

COE

COUNCIL *for* OPPORTUNITY *in* EDUCATION



Chair's Report Submitted to COE Board of Directors

May 17-20, 2011
Hyatt Regency Washington
On Capitol Hill
400 New Jersey Ave, NW
Washington, District of Columbia

Mateo Arteaga



May 17, 2011

Dear Board and Committee Members:

I look forward to our spring board meeting in the nation's Capitol, as we have much to accomplish. This Board meeting will offer us the opportunity to meet with our committee members and to report progress on our goals and objectives. Of course, while in Washington, we will also make an additional push in advancing our legislative goals with visits to the Hill on May 18th.

Please arrive in Washington having thoroughly reviewed the board meeting materials and be ready to get to work. If you have any questions, concerns, or issues you would like to bring to my attention prior to the meeting, please do not hesitate to contact me at 509.899.1302 or by email at arteagam@cwu.edu.

Thank you in advance for your full participation at the meeting. I appreciate all your hard work and your commitment to COE. I stand ready in anticipation of what we can accomplish together for the TRIO Movement. Let's look forward to a productive board meeting!

Sincerely,

Mateo

Mateo Arteaga M. Ed.
Board Chair

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Board of Directors
Committee Structure Definitions

Approved May 8, 2004

Committees and task forces generally do the majority of the Council for Opportunity in Education's Board of Directors (hereby referred to as the Board) work between meetings. This allows the full Board to keep its attention on important decisions, and on the organization's success in fulfilling its stated mission. Committees provide the opportunity for Board members to contribute to the work of the Board in ways they would not be able to in regular meetings. These work groups enable the full Board to benefit from the special skills and expertise of its members in a concrete manner.

Definition #1: Standing Committee

By their placement and identification within the Council Bylaws, standing committees are permanent and rigidly structured. These committees are clearly defined in the Bylaws to prevent changes in duty or membership as outlined in Article XVI Section I. In addition, Standing committees:

- Have a rigidly defined, inflexible duty.
- Membership is structurally defined.
- The work of the Standing committee pertains to the organization, existence and established purpose of the Board.

Definition #2: Regular Committee

A regular committee is charged with performing a necessary aspect of the full Board's work. The Board Chair has discretion in the appointment of, membership in and charges to regular committees, contingent upon approval by the full Board. In addition, Regular committees:

- Accept the charge of the Board Chair, identify issues, make recommendations for policy or action and, as appropriate, participate in the implementation of decisions and activities.
- Have the potential to be more fluid and flexible, allowing for evolution, growth and change based upon efficiency and the goals established by the Board.
- May exist for the life of the Council.

Definition #3: Task Force

Clearly defined, time-limited duties are assigned to a Task Force (often referred to as an ad-hoc committee in other organizations). The discretion for establishment of a Task Force resides with the Board Chair, contingent upon approval by the full Board. In addition, a Task Force:

- May continue until the assigned work is completed.
- May be disbanded, or if appropriate, the work transferred to a comparable committee or Commission.

Definition #4: Commission

In rare cases a Commission may be established. Membership on a Commission is often granted to individuals ranking at the top of their field, or appointed to complete a highly specialized and time-defined function. Commissions bring visibility and attention to the particular issue being addressed.

2010-11 PURPOSES AND CHARGES FOR BOARD COMMITTEES

BYLAWS

Purpose: To consider proposals for changes in the By-Laws and to recommend changes in the By-Laws to the Board of Directors.

Charges:

1. Facilitate effective communications within the Regions when changes require regional ratification.

BUDGET AND FINANCE

Purpose: To prepare an annual budget for review and approval by the Board; to ensure an annual audit of the financial affairs of the Council; and to provide guidance in matters pertaining to the fiscal affairs of the Council.

Charges:

1. Review and update fiscal policies as necessary and present recommendations for the Board's consideration.
2. Monitor budget/financial plans to ensure that all financial expenditures support the Council's strategic plan.

CONFERENCE

Purpose: To plan and promote an annual meeting that ensures high-quality professional development experiences for administrators, counselors, researchers, and instructors involved with educational opportunity programs, that enhances Council visibility, and that generates budgeted unrestricted revenue.

Charges:

1. Meet revenue target and hold to 95% of expense target.
2. Include workshops dedicated to leadership development opportunities.
3. Develop a marketing plan for the 30th anniversary conference.

EVALUATION AND COMPENSATION

Purpose: Assist the Board Chair in evaluating the President and making recommendations to the Board relating to compensation of the President.

Charges:

1. Conduct an annual evaluation of the President.
2. Ensure that the Board Chair enlists input from all members of the committee and prepares a summary evaluation to present to the President.

3. Ensure that both the Council Board and the President are fairly represented in all aspects of the evaluation and compensation process.
4. Enlist assistance from the Council's counsel to ensure that Intermediate Sanctions requirements are followed for all Council personnel who fall within these regulations.

