

**WESTERN BUSINESS EDUCATION ASSOCIATION  
(WBEA)**

***POLICIES AND PROCEDURES MANUAL***

*and*

***APPENDICES***

**July 1, 2017 - June 30, 2018**

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## 0000 INTRODUCTION

This *Western Business Education Association (WBEA) Policies and Procedures Manual and Appendices (P&P)* implements the Articles of Incorporation and the Bylaws of the corporation.

## 1000 EXECUTIVE BOARD

The Executive Board is the governing body of the corporation. It shall consist of no less than seven (7) members, in accordance with the Articles of Incorporation.

### 1010. MEMBERSHIP

1. The Executive Board as identified in the Articles of Incorporation shall be composed of:
  - a. Officers of the corporation
    - (1) President
    - (2) President-elect
    - (3) Treasurer
    - (4) Secretary
    - (5) Past President
  - b. WBEA Director to the NBEA Executive Board is elected every three years by the NBEA Executive Board at its Spring meeting.
  - c. Designed official representatives (usually the president and president-elect) of the states, territories, and provinces (S/T/Ps) within the Western Region of the National Business Education Association (NBEA).
2. In accordance with the 2016 Revised Bylaws, Directors of the WBEA Standing Committees:
  - a. Awards & Scholarship
  - b. Conference\*
  - c. Newsletter
  - d. Finance\*\*
  - e. Legislative
  - f. Membership
  - g. Nominating\*\*\*
  - h. Media Communications
  - i. Strategic Planning\*\*\*

shall be voting members of the Executive Board with the following exceptions:

\*The WBEA President directs the Conference Committee, and as President is a voting member of the Executive Committee and Board. When necessary, the WBEA President may appoint a Conference Chair, but that appointed conference chair would not be a voting member.

\*\*The WBEA President-elect directs the Finance Committee and as president-elect is a voting member of the Executive Committee and Board.

\*\*\*The WBEA Past President directs the Nominating and Strategic Planning Committees and as past president is a voting member of the Executive Committee and Board.

Only one vote per officer or committee director is allowed even though he/she may have additional voting positions.

3. The NBEA President and Executive Director shall be non-voting, ex-officio members of the Executive Board, in accordance with the WBEA Articles of Incorporation and Bylaws. The ISBE Representative from the western region shall be a non-voting ex-officio member of the Executive Board.
4. The Directors of the following standing committees will be invited to present reports at Executive Board Meetings: Awards and Scholarship, Conference (future, current and prior year), Newsletter, Finance, Legislative, Membership, Nominating, Strategic Planning, and Media Communications. Also invited to present reports at the Executive Board Meetings will be Directors of special (ad hoc) committees such as: Annual Conference Advisory and Robert J. Thompson NBEA/WBEA Membership Endowment.

#### **1020. RIGHTS AND RESPONSIBILITIES**

1. The Executive Board members must maintain active membership in NBEA/WBEA.
2. The Executive Board is charged with conducting the affairs of the corporation.

#### **1030. MEETINGS**

1. In accordance with the WBEA Articles of Incorporation and Bylaws, the annual meeting shall be held during either the three-day February holiday of Presidents' Day or the three-day May holiday of Memorial Day (Arizona only). Arizona has the option of selecting either the three-day February or May holiday.
2. The Executive Board shall meet in conjunction with the annual WBEA Conference.
3. Special meetings may be called by the President or upon petition signed or voted electronically via e-mail by a majority of the Board members.
4. The Executive Committee shall set the time and place of the annual Executive Board meeting, based on bids received from the S/T/Ps (See Section 8030).
5. Executive Board meetings are to be conducted according to *Robert's Rules of Order, Newly Revised*.
6. A Board quorum shall consist of a simple majority of the voting members of the Executive Board.
7. Reimbursements for meetings will be made according to the guidelines in Section 7020.

## **2000 EXECUTIVE COMMITTEE**

The Executive Committee is a second governing body of the corporation. It shall consist of no fewer than six members.

## **2010. MEMBERSHIP**

1. The Executive Committee, as identified in the Articles of Incorporation, shall be composed of the officers of the corporation (①President, ②President-elect, ③Treasurer, ④Secretary, ⑤Past President, and ⑥ WBEA Director to the NBEA Executive Board.
2. The Directors of the Standing Committees serve as voting members of the Executive Committee.

## **2020. RIGHTS AND RESPONSIBILITIES**

1. The Executive Committee shall conduct the business of the corporation when the Executive Board is unable or unwilling to meet or in the case of emergency matters.
2. The Executive Committee should seek ratification of changes to the policies and procedures with a two-thirds (2/3) majority vote.
3. Changes will be effective immediately and reported to the Executive Board at its annual meeting.

## **2030. MEETINGS**

1. In accordance with the Articles of Incorporation, the Executive Committee shall meet semi-annually. One meeting shall be in conjunction with the annual WBEA Executive Board meeting, and the other meeting shall be held during the summer.
2. The President or a majority of the Committee members may call special meetings.
3. The President shall set the date, time, and place of the meetings of the Executive Committee. An attempt will be made to meet in a central location.
4. Reimbursements for meetings will be made according to the guidelines in Section 7020.

# **3000 OFFICERS**

The officers, as identified in the Articles of Incorporation, are the President, President-elect, Treasurer, Secretary, and the immediate Past President.

## **3010. REQUIREMENTS**

1. Each officer must be a member in good standing of NBEA/WBEA and his/her S/T/P.
2. Candidates for all offices must have attended a WBEA Executive Board meeting and served as a member of the WBEA Executive Board (refer to 1010.1 and 1010.2) for one full year within the last ten years.

### **3020. ELECTION AND APPOINTMENT**

1. All officers shall be elected at the annual meeting of the Executive Board for a term of one year, with the exception of the two-year term of office of the Treasurer (in odd years beginning July 1), two-year term of Secretary (in even years beginning July 1), and the three-year term of office of the WBEA Director to the NBEA Executive Board. Duties are assumed as of July 1. The President-elect will be the nominee for the office of President the following year.
2. The President-elect will be nominated from the S/T/P that will host the next annual conference, with the following exception: The person nominated to serve as WBEA President every fifth year, or Wild Card year, may be nominated from any WBEA S/T/P. If an S/T/P declines to be able to host a conference, then their year could be designated as a Wild Card year.
3. WBEA Director to the NBEA Executive Board shall be elected to serve a three-year term according to the NBEA guidelines.
4. All other officers may be nominated from any S/T/P within the WBEA region.

### **3030. NOMINATIONS**

1. The WBEA Past President will serve as director of the WBEA Nominating Committee.
2. If the WBEA Past President is seeking nomination for either a WBEA or an NBEA office, the WBEA President shall appoint a former WBEA President to serve as director of the WBEA Nominating Committee.
3. The Nominating Committee meeting shall be held prior to the meeting of the Executive Board. The time and place will be scheduled by the President.
4. Each S/T/P will appoint one member and an alternate to the Nominating Committee. This member must be a voting member of the WBEA Executive Board except when all voting members are candidates for a WBEA office. Written confirmation of any changes to the Committee representative must be submitted by the S/T/P President to the Nominating Committee Director.
5. By September 15, if the conference is in February, or December 15, if the conference is in May, the director shall send an announcement to the Nominating Committee members (with copies to S/T/P Presidents). This will include an announcement of vacancies; description of duties, guidelines; standardized résumé form, and an updated WBEA Officer Eligibility List. (See Appendix A3030).
6. S/T/P Nominating Committee members must submit a standardized résumé form for all nominees from that S/T/P to the Nominating Committee Director by November 15, if conference is in February, or January 15, if conference is in May. (See Appendix A3030).
7. If no candidates for any WBEA office apply, the Nominating Committee Director shall notify each member of the Executive Board by November 20, if conference is in February, or February 20, if conference is in May. An additional copy of Form A3030 will be sent to each S/T/P at that time. Additional nominations from S/T/Ps



shall be received by December 15, if conference is in February, or March 15, if conference is in May. (Note: Persons already nominated for an office do not have the option of changing their application to another office.)

**Nomination Deadline Chart**

Timeline	February Conference	May Conference
Director shall send an announcement to the Nominating Committee members (with copies to S/T/P Presidents).	September 15	December 15
Deadline for nominee to submit a standardized résumé form.	November 15	January 15
If are no candidates for any WBEA office apply, the Director shall notify the Executive Board.	November 20	February 20
Deadline for additional nominations.	December 15	March 15

8. If there are no candidates for an office, it is the responsibility of the Executive Committee to appoint an officer. The appointment must be approved with a two-thirds (2/3) majority vote of the Executive Committee.
9. All nominations must be approved by the S/T/P Executive Committee, Executive Board, or membership of the S/T/P making the nomination. The S/T/P Nominating Committee member shall verify an individual's willingness to serve and qualifications for the office prior to placing a name in nomination.
10. Nominees will not serve on the Nominating Committee except in emergencies. Emergencies will be determined by the WBEA Nominating Committee Director.
11. The Nominating Committee shall nominate one person for each of the following positions (in this order): President (President-elect from the previous year), President-elect (according to rotation schedule), Secretary, and Treasurer. During the wildcard year, the Nominating Committee may nominate up to two candidates for the office of WBEA President-elect. The voting will take place by written ballot, through the process of elimination, with a simple majority making the selection. All members of nominating committee, including director, will cast a secret ballot. The director ballot will be used only in the event of a tie vote. The director will announce the results without mentioning that the tie-breaking ballot was used.
12. The WBEA Nominating Committee Director shall present to the WBEA Executive Board a single slate of candidates for open offices. Additional nominations from the floor shall be limited to those candidates who have met stipulations outlined in Section 3030.6. The S/T/P representative on the nominating committee has until one hour prior to the WBEA Executive Board meeting to notify the Nominations Director that he/she will be making such nomination. The person bringing forth the nominee will provide materials (nomination form and résumé) necessary to the WBEA Board by the start of the Board meeting. The Board will be given a 15-minute break at the time of the Nominations Report on the agenda to review the

applications of those who were nominated from the floor along with the Nominating Committee's nomination(s) for the same position. The candidates for the WBEA President-elect during the wildcard year shall give a presentation to the WBEA Executive Board before ballots are cast.

13. The voting members of the WBEA Executive Board will cast their votes by written ballot, with a simple majority making the selection. All voting members of the Executive Board, including the President, will cast a secret ballot. The President's ballot will be used only in the event of a tie vote. Two ex-officio Executive Board members will count the ballots twice with the President's ballot only in the event of a tie. The two official counters will report the winner of the election to the President, who will report the election results to the entire Executive Board.

### **3040. CAMPAIGNING**

Campaigning for WBEA office shall be limited to active campaigning only in the candidate's own S/T/P.

### **3050. VACANCIES**

In accordance with Article III, Section 7 of the Bylaws, in the event any position of an elected officer, appointed position (Standing Committee or Special/Ad Hoc Committee Director), or member of the Executive Committee becomes vacant during the term of office, the President shall appoint a person to fill the unexpired term with a two-thirds approval vote of the Executive Committee. The vacated position of President will be filled by a WBEA past president. Notice is given to each Executive Committee/Board member when such appointments are made.

#### **1. Voluntary Resignation**

A member of WBEA may resign from any or all positions held within the WBEA organization and still remain a member of NBEA/WBEA. Voluntary resignation shall be in writing to the WBEA President or Secretary if resigning a WBEA office, Standing Committee, Special/Ad Hoc Committee Director position, or an Executive Committee position.

#### **2. Removal of Officer or Committee Director**

Any member of the Executive Committee or member of the committee of the director in question may recommend the removal of an elected officer, appointed position (Standing Committee or Special/Ad Hoc Committee Directors), or member of the Executive Committee. Grounds for removal include inadequate fulfillment of duties or the violation of any city, county, state, national, or international laws.

- a. Standing Committee or Special/Ad Hoc Committee Director or Executive Committee Member. A simple majority in the Executive Committee is needed to remove a Standing Committee or Special/Ad Hoc Committee Director or Executive Committee member.
- b. Elected Officer or Representative. If an elected officer fails to carry out the duties and responsibilities of his/her position, that officer may be removed from office as follows:

- (1) The Executive Committee, by a two-thirds majority vote, shall have the power to remove an officer. Removal of an officer may be effected when it is in the best interest of WBEA to do so.
- (2) Before final action may be taken with respect to the removal of an officer, a notice of intent to remove must be approved by a majority of the voting members of the Executive Committee through telephone, e-mail, or written vote. The affected officer must be notified in writing by the President or Secretary of the vote and advised of the reasons for the action in a written statement of particulars. The affected officer shall have thirty days from the time of the vote to effect remedial actions or otherwise bring him/herself in compliance with the purposes, Bylaws, and best interest of WBEA.
- (3) At the time at which the Executive Committee will make a final decision on a motion to remove, the members of the Committee shall reconsider its vote, reviewing any remedial steps taken by the affected officer or NBEA representative. A two-thirds vote of all voting members of the Executive Committee shall be necessary to approve a motion to remove an officer or voting Executive Committee member.
- 4) Any removal of an officer or WBEA Director to the NBEA Executive Board shall result in the automatic loss of any and all positions held within the WBEA organization and deletion of said years within those positions from WBEA eligibility for WBEA offices list.
- (5) Any officer removed from office will be replaced according to the WBEA Bylaws, Article III, Section 7.

## **3100 DUTIES OF OFFICERS**

### **3110. PRESIDENT**

1. Preside at all meetings of the Executive Board and Executive Committee.
  - a. Work with Secretary to prepare agendas.
  - b. Work with Secretary to send notice of meeting and agenda materials, including minutes of previous meeting, to all members at least ten days before the meeting.
  - c. Work with Secretary to send minutes of Executive Committee meetings to the NBEA Executive Director and NBEA President.
2. Serve as General Director of the annual WBEA Conference. (See Section 8000)
3. Work with Newsletter Editor to prepare and distribute the *Western News Exchange (WNE)* to communicate WBEA business to WBEA Executive Board members, regional of NBEA, NBEA Executive Director, the NBEA Executive Committee, WBEA members and Friends of WBEA. Number of issues is left to the discretion of the President.
4. Serve on the Finance Committee.

5. Work with Treasurer to send the following reports to the NBEA Executive Director and NBEA President:
  - a. IRS Form 990N (if appropriate)
  - b. End of Year Financial Report
  - c. Annual Arizona Corporate Filing Report
6. Serve as ex-officio member of all committees of the corporation.
7. Make appointments:
  - a. Appoint Standing Committee directors (every attempt should be made to make sure that no more than two committee directors shall be from the same S/T/P) as necessary to fill vacancies. (See Section 6000)
  - b. Appoint committee directors as needed to carry out the objectives of the corporation.
8. Be responsible for communications with all other organizations.
9. Represent or designate other Executive Committee members to represent WBEA at other professional meetings in which the interests of the corporation are concerned.
10. Serve on the Strategic Planning Committee. Review plan of action on the Strategic Plan with Executive Board.
11. See that resolutions passed by the Executive Board are pursued and action resulting from such is reported to the Board by a specified date.
12. Perform other duties common to such an officer and assume any other duties assigned to the office by the Executive Board.
13. Provide information to the incoming President regarding duties, responsibilities and procedures of the office of President.
14. Select President's Award recipient. (See Appendix A3110).
15. Develop and distribute a Program of Work for WBEA Executive Board.
16. Arrange for printing of WBEA letterhead and distribute to Executive Committee members.
17. Assist Past President with maintenance and update of *WBEA Policies and Procedures Manual and Appendices*.
18. Work with Secretary to prepare and send Program of Work along with updated *WBEA Policies and Procedures Manual and Appendices*, Bylaws, Articles of Incorporation, June 30 Financial Statement (actually sent in January mailing), and approved budget to Executive Board.
19. Perform additional tasks as listed in Program of Work.
20. Serve as legislative liaison in the absence of an appointed legislative liaison.
21. Communicate with WBEA members and Friends of WBEA

22. Promote liaisons with businesses, corporations, and other institutions to become WBEA business partners.
  - a. Promotion material will be sent to the Newsletter Editor for each newsletter encouraging retired business education teachers or part-time teachers to join as a Friend of WBEA.
  - b. Reminders will be sent to current Friends of WBEA contributors for another contribution for the next fiscal year starting July 1 and ending June 30.
  - c. Contribution amounts collected will be sent to the Treasurer and the Newsletter Editor will be informed of the Friend of WBEA contributors' name, email address, and S/T/P.
  - d. The Membership Director will receive a spreadsheet of the Friends of WBEA contributors that includes their name, email address, their contribution, and the S/T/P where they live from the Treasurer.

**3120. PRESIDENT-ELECT**

1. The WBEA President-elect will be nominated by the S/T/P hosting the WBEA Annual Conference.
2. Attend all meetings of the Executive Board and Executive Committee.
3. Perform all duties of the President in the absence or disability of that officer.
4. Represent the corporation at meetings and on committees as requested by the President and/or the Executive Board.
5. Serve on Strategic Planning Committee.
6. Direct the WBEA Presidents-elect Leadership Workshop portion of the Professional Development Leadership Training Workshop for S/T/P Presidents-elect. Invite and encourage the presidents-elect from each S/T/P to attend this leadership-training workshop. (See Section 9000 and Appendix A3120)
7. Direct the Finance Committee. (See Section 6040)
  - a. Prepare proposed budget for initial approval at the Executive Committee Summer Planning Meeting.
  - b. Present proposed budget to Finance Committee.
8. As a member on the WBEA Strategic Planning Committee, the President-elect will be responsible for executing the goals for the following year. Those goals should be presented to the Executive Committee at the Outgoing/Incoming and Committee Directors Meeting for discussion and inclusion in the Program of Work for the coming year.
9. Direct the preliminary planning for the WBEA Conference during his/her presidency. (See Sections 8050 and A8000)
  - a. Obtain conference budget from present conference finance chair.
  - b. Include conference budget with WBEA proposed budget.

