



Leadership Handbook

This handbook is an operational guide for the Board of Directors and other committees of the Tennessee Association of Collegiate Registrars and Admissions Officers (TACRAO). It includes a description and outline of responsibilities of each member of the Board of Directors and provides important information for members of the association.

This manual is updated annually by the President of the organization, with assistance from the Board of Directors.

TACRAO Constitution & Bylaws are maintained as separate documents. Each document is available on the TACRAO Website.

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INTRODUCTION

Welcome to the leadership of the Tennessee Association of Collegiate Registrars and Admissions Officers! Your position on the Board of Directors is an important one. Your colleagues have entrusted you with the responsibility of helping to direct the growth and activities of the association during the next year or two or even three; and with that trust comes the assumption that you will take this responsibility as seriously as did the many professionals who have served in the past.

You may very well be somewhat apprehensive about the task ahead of you. This is a common reaction after accepting such a leadership position. Not only are you unsure about what you have to do, but you already are responsible for duties on your own campus and somehow you must fit something else, TACRAO, into your already busy schedule. Is it worth it? What is in it for you? The following comments from past officers will give you an idea of how important this leadership position can be:

"I developed many lasting professional relationships because of the service period. I was also able to grow personally because of the task at hand, and the confidence that TACRAO showed toward my actions. The experience was positive from day 1!!!!"

"It's wonderful to have someone to call when you have a question. It's important to strive for professionalism within our profession. Being an officer helps to nurture that professionalism that is so vital to our industry. It's great to help others develop and hone their skills."

"I became aware of the talent and ability within the organization. It is important to develop that talent in the newcomers if the organization is to maintain its stability and grow. Serving as a TACRAO officer is an honor but it is also hard work. Any office should not be taken lightly. Admissions and records officers share a common bond unlike many organizations. It is that bond, that understanding of our frustrations, that helps to overcome the "times that try our souls"."

This Leadership Handbook is a guide to the many duties and responsibilities of the members of the Board of Directors of TACRAO. It is not a definitive statement nor is it all-inclusive since the roles of the association and its officers change from year to year as the profession and higher education itself change. It is hoped, however, that this handbook will help you to better understand two things: how the Board of Directors works and how it responds to the needs and desires of the association, and what role you will play as a member of the Board of Directors in the continuing growth and professionalization of the Association.

Introduction Written By: Glenn W. Munson, TACRAO President, 1987-88

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PRESIDENT

The President is elected for a one-year term after having served as President-elect. The President takes office following the official elections held during the Business Meeting session of the Annual Meeting. The duties of the President follow.

Responsibilities regarding the Board of Directors

- Oversee the management of TACRAO and make periodic reports to the membership
- Establish goals for the organization and provide direction for TACRAO projects
- Chair all Board of Directors meetings
- Work with each officer to insure responsibilities are carried out including the delegation of and follow up on assignments to Vice Presidents
- Serve as formal liaison with SACRAO and AACRAO
- Attend AACRAO Leadership, SACRAO, and AACRAO Annual Meeting as TACRAO representative or designate an appointee for representation
- Work with Vice President for Communications to complete each newsletter edition
- Work with Treasurer to pay bills and issue annual membership renewal notices
- Assign committee chairs and members with assistance of Board of Directors

Responsibilities for the TACRAO Annual Meeting

- Contact with and arrangements for AACRAO and SACRAO representative
- Preparation of certificates of membership, appreciation, and other awards
- Selection and purchase of conference memento for members
- Selection of keynote speaker with President-elect
- Coordination with Vice-President for Communications for on-site registration
- Conduct annual business meeting, including reproduction of any necessary handouts
- Solicit door prizes for annual meeting from membership via newsletter and other communication

Timeline of Responsibilities and Duties

January

- First Board of Directors meeting
 - Appoint committee chairs and assign chairs to appoint their respective committees using volunteer forms collected at annual meeting
 - Assign special projects
 - Clarify assignments such as support staff workshops, summer workshops
 - Confirm time line for newsletters
 - Begin discussion of next year's program format and theme with president-elect
 - Respond to various requests for information from SACRAO and AACRAO
 - Find out which Board members will be attending SACRAO and AACRAO and make any necessary assignments for representation of TACRAO at those meetings
 - Set date for next Board of Directors meeting

February

- Make sure negotiations are underway for the conference hotel for the following year
- Attend SACRAO annual meeting if at all possible or designate an attendee for representation

March

- Second Board of Directors meeting
 - Committee reports
 - Workshop reports (dates for all should be set by this date)
 - Newsletter report
 - Schedule next meeting
- Confirm plans for all summer activities with appropriate Vice Presidents
- Contracts for meeting events should be finalized and signed
- Schedule another Board meeting before the annual meeting at conference site
- Sign contracts with hotel selected for next year's meeting (be sure that contract calls for the flexibility to add to meeting space and room reservations if needed)

April

- Attend AACRAO annual meeting if at all possible or designate an attendee for representation
- Attend any scheduled workshops for state officers at AACRAO if possible

May

- Third Board of Directors meeting
 - Report of state-wide coordinating committee on calendar progress
 - Other committee reports as needed
 - Relay final plans/dates for all spring & summer workshops
 - Continue with program planning
 - Schedule next meeting
- Send letters to membership as needed for workshop announcements/support
- Attend scheduled workshops as possible

June

- Attend workshops as possible and send thank-you notes to chairs of each one

July

- Fourth Board of Directors Meeting
 - Set time-line for online registration to go live
 - Decide deadlines for early registration
 - Set registration fee if not already been done
 - Assign responsibility for registration table and on-site registration
- Newsletter edition should go out
- Attend TACRAO Summer Admissions Workshop
- Send thank you notes to all summer activity chairs

August

- Support President-Elect as needed with Annual Meeting arrangements

September

- Fifth Board of Directors meeting at site of annual meeting
 - Finalize all program plans
 - Review committee lists
 - Visit site of Big Event
 - On-site inspection of all facilities in conference hotel
 - Finalize slate of officers to be recommended for approval at the annual meeting
- Newsletter goes out; be sure to include call for door prizes from each institution
- Registration information goes out to membership