GOVERNMENTAL RELATIONS

Purpose: To assure that the views of the TRIO and GEAR UP communities are communicated to and understood by Congress; to disseminate pertinent information regarding legislative issues relevant to educational opportunity programs; to maintain liaison with, obtain information from, and disseminate information from appropriate federal departments and agencies about issues pertinent to educational opportunity programs.

Charges:

1. Provide opportunities in each region for discussion of annual appropriations and, when appropriate, reauthorization issues.
2. Continue to identify and cultivate strategic relationships with elected officials, corporate entities, and others to advance postsecondary educational opportunity for low income students.
3. Continue to promote educational opportunity for low-income Americans in national media.

INTERNATIONAL ACCESS

Purpose: To plan and implement the Council's global initiatives, including staff and student study tours. To encourage greater international travel and study by TRIO students and staff.

Charges:

1. Plan and implement the 2010-11 student study tour.
2. Assess current international efforts and recommend ways to enhance international relationships and partnerships and to introduce the TRIO model internationally.
3. Identify and explore ways to increase regional, state, and community support of global experiences for the TRIO community.
4. Promote international access opportunities for TRIO participants and staff in national media and at regional and state conferences.
5. Include at least 1 workshop in the annual conference dedicated to expanding international opportunities for TRIO staff and students.
6. Encourage student and/or staff presentations of study abroad programs at the regional conference.

NOMINATIONS AND ELECTIONS

Purpose: To coordinate procedures required for the nomination and election of Council officers under Article VII of the Bylaws.

Charges:

1. Initiate the election process and coordinate with the Council staff the dissemination of information to the Board in a timely manner.
2. Ensure that ballots are tallied.
3. Ensure that election results are presented to the Board.

PERSONNEL

Purpose: To monitor the implementation of the Council's personnel policies and to recommend modifications in these policies as required.

Charges:

1. Review and make recommendations for modifications in the Council's existing policies for Board approval.
2. Monitor the implementation of the Council's personnel policies.
3. Provide support to the Evaluation and Compensation Committee as needed.

PROFESSIONAL STANDARDS

Purpose: To assist educational opportunity programs in achieving high levels of effectiveness through use of self-study tools and peer monitoring, including the CAS Standards.

Charges:

1. Provide pre-conference training on CAS Standards
2. Facilitate the linkage of CAS Standards to multiple types of program evaluation
3. Include at least 1 workshop at the annual conference on CAS Standards

RESOURCE DEVELOPMENT

Purpose: To assure that the Council reaches its Fair Share targets and to plan and implement appropriate ways of honoring those who contribute to the Council.

Charges:

1. Increase institutional memberships at institutions that host TRIO programs
2. Ensure that each region meets its Fair Share target
3. Ensure that all states meet their Fair Share target
4. Increase personal contributions

STATE LEADERSHIP

Purpose: To assist states/chapters build their capacity to increase the visibility of TRIO among stakeholders and to broaden and strengthen educational opportunity efforts

Charges:

1. Continue to build state/chapter capacity using the benchmarks of the scorecard as a tool to measure progress
2. Conduct a State Leadership Caucus prior to the annual conference
3. Conduct the State Leaders Summit which will provide leadership training for state/chapter leaders
4. Administer the State Initiative grant program.
5. Include a strand of workshops in the annual conference designed to increase state initiative efforts

STRATEGIC PLANNING

Purpose: To monitor the implementation of the 2010-13 Strategic Plan.

Charges:

1. Prepare a report for the September 2011 Board meeting describing progress made toward strategic plan goals by each committee.

TRIO ACHIEVERS AND ALUMNI

Purpose: To seek and identify former TRIO participants for recognition and support of educational opportunity.

Charges:

1. Solicit nominations and select TRIO Achievers to be recognized at the Council's 2011 Annual Conference.
2. Encourage that all states/chapters have alumni representation at the 2011 Policy Seminar.
3. Encourage the expansion of at least five TRIO Alumni Chapters.
4. Work to expand the number of alumni in the COE Alumni database.
5. Support the National TRIO Alumni Association in creating online alumni sites.
6. Include at least 2 workshops at the annual conference on alumni development.

2010-2011 Board Committees

By-Laws Committee

<p>Chairs: Vicki Trier Evelyn Rivera Torres</p> <p>Members: Jose Vargas Michael Maxwell Barry Lofton Michelle Scott Dawn Eckhardt Reggie Jean Barbara Thompson Rebecca Craft Patricia Gregson Ronnie Gross</p> <p>COE Staff: Maureen Hoyler</p>		<p>Purpose: To consider proposals for changes in the By-Laws and to recommend changes in the By-Laws to the Board of Directors.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Facilitate effective communications within the Regions when changes require regional ratification.
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Budget and Finance Committee