10. Present the outgoing President with a half-gavel plaque provided by the Awards & Scholarship Director at the WBEA Awards Banquet.
11. Perform any other duties assigned to the office by the President and/or Executive Board.

### **3130.     **TREASURER****

1. The WBEA Executive Board shall elect the WBEA Treasurer. The WBEA Treasurer shall be elected for a term of two years, beginning July 1 (odd years).
2. Attend all meetings of the Executive Board and Executive Committee.
3. Maintain an accounting system with the accounts related to the budget categories.
  - a. Operate a check authorization system with each expenditure supported by a receipt, invoice, or other source document.
  - b. Have books available for inspection by the Executive Board at any time.
  - c. Expense reports and memorandums should be used to keep records of all transactions. Attach all documentation to the expense reports and memorandums.
4. The Treasurer will keep a spreadsheet of the Friends of WBEA contributors that includes their name, email address, their initial contribution and any additional contribution.
5. The Treasurer will:
  - a. Maintain a WBEA checking account. Receive and disburse the funds of the corporation in accordance with the procedures in Section 7000. When the treasurer's term begins, the signatures to the account should be the president, president-elect, and treasurer. Signatures need only be updated every two years.
  - b. Process accounts payable and accounts receivable as follows:
    - (1) All requests for payment of bills and/or reimbursable expenses are sent directly to the Treasurer of WBEA within five days of receipt.
    - (2) All requests will be evaluated by the Treasurer to determine if they are within the scope of the budget.
      - (a) If a request appears to be beyond these guidelines, the Treasurer will confer with the President to rectify the problem.
      - (b) If the request involves an expense shared between WBEA and an S/T/P, the Treasurer shall coordinate payment of this bill with the S/T/P so WBEA's share of the expense is paid.
      - (c) If the request is within the scope of the budget, the Treasurer may approve this request and then prepare an expense report and attach any receipts/bills to the back of the expense report.
    - (3) The Treasurer will prepare a check to pay the expense within two days of receipt of the bill, if money is available.

- c. Reconcile the bank account on receipt of the bank statement. The treasurer may use an accounting program that automatically does the reconciliation if so desired.
6. Submit two financial reports (as of December 31 and June 30 of previous budget year). The financial statements should be the budgeted vs. actual income and expenses and the Balance Sheet. These are sent to the President for inclusion in the Executive Board packet of materials for the WBEA Executive Board meeting. The material from the June 30 statements should include at least a five-year comparison balance sheet.
  - a. The June 30 financial statement, balance sheet, and comparative balance sheet should be sent to the WBEA President and he/she will distribute as needed.
  - b. The December 31 financial statements should be sent to the WBEA President within 30 days.
7. Serve on the Finance Committee.
8. Submit a duplicated report of the corporation's finances by budget category to the Executive Board.
9. Have expense reimbursement forms (sample in Appendix A3135) available at Executive Board and Executive Committee meetings.
10. Arrange for the annual review of the accounting records of the association as soon after the close of the fiscal year (usually this cannot be done until WBEA receives final income and expense figures from NBEA) as possible. A committee of three people, one of whom should be a past treasurer, shall be appointed by the President to perform an annual review of the WBEA books. A letter of confirmation by the committee will be submitted to the President and President-elect.
11. All records except the prior year's books should be transferred to the new treasurer by June 30, the end of the outgoing treasurer's term. At least a month before the new treasurer assumes office, arrangements should be made to transfer enough funds so that new accounts, if needed, can be opened by June 30. All funds should be transferred upon reconciliation of the end of June bank statement. Records (other than permanent) are to be maintained for seven years. Records to be transferred are:
  - a. Articles of Incorporation, IRS EIN number (93-0816856), and blank expense reports (permanent, one set).
  - b. Combined Financial Reports/Budgets, December 31 and June 30.
  - c. Review committee letter.
  - d. Current Program of Work for Treasurer as well as each WBEA officer and committee director's Program of Work Reports as of December 31 and June 30.
  - e. Closing bank statement(s).
  - f. Expense reports and memorandums with supporting documentation.
  - g. Current *WBEA Policies and Procedures Manual and Appendices*.

- h. Minutes: Executive Board, Executive Committee, Old and New Officers.
  - i. Documentation of receipts.
12. Assume the office of the President in the absence of the President and President-elect.
  13. Perform such other duties as the President and/or Executive Board may delegate.
  14. Provide information to the incoming Treasurer regarding duties, responsibilities, and procedures of the office of Treasurer. (See Appendix A3130)
  15. Maintain Incorporation status (for a two-year period) and file reports in Arizona as stated in Section 10000.

**3131. BUDGET NOTES**

1. Account numbers 4100 and 5720—WBEA's share of NBEA Executive Board meetings: NBEA will deduct WBEA's share of expenses of WBEA – NBEA Representative from membership income. NBEA will send a check for the net amount to WBEA. The NBEA headquarters determines this amount. The gross amount of WBEA's share of NBEA Executive Board meeting expense should be entered in line 5720, and the gross membership dues share should be entered in the revenue section of the budget report.
2. Account number 6300—Professional Development Institute
3. Account number 6410—Conference Advance. An amount up to \$1,000 can be requested by the S/T/P hosting a conference after July 1 in the fiscal year prior to the conference. (See Section 8040).

**3140. SECRETARY (See Appendix A3140)**

1. The WBEA Executive Board shall elect the WBEA Secretary. The WBEA Secretary shall be elected for a term of two years, beginning July 1, on even years.
2. Attend all meetings of the Executive Board and Executive Committee.
3. Prepare agendas (working with the president), minutes of each meeting of the Executive Board and Executive Committee and send a copy to the President within one month after the meeting. Within two weeks after approval by the President, make necessary changes and distribute to Executive Committee, the NBEA Executive Director, and NBEA President. Use minutes-format detailed in Section A3140, Item #7.
4. Prepare and distribute to all Executive Board members a detailed directory quarterly, including:
  - a. S/T/P officers, Membership Chairs, Editors of newsletters. (See Section A3141)
  - b. Official delegates to WBEA Executive Board and alternates.
  - c. Preferred mailing addresses, telephone numbers, FAX numbers, and e-mail addresses.



- d. S/T/P Conference date(s).
  - e. S/T/P newsletter deadlines.
  - f. S/T/P terms of office.
  - g. Contact each S/T/P and request changes. If changes, send an updated copy to Executive Board members
5. Retain-original motions (on Secretary-prepared motion forms), original votes (on Secretary-prepared voting forms), and original notes, if applicable, until minutes have been officially accepted. Keep a book of original copies of the minutes of all meetings for two years. Transmit the book to the incoming Secretary at the end of term of office.
  6. Assume the office of the President in the absence of the President, President-elect, and Treasurer.
  7. Perform such other duties as delegated by the President and/or Executive Board.
  8. Provide information to the incoming Secretary regarding duties, responsibilities, and procedures of the office of Secretary.
  9. Disseminate blank directory forms at the WBEA Executive Board meeting and indicate they should be returned to the new Secretary whose name and address will be given orally or electronically to be written on the form. The outgoing Secretary will write to the new S/T/P Presidents by May 1, asking for return of directory information with a July 1 deadline.

**3150. PAST PRESIDENT**

1. Attend all meetings of the Executive Board and Executive Committee.
2. Serve in an advisory capacity to the corporation
3. Serve as director of the Strategic Planning Committee
4. Present written report of previous WBEA conference to the Executive Board.
5. Direct the Nominating Committee and conduct nominations for officers as detailed in Section 3030.
6. Update the *WBEA Policies and Procedures Manual and Appendices* as well as the WBEA Bylaws.
  - a. Search the minutes for information to include.
  - b. Prepare changes and distribute to Board members.
7. Coordinate or appoint another WBEA Past President to coordinate the program at the Past Presidents' Reception. (See Appendix A3150)
8. Perform such other duties as the President and/or Executive Board may delegate.
9. Assume the office of the President in the absence of the President, President-elect, Treasurer, and Secretary.

# 4000 WBEA DIRECTOR TO THE NBEA EXECUTIVE BOARD

## 4010. **REQUIREMENTS**

1. Candidates for WBEA Director to the NBEA Executive Board must be members in good standing of NBEA/WBEA for five consecutive years and must have attended at least three NBEA Conventions within the last seven years, immediately prior to running for office.
2. Eligible candidates may not have previously served on the NBEA Executive Board for a total of three years or more (consecutive or non-consecutive) in any capacity.
3. Candidate must have served on an executive board at the state, territory, province, or regional level or held a leadership position in an educational setting.
4. Each candidate for WBEA Director to the NBEA Executive Board must be in good standing with the S/T/P that nominates him/her.
5. Elected WBEA Director to the NBEA Executive Board will conduct the Professional Development Leadership Training, (PDLT) along with the WBEA President-elect and WBEA Membership Director at the annual conference.

## 4020. **NOMINATION AND ELECTION**

## 4030. **DUTIES (See Appendix A4030)**

1. Attend all meetings of the Executive Board and Executive Committee of WBEA.
2. Represent WBEA on the NBEA Executive Board.
3. Prepare and present a report of the NBEA Executive Board meeting to the WBEA membership. Submit the report for each issue of the WBEA newsletter or electronic newsletter.
4. Conduct the Professional Development Leadership Training, along with the WBEA President-elect and WBEA Membership Director at the WBEA annual conference.
5. Perform such other duties as the President and/or Executive Board may delegate.

# 5000 STATES/TERRITORIES/PROVINCES (S/T/P)

## 5010. **REPRESENTATION FROM S/T/P**

In accordance with the Bylaws, each S/T/P shall develop its own procedures for selecting representatives (must be elected; normally the president and president-elect) and alternates to the WBEA Executive Board according to the following tabulation of professional memberships in NBEA/WBEA, as of June 30 of the preceding year:

1-300 .....	2 representatives
301-600 .....	3 representatives
over 600 .....	4 representatives

## **5020. DUTIES**

All duties apply to S/T/P Presidents or designees.

1. Attend the annual Executive Board meeting.
2. Prepare and present S/T/P report to the Executive Board.
  - a. Electronic or written report (50 copies, stapled and 3-hole punched), to include new officers' preferred mailing addresses and activities of interest to the Executive Board.
  - b. Oral report—not to exceed three minutes.
3. Send information for WBEA Directory, as requested, to WBEA Secretary following your annual S/T/P conference elections. Send changes as necessary. Respond to the WBEA Secretary's request for this information. If no changes, please let the WBEA Secretary know that there are no changes. **THIS IS EXTREMELY IMPORTANT!**
4. Send copies of all publications to WBEA Board members and S/T/P newsletter editors.
5. Submit bid to host WBEA Conference at appropriate time. (See Section 8020)
6. Send articles about S/T/P conferences and items of interest to WBEA Newsletter Editor and to WBEA Media Communications Director.
7. Maintain WBEA Handbook received at the Presidents-elect portion of the Professional Development Leadership Training (PDLT) Workshop. Pass on information to new S/T/P Executive Board members.

## **6000 COMMITTEES**

### **6010. AWARDS and SCHOLARSHIP—Standing Committee**

#### Purpose

The purpose is to promote the WBEA Recognition program, Media Award programs, and the Scholarship program for WBEA and NBEA. (See Appendices A6010-A6010.5).

#### Operational

1. The director shall conduct the WBEA Recognition Awards, the WBEA Media Awards, and the WBEA Educational Opportunity Scholarship (EOS) programs. The director shall be appointed for a one-year term renewable for two more years at the option of the President and Director and shall be a voting member of the WBEA Executive Board. The Director shall work with the Membership Director to facilitate the Robert J. Thompson and other membership awards.
2. Conduct WBEA and NBEA Recognition Awards Programs.
  - a. Prepare an article for each issue of the WBEA newsletter.

- b. Write letters (sent electronically) to the presidents, presidents-elect, and award chairs to encourage S/T/Ps to submit their own award recipients for appropriate WBEA and NBEA awards.
  - c. Establish committees to judge the applications sent to the committee members to determine recipients of the various awards.
  - d. Notify the nominators of the nominees who will receive the WBEA awards. Ask the nominators to contact the winners' supervisors to provide support for the winners. Ask the nominators to ensure that the winners are present at the WBEA awards ceremonies along with their family and friends. Family, friends, and colleagues who are not registered for the conference must contact the WBEA conference chair for special meal rates for the awards ceremonies.
3. Advertise and administer the WBEA Recognition Certificate and Media Award Programs.
    - a. Send information to S/T/P Presidents and Presidents-elect.
    - b. Prepare certificates as requested and mail to the S/T/Ps for awarding at their own local conferences.
  4. Order Past President's Half-Gavel plaque to be given to the outgoing President by the incoming President (the current President-elect).
  5. The Robert J. Thompson WBEA Membership Award will be given at the Awards ceremony. The award will consist of a \$50 check to the S/T/P to be used for membership promotion and a certificate to the S/T/P Membership Director/Chair. The S/T/P Membership Director/Chair must be a member of NBEA/WBEA.
  6. Order Distinguished Service Award plaque.
  7. Prepare Media Awards (framed certificates or plaques and small gift of appreciation)—three awards maximum.
  8. Order Outstanding Educator plaques.
  9. Order Outstanding Career and Technical Student Organization Advisor plaque.
  10. The WBEA Executive Committee, with a majority vote, may elect to give, on a limited basis, special awards (e.g. Special Friend of WBEA or Lifetime Achievement Award) to exemplary individuals or companies who have made outstanding contributions to WBEA above and beyond the Distinguished Service criteria.
  11. Prepare certificates of appreciation for Executive Board Members (official representatives and ex-officio members) in attendance; and assist with other awards according to guidelines.
  12. Prepare Awards & Scholarship Booklet to be distributed at Awards ceremony. Appoint people to hand out after event. Awards should be listed in the following order:
    - a. President's Award
    - b. Distinguished Service Awards
    - c. Outstanding University Educator
    - d. Outstanding Post-secondary Educator

- e. Outstanding High School Educator
  - f. Outstanding Career and Technical Student Organization Advisor
  - g. Media Awards
  - h. Membership Awards
  - i. WBEA Educational Opportunity Scholarship
13. Together with the WBEA President, present awards at the WBEA Annual Conference. Presentations should be in the following order:
    - a. Membership Awards
    - b. Media Awards
    - c. Outstanding Career and Technical Student Organization Advisor
    - d. Outstanding High School Educator
    - e. Outstanding Post-secondary Educator
    - f. Outstanding University Educator
    - g. Distinguished Service Award
    - h. The WBEA President will present the President's Award
  14. Send information about awards recipients to the WBEA newsletter editor and other business education publications.
  15. The director shall conduct the WBEA Educational Opportunity Scholarship Program.
    - a. Prepare an article for each issue of the WBEA newsletter to advertise the Scholarship Program.
    - b. Write letters to the presidents and presidents-elect, sent electronically, to encourage S/T/Ps to submit applications for the Scholarship.
    - c. Establish committees to judge the scholarship applications to determine the awardees.
    - d. Notify the recipients who will receive the scholarship and encourage scholarship recipient to be present at the WBEA conference to gratefully accept the scholarship award.

**6010.1. WBEA RECOGNITION PROGRAM**

The following 8 ½" x 11" certificate is available for any WBEA member to award to individuals who have made contributions to business education. These might be principals, college presidents, outstanding speakers, etc. This certificate may be awarded by the S/T/P at its local conferences. The wording on the certificate may be as follows:

<p><b>CERTIFICATE OF APPRECIATION</b></p> <p>Presented to</p> <p>(space for name of recipient)</p> <p>in recognition of professionalism and dedication to</p> <p>The Name of S/T/P organization</p> <p>an affiliate of the Western Business Education Association</p> <p>as evidenced by</p> <p>(place to fill in contribution)</p>
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Signed by the WBEA Awards & Scholarship Director and S/T/P President and/or Requestor

To Request a Certificate:

Send an e-mail to: Awards & Scholarship Director with the necessary information to complete the award and your contact information.

### **6010.2. WBEA DISTINGUISHED SERVICE AWARDS**

Nominations for this award may be submitted for either an individual or a group (See A6010.2):

1. Individual who has served and contributed to WBEA and business education through professional activities that include leadership, service, honors, and awards, and research and writing. This nominee must be a business educator and a member of WBEA.  

and/or
2. A Company, or Representative of a Company, or a Legislator who has served a major portion of education in the Western region.

#### **6010.2.1. WBEA DISTINGUISHED SERVICE AWARD TO AN INDIVIDUAL (See Appendix A6010.2.1)**

The Distinguished Service Award is the highest award presented by the Western Business Education Association. Only one award may be given each year to an individual, and the presentation will be made at the WBEA Annual Conference.

#### Criteria for Nomination

1. An individual who has served and contributed to WBEA and business education through professional activities that include leadership, service, honors and awards, and research and writing.
2. This nominee shall be a business educator who must be a member of WBEA.

#### Procedure for Submitting Nominations

1. Nominations may be made by any NBEA/WBEA member or by a State/Territory/Province (S/T/P) Association.
2. The WBEA Distinguished Service Award nomination form must be submitted with the candidate's name and a color photo. The application will be limited to the nomination form, (See Appendices A6010.2.1) and no other supporting materials may be attached.
3. One electronic copy shall be submitted.
4. The date for submitting applications for the award will be December 1. If conference is in May instead of February, the deadline will be February 1.

### Judging the Award

1. Judging for the WBEA Award will be accomplished through a committee of three judges appointed **secretly** by the Awards & Scholarship Director with input from the WBEA President that includes two past presidents of WBEA. The Awards & Scholarship Director will serve as Director of the Committee.
2. The WBEA President will be informed of the Committee's decision.
3. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

### Criteria for Judging the WBEA Member Nomination

1. Contributions to WBEA (40points).
2. Contributions to State/Territory/Province (20 points).
3. Professional Contributions (20 points). Includes projects, writing and research, honors and awards, and other professional organizations.
4. Personal integrity (20 points).
5. Nominees receiving less than an average of 75 total points will not be considered for the award.

