

NAACO Regional Meeting Handbook

September 2023



Table of Contents

1. Overview	3
2. Host Institution Responsibilities	3
3. NAACO HQ Responsibilities	4
4. How-To Guide Regional Meetings	4
APPENDICES	8
A. NAACO REGIONS AND REGIONAL DIRECTORS	8
B. AGENDA TEMPLATE	8
C. BUDGET TEMPLATE	9
D. WORKBACK SCHEDULE – IN-PERSON MEETING	9
E. WORKBACK SCHEDULE – VIRTUAL MEETING	11

1. Overview

Regional meetings are one-day maximum, in-person or virtual, events hosted by a NAACO member institution with support from NAACO HQ.

Regional meetings provide a place for attendees to have discussions and may be an opportunity to learn about the host institution's ceremonies and practices. Unlike the Annual Conference, regional meetings do not include formal calls for presentations or external keynote speakers.

The education provided at a regional meeting is primarily led by the host institution with guidance from their regional director, supported by attendee discussions, and presentations from other members are encouraged. Regional meetings also allow the host institution the opportunity to invite colleagues who may not be engaged in NAACO to share their expertise on topics of interest to attendees. This might include a presentation on marketing, security, sustainability, or other initiatives that the host institution would like to present.

Registration fees for in-person meetings are \$125 for members and \$225 for non-members and for virtual events are \$25 for members and \$50 for non-members.

2. Host Institution Responsibilities

- Review this handbook
- Submit an [Application to Host a NAACO Regional Meeting form](#), for Board Approval, minimum 10 weeks prior to the desired date of the meeting
- Work with NAACO HQ to develop a budget, schedule, content and communication plan
- Identify non-member institutions in the region to invite
- For in-person meetings, arrange meeting room, AV, parking, room set-ups, and catering
- For virtual meeting, provide meeting platform and link on which the meeting will be hosted
- **OPTIONAL Provide hotel recommendations and if able to do so without fulfilling a booking guarantee, reserve a block of guest rooms with a meeting rate**
- Determine agenda, confirm speaker participation (see template), and identify facilitators for any breakout sessions
- If requested by NAACO HQ, provide tables for NAACO sponsors at in-person meeting
- Oversee check-in of attendees and provide on-site assistance throughout the meeting
- Enjoy networking with your commencement/convocation colleagues!
- Complete and submit an expense form to NAACO HQ one-week post-event

- Optionally contribute an article to the MACE newsletter post-meeting to report on the regional meeting

3. NAACO HQ Responsibilities

- Review and approve Regional Meeting Application with Director-at-Large for Membership and send approval to Host Institution within 5 business days
- Send survey, if requested, to regional member institutions to collect data regarding preferred meeting date and topics of interest
- Provide budget template and work with regional meeting host(s) to develop budget
- Provide agenda template, and along with the Regional Director, support in developing
- Send meeting invitation to all regional members and identified non-member institutions
- Add regional meeting to [event listings](#) on NAACO website and on NAACO Connect.
- Oversee registration and send confirmation emails to attendees
- Oversee correspondence with and registration of NAACO sponsors and advise host institution of any table needs
- Provide attendee list to host institution 2 weeks, 1 week, and 1 day prior to meeting
- Provide NAACO logo for nametags
- Act as main point of contact for all inquiries from members, non-members and sponsors
- Coordinate the attendance (in-person or virtual) of a NAACO Board member or Board-appointed representative to the regional meeting who will provide greetings on behalf of the board at the beginning of the agenda and serve as a resource regarding NAACO
- Coordinate payment of expenses to host institution 30 days after receipt.

4. How-To Guide Regional Meetings

1. Reach out to your [Regional Director](#) regarding interest in hosting an in person or virtual regional meeting. The Regional Director can answer questions about the process.
2. Narrow down a few date options and create a planning timeline.
3. Complete and submit to NAACO HQ an [Application to Host a NAACO Regional Meeting](#) minimum 10 weeks before the requested date(s) including:
 - o Proposed dates and times. Please provide at least three options with the event lasting for at least 6 hours.