October

- Send email to Deans and Directors encouraging them to come to the meeting and to allow staff members to attend
- Prepare Certificates of Appreciation for Board members and committee chairs
- Officer Timelines due for Leadership Handbook revisions

November

- Request Board members to come to the meeting early to stuff packets (if needed) and take care of any last minute details
- Get volunteers to help distribute door prizes, if needed
- At the Annual Meeting, upon ascending to the position:
 - Conduct end of business meeting and last session conference recap
 - Review conference evaluation forms
- Introduce speaker at Friday breakfast (if appropriate)
- Conduct Board of Directors meeting after conference
 - Plan for January meeting
 - Ask president-elect to have theme for next year's meeting ready for consideration.
 - Ask those rotating off Board to meet with their new counterparts and transfer information
 - Plan winter edition of newsletter
 - Conference evaluations, write-ups of highlighted sessions, evaluation results, committee assignments (potential topics)
 - Discuss improvements from this meeting that could be implemented next year
 - Ask Board to write "thank you" letters to participants and chairs of the sessions for which they were responsible
 - Discuss officer responsibilities
 - Encourage Board members to capitalize on enthusiasm from this year's meeting to plan and recruit for summer activities and next year's meeting
- After conference:
 - Summarize session and conference evaluations
 - Distribute full set of evaluations to new and old Board members
 - Send "thank you" notes and session evaluations to all presenters and chairs
 - Make lists of members indicating interest in committees and/or offices and distribute to appropriate officers
 - Appoint committee chairs and special project coordinators (such as New Member Handbook, Officer Handbook) and get input on possible committee members
 - Assemble data for winter newsletter and send to Vice President for Information Technology and Publications

Yearly Activities/Projects

- Association Newsletter – three to five editions per year
- Leadership Handbook – given to members of the new Board of Directors each year
- New Members Guide – encourage new members to review at First Time Attendee session
- Registrar's Roundtable – one-day forum for all registrars in state
- Statewide Coordinating Calendar – produced and then published each summer for the upcoming recruitment year. It is the culmination of the work of the coordinating committee.
- Summer Admissions Workshop (usually geared toward new admissions staff) – two to three days, set up in sessions with common themes

- Support Staff Workshops (one per section of the state: East, Middle, West) – normally one day affairs hosted by a member school
- Meeting Guide – contains historical data on events of previous years (annual meeting, workshops, etc.)
- Update TACRAO homepage in consultation with webmaster
- Submit state news to SACRAO and AACRAO for inclusion in those regional and national newsletters

PRESIDENT-ELECT

The President-Elect is elected for a one-year term following which, barring unforeseen circumstances, the individual assumes the presidency of the association. The President-Elect has primary responsibility for the program and planning of the annual meeting.

Responsibilities regarding the Board of Directors

- Attend the Board of Directors meetings throughout the year
- Assume presidency of association should president not be able to serve
- Participate in and/or attend the support staff workshop in region and the Admissions summer workshop
- Other duties as assigned by the President

Responsibilities for the TACRAO Annual Meeting

- Selection of theme and/or title (if desired)
- Solicit program session ideas with assistance from Board and membership
- Selection of program sessions and delegation of responsibility for session preparation to vice-presidents (chairs, presenters, and records if desired)
- Selection of and arrangements for keynote speaker and topic of session; travel and hotel arrangements as well if necessary
- Create preliminary program prior to meeting and distribute on annual meeting app with assistance of Vice-President for Information Technology and Publications
- Make all meeting room assignments and arrange for all session physical arrangement and audio-visual requirements
- Create final conference program
- Obtain appreciation plaque for outgoing President
- Conduct last session conference recap (as President)
- Serve as ex-officio member of Local Arrangements Committee for fall annual meeting
- Make all arrangements with the conference hotel:
 - Contract, credit, billing, payment (with treasurer)
 - Conference meals including menus, coffee breaks
- Preregistration including setting registration fee (with Treasurer)

Timeline of Responsibilities and Duties

December

- Review Constitution and Board responsibilities and timelines
- Review evaluations from annual meeting
- Begin consideration of next year's annual meeting theme, session topics, speaker
- Prepare Preliminary Session Outline work sheets
- Attend AACRAO Leadership with President

January

- Review timetable of activities for setting annual meeting program
- Present theme for next annual meeting to Board
- Distribute session topic ideas culled from evaluations from this year
- Ask Board members to bring three specific sessions with presenters to May meeting
- Request suggestions for keynote speaker

- Distribute Preliminary Session Outline work sheets to be returned by mid-March
- Submit article for spring newsletter soliciting topics for annual meeting
- Distribute results of “I Will Volunteer” forms to all committee chairs and event planners

February

- Send reminder letter to Board regarding topics for sessions due at May meeting
- Pursue leads for keynote speaker

March

- Lead Board meeting on program construction
- Contact keynote speaker and follow up with confirmation letter
- Review contract with hotel with LAC chair for presentation to Board

April

- Attend AACRAO annual meeting if at all possible, especially leadership sessions
- Engage possible workshop presenters and/or develop session or workshop topics from AACRAO presentations

May

- Prepare and distribute tentative outline of annual program to Board members
- Identify and develop “Big Event” with LAC chair or Time and Site Committee
- Request “Equipment Needs” list by July meeting
- Summarize program topics and presenters as presented at March meeting and distribute to Board prior to May meeting

June

- Formulate annual program and begin to place sessions in tentative time slots
- Obtain names of Session Chair/Records
- Submit summer newsletter article
- Confirm attendance with session presenters
- Send confirmation letter to keynote speaker with meeting specifics
- Prepare first draft of annual meeting program for Board