### Awards Presentation

The WBEA Awards & Scholarship Director will present the WBEA Distinguished Service Award at the WBEA Annual Conference during a general session or meal function.

### **6010.2.2. WBEA DISTINGUISHED SERVICE AWARD FOR A COMPANY, OR REPRESENTATIVE OF A COMPANY, OR LEGISLATOR (See Appendix A6010.2.2)**

The Distinguished Service Award for a Company, or Representative of a Company or Legislator is awarded to a company or individual who does not necessarily have membership in Western Business Education Association. Only one award may be given each year to an Organization, or to a Representative of an Organization, or to a Legislator and the presentation will be made at the WBEA Annual Conference.

### Criteria for Nomination

A Company, or Representative of the Company, or a Legislator who has served a major portion of their business in the Western region.

### Procedure for Submitting Nominations

1. Nominations may be made by any NBEA/WBEA member or by a State/Territory/Province (S/T/P) Association.
2. The WBEA Distinguished Service Award nomination form must be submitted with the candidate's or company's name. The application will be limited to the nomination form, (See Appendices A6010.2) and no other supporting materials may be attached.
3. One electronic copy shall be submitted.
4. The date for submitting applications for the award will be December 1. If the conference is in May instead of February, the deadline will be February 1.

#### Judging the Award

1. Judging for the WBEA Award will be accomplished through a committee appointed **secretly** by the Awards & Scholarship Director with input from the WBEA President. The Awards & Scholarship Director will serve as Director of the Committee.
2. The WBEA President will be informed of the Committee's decision.
3. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

#### Criteria for Judging the Company, or Representative of a Company, or the Legislator Nomination

1. Contributions to WBEA (80 points).
2. Contributions to State/Territory/Province (10 points).
3. Statement for "Why Award Should Be Given" (10 Points).
4. Nominations receiving less than an average of 75 total points will not be considered for the award.

#### Awards Presentation

The WBEA Awards & Scholarship Director will present the WBEA Distinguished Service Award for a Company, or Representative of a Company, or Legislator at the WBEA Annual Conference during a general session or meal function.

#### **6010.3. OUTSTANDING BUSINESS EDUCATORS OF THE YEAR AWARDS (See Appendix A6010.3)**

The Outstanding Business Educator of the Year Award recognizes contributions to business education by a NBEA/WBEA member based on direct input to the classroom, participation and offices held in local S/T/P, regional, and national professional associations, conference and leadership activities, curriculum development, and other activities. Only one award for each of the four educational levels may be given each year.



## Nominations for the Awards

Nominations for these awards may be submitted for the following individuals. All nominees must be a member of NBEA/WBEA.

1. Outstanding Business Educator at the Elementary/Middle/Junior High School level.
2. Outstanding Business Educator at the High School level.
3. Outstanding Business Educator at the Senior College/Collegiate/University level.
4. Outstanding Business Educator at the Post-secondary level that is less than a four-year institution.

## Procedure for Submitting Nominees

1. Nominations may be made by any NBEA/WBEA member or by the S/T/P associations.
2. Nominations must be on the official form and procedures outlined on the form must be followed. A color photograph of the nominee should also be included with the official form. (See Appendices A6010.3)
3. One electronic copy of the Nomination shall be submitted.
4. The date for submitting applications for the award will be December 1. If the conference is in May instead of February, the deadline will be February 1.

## Judging the Award

1. Judging the WBEA Outstanding Business Educator Awards will be accomplished through a committee of three appointed **secretly** by the WBEA Awards & Scholarship Director. The same committee may be used for the WBEA Distinguished Service Award (6010.2). The Awards & Scholarship Director will serve as director of the committee.
2. The WBEA President will be informed of the Committee's decision.
3. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

## Criteria for Judging the WBEA Outstanding Business Educator Nominations

1. Education and degrees (list majors, minors and institutions).
2. Teaching experience (list years and location of experience).
3. Professional memberships (list organizations and length of time of memberships which must include at least two years in NBEA/WBEA).
4. Honors and awards received (Total of 10 points possible for Items 1 through 4).

5. Contributions to Business Education through classroom involvement, curriculum development, student organizations, administrative responsibilities, and/or publications. (recommend “published articles”) (50 points).
6. Participation in local, regional, national, and international professional associations. Include offices held, committees served on, and conference activities (20 points).
7. Include a maximum of three letters of recommendations that document the information included in this nomination. (20 points total).
8. Nominees receiving less than an average of 75 total points will not be considered for the award. Total maximum possible points is 100.

### Awards Presentation

The WBEA Awards & Scholarship Director will present the WBEA Outstanding Educator Awards at the WBEA Annual Conference during a general session or meal function.

### Notification of Professional Journals

The Awards & Scholarship Director will write an article announcing the award winners and other pertinent information about them in the WBEA newsletter, *Business Education Forum*, and other related journals.

### **6010.4. S/T/P MEDIA RECOGNITION PROGRAM (See Appendix A6010.4.1 and A6010.4.2)**

The S/T/P Media Recognition Program is designed to recognize and reward S/T/Ps for their high standard of excellence in communication to their members. Moreover, it encourages S/T/Ps to keep in contact with every member on a regular basis, promote professional and educational opportunities, and serve as a support network among its membership locally, regionally, and nationally. All S/T/P editors must be members of NBEA/WBEA.

### Procedure

1. One copy of *any two* newsletters, published between July 1 of a calendar year and June 30 of the following year, must be submitted electronically to the Awards & Scholarship Director.
2. Short write up or calendar of all communication sent to members between July 1 of a calendar year and June 30 of the follow year, must be submitted electronically to the Award Director. This would include any links to *online medium such as a Web site, Facebook, Twitter, etc.* This includes any electronic communication.
3. Entries must be received by December 1. If conference is in May instead of February, the deadline will be February 1.
4. Name, address, and telephone number of S/T/P Editor(s) must be included. S/T/P Editor must be a member of NBEA/WBEA.
5. All entries must be sent to WBEA Awards & Scholarship Director.

6. The Director and two committee members will select the winners.
7. The WBEA Awards & Scholarship Director will present the three WBEA Outstanding Media Awards at the WBEA Annual Conference during a general session or meal function

### Media Judging Committee

The Media Judging Committee will be convened and directed by the Awards & Scholarship Director. Two additional members will be appointed by the Awards & Scholarship Director with input from the WBEA President.

1. Each member will come from a different S/T/P. An effort will be made to rotate membership from all S/T/Ps.

### Judging Criteria

1. Content and purpose (35 points).
  - a. Is the information given interesting and suitable for the intended audience?
  - b. Does the information deal with matters of professional interest as well as items that would benefit the membership?
  - c. Timeliness: Is the information pertinent to business educators?
  - d. Does the information focus on the activities of the S/T/P and its membership?
  - e. Is there a careful balance of state/province, industry, high-tech trends, and "how to" or innovative programs/ideas and information for the classroom teacher?
  - f. Does the publication have a good variety in both information, articles and contributors?
  - g. Are there contributions from beyond the group itself?
  - h. Does the publication make reference to membership, the benefits of membership, how membership is doing, etc.?
2. Professionalism/Impact (30 points).
  - a. What impression does the information give the reader at first glance? Is it a positive and progressive image on behalf of the S/T/P?
  - b. Does the overall impact leave a professional image with the reader?
  - c. What impression does the information convey to the public, to business leaders, and to legislators.
3. Organization and Format (20 points).
  - a. Is the format and layout of materials attractive and conducive to easy reading?
  - b. Are illustrations and artwork used effectively, and do they enhance the publication?
  - c. Does the publication appear balanced in its content, design, illustrations, and format?

- d. If there are photos, are they clear and attractively arranged?
- 4. Readability (10 points).
  - a. Is the information well written, concise, and clear?
  - b. Is the information positioned in an easy-to-follow manner?
  - c. Are illustrations and advertising copy placed discreetly so as not to detract from the information contained in the newsletter?
  - d. Does the publication possess accuracy in grammar, word usage, and sentence structure?
- 5. Membership Contact (5 points).
  - a. Of those S/T/Ps submitting information for this award, give 5 points to the S/T/P, which has the greatest NUMBER of newsletters and contacts made during the award year.

Nominees receiving less than an average of 75 total points will not be considered for the award.

Judging Timeline

1. By December 5, (February 5 if conference is in May), Awards & Scholarship Director emails each committee member one copy of each S/T/P communication packet submitted.
2. By December 15, (February 15 if conference is in May), each committee member ranks choice from high/best to low using the Ranking Sheet (A6010.4.1) and conveys ranking to Awards & Scholarship Director.
3. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners’ supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.
4. Prior to WBEA Conference, Awards & Scholarship Director will request a check for each S/T/P in the amount of fifty dollars (\$50).
5. The WBEA Awards & Scholarship Director will present the Media Awards at the WBEA Annual Conference during a general session or meal function.

Awards Timeline	February	May
Deadline to submit awards nomination packet	December 1	February 1
Director distributes packets to the judges	December 5	February 5
Deadline for judges to rank the S/T/P packets	December 15	February 15
Director will notify the nominator of award	TBD	TBD

Awards

The top three entries will be recognized in the form of a fifty dollars (\$50) monetary gift.

## **6010.5. OUTSTANDING CAREER AND TECHNICAL STUDENT ORGANIZATION ADVISOR AWARD (See Appendix A6010.5)**

The Career and Technical Student Organization Advisor Award is for a NBEA/WBEA member who:

1. has a strong belief in the organization;
2. serves as a role model;
3. commits sufficient time to the organization
4. involves students in making decisions for the organization;
5. encourages the development of responsibility and leadership in students;
6. helps students set up meaningful programs, meetings, and events that are consistent with the organizational purpose;
7. possesses a familiarity with policies that impact the organization;
8. displays an interest in students' personal growth and development.

### Procedures

1. Nominations may be made by any NBEA/WBEA member or by a State/Territory/Province (S/T/P) association. The nominee must also be a member of NBEA/WBEA.
2. Nominations must follow the official form and procedures outlined. No additional material is to be submitted.
3. Submit one copy electronically of the nomination packet, along with a black and white or color photograph which will be used for the Awards Booklet to the WBEA Awards & Scholarship Director by December 1. If conference is in May instead of February, the deadline will be February 1.
4. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

If a nominee is not selected for the award the first year of nomination, the papers may be considered the next year. Contact the Awards & Scholarship Director to request that the application be considered again. If editing is required, a new application must be submitted following the guidelines by the deadline date.

### Eligibility

1. The recipient must be a member of WBEA/NBEA and of his/her S/T/P association for a minimum of two years.
2. The recipient should be currently advising a business-related Career and Technical Student Organization (CTSO) for which he/she is being nominated.
3. The recipient's contributions may have been made over an extended period of time, but the major impact must have occurred within three years prior to the nomination.

### Criteria for Judging the Award

1. Education and Degrees (List majors, minors and institutions).
2. Teaching Experience (List years and location of experience).
3. Professional Memberships (List organizations and length of time of memberships).
4. Honors and Awards Received—Personally/Chapter/Members (Total of 20 points possible for Items 1 through 4).
5. Contributions to Career and Technical Student Organization (Include offices held; committees served on; conference activities; and participation of students at the local, state, regional, and/or national levels). (60 points)
6. Include a Maximum of three letters of recommendation that document the information included in this nomination. (20 points total.)

Nominees receiving less than an average of 75 total points will not be considered for the award.

### Awards Presentation

The WBEA Awards & Scholarship Director will present the WBEA Outstanding Career and Technical Student Organization (CTSO) Advisor Award at the WBEA Annual Conference during a general session or meal function.

### Notification of Professional Journals

The Awards & Scholarship Director will write an article announcing the award winners and other pertinent information about them in the WBEA newsletter, *Business Education Forum*, and other related journals.

### **6010.6. WBEA EDUCATIONAL OPPORTUNITY SCHOLARSHIP (See Appendix A6010.6)**

The Western Business Education Association (WBEA) takes pleasure in announcing the annual WBEA Educational Opportunity Scholarship for business and computer science educators. The scholarship will be available for tuition reimbursement and is offered and managed by the WBEA Executive Board. Funding for the scholarship will be through donations from individuals, companies, and other sources. This scholarship will exist as funds are available and at the discretion of the WBEA Executive Board.

### Operational

1. Additional committee members may be selected by the Director, subject to the approval of the president, if necessary.
2. WBEA will offer a yearly scholarship with the amount to be determined each year according to availability of funds.
3. Funds will be provided by contributions made by individuals or organizations in honor of a business/computer educator who is retiring, a business

educator/administrator who is involved in teaching/administration, or a deceased member.

### Procedure

1. Eligible applicants must be a current member of an S/T/P and a member of WBEA/NBEA in good standing for at least one year.
2. Eligible applicants must be currently engaged in the business/computer education profession in the Western Region.
3. Applicants must submit the completed application to the Awards & Scholarship Director by December 1. If conference is in May instead of February, the deadline will be February 1.
4. The Awards & Scholarship Director will inform the recipient of the scholarship no later than December 15. If conference is in May instead of February, notification will be done by February 15.
5. Applicants must register for and pass a credit class with a "C" grade or better, or register for and complete a non-credit class.
6. Applicant must submit proof of payment and a grade sheet or unofficial transcript upon completion of the class to the Awards & Scholarship Director for reimbursement.
7. The Director will request payment from the WBEA Treasurer. All funds should be distributed by June 30.

The winner will be featured in the WBEA Newsletter and recognized at the annual conference.

## **6015. PROFESSIONAL DEVELOPMENT—Standing Committee**

### Purpose

The purpose of the Professional Development Committee (WBEA Director to the NBEA Executive Board, WBEA President-elect, WBEA Membership Director) is to facilitate the Professional Development Leadership Training (PDLT) and other professional development activities. This Professional Development Leadership Training was created to increase leadership awareness among WBEA members and to facilitate increased involvement in S/T/P and WBEA leadership positions. The WBEA Director to the NBEA Executive Board, along with the WBEA President-elect and WBEA Membership Director will conduct the Professional Development Professional Development Leadership Training at the annual WBEA conference.

### Operational

1. The Director shall be the WBEA Director to the NBEA Executive Board. The assistant directors will be the WBEA President-elect and the WBEA Membership Director.
2. Outline of Professional Development Leadership Training (PDLT) program
  - a. The Professional Development Leadership Training will take place at the annual conference from 7:30 am – 11:30 am.

- b. The following people are required to attend the Institute
    - i. S/T/P Presidents-elect
    - ii. S/T/P Membership Directors
  - c. The Professional Development Leadership Training is also open to those who wish to learn more about leadership responsibilities and positions at the National, Regional, and State levels.
  - d. WBEA Director to the NBEA Executive Board will give an overview of the Professional Development Leadership Training activities (Times are approximate)
    - i. 7:30 - 9:00 – Introductions and overview of NBEA, WBEA and S/T/Ps and how they work together, etc.
    - ii. 9:15 – 11:00 – Breakout sessions
      - 1. S/T/P Presidents-elect with WBEA President –elect
      - 2. S/T/P Membership Directors with WBEA Membership Director
      - 3. All others with WBEA Director to the NBEA Executive Board
    - iii. 11:15 – 11:30 – Wrap up (all together)
    - iv. Certificates will be given at the Opening Session or Luncheon Session for attendees
3. Financial support for the Institute will be provided through:
- a. One dollar (\$1.00) of the WBEA Conference registration fee to be set aside for the Professional Development Leadership Training fund for each paid professional registrant at the conference.
  - b. A fund-raising event (e.g. pineapple pull) at the annual WBEA Conference to be developed by each host state.
  - c. The WBEA Silent Auction.
  - d. Other WBEA fundraising programs as may be developed by WBEA.

### Procedure

- 1. Information about the Professional Development Leadership Training will be included in the fall issue of the WBEA newsletter and will be available on the WBEA website (WBEA Director to the NBEA Executive Board responsibility).
- 2. The WBEA Director to the NBEA Executive Board will mail the Professional Development Leadership Training cover letter and registration forms by August 1 to S/T/P presidents for distribution to S/T/P members. (See Appendices A6015.1 and A6015.2)
- 3. Each S/T/P President will identify S/T/P President-elect, S/T/P Membership Director, and those interested in learning more about our professional organization and leadership opportunities.



4. Completed forms will be returned to the WBEA Director to the NBEA Executive Board by December 1.
5. The WBEA Director to the NBEA Executive Board will keep the WBEA President informed of the details of Professional Development Leadership Training participation by each S/T/P.
6. Each Professional Development Leadership Training participant will receive a certificate upon completion of the professional development activity. Give names to Awards & Scholarship Director for preparation of certificates, which will be presented at a WBEA annual conference general function.

**6020. CONFERENCE—Standing Committee**

Purpose

The purpose of the committee is to plan the annual WBEA Conference.

Operational

1. The President shall be responsible for the conference and may appoint a WBEA Conference Chair.
2. Conference policies are detailed in Section 8000.

**6030. NEWSLETTER —Standing Committee (See Appendix A6030)**

Purpose

The purpose is to promote communication in the region through the periodic *Western News Exchange* publication.

Operational

1. The Newsletter Editor shall be appointed by the WBEA President for a one-year term renewable for two more years at the option of the new WBEA President and director. The Newsletter Editor shall be a voting member of the Executive Board and Executive Committee.
2. The Newsletter Editor will publish a minimum of two issues of the newsletter per year and distribute to WBEA members and NBEA Executive Board. An electronic version will be sent to Friends of WBEA. WBEA members will be encouraged to submit their e-mails so they can be sent electronic versions also.

See Advertising Policy and Statement of Publication in A6030.2.

- a. Determine deadlines and publication dates for each issue.
- b. Select printer for the newsletter.
- c. Obtain list of current WBEA members from NBEA.
- d. Obtain bulk-mailing instructions from the post office and determine where newsletters will be mailed.

