



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

Name:	Angie Alvarez
Position:	Chapter President
Committees to Oversee:	COE Fair Share Membership & Elections Technology Resource Development
Committee Chairs/Co-Chairs:	Ana Prado Victoria Garcia Amel Khan Valeria Rizo
<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 the 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. 	

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. We are currently at 2. 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 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 had a successful virtual PDS event!
- Amel will be supporting the WESTOP Annual Conference Technology Committee
- In the new year, we'll be working on identifying a platform for SLC.
- More details to be provided by Tech Chair, Amel Khan.

Membership and Elections:

- As of December 11, 2020, SoCal has 206 members.
- More details will be provided by the Membership and Elections Chair, Victoria Garcia.

WESTOP Update:

- Annual Conference will take place March 8 - 10, 2021 virtually. Theme is **“Resilience: Charting the Course Forward Together”**
 - Registration will open on December 16, 2020.
 - Committee has begun meeting on a monthly basis. At our last meeting on November 30th, the entire committee was able to see a demo of the selected virtual platform, Socio, and was able to ask questions regarding their particular committee.
- The transition to Chase has not been the smoothest at the chapter level. We have finally received our checks so we can process all pending requests. This includes our 2020 SLC Scholarship. They have been mailed out as of December 11, 2020.
 - Chapter Treasurers are taking part in a monthly training series to get them up to date with the changes to fiscal policies and procedures.
- During our November meeting, it was reported that the 2019 taxes were being finalized and to be submitted ahead of schedule and a draft of the 2020 partial-year (Jan-June) taxes was also being drafted to be submitted soon.
- As the WESTOP Board and Chapters work on this transaction in our fiscal affairs, President Williams created a Finance Ad-Hoc Committee to advise and consult on matters pertaining to our fiscal policies and procedures. The committee members are: Dr. Joy Brittain, WESTOP Past-President and former CFO; Angelica Gebhardt, current WESTOP CFO; Terry Skall, Mission Edge Client Controller; and President Williams.
- Proposed bylaw change was voted on. You can read the language on the attachment to my report.
- 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
- The BOD decided to contract someone to design and get our WESTOP website started. Once that happens, they will also be working on transitioning our chapter website to that site. Our current site is paid through April 2021 so we will continue to maintain that in the meantime.
- WESTOP President-Elect Jesus Maldonado is working with COE Fair Share and Legislation/Education chairs to begin a social media campaign to solicit more donations for fair share and highlight the importance of participating in Policy Seminar. If you are not already, follow our new WESTOP official Instagram account, @westopworks.
- WESTOP Board will be traveling to Kona, HI for the January BOD meeting. The BOD will be presenting for the PI Chapter PDS and touring the 2022 Annual Conference site.
- The BOD voted on signing a contract to host the 2023 Annual Conference at The Row in Reno, NV for February 10-18, 2023.
- The BOD and Service Council began the conversation regarding the 2024 Annual Conference and what a potential site could be in the Central California area. If you have any suggestions, feel free to let me know.

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