July

- Finalize program content, events, keynote speaker, and schedule
- Finalize physical arrangements for the annual meeting: all sessions locations, session set-ups, and equipment needs should be submitted to the hotel
- Ask Board members for specific aspects of their sessions that still need finalizing and/or confirmation; have them confirm Chair/Records
- Finalize committee entries for program
- Review New Member Guide for changes and updates
- Attend Summer Admissions Workshop

August

- Circulate among Board members annual program draft with gaps highlighted
- Give deadline for completion (about September 15)
- Request list of corporate sponsors from Past President
- Make travel arrangements for keynote speaker and any workshop presenters
- Confirm AACRAO and SACRAO representative with President

- Email membership hotel reservation information and deadlines
- Submit outline of program to Vice-President for Information Technology
- Write letter encouraging attendance at annual meeting for fall newsletter

September

- Decide on menus for annual meeting, sign catering contracts
- Go over meeting room and audio-visual needs with the hotel
- If possible, meet the hotel people responsible for each segment of the meeting
- Review equipment needs list with Board and LAC chair
- Ask Board to write or email all presenters and chairs confirming participation and duties
- Declare last call for changes to program
- Work with Vice President for Technology to ensure that annual meeting app is prepared
- Review registration materials with the VP for Communications and the Treasurer
- Review local arrangements, special event, and meals with president
- Visit meeting site and confirm meeting room assignments and audio-visual needs with hotel representative
- Send program session information to keynote speaker
- Prepare and print "I Will Volunteer" for committee assignments and interests
- Arrange time at annual meeting site to stuff packets
- Order plaque for outgoing president and other honorees, retirees
- Order name badge ribbons

October

- Obtain meeting room assignments from hotel or LAC chair to be included in printed program
- Buy or prepare packet materials with assistance of LAC:
 - Folders, pads and pencils
 - Chair/recorder guidelines
 - Brochures of local attractions or special event
 - Update Leadership Handbook timeline and forward to editor, president

November – During Annual Meeting:

- Arrive at meeting site one day before meeting; have packet materials ready to stuff
- Prepare to attend First Time Attendees session
- Prepare Session signs for outside meeting rooms (if needed)
- Adjust number of hotel rooms being held according to registrations
- Give catering the final numbers for meals. This should include some in addition to those who have pre-registered for the meeting. (Give it your best guess.) Ask catering manager about last date for guarantee and excess meals to be prepared.
- At the Annual Meeting, upon ascending to the position of President:
 - Present former president with plaque and close business meeting with appropriate comments
 - Conduct end of business meeting and last session conference recap
 - Solicit input on direction, goals for TACRAO during upcoming year
 - Solicit committee volunteers and officer nominees
 - See Timeline/Responsibilities of President (above)
 - Review conference evaluations
 - Introduce speaker at Friday breakfast (if appropriate)
 - Conduct Board of Directors meeting after conference
 - Set time and site of January meeting

- Ask president-elect to have theme for next year's meeting ready for consideration
 - Ask those rotating off Board to meet with their new counterparts and transfer information
 - Plan winter edition of newsletter
 - Conference evaluations, write-ups of highlighted sessions, evaluation results, committee assignments (potential topics)
 - Discuss improvements that could be implemented next year
 - Ask Board to write "thank you" letters to participants and chairs of the session for which they were responsible
 - Discuss officer responsibilities
 - Encourage Board to capitalize on enthusiasm from this year's meeting to plan and recruit for summer activities and next year's meeting
- ◆ After conference:
- Summarize session and conference evaluations
 - Distribute full set of evaluations to new and old Board of Directors
 - Send "thank you" notes and session evaluations to all presenters and chairs
 - Make lists of members indicating interest in committees and/or offices and distribute to appropriate officers
 - Appoint committee chairs and special project coordinators (such as New Member Handbook, Leadership Handbook) and get input on possible committee members
 - Assemble data for winter newsletter and send to Vice-President for Communications

PAST-PRESIDENT

The position of Past-President is the third and final step in the three-year progression of the presidency. The president becomes past-president during the annual business meeting at the time when all new officers assume their new positions.

Responsibilities:

- Serve as advisor and consultant to the President and the Board of Directors
- Responsible for corporate sponsorship of the annual meeting
- Chair the Nominations Committee
- Responsible for special awards at annual meeting
- Arrangements for Past-Presidents Dinner, including the Board of Directors and the SACRAO and AACRAO representatives
- Chair By-Law Review Committee, if in a mandated review year
- Other duties as assigned by the President
- Responsibilities at Annual Meeting:
 - Serve as contact for exhibitors
 - Relax and enjoy it (compared to previous two years)

Timeline of Responsibilities and Duties

December

- Send “thank you” letters to all sponsors, exhibitors, and non-member presenters at annual meeting

January – March

- Attend Board meetings and begin work on program sessions as assigned
- Ask Board members to start targeting potential exhibitors
- Solicit Corporate Sponsors from exhibitors at SACRAO
- Appoint Nominations Committee
- Review corporate sponsorship levels for any revisions

April

- Solicit corporate sponsors from exhibitors at AACRAO
 - Market segments to recruit: (last year’s sponsors, local vendors by section of state, national vendors who can be recruited at AACRAO)
- Begin initial communication to solicit corporate sponsors
- Remind Board members to be alert to members who could be next year’s leaders. Summer activities are good way to assess leadership potential.
- Solicit nominations from membership via newsletters and workshops
- Complete program session arrangements
- Begin nominating committee work
 - Appoint members if not already done
 - Start list of possible nominees for available offices
 - Discuss nominations at July Board meeting
 - Finalize several nominations for each position
 - Circulate ballots to nominations committee
 - Tally votes from nominations committee

May – July

- Attend Board meetings and discuss nominations
- Follow-up with corporate sponsors
 - Attempt to get those who have committed to donate now
 - Call or do second mailing to those who have not responded
- Contact definite sponsors as to obligations, registration, mailing materials, etc.
 - Encourage early payment of fee or sponsorship

August

- Finalize nominations
- Call candidates to confirm their availability and willingness to serve
- Send letter to nominees outlining responsibilities (copy of handbook information)

September

- Attend Board Meeting
- Publish nominations in Newsletter
- Confer with local arrangements chair regarding hotel information, set-up time, etc., and communicate as necessary with sponsors
- Coordinate any awards or honorary memberships to be awarded, including memento and/or plaque

October

- Final contact with sponsors to answer questions about displays, electrical outlets and other needs, sponsored events, etc.