- e. Determine content for each issue and contact appropriate contributors, including WBEA officers, S/T/P editors, standing committee directors, and conference chairs. (See Appendix A6030.4. for a sample).
- f. Determine the name of advertisers and sizes of ads prior to each newsletter deadline.
- g. Place advertisements in newsletter in appropriate locations. A check for the full amount must accompany the ad copy. (Note: Not more than one-sixth of the content of the newsletter shall be advertising material.)
- h. Prepare newsletters for mailing and posting on the WBEA Website.

**6040. FINANCE—Standing Committee**

Purpose

The purpose of the Finance Committee is to develop, review, modify, and obtain approval for the annual budget.

Operational

1. The President-elect will serve as the director of the Finance Committee, and the committee membership will include the Treasurer and the current President.
2. The committee is responsible for preparing the proposed budget to be submitted to the Executive Board for approval.
3. The President-elect will submit the proposed budget to the Executive Board for approval at the annual Board meeting.

**6050. LEGISLATIVE—Standing Committee**

The Legislative Committee is a standing committee of WBEA. The Legislative Committee shall consist of the Legislative Liaison to NBEA and a Legislative Chair from each S/T/P. If the S/T/P does not have a Legislative Chair, the S/T/P President will serve on the Legislative Committee.

The Legislative Liaison to NBEA will serve as the director of the WBEA Legislative Committee and as a voting member of the WBEA Executive Board.

Purpose

The purpose of the Legislative Liaison is to communicate with the S/T/Ps in the WBEA region regarding legislation, to disseminate information to the S/T/Ps concerning legislative issues pertinent to WBEA, NBEA and the S/T/Ps, and to assist S/T/P organizations in learning effective lobbying strategies at S/T/P and national levels.

Operational

The Legislative Liaison shall be appointed for a one (1)-year term renewable for two (2) more years at the option of the new WBEA President and the person serving as legislative liaison.

The duties of the Legislative Liaison shall be to:

1. Communicate on a regular basis with S/T/P Legislative Chairs (and/or) Presidents/Presidents-Elect concerning legislative updates, announcement of the WBEA Legislative Session at the annual Conference, and other legislative information.
2. Correspond with S/T/Ps regarding national legislative concerns, including legislators to contact concerning legislative actions.
3. Serve as a clearinghouse for legislative issues pertinent to WBEA, NBEA and S/T/Ps.
4. Encourage S/T/Ps to become involved in legislative actions that affect business education at the S/T/P level.
5. Encourage S/T/Ps to use NBEA and ACTE (Association for Career Technical Education) legislative materials and information.
6. Keep informed, through NBEA and ACTE concerning legislation that will impact business education and communicate with each S/T/Ps through periodic releases of information.
7. Prepare a legislative article for each issue of the WBEA newsletter.
8. Conduct a legislative session at the WBEA Conference.
9. Attend Executive Board meetings, Executive Committee meetings, and WBEA Conferences.

#### **6060. MEMBERSHIP—Standing Committee (See Appendix A6060)**

##### Purpose

The membership director promotes members in the region and assists S/T/P directors in promoting membership in the S/T/Ps.

##### Operational

1. The director shall be appointed for a one-year term and renewable for an additional two-year term at the option of the new WBEA President and director. The director shall be a voting member of the Executive Board and Executive Committee.
2. Duties will include the promotion of NBEA/WBEA membership.
  - a. The promotion of NBEA/WBEA membership
  - b. Prepare promotional materials for S/T/Ps.
  - c. Coordinate display for WBEA Conference with NBEA Membership Director.
  - d. Write articles for S/T/P and WBEA newsletters.

- e. Administer the Robert J. Thompson Membership Awards. Work with Awards & Scholarship Director to order awards (See Appendix A6061).
- 3. In the event the Membership Director is unable to fulfill the three-year term, a replacement director shall be appointed by the new WBEA President to complete the unfinished three-year term.
- 4. Administer the WBEA Membership Achievement Awards. (See Appendix A6062).
- 5. Co-facilitate the Professional Development Leadership Training at annual WBEA Conference
  - a. Work with the WBEA Director to the NBEA Executive Board and WBEA President-elect to coordinate S/T/P presidents-elect attendance and S/T/P membership director attendance at the WBEA Conference Professional Development Leadership Training.
  - b. Work with WBEA Conference Chair to find a sponsor for the Professional Development Leadership Training Continental Breakfast or lunch.
  - c. Plan and conduct breakout training session for membership chairs during WBEA Professional Development Leadership Training.
- 6. Membership Chairs will be recognized at the Opening Session or Luncheon Session.

**6070. *NOMINATING COMMITTEE—Standing Committee***

Purpose

The purpose of the Nominating Committee is to review, approve, and present the nominations for WBEA officers.

Operational

- 1. The WBEA Past President will serve as director.
- 2. The committee will consist of one representative from each S/T/P.
- 3. The nomination policies are detailed in Section 3030.

**6080. *STRATEGIC PLANNING COMMITTEE—Standing Committee***

Purpose

The purpose of the Strategic Planning Committee is to promote the stated purposes of business education in WBEA. The committee's charge is to use the Strategic Plan to review the progress of WBEA and to make recommendations. The committee will annually review the progress made in implementing the Strategic Plan goals and recommend actions as needed. Special committees such as Telecommunications, Newsletter, are often organized to focus on specific aspects of the Strategic Plan.

Operational

- 1. The immediate WBEA Past President shall be the director of the committee.

2. Membership will consist of the director, current WBEA President, current WBEA president-elect, WBEA Director to the NBEA Executive Board, two additional WBEA past presidents, and three S/T/P presidents. S/T/P representatives will be appointed from S/T/Ps that are not represented by the other members of the committee. An attempt will be made to include both experienced and relatively new educators from all S/T/Ps.
3. Meetings will be held at the annual conference.
4. The committee will annually review the progress made in implementing the Strategic Plan goals and recommend actions as needed.

**6090. MEDIA COMMUNICATIONS COMMITTEE—*Standing Committee***

Purpose

The purpose of the WBEA Media Communications Committee is to facilitate the movement of information electronically within the WBEA region.

Operational

1. The director shall be appointed for a one-year term renewable for two more years at the option of the new WBEA President and shall be a voting member of the WBEA Executive Board.
2. Contact and communicate with S/T/P Webmasters or representatives who are the committee representatives after President sends updated committee list. Work with President on obtaining this list.
3. The Media Communications Committee shall meet during the annual WBEA Conference.
4. The director is responsible to keep the WBEA website current that includes the WBEA logo, current and past newsletters, up-to-date conference information, social media, presidential messages and communications, pictorial gallery of past conference pictures, representative pictures and information from our regional S/T/Ps.

**6100 SPECIAL COMMITTEES**

**6110. ANNUAL CONFERENCE ADVISORY COMMITTEE—*Special Committee***

Purpose

The purpose of The Annual Conference Advisory Committee is to review proposals, including budgets, by the S/T/Ps submitting proposals for WBEA Conferences. After reviewing the proposals, the committee submits their recommendations to the Board. A conference guide is available to assist states in planning the conference.

Operational

1. The committee consists of three members with rotating memberships. At least one member should be a WBEA Past President, and each member should be familiar with conference planning.
2. The committee's most senior member will be the director of the committee and will be asked to present a report at the Executive Board meeting.
3. The committee shall meet prior to the annual Executive Board meeting to review proposals, including budgets, by the S/T/Ps submitting proposals to host the WBEA Conference. S/T/Ps should present their proposals to this Committee four years prior to their hosted conference to offer sufficient time for review.

## **7000 FINANCE**

### **7010. SOURCES OF INCOME**

1. A share of the individual NBEA membership dues allocated to WBEA.
2. Contributions from Friends of WBEA.
3. WBEA annual conference share of profits.
4. Other income may be derived from such additional sources as may be authorized by the WBEA Executive Board, in compliance with the Articles of Incorporation.

### **7020. REIMBURSEMENT POLICIES**

1. The budget, as approved by the Executive Board, sets the general limits of expenditures for specific items. Adjustments may be made by the President and Treasurer during the year, as long as the total budget is not exceeded.
2. Services performed by NBEA, at the request of WBEA, are authorized expenditures.
3. All expenses must be clearly and accurately described and must represent actual money expended on behalf of the corporation. (see Appendix A3135)
  - a. It is desirable that receipts/bills be provided as source documents to substantiate all expenditures.
  - b. All requests for payment of bills and/or reimbursable expenses must be sent directly to the Treasurer of WBEA within five days. Sign bills to show service has been performed. Bills should be addressed to WBEA in care of the individual.
  - c. All unusual items or amounts must be fully explained.
  - d. The Treasurer can approve all reimbursements up to \$500 if supported by a budget line item. If the amount of the reimbursement is over \$500, it must be approved by the Treasurer and the President.
4. If a personal automobile is used for corporation business, the actual amount of mileage driven on behalf of the corporation will be reimbursed at 30 cents per mile. This will only be considered as part of the division of funds from the WBEA Executive Committee Summer Planning Meeting and as part of the President's

travel expenses. Car pools and other means to reduce the cost of transportation are encouraged. Parking fees and tolls will be reimbursed. If there is a choice between personal automobile and air transportation one month prior to the meeting, the lesser of the two will be reimbursable.

5. When air transportation is utilized, the use of an economical airfare is encouraged.
6. Stipends for meeting attendance will be paid as budgeted. A stipend of \$50 will be budgeted for attendance at the WBEA Executive Committee Summer Planning and the WBEA Executive Board meetings.
7. Semiannually, S/T/Ps may receive the First-Class Mail Letter rate plus \$0.10 per mailing reimbursement for mailings to NBEA/WBEA lapsed members. A list of lapsed members from the S/T/P will be provided by the WBEA Membership Director when received from NBEA. Receipts for mailings or documentation of total mailings must be received by the Treasurer (the \$0.50 is all-inclusive of postage and stationery; no reimbursements will be made for postage, stationery, or other expenses beyond the First-Class Mail Letter rate plus \$.10 per mailing).
8. Each S/T/P will be reimbursed \$10 for each Friend of WBEA from their S/T/P after the June 30 end of fiscal year.

## **8000 CONFERENCE**

### **8010. DATES**

1. The annual WBEA Conference will be scheduled each year during either the three-day holiday of Presidents' Day, (third week in February) or the three-day holiday of Memorial Day (last week in May) for Arizona only. The conference will begin on Thursday, with other committee meetings scheduled prior to the opening session. This schedule may be altered to meet the needs of the hosting S/T/P with Executive Committee approval.

### **8020. ROTATION**

1. The WBEA Conference location will be based on the following rotation schedule subject to the approval of the WBEA Executive Board.
2. Conference location will rotate among S/T/Ps with the year-ending digit as follows:

0 Wild Card	5 Wild Card
1 Washington	6 Hawai'i
2 California	7 Montana
3 Utah	8 Arizona
4 Oregon	9 Idaho

Alaska, Alberta, British Columbia, Nevada—can be scheduled as desired for the Wild Card year. Either the WBEA Board or an S/T/P may bid to host the WBEA Conference for the Wild Card year.

3. The rotation schedule may be interrupted by a "wild card" bid from any S/T/P.
4. If an S/T/P is unable to host a conference for a particular year, then arrangements can be made between S/T/Ps, with WBEA Executive Committee approval, to switch the S/T/P rotation on a once-only basis.

### **8030. BIDS TO HOST**

1. The S/T/P desiring to host the WBEA Conference will initiate a formal bid by completing an Application to Host WBEA Conference. (See Appendix A8030).
2. The application to host the WBEA Conference (A8030) must be completed and submitted to the WBEA Annual Conference Advisory Committee then to the WBEA Executive Board at least four years in advance of the conference date to offer sufficient time for review.
3. Each year, a conference status report must be reviewed by the WBEA Annual Conference Advisory Committee and presented to the WBEA Executive Board.

### **8040. POLICIES**

1. The President-elect will submit a tentative budget for the conference at the Executive Board meeting preceding that conference. A \$1,000 conference advance may be requested from the Treasurer after July 1 of the fiscal year in which the conference will be held. The \$1,000 conference advance should not be reflected as either conference income or expense of the conference.
2. Funds for the WBEA Professional Development Leadership Training will be allocated before conference proceeds are distributed to the state and region. These will be paid out of funds raised for professional development. If there is not enough income to cover the expenses, then the balance will be taken from the Professional Development reserve account.
3. One dollar (\$1.00) from each conference registration goes to the Professional Development Fund and must be paid to WBEA by the hosting S/T/P within one month of the end of the conference.
4. Receipts from other Professional Development fundraisers (such as the silent auction and pineapple pull) must be paid to the WBEA Treasurer by the hosting S/T/P within one month of the end of the conference.
5. All activities are not to be subsidized by member registrations.
6. The S/T/P hosting the conference must provide WBEA with a financial statement and check for WBEA's portion of the proceeds by June 15 if the conference is in February, or July 1 (preferably, but no later than September 15) if the conference is in May in the year of the conference. If additional revenues or expenses come in after that time, an adjustment should be made.



7. The Past President (or appointed Conference Chair) will present a written post-conference report, including a financial report, at the Executive Committee Summer Planning and the Executive Board meetings following the conference.
8. Only the host S/T/P President or designee will sign the contract with the hotel.

#### **8050. RESPONSIBILITIES**

The President will serve as General Director of the Conference, responsible for the coordination of:

- |                                  |                                   |
|----------------------------------|-----------------------------------|
| 1. Site Selection/facilities     | 9. Printing                       |
| 2. Selection of committee chairs | 10. Prizes/gifts                  |
| 3. Program/sessions              | 11. Meals/social events           |
| 4. Publications                  | 12. Sponsors                      |
| 5. Registration                  | 13. Past Presidents' Reception—   |
| 6. Hospitality                   | appoint a person to plan and host |
| 7. Exhibits                      | the Reception at the annual       |
| 8. Housing                       | conference. (See Appendix         |
|                                  | A3150)                            |

### **9000 WBEA PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING (See Appendix A3120)**

1. The WBEA Director to the NBEA Executive Board is responsible for the planning and execution of the Professional Development Leadership Training (PDLT). The Director will work with the President-elect and the Membership Director. The WBEA Director will conduct the first part of the training session, then the participants will be assigned to 1 of 3 groups: (1) S/T/P Presidents-elect Training conducted by the WBEA President-elect, (2) S/T/P Membership Directors Training conducted by the WBEA Membership Director, or (3) Professional Development conducted by the WBEA Director to the NBEA Executive Board.
2. The WBEA Director to the NBEA Executive Board is responsible for directing this meeting, the breakout session of PDLT including:
  - a. Promoting PDLT through WBEA newsletter articles.
  - b. Creating the PDLT application form.
  - c. Determining the schedule.
  - d. Preparing an agenda with scheduled visits by current WBEA Executive Committee members.
  - e. Updating the content of the electronic handbook.
  - f. Coordinating the PDLT with the WBEA President-elect and the WBEA Membership Director
  - g. Creating certificates for the PDLT graduates.
  - h. Recognizing the PDLT graduates at the designated WBEA function.

- i. Recognizing the PDLT graduates in the WBEA newsletter.
- 3. The S/T/P Presidents-elect workshop will be held in conjunction with the Professional Development Leadership Training (PDLT). The WBEA President-elect will conduct a breakout session during this time.
- 4. The S/T/P Membership Directors' workshop will be held in conjunction with the PDLT. The WBEA Membership Director will conduct a breakout session during this time.

## 10000 INCORPORATION

### 10010. DURATION

According to the Articles of Incorporation, the corporation shall "endure for the full term of 25 years with the privilege of perpetual succession, as provided by law." (Beginning 11/9/78)

### 10020. PROCEDURE

- 1. The Treasurer shall be responsible for maintaining incorporation status.
- 2. IRS Form 990-N must be completed (when revenue for the year requires) and filed for each fiscal year **no later than November 15 or designated deadline.**
  - a. IRS EIN: 93-0816856
  - b. Arizona State No.: 119529-9
 

Send Forms to:	Internal Revenue	<u>and</u>	State of Arizona
	Service Center		Department of Revenue
	Ogden, UT 84201		PO Box 29002
			Phoenix, AZ 85038
- 3. The Arizona Corporation Commission Papers must be filed annually.
  - a. Send to: Arizona Corporation Commission  
1200 West Washington  
Phoenix, AZ 85007
  - b. The **annual document will be filed no later than September 20.**
  - c. The forms are sent, by the Arizona Corporation Commission to WBEA's agent who must live in Arizona and then forwarded to the treasurer.
  - d. The Arizona Corporation Commission will contact the WBEA's Arizona agent if the annual filing is not completed by the deadline date or with any concerns.
  - e. A copy of the filed forms must be sent to the NBEA Executive Director and NBEA President.

# 11000 BUSINESS PARTNERSHIPS

## 11010. *DEVELOPMENT*

1. Businesses in the WBEA region will be encouraged to become business partners with the WBEA to provide expertise and/or funding to our organization.
2. Business partners can display their logos on the WBEA webpage with links to resources on their own webpages if the business has exhibited at least once in the last two years at a WBEA or S/T/P conference or paid for advertisements in the WBEA newsletter
3. Business partners will be encouraged to display the WBEA logo on their own web page with a link to our WBEA webpage.
4. Business partners will be encouraged to attend the WBEA annual conference and S/T/P conferences as exhibitors and sponsors to share their expertise.

