

## Professional Development Opportunities Roles and Responsibilities

### Introduction to the Annual Meeting

The AACRAO Annual Meeting (AM) addresses critical professional development needs of AACRAO's core professional constituency. The meeting offers plenary presentations, sessions, roundtables, and pre-meeting workshops with speakers discussing issues critical to higher education professionals in multiple interest tracks. Program sessions should cover a wide variety of issues important to the membership.

#### Session Development:

The development of the Annual Meeting is a collaborative endeavor of the Annual Meeting Program Committee (PC), the Professional Activities Committee (PACs), the AACRAO National Office, and specified/contracted meeting planning/management companies. The AACRAO Board of Directors (BOD) supports the PC in creating the AM, but overall responsibility for AM content, structure, and format rests with the PC and the national office.

#### Vendor Sessions:

Program sessions may include a limited number of paid corporate presentations. If not a paid corporate presentation, presentations regarding the use or implementation of a commercial product should include examples of competitor's products also. Companies may not partner with an AACRAO member institution to present their product to avoid having to pay to present.

### Annual Meeting Budget

All non-exhibit hall expenses, including those for the PC and Co-chairs of volunteers are considered part of the Annual meeting "meeting" budget; prior approval of all expenditures is required. Exhibit-related expenses are in the annual meeting "exhibits" budget. The national office has full oversight and responsibility for the annual meeting budget.

### Complimentary Registration and Housing Policies

Complimentary lodging in single rooms is provided for the Chair of the Annual Meeting PC and for the co-chairs of AM volunteers for up to five nights for the meeting that they are serving in this role (for example 2018 co-chairs of AM volunteers for Orlando will receive complimentary hotel and registration). Complimentary registration is provided for the Chair, Vice Chair, members of the Annual Meeting PC, and the co-chairs of AM volunteers.

## Roles and Responsibilities

### **AACRAO President:**

Plans and conducts Opening Session (not including Opening Plenary), Business Meeting and Town Hall Meeting in conjunction with the national office;

Selects the Parliamentarian for the Business Meeting;

In consultation with the national office, the current Program chair and program vice chair, selects the incoming program vice chair-elect. Brings the selected individual's name forward for BOD approval.

### **AACRAO President-elect:**

Serve as the BOD liaison and conduit to the BOD with the PC;

In consultation with the national office, the current Program chair and program vice chair, selects the incoming program vice chair-elect.

### **AACRAO Vice Presidents (with portfolios):**

Support the PC committee chair aligned with his/her role, as necessary, to fulfill PC duties for AM;

Reinforce the PAC and PCs role in creating and establishing the AM content;

Work in collaboration with the PC and PAC chairs to identify areas of need/interest for the AM program to assure that the AM program offerings support and further the areas of interest of the VP's portfolio;

Work in collaboration with the national office to identify areas of need/interest for the AM program to assure that the AM program offerings support and further the areas of interest of the VP's portfolio.

### **Annual Meeting Chair:**

The chair, having served as the vice-chair the prior year, is appointed to a one-year term;

Oversees the overall work of the AM PC;

Oversees sessions database and, working with Program Committee Coordinators, ensures that information is ready for meeting brochure, room assignments, and program;

Understands and helps train committee members on the use of the database;

Organizes coverage of the session data entry room at the annual meeting;

Work with the national office and PC chair-elect and PC to update the annual calendar of events for the AM taking both session planning and publication needs into consideration;

Oversees calls for session proposals;

Works closely with the national office on establishing the AM.

### **Annual Meeting Vice-chair:**

The vice chair is appointed by the BOD to a one-year term, to be trained as the chair for the next Annual Meeting. This appointment happens prior to the December Leadership Meeting held 15 months before the Annual Meeting;.

Works collaboratively to oversee the overall work of the AM PC;

Works closely with the national office on establishing the AM;

Serves as the coordinator for poster sessions;

Quality control of the data base as sessions are entered and revised throughout the process;

Monitors sessions database to confirm titles are appropriate, short and long descriptions are clean (no stray characters or grammar errors);

Updates missing information such as intended audience, estimated enrollment, repeat status, webinar candidate, etc.;

Take and distribute notes from the June planning meeting, as well as the planning meetings at the AM and the Leadership Meeting;

Coordinate with the Program Chair, responsibilities and duties necessary during the AM.

### **Annual Meeting Program Committee (Group Coordinators):**

In consultation with the VP with portfolio approve membership of the PACs;

In consultation with the VP with portfolio approve PAC chairs;

Overall accountability for the structure and content of the AM;

Establish the AM program including workshops, sessions, roundtables, etc.