November – During Annual Meeting

- Attend annual meeting
- Present plaques or certificates to retiring TACRAOns who have made significant contributions to the Association
- Present other special awards as prescribed by President and Board of Directors
- Serve as contact for corporate sponsors
 - Assist with display set-up, fee payments and collection
 - Be sure that sponsors are recognized at sponsored events

VICE - PRESIDENTS

There are six Vice-Presidents:

Admissions, Administrative Support Services and Outreach, Information Technology, Records and Registration, Recruitment Services, and Communications

All have similar general responsibilities as outlined below, but there are several duties specific to each office. Two vice-presidents are elected each year, giving each vice-president a two-year term. The Vice-Presidents for Records and Registration, for Recruitment Services, and for Information Technology are elected in even-numbered years; the other three vice-presidents are elected in odd-numbered years.

Common Responsibilities of all Vice-Presidents:

- Serve on the Board of Directors
- Coordinate annual meeting sessions in the appropriate area as assigned by president and president-elect, including suggesting titles, formats and finding participants
- Assist President in overall planning and operations of organization
- Other duties as assigned by President

Timeline of Responsibilities and Duties

December

- Review conference program sessions and evaluation forms for possible topics for next year's annual meeting and the volunteer forms for people interested in helping with individual responsibilities.

January

- Get assignment from President-Elect about the number of conference sessions to prepare

February

- Begin to work on ideas for your TACRAO conference sessions (at least three sessions)
- Call your potential session presenters to ask for their participation on the program

March – July

- Give progress report on sessions and other responsibilities at the Board meeting
- Time devoted to organization of individual responsibilities

August

- Contact session speakers for follow-up information on workshop sessions

September

- Forward final copy of TACRAO Conference Schedule to your session presenters

October

- Assist President with any last minute details in preparation for the annual meeting.
- Submit revisions of the time-line in the Leadership Handbook as necessary.

November

- Arrive at annual meeting site a day early to help stuff packets
- Assist the President—get everything ready for the meeting the next day
- Be available throughout the meeting to help where needed
- Review TACRAO conference program sessions and evaluation sheets for topic suggestions for next year's conference

Vice-President for Admissions

Additional Responsibility:

- Coordinate Summer Admissions Workshop and Conference for Counselors (C4C) with appointed committees

Timeline of Responsibilities and Duties

February

- Conduct first committee meeting to begin planning for the workshop and conference
 - Set tentative date, location, theme, agenda, fees, time lines
 - Appoint committees
 - Facilities—obtain contract, select menus
 - Registration—packets, collect fees and forms
 - Program—session topics, facilitators and/or presenters

March

- Obtain Board approval of workshop agenda
- Submit facilities contract to President for review and approval
- Submit article to newsletter about workshop and conference
- Send letter to announce workshop to Deans and Directors at all member institutions
- Each committee member secure speakers/facilitators for at least one session

April

- Conduct second committee meeting to finalize plans for the workshop and conference: session planning, logistics, registration procedures, menus, door prizes
- Send second letter to Deans and Directors with detailed program, registration information
- Contact counselors to inform them of relevant information (date, time, location, etc.)

May

- Final workshop and conference committee meeting
 - Reconfirm facilitators/presenters
 - Check numbers of registrants for workshop for financial goals
 - Prepare workshop evaluation form

June – July

- Conduct Summer Admissions Workshop
 - Check registration and room setups
 - Monitor sessions and troubleshoot as necessary
 - Distribute and collect evaluations
 - Pay bills
- Follow-up and “thank you” notes to participants, facilitators, and presenters
- Make report to Board regarding workshop attendance, finances, etc.
- Write article for TACRAO newsletter

September-October

- Conduct Conference 4 Counselors
 - Check registration and room setups
 - Monitor sessions and troubleshoot as necessary

- Distribute and collect evaluations
 - Pay bills
- Follow-up and “thank you” notes to participants, facilitators, and presenters
- Make report to Board regarding attendance, finances, etc.
 - Write article for TACRAO newsletter

Vice-President for Administrative Support Services and Outreach

Additional Responsibility

Oversee regional committees to plan and host Support Staff Workshop in each area (East, Middle, and West). May serve as Committee Chair in own region. Assist other vice-presidents with the planning of all summer activities, especially those that incorporate topics dealing with data management and research

Timeline of Responsibilities and Duties: Support Staff Workshops

December

- Review conference program sessions and evaluation forms for possible topics for next year's annual meeting and the volunteer forms for people interested in helping with the Support Staff workshops

January – March

- Contact members who expressed interest in helping with the support staff workshops on I Will Volunteer forms and ask to help with workshop in their area
- Ask one member who has agreed to help to serve as chair of the workshop for that area (or two can co-chair if prefer)
- Once Chair(s) are finalized, provide them names of others who expressed interest in helping with support staff workshops in their area so they can contact them about serving on their planning committee
- Send Chairs copy of guidelines for planning a support staff workshop

April

- Begin plans for Support Staff Workshops
 - Survey area membership concerning support staff workshop ideas, date and time (may not have to be done each year)
 - Consult with President regarding selection of committee chairs and workshop budgets
 - Appoint committee and develop agenda
 - Set locations and dates
- Meet/call support staff planning committee to get ideas for presenters and sessions
- Delegate session responsibilities to planning committee
- Ask Chairs to designate institution for conferences and get approvals
- Inform Chairs may need to fill out contract for facility use, if required and talk with food service at host institutions about meals and set-up for conference
- Suggest to Chairs they may solicit sponsorship for meal to help offset workshop fee
- Inform Chairs to utilize own institutional accounts and contacts when reserving rooms, purchasing meals, etc for reimbursement from TACRAO after workshop completion
- Remind Chairs to consult with host institutions about parking facilities for conferences and secure any needed passes and directions for attachment to registration forms
- Give progress report on Workshop preparations at the Board meeting

May

- Send initial letter or email announcing Support Staff Workshop to Registrars, Deans, and Directors
- Assist Chairs with confirmation from host institutions and review room arrangements, audio-visual equipment provided, and food service arrangements
- Send letters to each speaker confirming topic, time allotment and AV needs
- Suggest to Chairs to delegate an individual, preferably on the host campus, to make session and directional signs
- Ask host institution to provide folders, pens, pads for workshop, if possible

- Provide Vice-President for Communications with the names of workshop chairpersons, dates and locations of the workshops, and names of any committee members for inclusion in the next edition of the newsletter.

