



**Western Association of Educational Opportunity Personnel
President Report
2018 – 2019
(May 31, 2019 Chapter Meeting)**

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

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: Continue to disseminate information through google listserv and social media platforms.

Chapter Board and Service Council: Elected Treasurer (Miguel Zarate Jr.) and Secretary (Caroline Felix) at the February chapter meeting. Will hold elections for the Vice President position at today's meeting.

Resource Development: Support our efforts by participating in opportunity drawings and scheduled member networking events/activities. Chapter Polo – suggested donation \$40, Water Bottle – suggested donation \$10 and Straight Out of SoCal T-Shirt – suggested donation \$20. 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 took place in April. More than 500 individuals were in attendance. More details to be provided by Chair Liz Hanna. TRIO Day of Service was held on Saturday, February 23rd, 2019. Report will be provided by TRIO Day Chair, Laura Orozco.

Professional Development: The Professional Development Academy was held May 3-5, 2019 at the UCLA Lake Arrowhead Conference Center. Nine participants were selected to participate. Five Faculty were invited to present on the following topics: TRIO History, DoE, COE, WESTOP and the Current State of TRIO Programs; HR Labor Laws and Employee Management for New Supervisors; Legislation, Regulations, Allowable vs. Non-Allowable Costs; Grant Writing Strategies, Hygiene and Packaging; Are You Site Visit Ready?; Creating Work Life Balance; and Using Technology to Maximize Program Efforts.

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

Membership and Elections: As of February 2019, SoCal has 170 members. More details will be provided by the Membership and Elections Chair, Desiree Rivera



Fair Share: As of May 1 2019, COE is at 73%, WESTOP is at 65% of the goal with California being at 58%. SoCal's 10 for 10 goal is 25, currently at 24. More details provide by our Fair Share Coordinators, Miriam Carrillo and Laura Orozco.

Chapter Meetings: Proposed Chapter Meeting dates for 2019-2020.

Budget: Accounts balance as of May 20, 2019, balance does not reflect all expenditures/deposits for PDS, SLC, and PD Academy.

Business Checking: \$3,249.18

Business Market Rate Savings: \$730.20

Total Combined Balance: \$3,979.28

WESTOP Update: Participated in the WESTOP Board Meeting held May 2-3 2019 in San Francisco.

- WESTOP 42nd Annual Conference is scheduled for March 8-12, 2020 at the Hyatt Regency Orange County. Registration information will be released in early August. Same registration rates as the previous conference will apply.
 - Looking for committee members, if interested see Hortencia Cuevas or myself.
- Strategic Plan was extended for one additional year. Board and Service Council continued work on new strategic plan.
 - Strategic Plan 2019-2022 - draft attached
- WESTOP Bylaws Information – attached
- Mission Edge Bookkeeping contracted service to support CFO – July 1, 2019

Recommendations

None at this time.

Action Items

None at this time.

Respectfully submitted,

Dalia Hernandez

Southern California Chapter