# **APPENDICES**

**Western Business Education Association**

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**Résumé of Candidate for Office of:**

**Personal Data:**

Name: \_\_\_\_\_

S/T/P

Affiliation \_\_\_\_\_

Is the candidate a current member of  
WBEA/NBEA? \_\_\_\_\_

**Professional Preparation:**

**Professional Experience:**

**Professional Association Activities:**

**Other Professional Activities:**

**On the back, please add a statement why you are qualified to hold this office.**

The signatures of the Candidate and the S/T/P Representative provided below attest to the following:

**The Candidate has agreed to seek the office indicated above and has been determined by the S/T/P to be qualified for such office. The Candidate received and reviewed a copy of the Program of Work for the office, understands the duties and responsibilities of the office, and is willing to accept the commitment if elected.**

\_\_\_\_\_  
Candidate Signature    Date

\_\_\_\_\_  
S/T/P Representative. Signature                          Date

**NOTE:** This form must be completed, signed, and dated by the Candidate and S/T/P Representative to provide a valid nomination. A résumé may be attached.

### **A3110. PRESIDENT'S AWARD TIMELINE**

September: Determine the winner.

October: President informs Awards & Scholarship Director of the winner, and **secretively** does background work, soliciting information from winner's family and business associates to forward to the Awards & Scholarship Director.

January: Have Awards & Scholarship Director order plaque for winner.

Prepare background information on winner to be included in the awards booklet and read when presenting plaque at WBEA Conference.

With the assistance of the President, notify someone secretively to be sure winner will be at function when award is given.

February  
or May: Award plaque to winner at WBEA Conference.

### **A3120. PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING WORKSHOP TIMELINE**

October: Determine topics and contact officers about speaking during Professional Development Leadership Training Workshop.

November: Contact publishers to sponsor continental breakfast or lunch for Professional Development Leadership Training Workshop.

Write and/or e-mail S/T/P Presidents, Presidents-elect, and Membership chairs alerting them to upcoming Professional Development Leadership Training Workshop and urging full attendance. Mention topics and agenda for the day. Include reservation form for attendance.

January: Send reminders to S/T/P Presidents, Presidents-elect, and Membership chairs of upcoming Professional Development Leadership Training Workshop.

February: Hand out information on session leaders, topics, list of participants at Professional Development Leadership Training Workshop.

## **A3130. TREASURER'S GUIDELINES**

### **OPENING BANK ACCOUNTS:**

Select the best possible established banking arrangements as early as possible. Standard accounts include both an interest-bearing checking account and a savings account (usually some form of Certificate or Time Deposit).

Three signatures are included on accounts—president, president-elect, and the treasurer from the first year of treasurer's term. One signature is required on checks. However, if the amount of the check is \$500 or more, the President must give written approval and/or minutes from the Executive Board or Executive Committee meeting must be attached to the expense report showing approval. Get signature cards signed as early as possible to ensure that the new account is in place by July 1.

Most banking institutions require the organization's IRS EIN number (located in permanent records) and minutes with names of officers and corresponding ID (i.e. S/T/P driver's licenses). Check specifics of selected institution.

Checks are usually printed as follows:

Western Business Education Association  
Treasurer's Name, Treasurer  
Treasurer's Address and Telephone

Approximately 175 to 200 checks are needed for a fiscal year (July 1 to June 30).

### **RECEIPT OF FUNDS AND RECORDS:**

The incoming treasurer should acknowledge receipt of funds and records in writing by sending a memo to the outgoing treasurer with copies to both the president and president-elect. Check to see if the previous ending balance agrees with the beginning balance. Compare records to the checklist located in the current *WBEA Policies and Procedures Manual and Appendices*. Spot-check to see if all checklist records have been transferred for seven years.

### **TRANSFER OF FUNDS AND RECORDS:**

Send a memo of transmittal with funds or records to the incoming treasurer with a copy to the outgoing president. The outgoing treasurer should destroy records outside a current seven-year period. Exchange as many records as possible during Conference. The newly approved budget, addresses of the outgoing treasurer, president, president-elect, and these guidelines are important temporary documents for the incoming treasurer to take home.

### **EXECUTIVE COMMITTEE SUMMER PLANNING MEETING:**

Take a prepared skeleton Financial Report including the Executive Board approved budget (usually February through April). Blank expense reports and new checks are needed for disbursements as shown in the budget. It is suggested that the skeleton Financial Report be prepared well in advance of the WBEA Executive Committee Summer Planning (July) meeting and sent to both the outgoing and incoming presidents to reconcile differences. Expenses for this meeting are usually more than the amount budgeted. In this case, the expenses of all in attendance are added up and then a percentage is applied to determine the amount to pay each member (if \$1300 is budgeted for this meeting and the president's expenses were 10% of the total actual expenses, then \$130 would be reimbursed to the president).

**EXECUTIVE BOARD MEETING:**

Most disbursements take place during this meeting. Prepare to write 75 or more checks.

**EXPENSE REPORTS:**

No. 1 is the beginning expense report number for each year. Expense reports may be filed in a three-ring binder in date order. Other records may be kept in the same binder. Expense report numbers are written on checks. Combine several account numbers on one expense report, write one check, and save paperwork.

**VOIDING CHECKS:**

In addition to standard procedures, write VOID across the check, assign an expense report number, and attach the voided check to the voucher in the usual manner.

**STOP PAYMENTS:**

Check with the president before expending charges for stop payments. In most cases, recipients of checks can be contacted and lost check numbers can be kept with outstanding checks and monitored.

**RECONCILING:**

Reconcile on back of bank statements provided. File most recent bank statements on top. Any interest may be recorded in the checkbook in red.

**POSTING:**

Computerized spreadsheet posting works well by posting directly from expense reports into the Financial Report. Manual posting may require more detail listing. Treasurer may choose to use accounting software such as Quick Books Pro.

**CHART OF ACCOUNTS:**

Account numbers listed on the Financial Report serve as a simple chart of accounts.

**ACCRUAL ACCOUNTS:**

Some revenue and expense items such as membership income from NBEA earned during the current fiscal year but not yet received, interest income earned but not paid during current year, and NBEA expenses incurred but not paid should be recorded for current year as revenue and expenses and carried over to the next fiscal period as receivables and payables.

**CONFERENCE REVENUE:**

Check with the president to establish current procedures for reporting conference rebate as net or gross and to determine whether items such as photography and amenities or some leadership meals and flowers are deducted from conference income or whether this should be a line item.

**CONFERENCE RESERVE:**

WBEA will maintain a conference reserve account to help finance the conference when NBEA is in the region. Any surplus from a given year's budget will be put into this account. Once the amount in this account reaches \$5,000, the surplus will remain in the unrestricted reserve account.

**MISCELLANEOUS ACCOUNTS:**



Miscellaneous accounts include organization business such as phone, printing, postage, mailing supplies, or certificates. The president's miscellaneous account may include additional overhead expenses as supplies for meetings, leadership meals, letterhead, keying of Program of Work and WBEA Policies and Procedures Manual and Appendices.

**PROFESSIONAL DEVELOPMENT INSTITUTE:**

Maintain a separate line item in the budget for the Institute.

**UNRESTRICTED RESERVE:**

This account is used to balance the budget when expenses are greater than revenue for a fiscal year.

**R J THOMPSON MEMBERSHIP ACCOUNT:**

When the amount of expense for the R J Thompson Membership Award is known, transfer the amount from the Thompson reserve account to Thompson revenue for the year. (Dr. Robert Thompson Membership Award—account #3400 and Cr. Robert Thompson Membership Award—account #4700)

**ACCRUED ENTRIES:**

The following accrued entries should be made at the end of the fiscal year:

**Interest Income**

Dr. Interest Receivable—account #1400  
Cr. Interest Income (90% of amount)—account #4300  
Cr. Professional Development (10% of amount)—account #4500

**Dues from NBEA**

Dr. Accounts Receivable—account #1400  
Cr. Membership Dues—account #4100

**NBEA Board Meeting Expenses**

Dr. WBEA Share/NBEA Board Meeting—account #5720  
Cr. Accounts Payable—account #2100

**NBEA Professional Development Partnership**

Dr. Projects—account #6430  
Cr. Accounts Payable—account #2100

**CLOSING ENTRIES**

**Close revenue from Professional Development to reserve account**

Dr. Professional Development Revenue—account #4500  
Cr. Professional Development Reserve—account #3200

**Close expenses from Professional Development to reserve account**

Dr. Professional Development Reserve—account #3200  
Cr. Stipends—account 6300  
Cr. Promotion—account 6310  
Cr. Miscellaneous—account 6320

**Close revenue accounts to Unrestricted Reserve**

Dr. All 4000 accounts except #4500



**Signatures/Approvals**

\_\_\_\_\_  
Person Requesting Reimbursement

\_\_\_\_\_  
Authorized Signature

Send completed form, with attached receipts attached, to:

Dr. Brenda Jacobsen  
WBEA Treasurer  
4891 Mohawk  
Pocatello, ID 83204  
wbeatreasurer@gmail.com

For office use only:		
Amount Paid	\$0.00	Date Paid
Notes:		Check #

**A3140. CHRONOLOGY OF SECRETARY'S DUTIES**

1. During the conference when elected
  - a. Outgoing and Incoming Directors/Officers Executive Committee meeting:
    - (1) Attend the meeting and receive secretary's records.
    - (2) Obtain home and institutional addresses for new Executive Committee members to establish the Directory. Use asterisks to indicate preferred mailing addresses.
  - b. Compile the Executive Committee Directory (at least in draft format) prior to the end of the conference, or soon after and send to the President. (Use Directory format styles.)
  - c. Attend conference session for introduction of new WBEA officers.
2. Within one month following the conference
  - a. Create Executive Committee Directory (if not accomplished at conference) and send to all Executive Committee members.
  - b. File copies of minutes received from former secretary.
  - c. Distribute copies of minutes to Executive Committee, NBEA Executive Director, and NBEA President.
  - d. Transmit book of permanent records, disk of Program of Work and WBEA Policies and Procedures Manual and Appendices, and information from previous years to incoming Secretary.
3. May, June, July
  - a. Directory
    - (1) Prepare blank Directory forms to send to S/T/Ps.
    - (2) Prepare a letter addressed to each President-elect from the previous year requesting a reply for S/T/P directory information no later than June 30.

- (3) Send letters and forms to S/T/Ps no later than May 15.
  - (4) Organize and key Directory as S/T/Ps respond.
  - (5) Send reminders during mid-June to Presidents-elect who have not responded.
  - (6) Duplicate and distribute rough draft Directory to Executive Committee members at Summer Planning Meeting.
- b. Attend Executive Committee Summer Planning Meeting
    - (1) Create and duplicate motion and voting forms.
    - (2) Take minutes.
    - (3) Handle any corrections to previous minutes.
4. August and September
- a. Directory
    - (1) Finalize the directory.
    - (2) Distribute to Executive Committee and Executive Board.
  - b. Minutes of WBEA Executive Committee Summer Planning Meeting.
    - (1) Key, number each line, and submit to President for approval.
    - (2) Upon approval, distribute to participants, NBEA Executive Director, and NBEA President; and file original.
5. September through December
- a. Handle any updates of the Directory.
6. January
- a. Prepare for Conference meetings.
  - b. Finalize Minutes Book to turn over to new Secretary.
7. During the Conference (February or May)
- a. Executive Committee meeting
    - (1) Create and duplicate motion and voting forms.
    - (2) Take minutes and number each line.
    - (3) Handle any corrections to previous minutes.
  - b. Executive Board meeting
    - (1) Print large name tents (printed on both sides with name and position of Board member) for each Board member and place around table at Executive Board meeting.
    - (2) Circulate during social time before meeting to confirm that names in S/T/P delegations agree with your list.
    - (3) Have a clipboard with sign-up sheet for guests labeled as follows:
 

Name	Institution	S/T/P	Office (if any)
------	-------------	-------	-----------------
- Be certain all visitors sign in.

- (4) Have a supply of motion and voting sheets and distribute as needed during the meeting.
  - (5) Have three sets of colored paper or number the cut sheets to use for voting. There should be one piece of each color or numbered sheet for each voting member.
  - (6) Arrange with hotel catering office if a ballot needs to be printed.
  - (7) Call the roll of officers and delegates; determine quorum and the number for a majority.
  - (8) Take minutes and number each line.
  - (9) Handle corrections to previous meeting's minutes.
  - c. Attend Executive Committee—Outgoing and Incoming Directors/Officers Meeting
    - (1) Take minutes, number each line, and mail to President for approval; take attendance.
    - (2) Send original copy of minutes to new Secretary to be filed.
    - (3) Turn over materials to new Secretary.
8. Within one month following the conference
- a. Key and distribute Executive Committee and Executive Board Minutes to participants, including the NBEA Executive Director and NBEA President.
  - b. Finalize any remaining duties.

**A3141. DIRECTORY OF S/T/P OFFICERS AND DELEGATES FORM**

Official S/T/P Association Name:	Term of Office:	
	S/T/P Conference Date(s):	
	Conference Location:	
	Newsletter Deadlines:	
Name & Office	Business Name, Mailing Address, Telephone No., & E-mail address	Home Mailing Address, Telephone No., & E-mail address
President		
President-Elect		
Awards Chair		
Legislative Chair		
Membership Chair		
Newsletter Editor		
Web Master		
WBEA Nominating Committee Rep.		
WBEA Nominating Committee Alternate Rep.		

### **A3150. PAST PRESIDENTS' RECEPTION AT WBEA CONFERENCE**

- December Past President together with the Conference Chair makes arrangements for reception.
- January Past President together with the Conference Chair will e-mail WBEA past presidents an invitation (e-mail addresses will be obtained from the previous year's past president and/or conference chair). WBEA President distributes to the Executive Board.
- Awards & Scholarship Director arranges for Past President's plaque to be given at last conference function.
- February Past President may work with the Conference Chair to secure party supplies—wine, beer, soft drinks, napkins, plastic cups, nuts, etc. Alcoholic beverages may **not** be purchased with WBEA budgeted funds. Expenses are taken from the hosting S/T/P's conference budget.
- Past President will arrange for traditional program (PowerPoint of Past Presidents and their Boards as well as "roast" of outgoing president) about an hour after reception begins.

### **A4030. CHRONOLOGY OF WBEA DIRECTOR TO THE NBEA EXECUTIVE BOARD RESPONSIBILITIES**

1. After having been elected at the Executive Board meeting, attend the Old and New Officers Executive Committee Meeting.
2. Having received notice of election, make plans to attend the WBEA Executive Committee Summer Planning Meeting.
3. Notify the WBEA Director to the NBEA Executive Board whom you are replacing of your selection so that he/she may furnish you with your copies of the WBEA and NBEA notebooks.
4. Using the NBEA minutes from the spring meeting, plan to submit an article to the WBEA Newsletter Editor for inclusion in the Fall issue.
5. Attend the fall meeting (usually in November) of the NBEA Executive Board.
6. Attend WBEA Executive Committee meetings and the annual meeting of the WBEA Executive Board. Present a written report to the Board of NBEA activities and bring up for discussion those items, which you feel need input from the Board so that you may represent the views of the Board at the next NBEA Board meeting.
7. Conduct the PDLT Workshop as WBEA Director to the NBEA Executive Board along with WBEA President-elect and WBEA Membership Director.
8. Depending on the date of publication for the Western News Exchange newsletter, plan to submit an article for publication.

## **A6010.2. DISTINGUISHED SERVICE AWARD**

### **WESTERN BUSINESS EDUCATION ASSOCIATION**

Nominations for this award may be submitted for either an individual or a group. (Only one nomination may be made per year to an Individual and one to a company, or representative of a company, or a legislator.)

\* \* \* \*

1. An INDIVIDUAL who has served and contributed to WBEA and business education through professional activities that include leadership, service, honors and awards, and research and writing. This nominee must be a business educator and a member of WBEA.

and/or

2. A COMPANY or REPRESENTATIVE OF A COMPANY, or LEGISLATOR who has served a major portion of education in the Western region.

#### **Procedure for Submitting Nominations:**

1. Each State/Territory/Province or any NBEA/WBEA member may submit a nominee for these awards by the deadline, December 1. If conference is in May instead of February, deadline will be February 1. The nominee and the nominator must be a current NBEA/WBEA members.
2. The WBEA Distinguished Service Award Nomination forms must be used. The application will be limited to the nomination form. One electronic copy of the nomination is to be submitted. One color or black and white photograph must be submitted. The picture may be used for the Awards Booklet, but will not be used in the selection process.
3. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.
4. If a nominee is not selected for the award the first year of nomination, the nomination may be considered the next year. Contact the Awards & Scholarship Director to request that the application be considered again. If editing is desired, a new application must be submitted following the guidelines by the deadline date.
5. Nominees receiving less than an average of 75 total points will not be considered for the award.

#### **Criteria for Judging the WBEA Member Nominee**

1. Contributions to WBEA (40 points)
2. Contributions to State/Territory/Province (20 points)
3. Professional Contributions (20 points)  
(Includes projects, writings and research, honors, awards, and professional organizations.)



4. Professional Integrity (20 points)
5. Nominees receiving less than an average of 75 total points will not be considered for the award.

**Criteria for Judging the Company/Legislator/Other Nominee**

1. Contributions to WBEA (80 points)
2. Contributions to State/Territory/Province (10 points)
3. Statement for “Why Award Should Be Given” (10 Points)

**Awards Presentation**

The WBEA Distinguished Service Award will be given at the WBEA Annual Conference.

**Due Date**

Send form to the WBEA Awards & Scholarship Director by December 1. If conference is in May instead of February, deadline will be February 1.