<p>Chair: Dan Connell</p> <p>Members: Barry Lofton (2011) Michelle Scott (2011) Corris Davis (2011) Ngondi Kamatuka (Ex-Officio,</p>		<p>Purpose: To prepare an annual budget for review and approval by the Board; to ensure an annual audit of the financial affairs of the Council; and to provide guidance in matters pertaining to the fiscal affairs of the Council.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Review and update fiscal policies as necessary and present recommendations for the Board's consideration.
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<p>Chair Elect) Mike Wade (Ex-Officio) Vicki Trier (2012) Reggie Jean (2012) Mateo Arteaga Jose Vargas</p> <p>COE Staff: Susan Dorsey</p>		<p>2. Monitor budget/financial plans to ensure that all financial expenditures support the Council’s strategic plan.</p>
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Conference Committee		
<p>Chairs: Tracy Lyons Jose Martinez-Saldana</p> <p>Members: Janet Tauer Barbara Thompson Angel Olivares Lucila Loera Lynette Bates Rachel Martinez</p> <p>COE Staff: Angelica Vialpando</p>		<p>Purpose: To plan and promote an annual meeting that ensures high-quality professional development experiences for administrators, counselors, researchers, and instructors involved with educational opportunity programs, that enhances Council visibility, and that generates budgeted unrestricted revenue.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Meet revenue target and hold to 95% of expense target. 2. Include workshops dedicated to leadership development opportunities 3. Develop a marketing plan for the 30th anniversary conference

Evaluation and Compensation Committee		
<p>Chair: Mateo Arteaga</p>		<p>Purpose: Assist the Board Chair in evaluating the President and making recommendations to the Board relating to compensation of the President.</p>

<p>Members: Deborah Northcross Ngondi Kamatuka Ruth Johnson Michael Wade</p> <p>COE Staff: Alvin Phillips</p>		<p>Charges: Conduct an annual evaluation of the President.</p> <ol style="list-style-type: none"> 1. Ensure that the Board Chair enlists input from all members of the committee and prepares a summary evaluation to present to the President. 2. Ensure that both the Council Board and the President are fairly represented in all aspects of the evaluation and compensation process. 3. Enlist assistance from the Council’s counsel to ensure that Intermediate Sanctions requirements are followed for all Council personnel who fall within these regulations.
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Governmental Relations Committee		
<p>Chair: Arnold Mitchem</p> <p>Members: All Board Members</p> <p>COE Staff: Heather Valentine</p>		<p>Purpose: To assure that the views of the TRIO and GEAR UP communities are communicated to and understood by Congress; to disseminate pertinent information regarding legislative issues relevant to educational opportunity programs; to maintain liaison with, obtain information from, and disseminate information from appropriate federal departments and agencies about issues pertinent to educational opportunity programs.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Provide opportunities in each region for discussion of annual appropriations and, when appropriate, reauthorization issues. 2. Continue to identify and cultivate strategic relationships with elected officials, corporate entities, and others to advance postsecondary educational opportunity for low income students. 3. Continue to promote educational opportunity for low income Americans in national media.

International Access Committee		
<p>Co-Chairs: Renee Hampton Beth Olivares</p> <p>Members: Lynne Brown Mike Wade David Megquier Diane Sandefur Neil McFarlane Reggie Jean Evelyn Rivera-Torres Angel Olivares Barbara Thompson</p> <p>COE Staff: Holly Hexter</p>		<p>Purpose: To plan and implement the Council’s global initiatives, including staff and student study tours. To encourage greater international travel and study by TRIO students and staff.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Plan and implement the 2010-11 student study tour. 2. Assess current international efforts and recommend ways to enhance international relationships and partnerships and to introduce the TRIO model internationally. 3. Identify and explore ways to increase regional, state, and community support of global experiences for the TRIO community. 4. Promote international access opportunities for TRIO participants and staff in national media and at regional and state conferences. 5. Include at least 1 workshop in the annual conference dedicated to expanding international opportunities for TRIO staff and students. 6. Encourage student and/or staff presentations of study abroad programs at the regional conference

Nominations and Elections Committee		
<p>Chair: Mateo Arteaga</p> <p>Members: Regional Presidents</p>		<p>Purpose: To coordinate procedures required for the nomination and election of Council officers under Article VII of the Bylaws.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Initiate the election process and coordinate with the Council staff the dissemination of information to the Board in a timely manner. 2. Ensure that ballots are tallied. 3. Ensure that election results are presented to the Board.