Collaborate with the national office in the overall coordination of the AM sessions and workshops;

Work closely with the national office in the creation and the timing of communications to AM participants (i.e., presenters, facilitators, alternates, and other appropriate entities regarding) AM information;

Work in collaboration with the national office and the meeting management company to assign sessions to appropriate rooms based on expected attendance;  
On an annual basis, assess annual meeting structure, format, delivery and suggest improvements/changes;

Assist the evaluations chair in session evaluation process;

Verify arrival of session presenters at the AM;

Identify 'last minute' sessions to fill in session slots where presenters have canceled late or are no-shows at the meeting;

Determine and implement best method for informing AM attendees of session change information (formerly known as the 'daily session change flyer') - On-site, the Group VII Coordinator will be responsible for this duty;

Serve a three year term beginning and ending with the Annual Meeting.

#### **Professional Activities Committee (PAC) Chairs:**

Coordinate the work of the Professional Activities Committees with regards to AM program content;

Work collaboratively with their associated PC member to generate content for the AM;

Propose and prioritize sessions for the AM;

Assist the communication with AM presenters;

Recruit session presenters and sessions ideas at local state and regional meetings.

#### **Professional Activities Committees:**

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#### **National office staff:**

In consultation with the current Program chair and program vice chair, the current president and president-elect, select the incoming program vice chair-elect;

Approves budget, dates and schedules for the AM;

Collaborate with the PC chair and PC vice chair to coordinate the AM;

Determine with the PC and the BOD specific topics or critical issues to emphasize at the AM;

In consultation with the PC and the BOD, recruit plenary/keynote and general session speakers;

Recruit exhibitors, sponsors and corporate presenters;

Coordinate and disseminate communication relating to the AM;

Present to the board the evaluation of the AM;

Overall accountability for coordination of registration, finances, exhibits and housing;

Hire and manage the professional meeting companies;

Review contracts and make recommendations to the ED;

In conjunction with the PC, recommend changes to the AM structure, delivery, etc.;

Coordinate and develop all AM marketing including publications, web, and promotional publicity;

In conjunction with the PC, develop a theme for the AM;

Produce exhibitor prospectus;

Sell the exhibit hall booths and manage onsite exhibitor renewal;

Manage the exhibit hall;

Share evaluation results with appropriate/interested parties;

Oversee on-site logistics for the AM, including decorations, floor plans, security;

**Meeting Management Company:**

Manage assigned contracts;

Oversee on- and off-site logistics pertaining to the AM, including rooms assignments (made in conjunction with the PC chair and vice-chair), hotel space, and AV equipment;

Arrange AV for sessions;

Serve as liaison with hotel, convention center, and other entities involved in local arrangements/convention issues for the AM;

In conjunction with the national office, negotiate hotel, convention center, security, and selected supplier contracts;

Work closely with the PC to assign sessions to appropriately sized rooms based on expected attendance.

### **Registration Management Company:**

Provides registration site for attendees that registers them for the AM (including exhibitors);

Sends confirmation to registrants;

Provide registration reports to the national office;

Manage Lead retrieval;

Handles on-site registration of attendees and exhibitors including temporary workers and setting up equipment for registration;

Provides training to temporary staff.

### **Co-Chairs of Volunteers for AM**

The co-chairs of AM volunteers are appointed by the BOD up to two years prior to their AM. The BOD solicits applicants, typically through the host state and regional group. Note: all co-chairs must be AACRAO members. Co-chairs should recruit two subcommittee chairs to oversee Hospitality/Publicity and Operations. This is a two year commitment to include publicity the first year to promote next year's AM in whatever state the AM is at that year and hospitality in the second year at the AM in home state,

Work with AACRAO staff to recruit, coordinate and oversee volunteers for the AM;

Publicity/Hospitality Booth (years 1 & 2):

- Year 1: In coordination with the AACRAO staff, obtain promotional materials for publicity booth (year prior to the AM in your city);
- Year 1: Staff publicity booth at the AM (year prior to the AM in your city) based on the Registration desk hours;
- Year 2: Staff hospitality booth at the AM (following year in co-chairs city) based on Registration desk hours; provide walking maps to places of interest during conference, direct people and answer attendees' questions as needed.