**A6010.2.1. DISTINGUISHED SERVICE AWARD NOMINATION FORM for WBEA MEMBER**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

**DISTINGUISHED SERVICE AWARD—WBEA MEMBER**

<b>NOMINEE INFORMATION:</b>		Date: <a href="#">Click here to enter a date.</a>
Full Name of Nominee (Candidate): <a href="#">Click here to enter text.</a>		
Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
E-mail address: <a href="#">Click here to enter text.</a>		
Current Position: <a href="#">Click here to enter text.</a>		
Current School: <a href="#">Click here to enter text.</a>		
NBEA Membership #: <a href="#">Click here to enter text.</a>	Cell Phone #: <a href="#">Click here to enter text.</a>	
<b>NOMINATOR INFORMATION:</b>		

Name of Nominator (Person submitting Nomination): <a href="#">Click here to enter text.</a>		
Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
E-mail address: <a href="#">Click here to enter text.</a>		
NBEA Membership #: <a href="#">Click here to enter text.</a>	Cell Phone #: <a href="#">Click here to enter text.</a>	
Who should we contact for more information (Name): <a href="#">Click here to enter text.</a>		
Cell Phone #: <a href="#">Click here to enter text.</a>	E-mail address: <a href="#">Click here to enter text.</a>	
Is this a secret nomination? <a href="#">Choose an item.</a>		

<p><b>EDUCATIONAL BACKGROUND (List degrees, institutions, and years attended.)</b></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>OCCUPATIONAL BACKGROUND (Give years of experience in business education, administration, or supervision.)</b></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>STATEMENT OF WHY THIS PERSON IS BEING NOMINATED</b></p> <p><a href="#">Click here to enter text.</a></p>
<p>For the following areas, include significant contributions and achievements in furthering the goals of business education in the Western Region through leadership, offices held, service, research, and writings. Nominees receiving less than an average of 75 total points will not be considered for the award.</p>
<p><b>Contributions to WBEA (60 points)</b></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>Contributions to State/Territory/Province (include dates and responsibilities) (20 points)</b></p> <p><a href="#">Click here to enter text.</a></p>

Other Professional Contributions (20 points)  
 Include "in-house" projects, writing and research, honors and awards, and other professional organizations.

Click here to enter text.

**A6010.2.2. DISTINGUISHED SERVICE AWARD FOR A COMPANY,  
 REPRESENTATIVE OF A COMPANY, OR LEGISLATOR NOMINATION  
 FORM**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

**DISTINGUISHED SERVICE AWARD—Company,  
 Company Representative, or Legislator**

<b>NOMINEE INFORMATION:</b>		Date: Click here to enter a date.
Full Name of Nominee (Candidate): Click here to enter text.		
Address: Click here to enter text.		
City: Click here to enter text.	State: Click here to enter text.	Zip Code: Click here to enter text.
E-mail address: Click here to enter text.		
Current Position: Click here to enter text.		
Company Name: Click here to enter text.		
NBEA Membership #: Click here to enter text.	Cell Phone #: Click here to enter text.	
<b>NOMINATOR INFORMATION:</b>		
Name of Nominator (Person submitting Nomination): Click here to enter text.		
Address: Click here to enter text.		
City: Click here to enter text.	State: Click here to enter text.	Zip Code: Click here to enter text.
E-mail address: Click here to enter text.		
NBEA Membership #: Click here to enter text.	Cell Phone #: Click here to enter text.	

Who should we contact for more information (Name): <a href="#">Click here to enter text.</a>	
Cell Phone #: <a href="#">Click here to enter text.</a>	E-mail address: <a href="#">Click here to enter text.</a>
Is this a secret nomination? <a href="#">Choose an item.</a>	

<p><b>EDUCATIONAL BACKGROUND</b> (List degrees, institutions, and years attended.) – <i>Skip if a Company is being nominated.</i></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>OCCUPATIONAL BACKGROUND</b> (Give years and experience in business, administration, or supervision.) – <i>Skip if a Company is being nominated.</i></p> <p><a href="#">Click here to enter text.</a></p>
<p>Include significant contributions and achievements in furthering the goals of business education in the Western Region through WBEA leadership, service, and research and writings. Nominees receiving less than an average of 75 total points will not be considered for the award.</p>
<p><b>Contributions to WBEA (80 points)</b></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>Contributions to State/Territory/Province (10 points)</b></p> <p><a href="#">Click here to enter text.</a></p>
<p><b>Statement for “Why Award Should Be Given” (10 points)</b></p> <p><a href="#">Click here to enter text.</a></p>

**A6010.3. OUTSTANDING BUSINESS EDUCATOR**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

**Educational Levels:**

Nominations can be made for the following levels:

- Elementary/Middle/Junior High School Level
- High School Level
- Post-secondary Level
- Senior College/Collegiate/University

### **Procedure for Submitting Nominations:**

1. Nominations may be made by any NBEA/WBEA member or by a State/Territory/Province (S/T/P) association. The nominee and nominator must also be members of NBEA/WBEA.
2. Nominations must follow the official form and procedures outlined. Letters of Recommendations may be included with the official form.
3. Submit one copy of the nomination packet electronically, along with a black and white or color photograph to the WBEA Awards & Scholarship Director no later than DECEMBER 1. If conference is in May instead of February, deadline will be February 1.
4. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

**\*\*If a nominee is not selected for the award the first year of nomination, the nominee may be considered the next year. Contact the Awards & Scholarship Director to request that the application be considered again. If editing is required, a new application must be submitted following the guidelines by the deadline date.\*\***

### **Eligibility:**

1. The recipient must be a member of WBEA/NBEA and of his/her S/T/P association for a minimum of two years.
2. The recipient should be currently teaching business at the level for which he/she is being nominated.
3. The recipient's contributions may have been made over an extended period of time, but the major impact must have occurred within three years prior to the nomination.

### **What to Submit:**

1. NOMINEE DATA FORM Filled out completely.
2. A maximum of three letters supporting the nomination.
3. Color picture of the nominee which will be used for the Awards Booklet.
4. E-mail Nomination packets to Awards & Scholarship Director.

## **A6010.3.1 OUTSTANDING BUSINESS EDUCATOR NOMINATION FORM**

### **WESTERN BUSINESS EDUCATION ASSOCIATION**

### **OUTSTANDING BUSINESS EDUCATOR**

## NOMINEE DATA FORM

<b>NOMINEE INFORMATION:</b>		
Level of Nominee: Choose an item.	Date: Click here to enter a date.	
Full Name of Nominee (Candidate): Click here to enter text.		
Address: Click here to enter text.		
City: Click here to enter text.	State: Click here to enter text.	Zip Code: Click here to enter text.
E-mail address: Click here to enter text.		
Cell Phone #: Click here to enter text.		
Current Position: Click here to enter text.		
Current School: Click here to enter text.		
NBEA Membership #: Click here to enter text.	S/T/P Area: Click here to enter text.	
<b>NOMINATOR INFORMATION:</b>		
Name of Nominator (Person submitting Nomination): Click here to enter text.		
Address: Click here to enter text.		
City: Click here to enter text.	State: Click here to enter text.	Zip Code: Click here to enter text.
E-mail address: Click here to enter text.		
NBEA Membership #: Click here to enter text.	Cell Phone #: Click here to enter text.	
<b>Who should we contact for more information (Name):</b> Click here to enter text.		
Cell Phone #: Click here to enter text.	E-mail address: Click here to enter text.	
Is this a secret nomination? Choose an item.		

<p>Answer the following items. Nominees receiving less than an average of 75 total points will not be considered for the award.</p>
---

**EDUCATION and DEGREES (List majors, minors and institutions.)**

[Click here to enter text.](#)

**TEACHING EXPERIENCE (List years and location of experience.)**

[Click here to enter text.](#)

**PROFESSIONAL MEMBERSHIPS (List organizations and length of time, including a minimum of two years, of memberships.)**

[Click here to enter text.](#)

**HONORS AND AWARDS RECEIVED (Total of 10 points possible for the four items above.)**

[Click here to enter text.](#)

**CONTRIBUTIONS TO BUSINESS EDUCATION through classroom involvement, curriculum development, student organizations, administrative responsibilities, and/or publications. (50 points)**

[Click here to enter text.](#)

**PARTICIPATION IN LOCAL, REGIONAL, NATIONAL, AND INTERNATIONAL PROFESSIONAL ASSOCIATIONS. Include offices held, committees served on, and conference activities. (10 points for WBEA membership and activities; 20 points for other.)**

[Click here to enter text.](#)

**INCLUDE A MAXIMUM OF THREE LETTERS OF RECOMMENDATION that document the information included in this nomination. (20 points total)**

**A6010.4.1. S/T/P MEDIA RECOGNITION EVALUATION FORM**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

Point Assignment Sheet

As a judge for this award, please grade the attached publications/information according to each of the following criteria. The points you give for each category cannot exceed the total points designated. For example: For "content and purpose," 35 points are maximum number of points you can give to any one publication on this category.

It is conceivable that your total points given for each newsletter may not equal 100 points. On the other hand, no newsletter can receive over 100 points. Newsletter entries receiving less than an average of 75 total points will not be considered for the award. Three Communication winners will be selected by the Awards & Scholarship Director based on total number of points awarded by judges.

In case of a tie vote, the Awards & Scholarship Director will send a ballot to each judge for revote; if this does not determine the winner, Awards & Scholarship Director will break the tie.

Name of S/T/P submitting  
publication/information:

\_\_\_\_\_

JUDGING CRITERIA	POSSIBLE POINTS	EVALUATION
Content and purpose	35 points	
Professionalism/impact	30 points	
Organization and Format	20 points	
Readability	10 points	
Membership Contact	5 points	
Total Points for this Publication	100 points	

YOUR SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_



## **A6010.4.2. S/T/P MEDIA RECOGNITION PROGRAM**

### **Introduction**

S/T/P communication is critical in keeping your membership informed and to promote S/T/P activities to potential new members. These various methods of communication should reflect the quality and professionalism of business education.

### **Purpose**

The S/T/P Media Recognition Program is designed to recognize and reward S/T/Ps for the standard of excellence in communication. Moreover, it encourages S/T/Ps to keep in contact with every member on a regular basis, promote professional and educational opportunities, and serve as a support network among its membership locally, regionally, and nationally.

### **Recognition Eligibility:**

All Editors must be a member of WBEA/NBEA.

### **Judging Criteria**

Judging for the award is based on the following criteria.

#### **A. Content and Purpose (35 points)**

1. Is the information given interesting and suitable for the intended audience?
2. Does the information deal with matters of professional interest as well as items, which would benefit the membership?
3. Timeliness: Is the information pertinent to business educators?
4. Does the information focus on the activities of the S/T/P and its membership?
5. Is there a careful balance of state/province, industry, high-tech trends, and "how to" or innovative programs/ideas and information for the classroom teacher?
6. Does the publication have a good variety in both information, articles, and contributors?
7. Are there contributions from beyond the group itself?
8. Does the publication make reference to membership, the benefits of membership, how membership is doing, etc.?

#### **B. Professionalism/Impact (30 points)**

1. What impression does the information give the reader at first glance? Is it a positive and progressive image on behalf of the S/T/P?
2. Does the overall impact leave a professional image with the reader?
3. What impression does the information convey to the public, to business leaders,

#### **C. Organization and Format (20 points)**

1. Is the format and layout of materials attractive and conducive to easy reading?
2. Are illustrations and artwork used effectively, and do they enhance the publication?
3. Does the publication appear balanced in its content, design, illustrations, and format?
4. If there are photos, are they clear and attractively arranged?

D. Readability (10 points)

1. Is the information well written, concise, and clear?
2. Is the information positioned in an easy-to-follow manner?
3. Are illustrations and advertising copy placed discreetly so as not to detract from the information contained in the newsletter?
4. Does the publication possess accuracy in grammar, word usage, and sentence structure?

E. Membership Contact (5 points)

Of those S/T/Ps submitting information for this award, give 5 points to the S/T/P that which has the greatest NUMBER of newsletters and contacts made during the award year.

**Procedure**

1. One copy of *any* two newsletters, published between July 1 of a calendar year and June 30 of the following year, must be submitted electronically to the Awards & Scholarship Director.
2. Short write up of all communication sent to members between July 1 of a calendar year June 30 of the follow year, must be submitted electronically to the Award Director. This would include any links to online medium such as a web site, Facebook, Twitter, etc.
3. Submission must include the following information: Editor's Name, e-mail contact information, editor's NBEA Membership number and President's Name. If more than one Editor, please include information for all included in the nomination.
4. Entries must be received by December 1. If conference is in May instead of February, deadline will be February 1.
5. All entries must be sent to the WBEA Awards & Scholarship Director.
6. The Director and two committee members will select the winners.
7. A maximum of three Outstanding S/T/P Media Awards will be recognized each year at the WBEA Conference.
8. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner is present at the WBEA awards ceremonies.

S/T/P entries receiving less than an average of 75 total points will not be considered for the award.

Electronically submit entry to the Awards & Scholarship Director by December 1. If conference is in May instead of February, deadline will be February 1.

**A6010.5.           OUTSTANDING CAREER AND TECHNICAL STUDENT ORGANIZATION  
ADVISOR AWARD**

**WESTERN BUSINESS EDUCATION ASSOCIATION  
OUTSTANDING CAREER AND TECHNICAL  
STUDENT ORGANIZATION ADVISOR**

**Procedure for Submitting Nominations:**

1. Nominations may be made by any NBEA/WBEA member or by a State/Territory/Province (S/T/P) association. The nominee and nominee must also be a member of NBEA/WBEA.
2. Nominations must follow the official form and procedures outlined. Letters of Recommendations may be included with the official form.
3. Submit one copy of the nomination packet, along with a black and white or color photograph, which will be used for the Awards Booklet to the WBEA Awards & Scholarship Director by December 1. If conference is in May instead of February, deadline will be February 1.
4. The Awards & Scholarship Director will notify the nominator of the nominee who will receive the WBEA award. The nominator will contact the winners' supervisors to provide support for the winner. The nominator will ensure that the winner(s) is present at the WBEA awards ceremonies.

**If a nominee is not selected for the award the first year of nomination, the nominee may be considered the next year. Contact the Awards & Scholarship Director to request that the application be considered again. If editing is required, a new application must be submitted following the guidelines by the deadline date.**

**Eligibility**

1. The recipient must be a member of WBEA/NBEA and of his/her S/T/P association for a minimum of two years.
2. The recipient should be currently advising a business-related Career and Technical Student Organization (CTSO) for which he/she is being nominated.
3. The recipient's contributions may have been made over an extended period of time, but the major impact must have occurred within three years prior to the nomination.

**What to Submit:**

1. NOMINEE DATA FORM. Filled out completely.
2. A maximum of three letters supporting the nomination.
3. Color picture of the nominee, which will be used for the Awards Booklet.

E-MAIL FULL NOMINATION PACKET TO Awards & Scholarship Director by December 1.  
 If conference is in May instead of February, deadline will be February 1.

**A6010.5.1      OUTSTANDING CAREER AND TECHNICAL STUDENT ORGANIZATION  
 ADVISOR AWARD NOMINATION FORM**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

**OUTSTANDING CAREER AND TECHNICAL  
 STUDENT ORGANIZATION ADVISOR**

**NOMINEE DATA FORM**

<b>NOMINEE INFORMATION:</b>		
CTSO: <a href="#">Click here to enter text.</a>		Date: <a href="#">Click here to enter a date.</a>
Full Name of Nominee (Candidate): <a href="#">Click here to enter text.</a>		
Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
E-mail address: <a href="#">Click here to enter text.</a>		
Cell Phone #: <a href="#">Click here to enter text.</a>		
Current Position: <a href="#">Click here to enter text.</a>		
Current School: <a href="#">Click here to enter text.</a>		
NBEA Membership #: <a href="#">Click here to enter text.</a>	S/T/P Area: <a href="#">Click here to enter text.</a>	
<b>NOMINATOR INFORMATION:</b>		
Name of Nominator (Person submitting Nomination): <a href="#">Click here to enter text.</a>		
Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
E-mail address: <a href="#">Click here to enter text.</a>		
NBEA Membership #: <a href="#">Click here to enter text.</a>	Cell Phone #: <a href="#">Click here to enter text.</a>	

Who should we contact for more information (Name): <a href="#">Click here to enter text.</a>	
Cell Phone #: <a href="#">Click here to enter text.</a>	E-mail address: <a href="#">Click here to enter text.</a>
Is this a secret nomination? <a href="#">Choose an item.</a>	

<p>Answer the following items. Nominees receiving less than an average of 75 total points will not be considered for the award</p>
<p><b>EDUCATION and DEGREES (List majors, minors and institutions.)</b>  <a href="#">Click here to enter text.</a></p>
<p><b>TEACHING EXPERIENCE (List years and location of experience.)</b>  <a href="#">Click here to enter text.</a></p>
<p><b>PROFESSIONAL MEMBERSHIPS (List organizations, offices held, and length of time of membership.)</b>  <a href="#">Click here to enter text.</a></p>
<p><b>HONORS AND AWARDS RECEIVED – Personally/Chapter/Members (Total of 20 points possible for the four items above.)</b>  <a href="#">Click here to enter text.</a></p>
<p><b>CONTRIBUTIONS TO CAREER AND TECHNICAL STUDENT ORGANIZATION</b>  Include offices held, committees served on; conference activities; and participation of students at the local, state, regional, and/or national levels. (60 points)  <a href="#">Click here to enter text.</a></p>
<p><b>INCLUDE A MAXIMUM OF THREE LETTERS OF RECOMMENDATION that document the information included in this nomination. (20 points total)</b></p>

**WESTERN BUSINESS EDUCATION ASSOCIATION  
EDUCATIONAL OPPORTUNITY SCHOLARSHIP**

**Amount: \$500.00**

**Application Process:**

Applicants must:

1. be a current member of an STP business education association and a member of WBEA/NBEA in good standing,
2. be currently engaged in the business/computer education profession in the Western Region,
3. register for and pass a credit class with a "C" or better, OR
4. register and complete a non-credit class, AND
5. send proof of payment and grade sheet or unofficial transcript upon completion of the class to the Awards & Scholarship Director.

Please send the completed application form electronically by December 1 (February 1 if conference is in May instead of February) to the Awards & Scholarship Chair.

**Deadlines and Dates:**

1. All applications must be submitted by December 1. If conference is in May instead of February, deadline will be February 1.
2. The scholarship recipient will be informed of his/her receiving the scholarship no later than December 15 (February 15 if conference is in May instead of February). The recipient will be encouraged to attend the WBEA Annual Conference to be recognized for their scholarship award.
3. The recipient will be recognized in the WBEA newsletter.
4. Reimbursement will be made by the WBEA Treasurer by June 30 upon completion of the class and receipt of the unofficial transcript or grade sheet and proof of payment.