Personnel Committee

<p>Co-Chairs: Dawn Eckhardt Tracy Lyons (2011)</p> <p>Members: Renee Hampton (2011) Neil McFarlane (2011) Camille Zeigler (2012) Beth Olivares (2012) Corris Davis (2011) Jose Martinez-Saldana (2012) Deborah Northcross Ngondi Kamatuka (Ex-Officio)</p> <p>COE Staff: Al Phillips</p>		<p>Purpose: To monitor the implementation of the Council’s personnel policies and to recommend modifications in these policies as required.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Review and make recommendations for modifications in the Council’s existing policies for Board approval. 2. Monitor the implementation of the Council’s personnel policies. 3. Provide support to the Evaluation and Compensation Committee as needed.
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Professional Standards & Initiatives Committee

<p>Co-Chairs: Deborah Evers Neil McFarlane</p> <p>Members: Karen Madden Renee Hampton Diane Sandefur Janet Tauer Barbara Thompson Angel Olivares</p>		<p>Purpose: To assist educational opportunity programs in achieving high levels of effectiveness through use of self-study tools and peer monitoring, including the CAS Standards.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Provide pre-conference training on CAS standards 2. Facilitate the linkage of CAS Standards to multiple types of program evaluation 3. Include at least 1 workshop at the annual conference on CAS Standards
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Donnell Davis Lucila Loera Rachel Martinez COE Staff: Maureen Hoyler Kelly Middleton		
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Resource Development Committee

Co-Chairs: David Megquier Camille Zeigler Members: Regional Presidents COE Staff: Al Phillips Angelica Vialpando		Purpose: To assure that the Council reaches its Fair Share targets and to plan and implement appropriate ways of honoring those who contribute to the Council. Charges: <ol style="list-style-type: none"> 1. Increase institutional memberships at institutions that host TRIO programs 2. Ensure that each region meets its Fair Share target 3. Ensure that all states meet their Fair Share target 4. Increase personal contributions
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State Leadership Committee

Co-Chairs: Sidney Childs Deborah Northcross Members: Reggie Jean Corris Davis Deborah Evers		Purpose: To assist states/chapters build their capacity to increase the visibility of TRIO among stakeholders and to broaden and strengthen educational opportunity efforts Charges: <ol style="list-style-type: none"> 1. Continue to build state/chapter capacity using the benchmarks of the scorecard as a tool to measure progress 2. Conduct a State Leadership Caucus prior to the annual conference 3. Conduct the State Leaders Summit which will provide leadership
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<p>Rafael Topete Jose Vargas Vicki Trier Michael Maxwell Donnell Davis Lynne Brown</p> <p>COE Staff: Heath Alexander</p>		<p>training for state/chapter leaders</p> <ol style="list-style-type: none"> 4. Administer the State Initiative grant program. 5. Include a strand of workshops in the annual conference designed to increase state initiative efforts
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Strategic Planning Committee		
<p>Co-Chairs: Celeste Brooks Karen Madden</p> <p>Members: Anthony Culpepper Michelle Scott Dawn Eckhardt Rebecca Craft Beth Olivares</p> <p>COE Staff: Chandra Taylor Smith</p>	<p>Strategic Goal 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.</p>	<p>Purpose: To monitor the implementation of the 2010-13 Strategic Plan</p> <p>Charges: Prepare a report for the September 2011 Board meeting describing progress made toward strategic plan goals by each committee.</p>

TRIO Achievers & Alumni Committee

<p>Co-Chairs: Rafael Topete</p> <p>Members: Deborah Evers Evelyn Rivera Torres Janet Tauer Celeste Brooks Anthony Culpepper Rebecca Craft Lucila Loera Patricia Gregson Rachel Martinez</p> <p>COE Staff: Jodi Koehn-Pike</p>	<p>Strategic Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.</p> <p>Strategic Goal 3: Develop leaders to further the mission of the Council.</p> <p>Strategic Goal 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.</p>	<p>Purpose: To seek and identify former TRIO participants for recognition and support of educational opportunity.</p> <p>Charges:</p> <ol style="list-style-type: none"> 1. Solicit nominations and select TRIO Achievers to be recognized at the Council's 2011 Annual Conference. 2. Encourage that all states/chapters have alumni representation at the 2011 Policy Seminar. 3. Encourage the expansion of at least five TRIO Alumni Chapters. 4. Work to expand the number of alumni in the COE Alumni database. 5. Support the National TRIO Alumni Association in creating online alumni sites. 6. Include at least 2 workshops at the annual conference on alumni development
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COE Strategic Plan Goals 2010-2013

Strategic Goal I: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served

Goal 1 Objectives:

- A. Expand the role of the corporate advisory committee to establish new partnerships for the Council.
- B. Protect and expand opportunities for TRIO students
- C. Empower stakeholders, including alumni, parents, students and staff, to effectively advocate for TRIO.
- D. Enhance collaboration with the U. S. Department of Education

Strategic Goal II: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students

Goal 2 Objectives:

- A. Identify and engage stakeholders at the local/community level in support of TRIO and postsecondary educational opportunity.
- B. Develop and strengthen relationships with elected officials at all levels to increase the advocacy capacity of the TRIO community.
- C. Conduct, publish and disseminate research on the effectiveness of TRIO programs.
- D. Analyze data, disseminate information and stimulate discussion on policies and practices as they impact higher educational access and services for TRIO-eligible individuals.
- E. Provide resources, internships and other incentives for the training and support of TRIO professionals conducting research on educational opportunity programs and related issues.

- F. Develop and support TRIO alumni networks to recognize excellence and achievement from the TRIO community.