Operations (year 2 only):

- Collect workshop tickets;
- Collect meal and international reception tickets;

- Create inserts for signs for meetings and events which are not in the AACRAO session database. Update and create new session signs onsite for revised sessions as needed with coordination of the chair of group VII Annual Meeting Program Committee (AMPC) and AACRAO Staff. (AACRAO staff provides sign holders and original session signs from database as well as instructions and file to make the updates to.)
- Work with the AMPC Group VII coordinator on distributing daily updates to attendees.
- Check with the Chair of Evaluations to identify if assistance is needed collecting and/or providing volunteers for data entry of paper evaluations.

Packet Stuffing & Poster Area (year 2 only):

- Coordinate volunteer hands to assist with packet stuffing on Saturday morning at the convention center (25-30 volunteers is ideal)
- Coordinate volunteer hands (2-3 people per shift) to assist poster authors hang their posters on Sunday (two shifts: Sunday morning & Sunday afternoon)

Field Trip Coordinator:

- Depending on the institution/field trip that is arranged, it may be helpful to establish a more formal role for this specific task (Phoenix is the first year for this at the Annual Meeting)

Years 1 & 2 All volunteers are encouraged to offer assistance with stuffing bags, etc. as needed the day prior to the AM. (Normally Saturday morning)

## **AM Program Committee Time Flow/Task Flow**

### **17-16 months out**

The Program Committee Chair, Program Committee Vice Chair, and AACRAO staff begin preparations for the Leadership meeting. All conference forms, the annual meeting handbook, database instructions, etc, need to be updated and ready to distribute to the incoming Committee Chairs at the Leadership meeting.

### **16 months out**

The President Elect, President-Elect nominee, Program Committee Chair, Program Committee Vice Chair, Associate Executive Director, and Associate Director for Meetings attend the Leadership Meeting to transition from one committee to the next and to make plans for upcoming annual meeting and one year out annual meeting.

Review plans, including proposed Meeting at Glance, with Program Committee and AACRAO staff.

Program Committee Chair, working with AACRAO staff, prepares updates for Program Committee calendar for year.

Call for Proposals for the next year's Annual Meeting issued.

### **13 months out**

Program Committee meets with AACRAO staff to review important issues.

Program Committee attends luncheon meeting with PAC Chairs, Board of Directors, and AACRAO staff on first day of Annual Meeting (PAC Chairs Luncheon).

Program Committee meets with Chairs and Members of Professional Activity Committees at designated times to review session proposal data entry procedures and requirements (complete title, description, presenter, and facilitator) and presenter policies.

Program Committee monitors sessions for presenter no shows and quality of presentations.

Program Committee monitors session data entry of next year's sessions.

Assist with data entry for session evaluations.

Program Committee Chair requests information from AACRAO staff and Meeting Management Company regarding estimated number of rooms available for sessions and their capacity.

### **10-9 months out (Isn't program trying to tighten this up???)**

Program Committee reviews sessions to make sure that sessions information is complete and that complete workshop budgets have been submitted.

Program Committee continues to review Requests for Approval of Nonmember Presenter Expenses and Complimentary Registration and Requests for Corporate and Non Institutional Waiver Forms and to forward to President-Elect and Executive Director for approval.

Program Committee Chair reviews calendar with AACRAO staff to ascertain if there have been any changes related to publication date requirements.

Two to three weeks before the Summer Planning Meeting, the Program Committee has a conference call with the AACRAO staff to review policies and the Meeting at a Glance and to set the number of sessions assigned to each Group in each time slot.

Program Committee Chair creates time slots in the data base.

Program Committee Coordinators slot their sessions, change the status of the slotted sessions to "Accepted", and indicate any "Alternates" a week before the Summer Planning Meeting.

Prior to the Summer Planning Meeting the Program Committee chair with the assistance of the Program Committee Vice chair identifies presenters with multiple accepted sessions, reviews rejected proposals for ones that might be good alternates or Group VII sessions, and analyzes multiple presentations by the same presenter in the meeting as a whole.

Prior to the Summer Planning Meeting the Program Committee Chair, Program Committee Vice Chair, and AACRAO staff have a conference call to identify any issues that the Program Committee needs to discuss and to set the agenda for the meeting.

Program Committee meets in annual meeting city with Co-Chairs of Annual Meeting Volunteers, AACRAO staff, and Meeting Management Company.

Program Committee tours site of annual meeting to become familiar with site and identify possible challenges.

Program Committee tours Annual Meeting city with AACRAO staff.

Program Committee reviews the status of the external submissions and begins to resolve issues relating to multiple presentations by the same presenter.