June -- Duties with Workshop Chairs

- Letter or email from each Chair to member institutions, encouraging staff attendance at workshop and cost, when applicable
- Correspond with other area workshop coordinators for possible central theme or topics for all three workshops
- Secure pencils, pads, folders for workshop packets, if not being supplied by host institution
- Secure items from committee members' institutions for door prizes or have each school bring at least one item
- Secure at least two individuals who will work the registration table at the conference
- Check with presenters for any program title changes
- Design program cover and secure printing services (in-kind)
- Review program and finalize printing
- Finalize audio visual request from presenters
- Correspond with individual responsible for directional and workshop signs
- Prepare evaluation forms
- Find a suitable motivational handout for workshop packets and have duplicated
- Confirm food preparation with food services personnel for clarification and set-up arrangements of head table
- Establish responsibilities for registration and session introductions, etc.
- Send emails to members with dates, place and general information about upcoming workshops

July – Duties with Workshop Chairs

- Stuff workshop folders and arrange for distribution (evening before workshop)
- Bring evaluation forms for distribution with workshop folders
- Check all areas to be used for conference
- Give times to food services for food to be served (morning refreshments and lunch)
- Confirm guaranteed number for meal
- Make sure head table has floral arrangement (if affordable) and podium/lectern for speaker
- Make sure registration table is in an area accessible to everyone and have decorated, if possible with TACRAO paraphernalia
- Make sure registration has supplies: sign-in sheet, workshop folder, name tags, etc.
- Send thank you notes to all participants and the planning committee and anyone else who helped with the workshop
- Arrange to have gifts (school items, crafts, etc.) wrapped for presenters on the program (in-kind)
- Compile attendance counts using sign-in sheets
- Ensure the Workshop Chair mails completed TACRAO Workshop Financial Summary with all expense receipts, payment invoices and fees collected to treasurer for reimbursement or payment
- Prepare article about workshops for newsletter
- Prepare summary of workshop evaluations and forward to President

Vice-President for Information Technology

This vice-president is elected for a two-year term. This position is crucial in the ongoing communication with the membership and with other professional associations. Although not required, some knowledge of word processing and WEB knowledge is helpful.

Duties:

- Plan and coordinate annual meeting sessions as requested
- Oversee updates on the www.tnacrao.org website
- Oversee the TACRAO listserv at: listserv@tnacrao.org
- Serve as a liaison to TACRAO for technical issues
- Maintain any fees involved in the upkeep of the website
- Maintain social media accounts
- Update website with Newsletters and other documents as they become available

Timeline of Responsibilities and Duties

November – December

- Review TACRAO website for any revisions including updating Board of Directors
- Consult with President for any other additional changes to the TACRAO website

January

- Attend Board of Directors meeting

February – March

- Prepare website for workshop and conference registrations
- Announce any relevant TACRAO news or workshop dates on social media

April – August

- Maintain website for workshop and conference registrations
- Announce any relevant TACRAO news or workshop dates on social media
- Update website with announcements of workshops and conferences
- Ensure that app (for example, Guidebook) is ready for Annual Meeting. Research any suggested changes/updates.

September

- Coordinate with the Treasurer to update members listserv
- Attend Board of Directors Meeting
- Prepare TACRAO website for Annual Meeting registration and designated Annual Meeting space on the website
- Work with President and President-Elect to prepare content on app for Annual Meeting

October – November

- Continue to monitor TACRAO website and app for Annual Meeting
- Attend and assist with TACRAO Annual Meeting

Vice-President for Records and Registration

Additional Responsibility:

Coordinate Registrar's Roundtable

Timeline of Responsibilities and Duties: Registrar's Roundtable

December - February

- Confirm date and location for following roundtable and forum
- Arrange parking facilities/accommodations
- Develop theme for meeting
- Contact catering and establish timetable
- Explore topics/co-presenters
- Include information in newsletter

March - July

- Get Board approval of agenda for roundtable and graduate forum
- Include information in an article for the newsletter
- Finalize program, menu, meeting place, media needs, and theme items
- Prepare and email/send mailing including information and registration form, agenda, map, and parking information
- Get volunteer to emcee Roundtable and Forum if not doing personally and volunteer for registration table

August-October

- Log-in registrants, prepare list of attendees
- Answer member inquiries
- Establish final count and notify catering
- Finalize preparations for meeting with host institution's representative
- Obtain funds advance from Treasurer, if necessary
- Make arrangements with Treasurer for payment of catering costs after event
- Arrange for a reception table and sign-in sheet at the appropriate entrance
- Provide coffee, juice, muffins, etc., during morning registration period
- Prepare evaluation forms

Day of Registrar's Roundtable

- Review and monitor program areas and presentations/discussions
- Troubleshoot
- Emcee the sessions at the Roundtable or Forum, luncheon and combined meeting
- Administer evaluations at end of the day for both groups

After Registrar's Roundtable

- Tabulate cost and forward invoices and receipts to the treasurer
- Send out any necessary notes of appreciation/thank you
- Prepare report for Board regarding cost, attendance, and success of program
- Prepare report for Annual Business Meeting

Vice-President for Recruitment Services

Additional Responsibility:

Coordinate the Statewide Coordinating Calendar Committee. The Vice-President for Recruitment Services usually is selected from among those members of TACRAO who have served on the Statewide Coordinating Committee in previous years. The committee serves as a clearinghouse for college fairs and recruiting information, which assists high schools, community colleges, and other private organizations with program scheduling. This person also serves as the primary liaison for College Fair Automation (CFA).