Strategic Goal III: Develop leaders, both students and professionals, to further the mission of the Council

Goal 3 Objectives:

- A. Expand and refine the Council's leadership training programs.
- B. Provide professional development training for TRIO staff.
- C. Provide a forum for the exchange of leadership training models.
- D. Expand the Council's Board Orientation Program to incorporate leadership training for new Council Board members.

Strategic Goal IV: Build the capacity of regional and state organizations to increase support for equal educational opportunity

Goal 4 Objectives:

- A. Promote and expand state capacity building efforts through the Leadership Summit and State Leaders Caucus.
- B. Provide resources to states via the State/Chapter Excellence Awards and the State Initiative Grants, which will strengthen key relationships with TRIO professionals, alumni, legislators, and other stakeholders.
- C. Introduce and develop new programs and services to help regional and state associations strengthen their organizational effectiveness.
- D. Solicit and act upon input from regional and state associations concerning their needs.

Strategic Goal V: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

Goal 5 Objectives:

- A. Develop a multi-year fund development plan that identifies specific responsibilities for Board members and staff.
- B. Develop a plan to increase personal contributions and institutional memberships each year.
- C. Monitor the progress of the Council in meeting the goals and objectives of its 2010-2013 strategic plan.
- D. Develop a 2014-2017 strategic plan for the Council in order to continue to advance the Council's vision and strategic position.

Strategic Goal VI: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students

Goal 6 Objectives:

- A. Collaborate with other associations that advocate for international higher educational opportunity.
- B. Foster leadership in the TRIO community that embraces globalization and cultivates international travel and study abroad opportunities for TRIO students.
- C. Increase awareness among TRIO participants and professionals of the importance of international opportunities.

COMMITTEE REPORTS

By-Laws Committee

Co-Chairs: Evelyn Rivera-Torres
Vicki Trier

Members:

Dawn Eckhardt	Barry Lofton
Michael Maxwell	Reggie Jean
Ronnie Gross	Barbara Thompson
José Vargas	
Michele Scott	

COE Staff: Maureen Hoyler
Date: May 2011

I. Strategic Goal 5: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

II. Objectives: Monitor the organization's infrastructure to advance its mission and enhance its operations.
Purpose: To consider proposals for changes in the By-Laws and to recommend changes in the By-Laws to the Board of Directors.

III. Chair's Charges to the Committee:

1. Review proposals for By-Laws changes for the Board's consideration.
2. Recommend By-Laws changes for the Board's consideration.
3. Facilitate effective communications within the regions when changes require regional ratification.

IV. Activities:

1. Meetings during Board meetings.
2. Review of By-Laws by Committee members.
3. On-line discussions.

V. Outcomes:

1. Committee members reviewed the By-Laws and changes were apparent that were deemed necessary for consideration by the Committee or by the Board members.
One is a typo on page one Article IV-Membership Section 1, (1) which reads "The ten regional

association,..."and it should read "The ten regional associations.." so that an s is added to association. The other is to eliminate as unnecessary on page 9 of Article IX- Commissions, Task Forces, and Committees, Section 2, (f) the third section which reads: For 2005-2006, the Board Chair shall also appoint three members to one-year terms." The Committee assumes these instructions were carried out and it is no longer necessary to have them in the Bylaws.

2. No other amendments were made to the Committee by other Board or Regional Association members.

VI Recommendations:

1. An amendment may be necessary related to the Ad Hoc International Access Committee which the Committee will discuss.
2. Continuing review of the By-Laws when the Committee meets to consider any change if such a need arises in the near future.

**Conference Committee
To be distributed**

International Access Committee

Co-Chairs: Beth Olivares and Renée Hampton

Members: Lynne Brown, Mike Wade, David Megquier, Diane Sandefur, Neil McFarlane, Reggie Jean, Evelyn Rivera-Torres, Barbara Thompson, Holly Hexter

Date: May 20, 2011

I. Strategic Goal 6: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students.

II. Objectives:

- Determine the short and long term impacts of the student study abroad experiences initiated by COE.
- Develop the capacity of TRIO leaders to have academically-based global immersion experiences that will cultivate international education for TRIO students.
- Increase awareness among TRIO participants and professionals of the importance of international opportunities.

III. Chair's Charges to the Committee:

- Plan and implement the 2010 – 2011 student study tour
- Assess current international efforts and recommend ways to enhance international relationships and partnerships and to introduce the TRIO model internationally
- Identify and explore ways to increase regional, state, and community support of global experiences for the TRIO community.
- Promote international access opportunities for TRIO participants and staff in national media and at regional and state conferences.
- Include at least 1 workshop in the annual conference dedicated to expanding international opportunities for TRIO staff and students.
- Encourage student and/or staff presentations of study abroad programs at the regional conference.

