACRAO, the registration fee for that conference will be waived.

If a session with two presenters is judged best, both presenters will be recognized with the award. Sessions with more than two presenters are not eligible for the prize.

## **Selection Process**

Immediately following the annual meeting and in consultation with the VP for Program Evaluation, the presenter with the highest scored evaluation will be submitted to the President for recognition. The session must have been presented by one or two SCARAO members, specifically, not non-members. To support awardee selection, it is important to highlight the importance of submitting session evaluations throughout the annual meeting.

Program Committees or the appropriate Vice President can also submit a recommendation for the award to the SACRAO President, commenting briefly on the presenter's delivery and preparation and the session's relevancy.

The SACRAO President, Past-President, and President-Elect will review these recommendations and evaluations for each recommended session and choose a recipient for the award.

Following the meeting, the President will congratulate the recipient in writing and include an appropriate plaque or certificate with the letter along with a \$50 check from SACRAO. Also, a copy of that letter should be sent to the recipient's supervisor or other designee of the recipient. The President will also submit an article announcing the award recipient for the next edition of the Newsletter. The recipient will be acknowledged at the opening session of the next annual meeting.

Finally, the recipient will be encouraged to submit a written version of the session for publication in *The SACRAO Journal* or the Newsletter.

# Appendix E: Student Pre-Professional Annual Meeting Scholarships

These awards are for traditional, usually full-time, undergraduate or graduate students within the SACRAO region who have research or interest in the higher education admissions or records professions, generally working with or attending a SACRAO member institution, and show promise for advancing within the profession. The award is for up to \$1,200 for travel and accommodation to the SACRAO annual meeting, plus includes a registration fee waiver. The Professional Development Committee will determine the scholarship eligibility requirements and oversee the scholarship application review, with support from the EC.

**Deadline:** December 1. Late applications will not be considered.

Recognition will be based on many factors, including the following:

- Selection for participation in the upcoming annual meeting as a session presenter or poster presentation submission
- Previous participation in SACRAO through committee, presenter, or other activity
- Interest in the field of admissions, records, or area relevant to the mission of SACRAO
- Promise for further participation in the activities of SACRAO

The individual student, a State ACRAO president, the designated Professional Development representative of the State ACRAO, or members of SACRAO may complete the application.

The Vice President for Professional Development should provide SACRAO Expense Reimbursement Vouchers (*available online*) to the scholarship winners. The scholarship winners should send the completed vouchers and receipts to the President for reimbursement authorization. The President will forward these documents to the Treasurer for payment.

A sample application for the Student Pre-Professional Annual Meeting Scholarship follows. The schedule for the selection process appears in the responsibilities of the Vice President for Professional Development.

**Application: Student Pre-Professional Annual Meeting Scholarship** (online submission)

## **APPLICATION INSTRUCTIONS:**

- The individual student, a StateACRAO president, the designated Professional Development representative of the StateACRAO, or members of SACRAO may complete the application.
- Complete this application in its entirety. Consideration will only be given to applicants with completed applications. Award selection will be based solely on the information provided on this application.

## **Student Applicant**

Name:

Email Address:

Complete Mailing Address:

Institution Attending:

Degree/Major Seeking:

Anticipated Graduation Date:

**Nominating Person (Check One) SELF \_\_\_ OTHER \_\_\_**

Name of Person (if other):

Professional Title/Relationship to Applicant:

Email Address:

Telephone Number:

SACRAO Institution:

StateACRAO:

**Why would the student like to attend the SACRAO annual meeting?**

**Pre-professional objectives relevant to admissions, records, or other relevant SACRAO fields.**

**Any previous SACRAO participation? If so, when and where?**

**Personal Activities:**

Please describe any personal education, involvements, and/or achievements that may be relevant to and support your application.

## Appendix F: MOSIS Conference (*Historical Information Only*)

**NOTE:** In February 2003, the SACRAO Executive Committee voted to discontinue the annual MOSIS Meeting after the final meeting held in July 2003 in San Antonio, Texas. This decision was made for a variety of reasons, including dwindling attendance, lack of site proposals for future meetings, lack of volunteers for program and local arrangements responsibilities, tightened institutional travel budgets, and the emergence of several “competing” meetings, such as the AACRAO Technology and Transfer Conference and various user groups. The information listed below is included in this manual for historical reference.

### Attendance and Room Nights

Year	Attendance	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday
1988	259	room counts unavailable					
1989	321	8	79	194	198	181	12
1990	no conference						
1991	259	10	64	156	164	135	7
1992	319	32	166	218	218	196	21
1993	260	3	89	152	159	141	8
1994	218	4	120	172	183	174	
1995	233	2	94	158	171	153	10
1996	189		87	117	120	115	13
1997	386	26	129	204	207	183	15
1998	285	22	147	243	243	216	9
1999	185		63	157	161	132	
2000	272	17	86	141	142	130	
2001	no conference						
2002	137	10	60	100	100	88	
2003	102						

### Location and Coordinator

Year	Hotel	City, State	Coordinator/Program Chair	Institution	Attend
1988	Baton Rouge Hilton	Baton Rouge, LA	Robin Montgomery & Ron Hay	Louisiana State University	259
1989	Dallas Marriott Quorum	Dallas, TX	John Hall	Southern Methodist University	321
1990	no conference				
1991	Westin Peach Tree Plaza	Atlanta, GA	Bill Leslie	Georgia Tech	259
1992	Ramada Resort Hotel	West Palm Beach, FL	Scott MacLachlan	Palm Beach CC	319
1993	Baton Rouge Sheraton	Baton Rouge, LA	Robin Montgomery & Ron Hay	Louisiana State University	260

<b>Year</b>	<b>Hotel</b>	<b>City, State</b>	<b>Coordinator/Program Chair</b>	<b>Institution</b>	<b>Attend</b>
1994	Doubletree at Warren Place	Tulsa, OK	Doc Doherty	Tulsa Junior College	218
1995	Hyatt Regency	Lexington, KY	Les Grigsby	Eastern Kentucky University	233
1996	Biscayne Bay Marriott	Miami, FL	J. Tom Stewart	Miami-Dade CC	189
1997	Hyatt Regency Austin	Austin, TX	David Stones	University of Texas-Austin	386
1998	North Raleigh Hilton	Raleigh, NC	Martha Welch & Tom Black	North Carolina State & Duke	285
1999	Adams Mark Hotel	Daytona Beach, FL	Joe Roof	Seminole CC	185
2000	Northwest Arkansas Holiday Inn	Fayetteville, AK	Cindy Farrier	University of Arkansas-Fayetteville	272
2001	no conference				
2002	Westin Francis Marion	Charleston, SC	Dorinda Harmon & Bob Askins	College of Charleston & University of So Carolina-Columbia	137
2003	Holiday Inn-Riverwalk	San Antonio, TX	Steve Bazan & Barbara Blaney	Southwest Texas State & University of South Carolina-Columbia	102