Timeline of Responsibilities and Duties: Statewide Coordinating Committee

December

- If using calendar committee members for Spring Calendar, contact those members and distribute information and assignments to them. You will not need as many committee members for spring.
- Usually the VP for Recruitment Services and one other person can handle the spring semester calendar of events.
- Call Spring Calendar contacts if necessary before final printing of calendar.
- Compile information into the Spring Calendar.

January

- Email Spring Calendar to TACRAO members and to institutions that purchased the Fall calendar.

February

- Call Calendar Committee members to see if would still like to volunteer to serve on committee.
- Make sure to get their email addresses.
- Begin editing and preparing documents (order form, cover letter for order form, Calendar Committee memo, assignments, etc.) It is easier if you can make the cover letter and order form one document.
- Contact TACRAO secretary to determine members who have not paid dues. They do not receive a Fall Calendar unless dues were paid the previous year. Remove those institutions from your spreadsheet.
- CFA 1st communication (refer to Association Program Planning Calendar)

March

- Send an email to members about changing calendar contact.
- Send calendar assignments to Calendar Committee. Give members at least four weeks to complete their assignments and two weeks for the Vice President to tidy up the details before school is out.
- Calendar information should be returned to the Vice President by April 30.
- Send list of College Fair Coordinators to CFA

April

- Edit cover letter for calendar and any other documents that may need edited.
- Begin compiling information for Calendar as it is received.
- Fall fair listing due to CFA
- CFA 2nd communication (refer to Association Program Planning Calendar)

May

- Email purchase letter and order form to Purchase List database
- Send out order form

- Send order form to be placed on the TACRAO website in addition to membership forms
- Continue to update CFA fair listing

June

- Begin check log as checks come in
- Mail checks to TACRAO Treasurer
- Edit cover letter to fair organizers
- Edit labels if needed
- Finalize calendar
- Update databases
- Double check email addresses of Fair organizers on calendar
- Answer emails
- Email Fall calendar to members and those institutions who purchase the calendar
- Make a database for labels of those who purchased the calendar by a certain date
- Run off labels of members and those who purchased calendar
- Send out labels to fair organizers or email databases to those who prefer it
- Continue to update CFA fair listing

July

- Construct fair evaluation
- Establish how evaluations are going to be distributed and collected
- Answer emails, emails, emails
- Send Thank You notes to committee members
- Comment
- CFA 3rd communication (refer to Association Program Planning Calendar)

Vice-President for Communications

The Secretary is responsible for keeping membership records of the Association. All records are computerized, and each new secretary is supplied by TACRAO with the appropriate software and membership records. The Secretary is responsible for coordination of the updates to the New Member Guide and Newsletter. The Secretary is elected for a two-year term.

Responsibilities regarding the Board of Directors

- Attend all TACRAO Board of Directors meetings
- Take official minutes of all Board meetings and annual meeting and distribute to Board and committee chairs
- Distribute association dues invoices to all members in May of each year

Responsibilities for the TACRAO Annual Meeting

- Coordinate online pre-registration with President-Elect and Treasurer
- Coordinate registration with President-Elect and Treasurer
- Provide nametags at annual meeting registration
- Maintain record of attendance at conference

Timeline of Responsibilities and Duties: Newsletter

- Gather stories and information, publish and distribute the TACRAO newsletter
- Four issues per year with suggested topics below:
 - *Winter issue* published as a review of the annual meeting with:
 - Letter from the President
 - List of committee chairs and responsibilities
 - Recap of conference evaluations as well as other information as available
 - *Spring issue* to include:
 - Letter from the President-elect
 - Updated list of committee chairs
 - Review of SACRAO by TACRAO members who attended
 - TACRAO survey results
 - List of important dates and other information
 - *First Summer issue* to include:
 - Feature article on a pertinent topic
 - Dates of summer activities (Registrar's Roundtable, Support Staff Workshops, Admissions Summer Workshop) and as much information as is available
 - Review of AACRAO by TACRAO members who attended
 - Other information and regular features as available
 - *Fall issue* to include:
 - Final details, promotion of, and information about annual meeting
 - Final opportunity to preregister
- Gather as much personal news as possible
- Collect and maintain other state newsletters

November

- Identify Communications and Publications Committee
- Gather information for Winter Issue of newsletter

December

- Copy deadline for Winter Issue of newsletter about December 15 to insure collection of material after graduations but before holidays

January

- Email Winter Issue of newsletter; arrival date should be after spring semester begins to avoid registration clutter

February – March

- Gather information for Spring Issue of newsletter
- Copy deadline for Spring Issue of newsletter about March 15

April

- Email Spring Issue of newsletter during first week
- Gather information for First Summer Issue of newsletter

May – June

- Copy deadline for First Summer Issue of newsletter no later than first week
- Email First Summer Issue of newsletter to ensure timely information about summer activities

September

- Copy deadline for Fall Issue of newsletter about September 15

October – November

- Email Fall Issue of newsletter by end of first week (at least 30 days prior to annual meeting)
- Attend and assist with TACRAO Annual Meeting

Timeline of Responsibilities and Duties: New Member Guide

December – January

- Select committee chair to coordinate New Member Guide
- Review volunteer forms for people interested in serving on committee
- Send chair a copy of last year's Guide and necessary computer files

May – June

- Committee reviews directory for possible changes and additions
- Confirm that new officers are listed

July

- Present draft copy of Guide to Board members for their revisions/suggestions

September

- Finalize content and arrange for printing
- Get number of copies to be printed from President
- Provide President-elect with names of committee members for listing in annual meeting program