IV. Activities:

- Participated in a conference call to discuss 2011 – 2012 budget.
- Presented budget recommendations to Board Chair Elect.
- Implemented 2011 student study tour: Fifteen students were selected.
- Committee Co-Chairs registered for EAN conference.
- Committee Co-Chairs submitted a proposal to present at the EAN conference.
- Committee member Evelyn Rivera-Torres will accompany the students on the study tour.

V. Outcomes:

VI. Recommendations:

Personnel Committee

Co-Chairs: Dawn Eckhardt/Tracy Lyons

Members: Neil McFarlane, Camille Zeigler, Beth Olivares, Corris Davis, Renee Hampton, Jose Martinez-Saldana, Deborah Northcross, Ngondi Kamatuka

COE Staff: Alvin Phillips

Date: April 25, 2011

- I. **Strategic Goal 5:** Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity
 - Provide an up-to-date Personnel Policies manual.
 - Provide a detailed, comprehensive evaluation process for Council employees.
 - Develop guidelines for recommending salary increases and merit bonuses for all Council employees.

- II. **Purpose/ Objective:** To monitor the implementation of the Council's personnel policies and to recommend modifications in these policies as required.

- III. **Chair's Charges to the Committee:**
 1. Review and make recommendations of any modifications in the Council's existing policies for Board approval.
 2. Monitor the implementation of the Council's personnel policies.
 3. Provide additional support to the Evaluation and Compensation Committee as needed.

- IV. **Activities:**
 - Reviewed the procedures for evaluation and compensation of the President as amended dated December 2010.
 - Provided the Evaluation and Compensation Committee with copies of the President's current contract.
 - Prepared a May 2011 Comparable Compensation Summary for Personnel Committee and the Evaluation Compensation Committee

- V. **Outcomes:**
 - Reviewed personnel policies.
 - Provided the required support to the Evaluation and Compensation Committee by providing Comparable

Compensation Summary Report and Evaluation tool for the President.

VI. Recommendations from September Board Meeting:

- The Board approved a 3-year contract for the President, and the Personnel Committee was requested to begin research on a succession plan for the President.

Professional Standards and Initiative Committee

To be distributed

Resource Development Committee

Chairs: David Megquier and Camille Zeigler

Members: All Regional Presidents

COE Staff: Al Phillips and Angelica Vialpando

Date: April 26, 2011

I. Strategic Goal 5: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

II. Purpose:

To assure that the Council reaches its Fair Share targets and to plan and implement appropriate ways of honoring those who contribute to the Council.

III. Charges:

1. Increase institutional membership of the institutions that host TRIO Programs
2. Ensure that each region meets their Fair Share target
3. Ensure that all states meet their Fair Share target
5. Increase personal contributions

IV. Activities:

- Ended Winter Campaign March 31, 2011 and raised over \$500K.
- Conducted conference calls—COE staff—in March 2011 with Regions/States as requested.
- E-mailed letters—Board Chair—to each Region/State President on April 1, 2011 to request that all regions and states reach 95% Fair Share by May 31, 2011.
- E-mailed letters—Co-Chairs of Resource Development—on April 7, 2011, announcing “Beat the Clock Campaign,” saving eligible institutions \$300.
- E-mailed letters—COE staff—on April 14, 2011, announcing the “Beat the Clock Campaign” to each eligible institution who could take advantage of the \$300 savings.
- E-mailed Fair Share Update—COE staff—on April 22, 2011. At that time, VT, NJ, LA, OK, MN, ID, WY and MH had exceeded 95%, COE at 67%.
- E-mailed status of Fair Share—Co-Chairs of Resource Development— on April 28, 2011 to all Region/State Presidents, and provided them with a detailed plan to achieve success with an emphasis on making 95% Fair Share by May 31, 2011.
- Presented at Region/State Conferences—COE staff—and learned that some regions/states strongly support Fair Share; however, in some regions/ states **Fair Share is not on the agenda!**
- Resource Development will conduct a Phone-a-Thon at the May Board Meeting.

V. Outcomes:

1. The Winter IM Campaign was extremely successful. Over \$500K was raised. This campaign was needed because in December we were at only 27% of reaching the Fair Share Goal.
2. Some Regions have been very generous in their personal donations. We are very grateful to the following regions whose personal donations have exceeded \$5,000: ASPIRE, MAEOPP, MEAOPP, and SAEOPP. SWASAP, NCEOA, and WESTOP.
3. We continue to look for Champions and Co-Champions as we visit Region/State meetings. Presently, there are 91 Champion/Co Champion Pledges for 2011. However, we are short of our goal, 100 Champions/Co-Champions for 2011.

VI. Recommendations

- Concentrate heavily on Institutional Memberships.
- Make the website even more “user friendly” for members.
- Continue to have incentives to encourage persons to contribute to Fair Share.
- Encourage regions, states and territories to put more emphasis on Fair Share by ensuring Fair Share in on the agenda for each annual meeting.
- Participate in the frequent Regional and State conference calls.
- Recognize Champions during our annual conference Dinner.
- Recognize Champions at Regional and State Conferences.
- Develop a special campaign to recognize and encourage Former Board Members to become mentors in our States, Regional and National programs.
- Exceed 100 Donors for the Champion Campaign.
- Continue both the “**10 for 10**” and Champion/Co-Champion Campaigns each Fair Share Year.
- Provide membership a monthly webinar/conference call on a Hot Topic and charge non-members to participate.
- Provide reduced rates for retirees to participate in Policy Seminar and Annual Conference.

