



**Western Association of Educational Opportunity Personnel  
President Report  
2018 – 2019  
(December 14, 2018 Chapter Meeting)**

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| <b>Name:</b>   | Dalia Hernandez, Chapter President  |
| <b>Position:</b>   | Professional Development–Overseeing with President Elect  |
| <b>Committees to Oversee:</b>  | Research (Vacant)<br>Membership and Elections<br>Legislation and Education<br>Fair Share<br>Resource Development - Overseeing with President Elect<br>TRIO Alumni – Overseeing with President Elect |
| <b>Committee Chairs/Co-Chairs:</b>   | Hortencia Cuevas/Sergio Galvez<br>Desiree Rivera<br>Horacio Aceves<br>Miriam Carrillo/Laura Orozco<br>Caroline Felix/Ernesto Partida  |
| <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**



# WESTOP

## 2018-2019 Goals and Priorities

- a) Continue to invest in our member's professional development by creating new or expanding opportunities for scholarships and professional development.
- b) Strengthen chapter's networking component to allow members to engage in mentoring and support activities.
- c) Continue to streamline processes and bridge communication gaps by creating a one-stop center (chapter website) for access to chapter documents and vital staff/program resources.
  - Chapter Website Address: [www.westopsocal.org](http://www.westopsocal.org)
  - Facebook: <https://www.facebook.com/WESTOPSoCal/>
  - Instagram: <https://www.instagram/WESTOPSoCal/>
- d) Maximize the use of technology to allow for increased access and participation in chapter.
- e) Increase Fair Share individual member contributions for 2018-2019 by 10.
- f) Increase membership by at least 10% from previous year. Focus on reaching out to former members and new grantees.

## Updates

**Chapter General Updates:** SoCal TRIO Alumni Google Group and Facebook page have been created. Please disseminate information with alumni. See photos included

**Chapter Board and Service Council:** Research chair position is vacant, however, Conrad Valdez from CSUSB has agreed to lend his support.

**Resource Development:** Support our efforts by participating in opportunity drawings and scheduled member networking events/activities. Chapter Polo – suggested donation \$40 and Water Bottle – suggested donation \$10. Member networking event will be scheduled during winter break (January 2019) details will be provided through our google group and social media.

**Student Development:** SLC 2019 will take place in April. More details to be provided by Chair Liz Hanna. TRIO Day of Service is confirmed for Saturday, February 23rd, 2019. More details to be provided by TRIO Day Chair, Laura Orozco.

**Professional Development:** Report provided by Co-Chairs Hortencia Cuevas and Sergio Galvez

**Legislation and Education:** Report provided by Chair Horacio Aceves. Policy Seminar is scheduled for March 24-27, 2019 at the Hyatt Regency Washington on Capitol Hill.

**Membership and Elections:** As of December 10<sup>th</sup>, SoCal has 170 members. More details will be provided by the Membership and Elections Chair, Desiree Rivera

**Chapter Meetings:** February 2019 at WESTOP 41<sup>st</sup> Annual Conference in Phoenix and May 31, 2019.

**Budget:** Accounts balance as of 12/06/18, balance does not reflect all expenditures/deposits for PDS.

Business Checking: \$4,192.54

Business Market Rate Savings: \$1,026.52

**Total Combined Balance: \$5,219.16**

**WESTOP Update:** Participated in the WESTOP Board Meeting held November 2-4 2018 in Las



# WESTOP

Vegas.

- WESTOP 41<sup>st</sup> Annual Conference is scheduled for February 14-17, 2019 at the Phoenix Hyatt Regency in Phoenix. Registration information will be released in early October. Same registration rates as the previous conference will apply. Registration announcements to the members are ongoing.
  - Looking for workshop proposals, call for proposals deadline extended to Friday, December 14<sup>th</sup>.
- Strategic Plan was extended for one additional year. Board and Service Council continued work on new strategic plan.
- WESTOP Service Council budget requests were approved.
- Discussed WESTOP 42<sup>nd</sup> Annual Conference in Orange County
  - Co-Chairs – Hortencia Cuevas/ Dalia Hernandez
  - If anyone is interested in being part of the planning committee, please reach out to Hortencia or I.

## Recommendations

Requesting recommendations for member networking activities. What event(s) would you like to see implemented in the Spring and/or Summer.

## Action Items

1. Requesting that the membership select one of the date options below for PDS 2019. Given that the WESTOP Annual Conference will be held in SoCal in March of 2019, PDS will likely be a one and a half day PDS. PDS 2019 will be held in the San Diego area. Keep in mind that the CSU and/UC Counselor Conferences are typically scheduled during the second or third week of October.

Option 1: Thursday-Friday, October 3-4, 2019

Option 2: Wednesday-Thursday, October 9-10, 2019

Option 3: Wednesday-Thursday, October 16-17, 2019

Option 4: Thursday-Friday, October 17-18, 2019

Option 5: Wednesday-Thursday, November 6-7, 2019

Option 6: Thursday-Friday, November 7-8, 2019

Respectfully submitted,

*Dalia Hernandez*

Southern California Chapter





# WESTOP

PDS 2018



Southern California Chapter