- o **Note: Regional Meetings may not take place within 60 days of the Annual Conference.**
 - o Tentative schedule for the event
 - o Proposed speakers and session topics
4. The Director-at-Large for Membership and NAACO HQ will evaluate your application and inform you if it has been accepted within 10 business days.
 5. Once your event is approved, NAACO HQ will connect to support the planning process which will include:
 - o Providing a [budget template](#) (suggested # of attendees: 30; suggest breakeven budget)
 - This must be completed and sent back to NAACO HQ prior to promotion of the meeting, a minimum of 8 weeks prior to the meeting date.
 - o Providing an [agenda template](#)
 - This must be completed and sent back to NAACO HQ a minimum of 2 weeks prior to the meeting date
 - Use the recommended agenda outline as a guide
 - It is recommended that some speakers/sessions are confirmed prior to the invitation going out so that this information can be included on the invitation/website
 6. NAACO HQ will review and approve your budget or advise if any changes required
 7. NAACO HQ will send the meeting invitation to all member in your region. If you have contacts at any non-region institutions please let HQ know so that they can send the invitation to them as well.
 8. NAACO HQ will add your regional meeting to the [event listing page](#) on the NAACO website and promote it through social media
 9. NAACO HQ will oversee registration and collect payment
 - o Those from your institution only attending the meeting to present do not need to pay for registration
 - o Anyone attending the meeting and also presenting does need to register and pay
 - o Registration is complimentary for up to 2 members from the host institution; presenters from the host institution are also complementary
 10. Confirm details with presenters/facilitators
 11. NAACO HQ will coordinate the attendance of a NAACO board member or board-appointed representative to the regional meeting who will provide greetings on behalf of the board at the beginning of the agenda and serve as a resource regarding NAACO
 12. Send final agenda and any notes for attendees to [NAACO HQ](#) 10 days before meeting
 13. NAACO HQ will send final agenda and notes to attendees 1 week prior to the meeting
 14. NAACO HQ will send a thank you and survey to all attendees the next business day after the meeting

15. [Submit receipts](#) and expense form within 1 week after the meeting
16. NAACO HQ will process expenses and remit payment 30 days after receiving the expense form

In-Person Regional Meetings

1. Confirm dates/times and locations, room booking and arrange for any AV equipment required based on approved budget
 - o Computer with internet and projector/screen are recommended, consider a microphone for audio clarity
2. Book catering based on approved budget to include the following:
 - o Water throughout the day and refreshments for morning and afternoon break
 - o Lunch
3. Advise [NAACO HQ](#) when catering numbers need to be confirmed so that a cut-off date for registration can be determined
 - a. Dietary restrictions and accessibility requirements will be collected and sent to you 2 weeks, 1 week and 1 day prior to the meeting
4. Provide [NAACO HQ](#) with campus map including transportation & parking options for attendees
5. **OPTIONAL Provide hotel recommendations and** if able to do so without a fulfilling a booking guarantee, reserve a block of guest rooms with a meeting rate
6. NAACO HQ will oversee registration of any sponsors wanting to attend the meeting and will send you requests for table needs for sponsors a minimum of 1 week prior
7. Confirm catering, AV and room booking
8. Create nametags for attendees with the NAACO logo
9. Coordinate registration on the day of the meeting, ensuring someone is available at the registration table throughout the day
10. Coordinate presenters/facilitators on the day of the meeting
11. Coordinate catering and AV on the day of the meeting
12. Arrange to take a group photo and send this to HQ to be shared with attendees

Virtual Regional Meetings

1. Confirm what platform you will be using to host the meeting and share the link with [NAACO HQ](#) 10 days before meeting
2. It is recommended that you have one person to oversee the technical aspects of the meeting and one person to be the host
3. It is recommended that you have a speaker “green room”, i.e. a second virtual meeting set up where you can greet presenters and brief them before joining their session – you

will need another person to oversee this separate from the host and technical staff person in the main session

4. Run a test session in your platform to ensure all settings are correct
5. Coordinate letting attendees into the virtual room on the day of the meeting
6. It is recommended that you encourage attendees to rename themselves to add their institution name

APPENDICES

A. NAACO REGIONS AND REGIONAL DIRECTORS

Each NAACO Region has a Regional and Assistant Regional Director. These leaders are a source of information and can support your interest in hosting a regional meeting.

A full list of current regional leaders can be found on the [NAACO Leadership webpage](#).

B. AGENDA TEMPLATE

This is a recommended template to use to help build your agenda. Please feel free to adjust programming and times to suit your schedule.

- | | |
|---------|---|
| 8:45am | Arrival and registration <ul style="list-style-type: none">• Informal networking• Coffee and water (optional pastries, etc.) |
| 9:15am | Welcome <ul style="list-style-type: none">• Institutional host greeting• Greetings from NAACO President or Board member (in-person if attending, otherwise via Zoom)<ul style="list-style-type: none">o Benefits of NAACO membershipo Certificate Programo Annual Conference |
| 9:30am | Case Study or Panel Discussion #1 <ul style="list-style-type: none">• Presentation from host institution or a member• Focus on something the institution has done that is unique or recently implemented |
| 10:30am | Break <ul style="list-style-type: none">• Beverages and light snacks |
| 11am | Roundtable #1 <ul style="list-style-type: none">• Attendee-suggested topics |
| 12pm | Lunch |
| 1pm | Case Study or Panel Discussion #2 <ul style="list-style-type: none">• Presentation from host institution or a member• Focus on something institution has done that is unique or recently implemented |

- 2pm Roundtable #2
- Attendee-suggested topics
- 2:45pm Break
- Beverages and light snacks
- 3:15pm Case Study or Panel Discussion #3 or Roundtable #3
- 4:15pm Wrap up and closing
- 4:30-6pm Happy Hour (optional)

C. [BUDGET TEMPLATE LINK](#) - This is a recommended template to use to help build your event budget, working toward a cost-recovery meeting. Registration rates for in-person meetings are \$125 (member) and \$225 (non-member). Registration rates for virtual meetings are \$50 (member) and \$75 (non-member).