State Leadership Committee

Co-Chairs: Deborah Northcross and Sidney R. Childs
Members: Reggie Jean, Corris Davis, Deborah Evers, Rafael Topete, Jose Vargas,
Vicki Trier, Michael Maxwell, Donnell Davis
COE Staff: Heath Alexander, Kelly Middleton, Angelica Vialpando
Date: May 20, 2011

I. Strategic Goal #5: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

II. Objectives: To assist states/chapters to build their capacity to increase the visibility of TRIO among stakeholders and to broaden and strengthen educational opportunity efforts

III. Chair's Charges to the Committee:

1. Continue to build state/chapter capacity using the benchmarks of the scorecard as a tool to measure progress
2. Conduct a State Leadership Caucus prior to the annual conference
3. Conduct the State Leaders Summit which will provide leadership training for state/chapter leaders
4. Administer the State Initiative grant program.
5. Include a strand of workshops in the annual conference designed to increase state initiative efforts

IV. Activities:

- Revised Section III of Regional Report form to include dimensions of the State Scorecard
- Established sub-committee of three to review State Initiative Grant applications
- Notified 11 winners of State Initiative Grants, awarding \$10,000
- Planned and assisted in the 2011 Leadership Summit
- Updated the COE State Scorecard and sent it to regional presidents for distribution to state/chapter presidents

V. OUTCOMES: LEADERSHIP SUMMIT EVALUATION RESULTS:

Attendees: 127 States/Territories Represented: 42 All Regions Represented
States Not Represented: AZ, CT, NH, NJ, OR, PA, RI, SD, VA, WI

Overall, how satisfied were you with the Leadership Summit?

Very Satisfied 76% Satisfied 24%

Did the summit help develop interest pursuing or maintaining a leadership role?

Strongly Agree/Agree 97% Neutral 3%

I have a better understanding of the importance of leadership in local & state efforts?

Strongly Agree/Agree 98% Neutral 2%

The summit provided tools and information I can use in my leadership role?

Strongly Agree/Agree 100%

Neutral 0%

The topics included in the summit were important to my State Chapter

Strongly Agree/Agree 97%

Neutral 3%

VI. Recommendations:

Strategic Planning Committee

Co-Chairs: Karen Madden, Celeste Brooks

Members: Rebecca Craft, Anthony Culpepper, Dawn Eckhardt, Beth Olivares, Michel Scott, Barbara Thompson

COE Staff: Chandra Taylor Smith

Date: March 28, 2011

Strategic Goal 5:

Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

I. Purpose:

To monitor the implementation of the 2010-2013 Strategic Plan.

II. Charges:

1. Prepare a report for the September 2011 Board meeting describing progress made toward strategic plan goals by each committee.

III. Activities:

1. Strategic Planning session conducted at December 2010 Board meeting.
2. Focus groups developed specific plans related to each goal.

IV. Outcomes:

V. Recommendations:

1. Develop method to assess committee progress toward strategic goals

TRIO Achievers & Alumni Committee
--

Chair: Rafael Topete

Members: Deborah Evers, Evelyn Rivera Torres, Janet Tauer, Celeste Brooks, Anthony Culpepper, Rebecca Craft, Patti Gregson, Lucila Loera, & Dawn Eckhardt

COE Staff: Jodi Koehn-Pike, Aisha Richardson

Date: April 27 2010

I. Strategic Goal(s):

- a. Strategic Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.
- b. Strategic Goal 3: Develop leaders, both students and professionals, to further the mission of the Council.
- c. Strategic Goal 5: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

II. Purpose:

- a. To seek and identify former TRIO participants for recognition and support of educational opportunity.

III. Chair's Charges to the Committee:

- a. Solicit nominations and select TRIO Achievers to be recognized at the Council's 2011 Annual Conference.
- b. Ensure that all states/chapters have alumni representation at the 2011 Policy Seminar.
- c. Encourage the expansion of at least five TRIO Alumni Chapters.
- d. Work to expand the number of alumni in the COE Alumni database.
- e. Support the National TRIO Alumni Association (NTAA) in creating online alumni sites.
- f. Include at least 2 workshops at the annual conference on alumni development

IV. Activities:

- a. TRIO Achiever nomination forms were distributed at the 2011 Policy Seminar.
- b. At the Policy Seminar, each region was encouraged to nominate their 2010 Regional TRIO Achievers.
- c. E-mails were sent out in January, March, and April reminding the community to submit nominations. Notices were also posted on the TRIO and WESTOP listservs. Reminders will be sent on May 3 (one month to

deadline), May 20 (two weeks to deadline), and May 27 (one week before deadline).

