



**Western Association of Educational Opportunity Personnel  
President Report  
2019 – 2020  
December 13, 2019 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>	Laura Orozco/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 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**

2019-2020 Goals and Priorities

- a) Create a communication plan (i.e. email, social media) to reach members in an effort to have transparency with the chapter
- b) Increase membership by 10% from 2018-2019 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 programming for the membership and students
- e) Develop clear processes for accounting in alignment with the FAC manual

**Updates**

**Chapter General Updates:** Our VP, Horacio, was able to participate in COE's Executive Leadership Institute at Yale University in October. He was even featured in the Yale Daily News. Check out the article on our Facebook.

Our Chapter PDS was a huge success! We had 98 participants (our goal was 100). Highlight of it all was our "Climbing the Career Ladder: TRIO/Educational Equity and Beyond" Panel which re-engaged some of our former TRIO Directors who have moved on to non-TRIO leadership positions and how that has worked out for them. Overall, a great time was had by all; all in one day.

**Chapter Board and Service Council:** We have a full Board & Service Council with no vacancies!

**Fair Share:** As of November 2019, WESTOP is at 24% of our 19/20 goal. California's 10 for 10 goal is 40. Personal contributions for SoCal is at 13. More details provided by our Fair Share Coordinators, Laura Orozco and Ana Prado.

**Resource Development:** Support our efforts by participating in opportunity drawings and scheduled member networking events/activities. Chapter Polo – suggested donation \$40, Straight Out of SoCal T-Shirt – suggested donation \$20. Member Networking Events will be scheduled throughout the year. More details/opportunities provided by our Resource Development Chair, Valeria Rizo.

**Student Development:** SLC 2020 planning is underway. Date is set for April 4, 2020. More details to be provided by Chair, Daniela Barcenas. TRIO Day of Service will be held on the correct National TRIO Day, Saturday, February 22, 2020. Report will be provided by TRIO Day Chair, Jasmine Torres.

**Technology:** Amel will be working on making changes and updating our website.

**Membership and Elections:** As of December 2, 2019, SoCal has 207 members. More details will be provided by the Membership and Elections Chair, Victoria Garcia.

**Upcoming Chapter Meetings:** 2019-2020 Chapter Meeting Dates:

March 11, 2020 @ WESTOP Conference

June 7, 2020 @ Pasadena City College

**Budget:** Accounts balance as of December 2, 2019:

Business Checking: \$8,370.37

Business Market Rate Savings: \$75.01

**Total Combined Balance: \$8,445.38**

**WESTOP Update:** Participated in for the WESTOP Board Meeting held October 25, 2019 via Zoom.

- WESTOP 42<sup>nd</sup> Annual Conference is scheduled for March 8-12, 2020 at the Hyatt Regency Orange County. Registration information has been released. Register at: <http://www.cvent.com/d/fyqbxn>. Registration has to be approved first before making hotel arrangements so plan accordingly. Early Bird deadline is December 6th. Registration will now be at the regular rate.
- WESTOP President Reynoso is working with COE to address COE Conference and TRIO Trainings hosted in banned states. More information to come.
- WESTOP will be hiring YH Advisors for \$3,000 to file 2018 Taxes that are now considered late. WESTOP will be working on identifying an organization that specializes in Non-Profit tax preparation that is more cost effective for future years.
- WESTOP CFO will be working on cleaning up some processes that deal with reimbursement of Board & Service Council members when traveling for board business. This will, in turn, affect our Chapter processes. More information to come.

## Recommendations

None at this time.

Action Items
None at this time.

Respectfully submitted,

Angie Alvarez