



**Western Association of Educational Opportunity Personnel
President Report
2018 – 2019
(February 16, 2019 Chapter Meeting)**

Name:	Dalia Hernandez, Chapter President
Position:	Professional Development–Overseeing with President Elect Research/Archive (Vacant) Membership and Elections Legislation and Education Fair Share Resource Development - Overseeing with President Elect TRIO Alumni – Overseeing with President Elect
Committees to Oversee:	Hortencia Cuevas/Sergio Galvez Desiree Rivera Horacio Aceves Miriam Carrillo/Laura Orozco Caroline Felix/Ernesto Partida
Committee Chairs/Co-Chairs:	
<p>Position Description: 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>Key Responsibilities:</p> <ol style="list-style-type: none"> 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. 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. 3. Serve on the WESTOP Board of Directors Fiscal Affairs Committee and the WESTOP conference awards/scholarship committee. 4. Ensure that Chapter Board reports are submitted to the WESTOP president seven days prior to each Board meeting. 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. 6. Ensure that all financial information is forwarded to the WESTOP Chief Financial Officer in a timely manner for tax reporting purposes. 	



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Goals & Priorities

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
 - 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: Treasurer resigned, position will be filled at the annual conference election process. Elected treasure will complete the remainder term of the position (one year term)

Resource Development: In January, a Paint Night Networking Mixer was held, 10 individuals attended. 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 sport networking event will be scheduled for May/June 2019, details will be provided through Cvent, our google group and social media.

Student Development: SLC 2019 will take place March 16, 2019 at CSUDH. Theme is "Breaking Down Walls; Building for the Future Transforming Generations One Student Leader at a time". Currently, there are 378 individuals registered. More details to be provided by Chair Liz Hanna. TRIO Day of Service is confirmed for Saturday, February 23rd, 2019, 280 individuals have registered. More details to be provided by TRIO Day Chair, Laura Orozco.

Professional Development: PDS Report provided by Co-Chairs Hortencia Cuevas and Sergio Galvez. Professional Development Academy (PD Academy) has been scheduled for May 3-5, 2019 at the UCLA Lake Arrowhead Conference Center. The Professional Development Academy is SoCal's signature training program designed to enhance management competencies of new directors with 6-24 months of experience and/or of professionals who are new to TRIO. Information and application has been disseminated to the membership and Cvent registration has opened. Up to 10 participants will be selected. Cost for PD Academy is \$1,200 with SoCal contributing \$300 per participant as a scholarship,

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individual participant cost is \$900.

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. Importance of those not attending Policy Seminar to engage in local advocacy efforts.

Membership and Elections: As of December 10th, SoCal has 170 members. Elections for Treasurer, Treasurer Elect and Secretary will take place at conference. More details will be provided by the Membership and Elections Chair, Desiree Rivera.

FairShare: As of February 13, 2019, WESTOP is at 48% and California is at 36%. More details to be provided by Co-Chairs Miriam Carrillo and Laura Orozco.

Chapter Meetings: February 16, 2019 at WESTOP 41st Annual Conference in Phoenix and May 31, 2019 at Pfizer San Diego.

Budget: Below are the accounts balances as of February 12, 2019. Chapter budget balances do not reflect all expenses and/or deposits for PDS, December Chapter Meeting, TRIO Day, SLC and Policy Seminar.

Checking Account: \$2,823.10

Savings Account: \$1,026.68

Total Combined Balance: \$3,849.78

WESTOP Update: Participated in the WESTOP Online Board Meeting held January 12, 2019.

- WESTOP 41st Annual Conference is scheduled for February 14-18, 2019 at the 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.
- Strategic Plan was extended for one additional year. Board and Service Council continued work on new strategic plan.
- Discussed CFO structure and need for bookkeeping/accounting services
- WESTOP 2020 Conference will be held at the Hyatt Regency Orange County. Conducted a walkthrough of the hotel on February 1, 2019.
 - 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

Recommending that members approve a date range from the options provided for PDS 2019 with the agreement of having a one day PDS for 2019 in consideration of 2020 WESTOP Conference being held in SoCal. Recommending approval of the proposed PDS rotations.

1. One-Day PDS in Consideration of 2020 Conference being held in SoCal
 - a. Date(s) Options
 - i. Option 4: Thursday-Friday, October 17-18, 2019
 - ii. Option 3: Wednesday-Thursday, October 16-17, 2019
 - iii. Option 2: Wednesday-Thursday, October 3-4, 2019
2. PDS 2021 and 2022 Rotations
 - a. 2021 – San Diego Area

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b. 2022 – Inland Empire Area

Action Items

- 1. PDS Fall 2019 Date
- 2. PDS 2021 and 2022 Rotation

Respectfully submitted,

Dalia Hernandez

Members Paint Night Networking Mixer



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