**Handling of Funds:**

All funds for the scholarship will be administered by the Awards & Scholarship Director and the WBEA Treasurer.

Contributions to the Fund: Contributions to the Education Opportunity Scholarship fund can be made in any amount payable to the Western Business Education Association (WBEA). The contributions can be made to honor a business/computer educator who is retiring, a business educator or administrator who is involved in teaching/administrating, or a deceased member.

**WESTERN BUSINESS EDUCATION ASSOCIATION  
EDUCATIONAL OPPORTUNITY SCHOLARSHIP APPLICATION**

<b>APPLICANT INFORMATION:</b>		
Full Name of Applicant: <a href="#">Click here to enter text.</a>		
Home Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
E-mail address: <a href="#">Click here to enter text.</a>		
Cell Phone #: <a href="#">Click here to enter text.</a>		
Current Position: <a href="#">Click here to enter text.</a>		
Current School Name: <a href="#">Click here to enter text.</a>		
School Address: <a href="#">Click here to enter text.</a>		
City: <a href="#">Click here to enter text.</a>	State: <a href="#">Click here to enter text.</a>	Zip Code: <a href="#">Click here to enter text.</a>
NBEA Membership #: <a href="#">Click here to enter text.</a>	S/T/P Region: <a href="#">Click here to enter text.</a>	
Please describe your current position and professional activities. If you would like to include a Resume instead, please indicate that below and attach to application. <a href="#">Click here to enter text.</a>		
Please indicate your reason for requesting this funding and how it will benefit your career as a Business Educator. <a href="#">Click here to enter text.</a>		

**A6010.7. TYPES OF AWARDS**

1.	6010.2 Item #1  6010.2.1  10" x 8"	Western Business Education Association Distinguished Service Award presented to (name of Recipient) for exemplary service and contribution to business education through professional activities  Month Year
2.	6010.2.2  10" x 8"	Western Business Education Association Distinguished Service Award presented to (name of recipient—Company, or Rep. of a Co., or a Legislator) for exemplary service and contribution to business education through professional activities  Month Year
3.	6010.3 Item #1  10" x 8"	Western Business Education Association Outstanding Business Educator Elementary (or Middle School or Junior High School) (name of recipient)  Month Year
4.	6010.3 Item #2	Western Business Education Association Outstanding Business Educator High School (name of recipient)  Month Year
5.	6010.3 Item #3	Western Business Education Association Outstanding Business Educator University (or College) (name of recipient)  Month Year
6.	6010.3 Item #4	Western Business Education Association Outstanding Business Educator Post-secondary (name of recipient)  Month Year
7.	6010.5	Western Business Education Association Outstanding Career and Technical Student Organization Advisor Award (name of recipient)  Month Year



8.	6010.4 9" x 7" Three (3) awards Framed certificate with gift*	Western Business Education Association Media Recognition presented to (name of Editor(s) from S/T/P Publication Name) for high standard of excellence in communication 20xx-20xx
9.	6060 Item #2 d A6061 #4 Framed Certificate w/\$50 check to S/T/P for promotion of membership	Robert J. Thompson WBEA Membership Award presented to (Name of Membership Director) (Name of S/T/P)  20xx-20xx
10.	3110 Item #15  A3110  9" x 12"	Western Business Education Association President's Award presented to (name of recipient)  In appreciation of exemplary support and dedication and providing high standards of leadership in business education  Month Year
11.	6010 Item #4  12" x 9" Half Gavel Plaque	Western Business Education Association (name of current President) President  In appreciation for dedication, service and leadership 20xx-20xx
12.	6010 #1 A6062	Western Business Education Association Membership Achievement Award presented to (Name of Membership Director) (Name of S/T/P)  20xx-20xx

\* Plaque, Certificate, and/or Functional Gift (pen set, paperweight, etc.)

Note: If Western Business Education Association is too costly to engrave on a plaque, substitute WBEA for all occurrences.

**A6015. PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING FORMATION****WESTERN BUSINESS EDUCATION ASSOCIATION**

TO: S/T/P President (address to individual President)  
FROM: WBEA Director to the NBEA Executive Board  
DATE: Current Date  
RE: WBEA Professional Development Leadership Training

The responsibility of nurturing business educators by providing leadership training opportunities is an integral part of the Strategic Plans of NBEA, WBEA, and your S/T/P associations. With this goal in mind, WBEA has provided the Professional Development Leadership Training (PDLT) at the regional conference for the past \_\_\_\_ (started in 1999) Development Leadership Training years. PDLT includes each S/T/P President-elect, Membership Chairs and any person(s) from an S/T/P who are interested in learning more about leadership and positions in NBEA, WBEA, and S/T/P. Presidents-elect and Membership Chairs are encouraged to attend this training which is held on Thursday, (Date) from 7:30 am – 11:30 am. There will be three breakout sessions within the workshop, and it will include a continental breakfast.

Please copy and distribute the enclosed application form for the WBEA Professional Development Leadership Training to your President-elect, Membership Chair and any others from your S/T/P who may benefit from this training. You may want to distribute the application form at your fall conference/board meeting and/or include in your newsletter. The applications are to be returned to me by December 1, (current year).

Please return the applications to Name, WBEA Director to the NBEA Executive Board, address. If you have any questions or concerns, please contact me at (e-mail address) or talk to your S/T/P President.

c: Application

**A6015.1. PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING AND INSTRUCTIONS FOR REGISTRATION**

**(This is a sample only)**

**PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING  
FOR ALL PRESIDENTS-ELECT, MEMBERSHIP DIRECTORS, and  
THOSE INTERESTED IN LEARNING MORE ABOUT  
LEADERSHIP POSITIONS**



The Professional Development Leadership Training encompasses the Presidents-elect workshop, Membership Directors workshop, and leadership training. We encourage all Presidents-elect, Membership Directors, and those interested in leadership training to sign up for this workshop. The workshop will be held on Friday morning, **(date)** - **7:30 am – 11:30 am**. Some of the topics the workshop will cover are:

- Structure of Professional Organization Leadership
- Communications
- Meeting Management
- Other Leadership Responsibilities

Participants will receive valuable information that will be needed throughout the year. Those wishing to participate, please complete the application and submit it to (Name), WBEA Director to the NBEA Executive Board, at the address listed at the bottom of the application. Other information is as follows:

**DATE:** (Date of Conference)  
**WHERE:** (Location)  
**HOTEL INFO:**  
**CONFERENCE INFO:** [www.wbea.info](http://www.wbea.info)

**WBEA** is extremely happy to provide this opportunity for you. Your involvement with your professional association is a great investment for your future. If you have any questions, please contact

WBEA Director to the NBEA Executive Board (Name and e-mail)  
WBEA President-elect (Name and e-mail)  
WBEA Membership Director (Name and e-mail)

Complete this application and return it to: (Name), WBEA Director to the NBEA  
Executive Board  
(Address)  
by (Date).

As a participant in this workshop, you will be expected to register for the conference.

### **CONFERENCE INFORMATION**

Conference (Year and Date)  
(City and Hotel)  
Registration Fee for NBEA/WBEA members is \$XXX  
Registration Fee for nonmembers is \$XXX

### **PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING**

Date:  
Time:  
Location:

Thank you for participating in this program. WBEA is extremely happy to provide this opportunity for you. Your involvement with your professional association is a great investment for your future. Best wishes on your leadership venture. If you have any questions, please contact WBEA Director to the NBEA Executive Board or WBEA President.

The WBEA Professional Development Leadership Training participant must be an NBEA/WBEA member in good standing. The intent of this Leadership Training is to assist an NBEA/WBEA member in the area of professional development.

**A6015.2. PROFESSIONAL DEVELOPMENT LEADERSHIP TRAINING  
APPLICATION FORM**

**WESTERN BUSINESS EDUCATION ASSOCIATION  
WBEA (YEAR) PROFESSIONAL DEVELOPMENT APPLICATION**

**(Please note: This application is in addition to actual WBEA Conference Registration)**

Name \_\_\_\_\_

Preferred Mailing Address: \_\_\_\_\_

City, State/Province, Zip/Postal Code \_\_\_\_\_

School \_\_\_\_\_ School E-mail \_\_\_\_\_

Home E-mail \_\_\_\_\_

State/Territory/Province in which you belong: \_\_\_\_\_

Number of years employed as a business education teacher? \_\_\_\_\_

Number of WBEA \_\_\_\_\_ NBEA \_\_\_\_\_ conferences have you attended?

How much do you know already about the structure of WBEA/NBEA?

Very little    Some knowledge    Quite a bit    Not sure

I am currently serving as:

S/T/P President-elect    Membership Director    Other: \_\_\_\_\_

Currently, not serving in a leadership position; interested in learning more about NBEA/WBEA

Complete this application and e-mail or mail by December 1, (year) to:

**Name of WBEA Director to the NBEA Executive Board (e-mail)  
Address**

Questions, contact:

WBEA Director to the NBEA Executive Board (Name and e-mail)

WBEA President-elect (Name and e-mail)

WBEA Membership Director (Name and e-mail)

\*Note: Be sure to notify your S/T/P President that you have submitted your application.

Complete this application and return it to WBEA Director to the NBEA Executive Board by December 1.

**A6030. WESTERN NEWS EXCHANGE TIMELINE FOR PUBLICATION**

- June-August Contact possible advertisers with information regarding advertising in the WBEA newsletter.
- August 1 Prepare e-mail messages to the Presidents of the S/T/Ps and the WBEA Executive Committee requesting information for the first issue. Prepare e-mail messages to Awards and Scholarship, Membership, and Legislative Directors as well as WBEA Director to the NBEA Executive Board asking for information and reports for the first issue.
- September 1 Deadline date for information to be received for the first issue.
- September 1 Advertiser deadline for first issue and/or WBEA Webmaster.
- September 1 Absolute deadline for all materials to be submitted to the WBEA Editor—reports, advertising, etc.
- September 7 Send first issue to the printer.
- September 15 Mail and/or post electronically the first issue of the WBEA newsletter. Send electronic copy to the Media Communications Director for posting on the WBEA website.
- September-November Contact possible advertisers (optional).
- October 15 Prepare e-mail messages to the Newsletter Editors and Presidents of the S/T/Ps and the WBEA Executive Committee requesting information for the second issue. Prepare e-mail messages to Awards and Scholarship, Membership, and Legislative Directors as well as WBEA Director to the NBEA Executive Board asking for information and reports for the second issue.
- November 1 Deadline date for information to be received for the second issue.
- November 1 Advertiser deadline for second issue and/or WBEA Webmaster.
- November 1 Absolute deadline for all materials to be submitted to Editor--reports, advertising, etc.
- November7 Send second issue to the printer or send electronically to WBEA members, Friends of WBEA, and NBEA Board.
- November 15 Mail and/or post electronically the second issue of the WBEA newsletter. Send electronic copy to the Media Communications Director for posting on the WBEA website.

December-April Contact possible advertisers (optional).

- March 15 Prepare e-mail messages to the Newsletter Editors and Presidents of the S/T/Ps and the WBEA Executive Committee requesting information for the second issue. Prepare e-mail messages to Awards and Scholarship, Membership, and Legislative Directors as well as WBEA Director to the NBEA Executive Board asking for information and reports for the second issue.
- April 1 Deadline date for information to be received for the third issue.
- April 1 Advertiser deadline for third issue and/or WBEA Webmaster.
- April 1 Absolute deadline for all materials to be submitted to Editor--reports, advertising, etc.
- April 7 Send third issue to the printer.
- May 1 Mail and/or post electronically the third issue of the WBEA newsletter. Send electronic copy to the Media Communications Director for posting on the WBEA website.

Two weeks after the regional conference, the WBEA Conference Chair should send a report to the Newsletter Editor to be included in the third WBEA newsletter.

#### **A6030.2. WESTERN NEWS EXCHANGE ADVERTISING POLICY**

The Western Business Education Association reserves the right to be selective in the acceptance of advertisements, including, but not limited to, vendor, content and style. Unless other arrangements have been made, A CHECK FOR THE FULL AMOUNT MUST ACCOMPANY AD COPY, otherwise the ad will not be run. Contact the WBEA Editor for information

Ad prices (h x w indicated): Full Page (8.75" x 7") = \$200

1/2 Page (4.38" x 7") = \$125

1/4 Page (4.5" x 3.5") = \$75

Not more than one-sixth of the content of the newsletter shall be advertising materials.

Submit finished ads or camera-ready copy, plus payment directly to the Newsletter Editor.

Deadlines: Fall Issue is September 1  
Winter Issue is November 1  
Spring Issue is April 1

Statement of Publication:

The WBEA newsletter serves the membership of the Western Business Education Association, a region of the National Business Education Association, as well as Friends

of WBEA contributors. See the WBEA Membership Director's article for membership details.

All copyrights and trademarks are acknowledged.

All materials contained in the WBEA newsletter is copyrighted (current year) by either WBEA or by the author of the article. Unless otherwise noted, permission is granted to the State, Territory and Province (S/T/P) organizations to reprint articles appearing in the newsletter. To reprint articles so noted, contact the WBEA Editor for information. Reprints must reference the originating issue of the newsletter with credit to WBEA, referencing WBEA's entire name address, and specific author(s). Complete copies of any such reprinting must be mailed to the WBEA Editor..

WBEA members should submit all address changes to the NBEA Membership Director, 1914 Association Drive, Reston, VA 22091-1596. Friends of WBEA contributors should submit all address and e-mail changes to the WBEA Membership Director.

Opinions expressed in the WBEA newsletter do not necessarily represent those of WBEA.

Acceptance of advertising by WBEA for publication in its newsletter does not imply any endorsement of the vendor or product.

**A6030.4. SAMPLE OF NEWSLETTER DUE DATES AND CONTENT**

**WBEA Newsletter Articles Due Dates**

	Issue #1 Fall due: 9/1/--	Issue #2 Winter due: 11/1/--	Issue #3 Spring due: 4/1/--
President's Message	Welcome to a new year. Introduce WBEA Executive Committee--elected officials and committee directors.	Invitation to WBEA Conference; report on S/T/P visits; NBEA Executive Board meeting highlights.	Congratulations to WBEA award winners and newly elected officials; goodbye message.
President-elect's Message	Presidents-elect workshop	Presidents-elect workshop & combined membership chairs and presidents-elect meeting (don't mention the breakfast).	Introduction self in an article; report on who and from what S/T/P presidents-elect in attendance were at workshop.



**A6030.4. SAMPLE OF NEWSLETTER DUE DATES AND CONTENT**

**WBEA Newsletter Articles Due Dates**

	Issue #1 Fall due: 9/1/--	Issue #2 Winter due: 11/1/--	Issue #3 Spring due: 4/1/--
Treasurer's Message	Provide balance sheet (five years) for inclusion in the newsletter at some point during the year.		
Secretary's Message	WBEA Executive Committee Directory Info—this same list will be included on the website (excluding home information except for those who are retired and don't mind the personal home information shared).		
	Request S/T/P directory information		
WBEA Director to the NBEA Executive Board	News from NBEA Executive Board—provide National reports, events, and activities as needed.  NBEA Convention info.	News from NBEA Executive Board—provide National reports, events, and activities as needed.  NBEA Convention plus registration material.	News from NBEA Executive Board—provide National reports, events, and activities as needed; also, farewell message if appropriate.  NBEA Convention report.
Past President Nominations Director Strategic Plan Director	Request nominations for WBEA as well as NBEA positions.	Inform membership of the changes in the <i>WBEA Policies and Procedures Manual and Appendices</i> , Strategic Plan, and Bylaws	Election results, <i>WBEA Policies and Procedures Manual and Appendices</i> , summary of approved changes Strategic Plan comments, Bylaws summary of approved changes

**A6030.4. SAMPLE OF NEWSLETTER DUE DATES AND CONTENT**

**WBEA Newsletter Articles Due Dates**

	Issue #1 Fall due: 9/1/--	Issue #2 Winter due: 11/1/--	Issue #3 Spring due: 4/1/--
Awards & Scholarship Director—WBEA & NBEA Awards	Request for WBEA and NBEA awards nominations and describe types of awards.	Request for WBEA and NBEA awards nominations and criteria.	WBEA awards recipients with photos.  Report on any NBEA award winners from WBEA.
Editor	Online newsletter report; deadlines	Online newsletter report; deadlines	Online newsletter report; deadlines
Legislative Liaison (Director)	Report on Perkins funds; need to be active and contact state and national officials.	Report on current issues and announcement of the Legislative Breakout session at the WBEA Conference.	Report on current issues
Membership Director	Membership Updates--western region and S/T/Ps.	Membership Updates--western region and S/T/Ps.	Membership Updates—western region and S/T/Ps.
	Recognize membership chairs who met their goals.	Recognize membership chairs who met their goals.  Remind S/T/Ps of the mailing opportunity for contacting lapsed NBEA/WBEA members	Praise of S/T/Ps who met their goals or who were close to their goals. Explain how these chairs were recognized at the membership chairs' breakfast meeting, the WBEA Executive Board meeting, and the Awards Banquet at the WBEA Conference.
	Provide the NBEA official, current membership form and NBEA website.	Provide the NBEA official, current membership form and NBEA website.	Provide the NBEA official, current membership form and NBEA website.

