



**Western Association of Educational Opportunity Personnel  
President Report  
2020 – 2021  
March 9, 2020 Chapter Meeting**

<b>Name:</b>	Angie Alvarez
<b>Position:</b>	Chapter President
<b>Committees to Oversee:</b>	COE Fair Share Membership & Elections Technology Resource Development
<b>Committee Chairs/Co-Chairs:</b>	Ana Prado Victoria Garcia Amel Khan Valeria Rizo
<p><b>Position Description:</b> Provide executive leadership and ensure that all programmatic and fiscal operations of the Chapter are functioning properly. Conduct periodic Chapter meetings to facilitate a two-way flow of information between the WESTOP Board and SoCal Chapter.</p> <p><b>Key Responsibilities:</b></p> <ol style="list-style-type: none"> <li>1. Prepare and submit a revised Chapter budget at the May/June WESTOP Board meeting for approval. Budget must include both projected revenue and expenses for the calendar year. Review the current budget and consult with the Chapter Executive Committee as necessary.</li> <li>2. Provide a Chapter report, to include Chapter activities and financial status at each WESTOP Board meeting and submit annual and other reports as required.</li> <li>3. Serve on the WESTOP Board of Directors Fiscal Affairs Committee and the WESTOP conference awards/scholarship committee.</li> <li>4. Ensure that Chapter Board reports are submitted to the WESTOP president seven days prior to each Board meeting.</li> <li>5. Make arrangements for any WESTOP Board meeting held within the region of the Chapter, to include meeting room space, hotel and/or ground transportation. The Chapter, at its discretion, may provide continental breakfast(s) and/or refreshments during Board meetings and may inform Board members in advance as a courtesy.</li> <li>6. Ensure that all financial information is forwarded to the WESTOP Chief Financial Officer in a timely manner for tax reporting purposes.</li> </ol>	

**Goals & Priorities**

2020-2021 Goals and Priorities

- a) Create a communication plan (i.e. email, social media) to better inform members in virtual setting
- b) Increase membership by engaging Student Equity/Access programs
- c) Create Public Relations campaigns to have to demo when fundraising and soliciting donations
- d) Continue to create quality professional development for the membership and students
- e) Develop clear processes for accounting in alignment with the FAC manual

## Updates

### ***Fair Share:***

- Our personal contributions goal for 2021 is 21. If you have not done so, please go ahead and submit your 10 for 10 personal contribution forms to Ana. You can also donate at: [www.coenet.org](http://www.coenet.org) and let Ana know so we can have it counted.
- More details provided by our Fair Share Chairs, Ana Prado.

### ***Resource Development:***

- You can now place orders for our swag online!
- More details/opportunities provided by our Resource Development Chair, Valeria Rizo.

### ***Student Development:***

- More details provided by our Student Development co-chairs, Jasmine Torres and Leo Villalobos.

### ***Technology:***

- We have decided to move forward with a contract with SCHED, virtual conference platform for SLC. The contract includes 3 events at a reduced cost.
- More details to be provided by Tech Chair, Amel Khan.

### ***Membership and Elections:***

- As of February 23, 2021, SoCal has 218 members.
- More details will be provided by the Membership and Elections Chair, Victoria Garcia.

### ***WESTOP Update:***

- We will have Temo Solorio ( Leg/Ed Chair), Ana Prado (Fair Share Chair), Miguel Zarate (Treasurer), and myself as reps for WESTOP SoCal attending COE's Policy Seminar on March 21 - March 24, 2021.
- Our new website is live at [www.westop.org](http://www.westop.org). We will begin transitioning our [www.westopsocal.org](http://www.westopsocal.org) website as well to align with the new layout.
- 2019 and partial 2020 taxes have now been submitted with the help of YH Advisors.
- Our inaugural Rising Leaders Institute cohort will be concluding their training this month.
- Chapter President-Elect Onboarding is continuing with Dave Ferguson now taking the lead on the training. The last training focused on the financials. Topics discussed were accountability, creating a budget, and an overview of the Financial Affairs Procedures Manual.
  - November: Fiscal/Budgeting/Fiscal Affairs Procedures' Manual
  - January: Professional Development/Professional Development Seminars
  - February: Strategic Plan 2019-22 & Strategic Planning for 2022-25
  - March: (Annual Conference) WESTOP BOD and SC Meeting
  - April: Chapter Planning for 2021-2022 (e.g. meetings, events, service council chair recruitment, etc.)
  - May: Transitional WESTOP BOD meeting

### **2020-2021 Chapter Meeting Dates**

- September 25, 2020 - Virtually
- December 18, 2020 - Virtually
- March 8 - 11, 2021 - Virtually
- June 4, 2021 - Virtually

**2020-2021 WESTOP Event Dates**

- September 24 - 25, 2020 - Virtual BOD Meeting
- November 5 - 6, 2020 - Virtual BOD Meeting
- January 21 - 22, 2021 - Hybrid BOD Meeting in Kona, HI
- March 7 - 8, 2021 - Virtual BOD Meeting
- March 8 - 10, 2021 - Virtual Annual Conference
- May 13 - 14, 2021 - BOD Meeting in Flagstaff, AZ (TBD)

**Recommendations**

None at this time.

**Action Items**

None at this time.

Respectfully submitted,

*Angie Alvarez*