The Program Committee reviews the program as a whole, looking for topic overlap, time conflicts among sessions that would appeal to the same populations, and for holes in the program. (These reviews should be the main focus of the Summer Planning meeting.)

Program Committee reviews evaluations of previous annual meeting and considers possible program changes to correct problems.

Program Committee reminds PAC chairs to submit Requests for Approval of Nonmember Presenter Expenses and Complimentary Registration and Requests for Corporate and Non Institutional Waiver Forms for approval

### **Following planning meeting (10-9 months out)**

Program Committee Coordinators notify Professional Activity Committee Chairs of sessions that are selected for the program and those that are alternates.

## **9-8 months out**

Program Committee Chair provides database reports to Program Committee as needed.

Program Committee Coordinators review session database and clean up data entry problems and missing information. They pay special attention to session titles and interest tracks, which will appear in the meeting brochure.

Program Committee Coordinators review proposed sessions to make sure that each interest track has an adequate number of sessions.

Group VII Coordinator reviews workshop descriptions, budgets, and sets fees with AACRAO office. Program Committee Chair reviews confirmation messages and instructions to session participants with AACRAO staff.

AACRAO staff adds appropriate documents for presenters and facilitators to web (guidelines for presenters and facilitators and Guidelines for Professional Presentations, etc.) in preparation for sending confirmation e-mails.

## **8 months out**

Program Committee reviews confirmation message text and recommends changes.

AACRAO staff exports selected session data and full workshop information for brochure and sends to Program Committee for review.

Program Committee makes changes in database based on their review of sessions.

AACRAO staff sends confirmation, alternate, and cancellation e-mail messages to presenters, facilitators and committee member responsible for the session with links to appropriate documents on web explaining roles, expectations, times, etc.

Program Committee Coordinators monitor responses in the database from the confirmation messages.

## **7 months before and up to the AACRAO Meeting**

AACRAO office indicates presenter confirmation when entering AACRAO sessions into database for all session entered after confirmation e-mails are sent.

## **6-4 months out**

Program Committee Coordinators continue to update the database with responses from the confirmation messages.

AACRAO staff provides Program chair with reports and notifies Program Committee of non-respondents and presenters who decline. In turn, Program Committee Coordinators advise committees of this information.

Program Committee Coordinators work with committees to make sure that all unconfirmed presenters and facilitators are contacted to confirm their participation.

Program Committee Chair works with AACRAO Office to determine how many time slots office needs and how many can be used for alternate sessions. -- **This happens much closer to the meeting as hot topics are materializing.**

Program Committee Coordinators make arrangements for alternate sessions to be brought forward after determining how many session time slots are available.

Program Committee Coordinators continue confirmations, maintenance, refinements, edits, and changes.

It is recommended that Program Committee Coordinators have at least one “pocket” session available in the case of a sudden cancellation during the Annual Meeting. Consider using public sessions that were submitted after the deadline.

### **5 months out**

AACRAO staff sends draft of marketing brochure to Program Committee Chair to review.

AACRAO office sends audiovisual information and requests to all sessions.

AACRAO sends emails re-confirming presenters and facilitators.

Vice chair-elect is chosen (President, President-elect, current Program chair and Vice chair, and national office) in time for upcoming Leadership Meeting (generally by Sept. 1).

The outgoing Program Committee Chair, Program Committee Vice Chair, and AACRAO staff begin preparations for the Leadership meeting. All conference forms, the annual meeting handbook, etc, need to be updated and ready to distribute to the incoming Committee Chairs at the Leadership meeting.

In preparation for assignment of session rooms, Program Committee reviews attendance estimates for accuracy.

Program Committee Chair reviews database to make sure that all sessions have been assigned to a time slot and that all meal and plenary events have been entered.

### **4 months out**

The Program Committee Chair, Program Committee Vice Chair, Associate Executive Director, and Associate Director for Meetings attend the Leadership Meeting to transition from one committee to the next and to make plans for upcoming annual meeting and one year out annual meeting.

New Program Committees meet jointly at the Leadership Meeting.

Program Committee Coordinators work with their state and regional associations to identify facilitators.

### **AACRAO staff assigns program codes. -- Not sure what this means.**

AACRAO staff exports session data from database and sends to Meeting Management Company for room assignment.

**Program Committee Chair tracks** database for changes after AACRAO staff send data to Meeting Management Company.

Program Committee Coordinators remind PAC chairs to start communicating with PAC members for the upcoming planning cycle (including reminding PAC members of the PAC meeting on the first day of the Annual Meeting)

### **3 months out**

Program Committee Coordinators work with Professional Activity Committee Chairs to identify facilitators for sessions without them.