**WBEA Newsletter Articles Due Dates**

	Issue #1 Fall due: 9/1/--	Issue #2 Winter due: 11/1/--	Issue #3 Spring due: 4/1/--
	Membership Chairs' meeting at the WBEA Conference in (don't mention a breakfast or you could have crashers).	Membership Chairs' meeting at the WBEA Conference—firm location and times (don't mention the breakfast location).	Membership chairs' and presidents-elect breakfast report.
	Request S/T/P membership chairs to give you reports to be included in future issues.	Praise of S/T/Ps who met goals or are near goals.	Report on who won the awards for WBEA membership Explanation of the Robert J. Thompson NBEA/WBEA Membership Award and how to prepare for it the next year
WBEA Director to the NBEA Executive Board	Explain PDI and make a request for S/T/Ps to send people to PDI.  Application Form should be included in newsletter.	PDI update Date, time, and location of PDI workshop. Last announcement for applications.	Report of PDI graduates and a little about each participant.
Media Director and Webmaster	Explanation of WBEA Web page. Post the newsletter online.	WBEA Web page updates. Post the newsletter online.	WBEA Web page updates if appropriate. Post the newsletter online.
WBEA Conference Chair	WBEA Conference—registration, breakout sessions, etc. Provide a tentative schedule of events and travel/hotel information.	WBEA Conference updates including registration form, hotel information, and travel tidbits.	WBEA Conference report for current year.  Invitation to the next year's WBEA Conference with some information about dates, location, and hotel.

**A6030.4. SAMPLE OF NEWSLETTER DUE DATES AND CONTENT**

**WBEA Newsletter Articles Due Dates**

	Issue #1 Fall due: 9/1/--	Issue #2 Winter due: 11/1/--	Issue #3 Spring due: 4/1/--
Robert J. Thompson NBEA/WBEA Membership Endowment Director	Report on requirements and procedures. Include application form.	Report on requirements and procedures.	(1) Report recipients of the endowments--brief explanation about each winner--students and first-year teachers (2) Explanation of the Robert J. Thompson NBEA/WBEA Membership Endowment and procedures for next year.
NBEA President	Welcome message.	Greetings and NBEA activities.	Farewell and NBEA Convention report.
S/T/P Presidents, VPs, Newsletter Editors	Provide state reports and activities	Provide state reports and activities	Provide state reports and activities
Other Regional Presidents, VPs and Newsletter Editors	Provide Regional reports, events, and activities	Provide Regional reports, events, and activities	Provide Regional reports, events, and activities

## **A6060. MEMBERSHIP DIRECTOR'S DUTIES FOR WESTERN REGION**

### **CHRONOLOGY**

1. During the WBEA Conference when appointed:
  - a. Attend Old and New Officers' Executive Meeting(s).
  - b. Attend conference session for introduction of new WBEA officers.
  - c. Consult with NBEA Membership Director for advice and materials.
  - d. Organize and conduct the S/T/P Membership Chairs and Presidents-elect breakfast
2. Within one month following WBEA Conference:
  - a. Write article(s) for Western News Exchange.
  - b. Send publicity to national publications regarding WBEA trophy awardees.
  - c. Write letters of appreciation to S/T/P Membership Chairs.
3. June and July
  - a. Attend Executive Committee Summer Planning meeting.
  - b. Prepare materials for conference.
  - c. Create NBEA membership promotion theme.
4. August
  - a. Write to S/T/P Presidents and NBEA/WBEA, and S/T/P Membership Chairs and send the Robert J. Thompson WBEA Membership Award guidelines, the WBEA Membership Achievement Award guidelines and WBEA's First-Class Mail Letter rate per mailing of new/lapsed NBEA/WBEA member's guidelines. Encourage NBEA displays at their conferences. Give S/T/P Membership Chairs advice and guidance.
  - b. Secure a sponsor for the Membership Chairs/Presidents-Elect breakfast meeting.
5. September through December
  - a. Organize S/T/P Membership Chairs' meeting for WBEA Conference.
  - b. Should a Membership Chairs/Presidents-elect breakfast meeting be held, be sure to have each S/T/P identify only one membership chair and only one president-elect to represent the S/T/P. Any additional attendee will be charged the cost of breakfast.
  - c. Send invitations to membership meeting to S/T/P Membership Chairs and guests (WBEA Director to the NBEA Executive Board, WBEA officers, NBEA Membership Director, etc.)
  - d. Work with the WBEA Conference Chair to order meals and room for the Membership Chairs/Presidents-elect breakfast meeting.
  - e. Compile materials for draft of report to WBEA Executive Board.
  - f. Keep in touch with S/T/P Membership Chairs.
  - g. Determine membership achievement gift for S/T/P Membership Chairs.

h. Arrange an NBEA membership promotion display for WBEA Conference.

6. January

- a. Complete NBEA membership report for WBEA Conference and print copies.
- b. Complete NBEA membership promotion display for WBEA Conference.
- c. Finalize number attending S/T/P Membership Chairs' meeting.
- d. Purchase the Robert J. Thompson WBEA Membership Award gift and the WBEA Membership Achievement gifts(s).

7. February or May, WBEA Conference:

- a. Attend WBEA Executive Board meeting.
  - (1) Distribute copies of NBEA membership report.
  - (2) Distribute guidelines for the Robert J. Thompson WBEA Membership Award.
  - (3) Distribute guidelines for the WBEA Membership Achievement Award.
  - (4) Distribute guidelines for the WBEA Membership promotion stipends.
- b. Coordinate NBEA membership promotion display with NBEA Membership Coordinator.
- c. Organize and facilitate the S/T/P Membership Chairs' meeting (share ideas, etc.)
- d. Present the Robert J. Thompson WBEA Membership Award at WBEA Recognition Luncheon.
- e. Present the WBEA Membership Achievement Awards at WBEA recognition luncheon.
- f. Involve S/T/P Membership Chairs in NBEA display, etc.

8. Within one month following the WBEA Conference:

- a. Prepare publicity for national publications.
- b. Write articles for the *Western News Exchange*.

9. Attend the NBEA Membership Directors meeting at the annual NBEA Convention.

**A6061. ROBERT J. THOMPSON WBEA MEMBERSHIP AWARD GUIDELINES**

**The major membership award WBEA will sponsor each year will be the *Robert J. Thompson WBEA Membership Award*.**

1. This award will be given to the S/T/P membership chair who has completed all required reports **AND** has obtained the highest percent reached of the NBEA membership goal. The S/T/P must have at least 50 NBEA/WBEA members.
2. The S/T/P Membership Director must be a member of WBEA/NBEA.
3. The award will be a cash award of \$50.00 and a framed certificate.
4. The award will be computed on the prior year's June 30 NBEA Membership Report.
5. The award will be presented at the next WBEA Conference. The certificate will read:

The Robert J. Thompson WBEA Membership Award  
Presented to  
Name, S/T/P

**A6062. WBEA MEMBERSHIP ACHIEVEMENT AWARD GUIDELINES**

**Each year WBEA will sponsor *The WBEA Membership Achievement Award***

1. This award will be given to the membership chair who has completed all required reports and has reached 80% or above of the NBEA membership goal.
2. The S/T/P Membership Director must be a member of WBEA/NBEA.
3. The award will be a certificate.
4. The award will be computed on the prior year's June 30 NBEA Membership Report.
5. The award will be presented at the next WBEA Conference.
6. This award **will not** be given to the Membership Chair receiving the **Robert J. Thompson WBEA Membership Award**.

## **A8000. SAMPLE WBEA CONFERENCE TIMELINE**

- 48 Months Submit application to host the WBEA Conference to the Annual Conference Advisory Committee then to the WBEA Executive Board.
- 24-36 Months Select Conference Chair and conference hotel.
- 18-24 Months Conference Chair begins forming committees - selecting personnel - especially important to name Site Coordinator who is located near the conference site.
- Conference Evaluation Committee  
Door Prize Committee  
Exhibits Committee  
Finance and Budget Committee  
Fund Raising/Raffle Committee  
Hospitality Committee  
Membership Committee  
Publicity Committee  
Registration/Housing Committee  
Site Coordinator/Committee  
Speakers/Program Committee  
Tours, Travel, and Special Events Committee
- 18-14 months Meet with chairs of various committees to review their area of responsibility. See that each has a copy of responsibilities. Arrange for a copy of all communications sent out by the various committee chairs to be sent to Conference Chair.
- 16 Months Tentative plan and budget from all committees should be submitted to conference chair. (Be sure to include budget for Past Presidents' Reception.) (Note: No alcohol charges to come from Conference funds.)
- 15 Months Conference Chair and Finance and Budget Committee should meet and finalize the conference budget. Funds for the WBEA Scholarship shall be allocated before conference proceeds are distributed to the S/T/P and region.
- 12-13 Months Exhibit Chair formulates letter and forms for first mailing to exhibitors.
- 9-10 Months Conference Chair, WBEA President, and other committee chairs meet at the conference site, if possible, to make tentative plans for the conference.
- Conference Chair should get the reaction of the committee to such matters as:
1. Special room requirements needed for conference meetings—size, media needs.



2. Special requirements for meals and dinner meetings--media needs, piano, etc.
3. Tentative arrangement of rooms for the conference (registration space, exhibit space, general meeting rooms, sectional meeting rooms, accessibility of rest rooms, etc.)
4. Charges to be made for:
  - a. Registration
  - b. Meals (banquets, luncheons, Delta Pi Epsilon, fun night, etc.)
  - c. Hotel or housing accommodations
  - d. Space for exhibitors and rates to be charged (by hotel and to exhibitors)
5. Publicity
  - a. Number and kinds of general mailings and time schedule.
  - b. National publicity (Balance Sheet, Forum, etc.)
6. Complimentary tickets during conference. Conference Chair and WBEA President should follow WBEA guidelines in formulating their own policy. Keep a list of those who receive tickets.
7. Delta Pi Epsilon-sponsored meeting.
8. NABTE-sponsored meeting.
9. Review policies to govern hospitality coffees, open houses, and other special meetings or gatherings.
10. Determine policy regarding favors, door prizes, raffle prizes, etc.
11. Determine who shall be responsible for seeing that reservations are made for special conference guests. Recommendation: The WBEA President would seem to be a logical person to handle this detail for people invited by the WBEA President. Local Program Chair should make speaker arrangements.

#### 8-9 Months

Conference Chair should:

1. Check with committee chairs to determine progress being made by committee.
2. Remind committee chairs that each is to make a report to the Conference Chair as soon as possible. In the report, will be given for improving the work of the committee next year.
3. Make special effort to determine that Exhibit, Program, and Publicity Chairs are making satisfactory progress with their respective responsibilities.
4. Check on menus for various banquets and luncheons; contract or determine the date costs can be finalized.
5. Check that second mailing to exhibitors ready to be sent.

#### 6 Months

Conference Chair should:

1. Check on progress being made by all committees - particularly Exhibits, Program, and Publicity committees.
2. Make sure special sponsored activities and functions are taking shape.
3. Check with WBEA President about address labels.

- 5 Months      Conference Chair should:
1. Receive dummy of program from committees.
  2. Get any additional special instructions from WBEA President regarding such matters as whether or not to provide special activities for wives/husbands during conference, the handling of complimentary tickets during conference, etc.
  3. Check with WBEA President about reservations for visiting national officers and regional officers at the conference.
  4. Make plans on definite entertainment for various banquets and luncheons.
- 4 Months      Conference Chair should:
1. Check to see that all committees are functioning.
  2. Draft letter announcing the conference. This may be delegated to the Publicity Chair to write. This letter is to be printed and mailed by the Publicity Committee to WBEA members and all business teachers in the state where the conference is being held. Mailing should provide information about hotel accommodations, meal costs, airline facilities to conference city and should carry a tentative conference program. Provisions should be made for room reservations and pre-registration to be sent in.
  3. Together with the Past President, invite Past Presidents to WBEA Recognition Luncheon/Dinner and Past Presidents' Reception. (Could be included in registration materials; get mailing and contact information from the previous year's conference chair.)
- 3 Months      Conference Chair should:
1. Check to see that Exhibit Chair has everything under control.
  2. Conference Chair, Program Chair and WBEA President will meet to go over the conference.
- 2 Months      Conference Chair should:
1. Get copy of printed program from Program Chair. Check for accuracy of room assignments for meetings, special equipment needed, etc.
  2. Go over final plans with the Site Coordinator:
    - a. Check with AV person for equipment needed and special seating arrangements.
    - b. Arrangements for special coffees or receptions.
    - c. Make arrangements for special equipment needed at banquets and luncheons.
  3. Have Registration Chair report to Conference Chair periodically (perhaps weekly) on status on reservations received.
  4. Appoint a WBEA photographer.
- 1 Month      Secure names of those attending meetings before the formal start of the conference from the president, president-elect, and Past President so that

their packets can be pulled and given to them early (Executive Board, etc.).

2 Weeks Bring all committee chairs together and review the responsibilities of each committee throughout the conference.

2 Weeks After

1. Send thank-you notes to committee members, committee chairs, exhibitors, speakers, etc.
2. Photographer provides multiple copies of pictures to conference chair. Pictures to be sent to President, President-elect, and *WNE* Newsletter Editor within one month of the conference.

1-2 Months After

1. All committee chairs should submit final reports to Conference Chair.
2. Conference Chair will submit final report to WBEA President.
3. Pass Conference Planning Guide to new WBEA President-elect.

**A8030. APPLICATION TO HOST WBEA CONFERENCE**

**WESTERN BUSINESS EDUCATION ASSOCIATION**

Name of sponsoring S/T/P \_\_\_\_\_

Dates of conference \_\_\_\_\_ Estimated attendance \_\_\_\_\_

Location of conference \_\_\_\_\_  
(City) (S/T/P/Country)

Conference site (hotel) \_\_\_\_\_

Current guest-room rates at this property \_\_\_\_\_

Projected property guest-room rates on conference date \_\_\_\_\_

Projected costs, if any, for use of function space \_\_\_\_\_

Please attach information to support the availability of public transportation to the conference site. If possible, also include estimated travel costs from selected locations (near and far) within the Western Region.

Current WBEA/NBEA and S/T/P membership \_\_\_\_\_

Is there an expected change in the total membership by the proposed conference date?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

Conference profits will be divided as follows: WBEA \_\_\_\_\_% S/T/P \_\_\_\_\_%

Potential S/T/P members for a conference committee are:

(1) \_\_\_\_\_ (2) \_\_\_\_\_

(3) \_\_\_\_\_ (4) \_\_\_\_\_

A projected budget for the conference and a brief summary of the marketing strategy to be used to support the budget must accompany this application.

NOTE: This application must be signed by the current S/T/P President and at least one (1) of the S/T/P members, named above as a potential committee member.

\_\_\_\_\_  
S/T/P President Date

\_\_\_\_\_  
S/T/P Committee Member Date

## **A8041. WBEA CONFERENCE REGISTRATION GUIDELINES**

1. Registration fees will be determined by the conference committee. The total amount to be paid should be adequate to cover projected costs. The registration fee primarily covers attendance at conference workshops. It may or may not cover the costs of meal functions. Special activities should generally be charged separately.
2. It is appropriate to provide a deadline for registration with an increased fee for late or on-site registrations.
3. Cancellation and refund requests must be in writing, and a deadline for receiving such requests must be established. This date should coincide with committee needs for confirming guarantees with the hotel.
4. The registration fee is required of all WBEA PROFESSIONAL REGISTRANTS as well as PROFESSIONAL REGISTRANTS FROM THE HOST S/T/P.

NOTE: WBEA or Host S/T/P members appearing on the program as speakers or coordinators must register for the conference and pay the required registration fee.

5. A reduced registration fee is provided for RETIRED and STUDENT members as well as FRIENDS OF WBEA Contributors and will be listed on the Registration form. In determining the reduced fee, consideration should be given as to whether meal functions are included. Covering direct participant expenses should be the key to determining the reduced fee.
6. PROFESSIONAL MEMBERS FROM OTHER NBEA REGIONS are accorded the same registration fee as WBEA professional members.
7. COMPLIMENTARY REGISTRATIONS are extended to:
  - a. Program participants from regions other than WBEA. (Includes Regional Presidents, NBEA President, NBEA Executive Director and/or NBEA Membership Director, and other national presidents of professional organizations affiliated with NBEA/WBEA.)
  - b. Speakers outside the educational field. Generally, they are provided with complimentary meals for the day of their presentations if the meal functions are charged separately.
  - c. Exhibitors. Generally applies to exhibit days of conference and covers workshop attendance. If meal functions are included in the registration fee, exhibitors may be invited to purchase individual meal tickets.
  - d. Complimentary name tags may be provided for non-business educators who are the guests of paid registrants.

8. For statistical purposes, the registration form should provide appropriate blanks for participants to indicate institutional affiliations as well as NBEA regional association affiliation and member classification.
  - a. Institutional affiliation categories include Secondary, State Department of Education, College/University, Voc-Tech Center, Junior/Community College, Private Business College, City/County Supervisor, Junior High School, and Business/Industry.
  - b. Regional affiliations include Eastern (EBEA), Southern (SBEA), North Central (NCBEA), Mountain-Plains (M-PBEA), and Western (WBEA).
  - c. Member classifications include Professional (Teacher, Supervisor, Administrator, Other), Retired, Student, and Friends of WBEA Contributors.

It is also appropriate to include a box to be checked by those attending their first WBEA Conference. This provides an opportunity for special recognition (for example, by using different colored name tags). It is also appropriate to include a box to be checked by those attending the conference who agree to allow their contact information, including email address, to be released.

#### ***A8042 CONFERENCE PROCEEDS SPLIT***

1. If net income is over \$20,000, then the hosting S/T/P can receive up to a 60/40 percent split based upon a percentage of the S/T/P's attendees versus the total attendees—S/T/Ps getting 50-60 percent.
2. To qualify for anything other than a 50/50 split between the S/T/P and WBEA, both criteria must be met (net income over \$20,000 and the S/T/P's Conference attendees are over 50 percent of the total attendance, but not to exceed more than a 60 percent share).
3. When WBEA hosts its own conference, \$10 from conference profits shall go to the S/T/P of each registered member. This will be applied on a dollar for dollar basis with WBEA (i.e. if the conference had a net profit of \$1,000, then \$500 would be split among the S/T/Ps and \$500 would go to WBEA). The remainder of the profits will go into the WBEA Unrestricted Reserve.