November

- Take new Member Guide to the annual meeting

- New Member Guide committee chair attends first time attendees breakfast with Board members
- Send thank you note to committee chair and committee members

Timeline of Responsibilities and Duties

Board of Directors Meetings

- Record minutes and distribute previous meeting minutes to Board members for approval
- Maintain record of meeting handouts
- Share pertinent items with Board

January

- Transfer records to incoming Secretary

February-April

- File Corporation report with State of Tennessee

June - September

- Take inventory/order name tag supplies including ribbons for President, Past President, Board of Directors, Chair, Presenter, First Time Attendee, Sponsor, Special Guest

October

- Assist President –Elect and Treasurer as need with conference registration

November

- Prepare name tags for attendees
- Prepare copies of previous year's Business Meeting minutes for luncheon tables
- Record minutes at Business Meeting
- Prepare software and archives for transfer to new officer

December

- Prepare monthly list of duties and responsibilities

TREASURER

The Treasurer is responsible for keeping all financial records of the Association. All records are computerized, and each new treasurer is supplied by TACRAO with the appropriate software and financial records. The Treasurer is responsible for preparation of the tax statements. In addition, the Treasurer is responsible for managing and maintain the Association's membership roster. The Treasurer is elected for a two-year term.

Responsibilities regarding the Board of Directors

- Attend all TACRAO Board of Directors meetings
- Maintain accurate financial records
- Pay bills incurred by association activities
- Provide financial reports at annual meeting and Board meetings
- Provide financial counseling for TACRAO functions (i.e., support staff workshops, registrars roundtable, summer workshop)
- Maintain accurate TACRAO membership

Responsibilities for the TACRAO Annual Meeting

- Coordinate online pre-registration with President-Elect
- Coordinate registration with President-Elect
- Assist President with financial arrangements with hotel
- Settle accounts with hotel at close of conference with President-Elect

Timeline of Responsibilities and Duties

Monthly

- Review checking statements and reconcile/balance digital ledger using designated software
- Prepare bank deposits

On Request

- Respond to invoices, prepare and mail checks

Board of Directors Meetings

- Prepare and present financial report
- Share pertinent items with Board
- Pay for luncheon

January

- Send out inactivation notices to all schools that did not pay dues for current year
- Prepare end of year Financial Statement
- Transfer books, records, and checkbook to incoming Treasurer

February-April

- File Form 990 with IRS
- Send reminder notices to new members (approved in November) that have not yet paid dues

May-July

- Process dues payments

- Coordinate calendar distribution with the Vice President for Recruitment Services
- Distribute dues invoice with membership directory information to institutional members and listserv
- Update membership roster. Coordinate with Vice President for Technology so listserv can be updated.

June - September

- Ensure payment of Insurance premium
- First reminder notice to deficient dues payment with November payment due date
- Send names and addresses of members with delinquent dues to membership committee chair

October

- Process payments and meeting registrations

November

- Send final notice of deficient dues payments with December 31 due date
- Prepare and print financial report for Annual Meeting
- Meet with Audit Committee for review of books
- Prepare payment checks for non-member session presenters as determined by President
- Pay conference bills
- Obtain new signature cards for checking account from new President and President-Elect
- Prepare software and archives for transfer to new officer

December

- Send out dues notices to new members voted on at Annual Meeting
- Prepare monthly list of duties and responsibilities

COMMITTEE CHAIRS AND OTHER INFORMATION

The following section contains information for the chairs of other important committees of TACRAO. It also includes general information important to all officers of the Association.

TACRAO Committees

Standing Committees. The following standing committees are required by the Bylaws:

- Audit. Chair appointed by President
- Nominating. Chaired by Past President
- Membership. Chair appointed by Vice President for Administrative Support Services and Outreach
- Statewide Coordinating Committee. Chaired by Vice President for Recruitment Services
- Time and Site. Chair appointed by President
- Conference 4 Counselors Committee. Chair appointed by Vice President for Admissions
- Support Staff Workshops Committee. Chair appointed by Vice President for Administrative Support Services and Outreach
- Summer Admissions Workshop Committee. Chair appointed by Vice President for Admissions
- Communications and Publications Committee. Chair appointed by Vice President for Communications

Other Committees. These additional committees support the activities of the Association:

- Admissions Summer Workshop. Chaired by Vice President for Admissions and Financial Aid
- Conference Evaluation. Chair appointed by Committee
- Corporate Sponsors. Chaired by Past President
- Local Arrangements. Chair appointed by President-Elect.
- Registrar's Roundtable. Chaired by Vice President for Records and Registration
- Support Staff Workshop. Chaired by Vice President for Administrative Support Services and Outreach
- New Member Guide. Chaired by Secretary
- TAC-Grow. Chair appointed by President

Membership Committee Chair

The Membership Committee Chair is a volunteer position appointed each year by the President and reports to the Vice President for Administrative Support Services and Outreach. It is the responsibility of this person to solicit new members, review and process applications, and recommend applicants for membership.

Three types of application forms have been developed to assist the membership committee in collecting data regarding schools or persons requesting membership in TACRAO. The TACRAO constitution describes the different types of membership and the current dues structure. Schools applying for membership will be billed for dues once their application for membership has been approved by the membership at the annual meeting.

Applications should be completed as thoroughly as possible. Under the regular institutional membership status, the school may have as many members as they like. The application along with a copy of the institution's catalog should be returned to either the chairperson or a member of the committee. Prior to the last Board meeting (usually in September), the committee chair should notify

the President of the names of schools and their accrediting agencies so that the applications may be taken before the Board of Directors.

Responsibilities for the TACRAO Annual Meeting

- Provide written information regarding the schools and/or individuals applying for membership to the current membership at the business meeting. This information is placed on the luncheon tables.
- Formally present to the membership the schools and/or individuals applying for membership. The President will then ask for a vote.

Timeline of Responsibilities and Duties

March – April

- Solicit eligible Tennessee schools, out-of-state schools and individuals that are not currently TACRAO members.
- Send letter of invitation, appropriate application form, and current dues structure to prospective TACRAO members.