D.

E. WORKBACK SCHEDULE – IN-PERSON MEETING

Task	Due	Responsibility
Complete and submit Application to Host a NAACO Regional Meeting	Minimum 10 weeks before meeting	Host Institution
Put tentative hold on meeting room(s)	With application submission	Host Institution
Review and approve application	Within 10 business days of receipt	NAACO HQ and Director-at-Large, Membership
Send budget and agenda templates to Host Institution	With application approval	NAACO HQ
Confirm room booking	With application approval	Host Institution
Create agenda and reach out to speakers/presenters	With application submission and confirmed no later than 2 weeks before meeting	Host Institution
Complete budget template and return to NAACO HQ	Minimum 8 weeks before meeting	Host Institution

Review and approve budget	Within 3 business days of receipt	NAACO HQ
Book catering and AV based on approved budget	With budget approval	Host Institution
Let NAACO HQ know when catering has to be confirmed	When catering is booked	Host Institution
Send NAACO HQ a map of campus with meeting location marked as well as transportation, parking and hotels options	Within 5 business days of receiving budget approval	Host Institution
Send invitation to members and non-members in region	Minimum 6 weeks before meeting; within 3 business days of receiving map, parking, transportation and hotel information	NAACO HQ
Add regional meeting to website and NAACO Connect event listings	When invitation is sent	NAACO HQ
Collect registration and payment	When invitation is sent until catering confirmation deadline	NAACO HQ
Coordinate who from board will attend meeting and whether it will be virtual or in-person; advise host institution who will attend and how	Minimum 4 weeks before meeting	NAACO HQ
Send invitation to sponsors and ask those eligible if they would like a table to display collateral	When invitation is sent	NAACO HQ
Send logo for nametags to host institution	3 weeks before meeting	NAACO HQ
Send registration lists (including sponsors) to host institution	2 weeks before meeting, 1 week before meeting, 1 day before meeting	NAACO HQ

Send final agenda and any last-minute notes for attendees to NAACO HQ	10 business days before meeting	Host Institution
Make arrangements for any dietary restrictions and accessibility needs	1 week before meeting	Host Institution
Confirm catering and AV	3 days before meeting (or at catering deadline)	Host Institution
Create attendee nametags with NAACO logo	1 day before meeting	Host Institution
Place directional signage as needed	1 day before meeting	Host Institution
Coordinate registration, ensuring someone is available at registration throughout the day	Day of meeting	Host Institution
Coordinate presenters/speakers and optionally provide thank you gifts	Day of meeting	Host Institution
Coordinate catering and AV	Day of meeting	Host Institution
Send thank you email and survey to attendees	1 business day after meeting	NAACO HQ
Submit receipts and expense form to NAACO HQ	1 week after meeting	Host Institution
Pay expenses	30 business days after meeting	NAACO HQ

F. WORKBACK SCHEDULE – VIRTUAL MEETING

Task	Due	Responsibility
Complete and submit to Application to Host a NAACO Regional Meeting	Minimum 10 weeks before meeting	Host Institution

Review and approve application	Within 10 business days of receipt	NAACO HQ and Director-at-Large, Membership
Send agenda template to Host Institution	With application approval	NAACO HQ
Confirm which virtual platform to host meeting on	With application approval	Host Institution
Create agenda and reach out to speakers/presenters	With application submission and confirmed no later than 2 weeks before meeting	Host Institution
Send invitation to members and non-members in region	Minimum 6 weeks before meeting	NAACO HQ
Add regional meeting to website and NAACO Connect event listings	When invitation is sent	NAACO HQ
Collect registration and payment	When invitation is sent until catering confirmation deadline	NAACO HQ
Coordinate who from board will attend meeting and advise host institution who will attend	Minimum 4 weeks before meeting	NAACO HQ
Send invitation to sponsors	When invitation is sent	NAACO HQ
Coordinate staff to oversee technical aspects of meeting, hosting duties, and greenroom host (if applicable)	2 weeks before meeting	Host Institution
Send registration lists (including sponsors) to host institution	2 weeks before meeting, 1 week before meeting, 1 day before meeting	NAACO HQ
Send final agenda, meeting link and any last-minute notes for attendees to NAACO HQ	10 business days before meeting	Host Institution
Run test of platform software	3 days before meeting	Host Institution

Oversee hosting and technical requirements of meeting	Day of meeting	Host Institution
Send thank you email and survey to attendees	1 business day after meeting	NAACO HQ