Meeting Management Company enters session room assignments into sessions database.

AACRAO staff sends export of sessions to Program Committee for review prior to final export for program.

### **2 months out**

Program Committee reviews session export and makes corrections in database if necessary.

AACRAO staff sends list of session additions and cancellations that have been compiled by the Program Committee Chair since previous export to Meeting Management Company for room assignment.

Meeting Management Company adds new room assignments to database.

AACRAO staff exports session data for program.

AACRAO staff edits session data for program.

Program Committee chair maintains list of session additions and cancellations from time of export and forwards daily to AACRAO staff and Meeting Management Company. The Group VII Coordinator begins creation of the Daily Update Flyer once the program has gone to print.

AACRAO staff sends program copy to graphic designer.

### **2 months out to the week before the Annual Meeting**

Program Committee reviews program proof and returns edits to AACRAO staff.

AACRAO staff monitors workshops and meal attendance and notifies Program Committee of preregistration numbers.

Group VII coordinator informs workshop presenters of registration counts for their workshops.

Program Committee coordinators send counts to appropriate committees.

### **1 week before Annual Meeting**

Program Committee Chair sends change list to AACRAO Staff. The Group VII Coordinator takes over responsibility of the Daily Update Flyer at this time and manages it on site.

AACRAO Staff makes copies to be inserted into registration packets.

### **Week of Annual Meeting**

Program Committee meets with AACRAO staff to review important issues.

Program Committee attends luncheon meeting with PAC Chairs, Board, and AACRAO staff.

Program Committee meets with Chairs and Members of Professional Activity Committees at designated times to review session proposal data entry procedures and requirements (complete title, description, presenter, and facilitator) and presenter policies.

Program Committee monitors sessions for presenter no shows and quality of presentations

Program Committee attends wrap up meeting on last day of Annual Meeting

## **Co-chairs of AM Volunteers Time Flow/Task Flow**

### **18 months out from the AM**

AACRAO Staff provides copies of current AM planning manual to prospective co-chairs

Co-chairs are selected.

### **17 months out from the AM**

Co-chairs identify subcommittee chairs for registration, hospitality/publicity, and operations (signs, daily updates, etc.)

Recruit volunteers to work during upcoming AM.

### **15 months out from the AM**

Attend leadership meeting to discuss plans with PC, BOD members and AACRAO staff.

### **15-13 months out from the AM**

Confirm and communicate with volunteers

### **Annual meeting (year prior to the one they are hosting)**

Observe current AM and meet with AACRAO staff and Meeting Management Company representatives.

Attend luncheon with AMPC, AACRAO staff and Meeting Management Company.

Oversee subcommittee chairs and volunteers; connect these individuals with their counterparts at this AM.

Staff publicity booth.

Make a brief (5-10 minute) promotional presentation at the AM Business Meeting.

### **10-8 months out from the AM**

Meet in AM city with AMPC, AACRAO Staff and Meeting Management Company.

Tour AM site and facilities.

Begin recruiting volunteers at state and regional meetings.

### **6-5 months out from the AM**

Begin collecting brochures, maps, etc. for information and hospitality booth.

### **December (4-3 months out from the AM)**

Attend Leadership meeting to discuss plans with AMPC, BOD, and AACRAO staff.

## **2-1 months out from the AM**

Confirm volunteer assignments.

## **Week of the AM**

Co-chairs:

- Oversee activities of volunteers
- Set up volunteer staging room
- Print and distribute sign inserts for revised sessions, and meetings and events not in the database. AMPC Group VII Coordinator will collect and create the update information.
- Monitor session changes to notify AM attendees. Work closely with the AMPC Group VII Coordinator.
- Alert Meeting Management Company of cancelled sessions.
- Attend the AM thank you luncheon with the AMPC, AACRAO Staff, and Meeting Management Company.
- Attend the Honorees' reception

Note: The Registration Management Company is responsible for setting up, training, and managing the registration area; setting up and maintaining registration computers; and advising on registration area plans.

Volunteers:

- Assist with distribution of session change information (formerly known as the "Daily Update Flyer"). The AMPC Group VII Coordinator is responsible for collecting and creating the session update information.
- Staff meeting information booth.
- Staff hospitality booth.
- Collect meal and international reception tickets.
- Collect workshop tickets.
- Create and print sign inserts for revised sessions, meetings and events not in the database.
- Create last minute sign inserts.
- Distribute and collect signs in conjunction with the Meeting Management Company.