July – August

- Submit applications, catalogs, and recommendations for membership to the Board for review. The President and Board of Directors will review for appropriateness of accreditation and will send information for membership.

November

- The Chairperson will formally present to the TACRAO membership the institutions applying for membership. If any institution is denied membership the Secretary/Treasurer will refund that institution the amount paid within 30 days after the annual meeting.

Program Session Chair/Recorder

- Obtain packet of Session Evaluation forms from the designated area.
- Arrive early in the presentation room with evaluation packets
- Distribute session evaluation forms to all attending the session
- Introduce the session, yourself and the presenter(s), obtaining a brief sketch of their background before the session
- Ask all attending the program to complete the session evaluation form to be collected at the end of the session
- Count the number of attendees and write on the outside of the evaluation form envelope
- Collect the evaluation forms and return to the designated area
- Prepare a written summary of the session for the next newsletter
- Forward the summary to the Vice President for Information Technology and Publications

MEMBERSHIP IN TACRAO

Applicants for membership must submit a letter of application to the chair of the Membership Committee sixty (60) days prior to the annual meeting and be approved by an affirmative two-thirds vote of regular institutional members present at the annual meeting. Each institution, governing and/or coordinating agency, or organization may designate as many professionals as desired as members.

TACRAO has three classes of membership for which applications must be filed:

- **Regular Institutional Membership.** Regular institutional membership may be considered for college-level degree granting, in-state institutions if they are accredited by an accrediting association approved by the Council for Higher Education Accreditation (CHEA). Eligibility of other in-state institutions, whose accrediting association is not under CHEA, shall be determined by the Board of Directors of the Association. Membership dues are required in keeping with the dues structure of the Bylaws.
- **Associate Membership.** Associate membership status may be considered for out-of-state college-level degree granting institutions, if they are accredited by an accrediting association approved by the Council for Higher Education Accreditation (CHEA), and for post-secondary education governing and/or coordinating agencies. Eligibility of other out-of-state institutions, whose accrediting association is not under CHEA, shall be determined by the Board of Directors of the Association. Both the institutions and the agencies' consideration for membership must be recommended by the Membership Committee, approved by the Board of Directors and by an affirmative two-thirds vote of the voting members and institutional representatives present at the annual meeting. Membership dues are required in keeping with the dues structure of the Bylaws.
- **Affiliate Membership.** Affiliate membership status may be considered for those organizations which, while generally non-collegiate, are founded to have purposes parallel to those of this corporation and desire to participate in its activities provided that the Board of Directors approves them for consideration for membership, that they are recommended by the Membership Committee, and approved by an affirmative two-thirds vote of the voting members and institutional representatives or their designees present at the annual meeting. Membership dues are required in keeping with the dues structure of the By-laws.
- Applications for membership may be found on the Membership page of the TACRAO website.

Listserve and Website Information

AACRAO ListServe

All Board members should subscribe to the AACRAO ListServe for state and regional officers. It is recommended that AACRAO's web site be consulted for proper subscription instructions.

Tennessee ACRAO ListServe

This electronic discussion list is for members of the admissions and records professions at colleges and universities in the state of Tennessee. The TN-ACRAO-L was created by the Tennessee Association of Collegiate Registrars and Admissions Officers and is intended to promote the sharing of information, experiences, concerns, and advice about issues affecting admissions, records, and registration professionals in the state of Tennessee in particular and among others in the profession who wish to join. Technical, legal, financial, and administrative questions, comments, and viewpoints are encouraged.

To subscribe to the list, send a message to:
Listserve-request@tnacrao.org

The subject line should read: subscribe

Once you are subscribed, you will receive information about how to use the listserve, including details about sending messages.

To send mail to the list, address your message to:
listserve@tnacrao.org

Web Sites

TACRAO: www.tnacrao.org
SACRAO: www.sacrao.org
AACRAO: www.aacrao.org

Incorporation of TACRAO

The Tennessee Association of Collegiate Registrars and Admissions Officers, Inc., is chartered as a non-profit organization commonly referred to as a 501(c) (6) association. This status means that TACRAO is exempt from paying federal and state income taxes. A copy of the IRS letter stating that TACRAO is exempt from federal income taxes is included in the back of the handbook. This exemption was obtained in 1988 and reconfirmed in 1996. The TACRAO charter is recorded in the Knox County Court House.

An incorporated association, TACRAO has a registered agent with the state of Tennessee. Each year the state sends the agent a Corporation Annual Report form to complete. The yearly filing of this form maintains the TACRAO charter. Once the agent has completed the form, the form goes to the Secretary/Treasurer who then submits it with the required \$20 filing fee.

Becky Harper (UT-Knoxville) was President-elect during 1996, the year that TACRAO was incorporated. She became the registered agent with the state of Tennessee. When her term as Past President ended (1998), she passed to the incoming President-elect the incorporation papers and the corporate annual reports that go to the state each year. These papers are kept in a special black binder given to the organization upon incorporation. The President-elect remains the registered agent through his/her term as Past President. This process allows TACRAO to change its registered agent only every three years.

The IRS must be notified each time the registered agent changes. The address is:

Internal Revenue Service
ATTN: Entity Control
Stop 342
Memphis, TN 37501

The letter, sent by the new agent (president-elect), informs the IRS that the Tennessee Association of Collegiate Registrars and Admissions Officers, Inc., has a new registered agent, specifying the individual's name, and referencing our federal ID number (62-1234449).

The Treasurer is responsible for filing any forms regarding federal income tax. US Bank has TACRAO's Employer Identification Number (62-1234449) and sends the Treasurer a 1099 form on any interest earned. Since TACRAO has federal tax exemption with a non-profit status of 501(c)(6), the Treasurer must complete an informational tax return (Form 990) each year. This form must be filed within 3 months and 2 days after the end of the fiscal year. Our fiscal year runs from January through December.