- d. Members of the 2010–2011 Committee have been asked to recruit “Ambassadors” to register and create a profile on the NTAA website and provide their feedback.

V. Outcomes:

- a. The 2011 National TRIO Achievers nomination form was posted to the COE website.
- b. The 2010 National TRIO Achievers were posted to the COE website.

VI. Recommendations:

- a. None at this time.

REGIONAL REPORTS

Association for Equality and Excellence in Education, Inc. (AEEE)
--

Officers/ Executive Board Members:

Beth Olivares, Ph.D., President
Barbara Thompson, President-elect
Anthony Culpepper, Past-President
Maria Rijos-Aponte, Treasurer
Jorge Martinez-Santiago, Secretary

Date: May 2011**I. Regional News:**

Our annual conference, “Strengthening the Pipeline: One Student at a Time,” will be held May 1 through 4, 2011, at the Woodcliff Hotel and Spa in Victor, NY, just outside of Rochester. Throughout the conference, we will be joined by representatives from the Council, the US Department of Education, three college presidents, a member of the NYS Board of Regents, and over a dozen colleagues who will be sharing best practices and research related to TRiO and educational opportunity. Because many new newcomers are joining the conference, there will be ample opportunity for one-to-one leadership development and mentoring.

II. Regional Activities Related to the Council’s Strategic Plan:

(You need only convey information on those strategic goals that the region addressed since the last report. Use the current strategic goals as listed below.)

COE Strategic Plan Goals for 2005-2010

Goal 1: Strengthen the Council’s capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

See description of our conference and district meetings. Many conference sessions will describe best practices. Our strong team at Policy Seminar and creation of fact books for NY and NJ help educate our governmental partners and staff regarding TRiO in our region.

Goal 3: Develop leaders to further the mission of the Council.

Networking and leadership development at the annual conference and within the district meetings will help with leadership development.

III. Regional Activities Related to the Council Board Initiatives: (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: **BUILDING STATES' CAPACITY**

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- | | | | |
|---|----------------------------|--------------------------|----------------------|
| X | Membership and Recruitment | <input type="checkbox"/> | Alumni Development |
| X | State Meeting/Conference | <input type="checkbox"/> | Fund Development |
| X | Leadership Development | X | Government Relations |
| | | <input type="checkbox"/> | P.R. and Marketing |

Progress to Date

District Meetings

The Association for Equality and Excellence in Education (AEEE), Inc. represents New Jersey and New York, with a board structure equally comprised of District Representatives and Members-at-Large. Within the districts, board members hold meetings, provide feedback, and collect information from our members.

Regional Conference & Leadership Development

See above for a description of our annual conference, "Strengthening the Pipeline: One Student at a Time," held May 1 through 4, 2011, at the Woodcliff Hotel and Spa in Victor, NY, just outside of Rochester.

Membership & Recruitment

We currently have 166 members, and 117 individuals registered for the conference, of whom many are new. The Membership Committee has made substantial changes to the membership structure of the Association, which the board adopted, pending the approval of By-Laws changes that will be an action item at the annual meeting. The membership committee worked very hard to restructure membership categories, to make it easier for people to become members, and to maintain membership within programs even when staff leave. I believe these are very positive changes, and hope that the membership will vote to accept the By-Laws changes that are necessitated by this change.

Government Relations

- Our Policy Seminar Chairs did a really terrific job in terms of ensuring that we visited 100% of our Members of Congress and Senators. They also spearheaded the creation of State Fact Books, in both New Jersey and New York, which is a tremendous accomplishment. These Fact Books can have many uses, and we need the input from a

higher percentage of TRiO programs and AEEE members for updating and including your program information to make them even better.

Scorecard Benchmark(s) Pursued: Is this a New or Continuing Activity?

Is activity Committee or Individual Driven? [Optional]

These are BOARD driven activities.



ASPIRE, Inc. President's Report
 May 2011
 Washington, DC

Executive Board Members	State Presidents
Dawn Eckhardt, President	Nickie Archibeque, Colorado
Lynne Brown, Past President	Zach Hawkins, Montana
Rachel Martinez, President Elect	Lori Larson, North Dakota
John Shafer, Treasurer	Cody McMichael, South Dakota
Lori Brown-Wirth, Secretary	Lindsay Beddes, Utah
	Sandy Straley, Wyoming

Date: April 26, 2011

Regional News:

- Rachel Martinez has joined the ASPIRE Board in the position of President Elect, following the departure of Ryan Ross. Rachel's term as President Elect is a one-year replacement position, with the option to run for the office of President at the annual conference in October.
- Planning for our 2011 annual conference is going very well. Please join us October 8-12 in Salt Lake City, UT.
- All six states in the ASPIRE region held state conferences between February and April. For those states that have bi-annual legislative sessions, 2011 is a legislative year. All state conferences included a component to address state legislative issues and/or make contact with state and local leaders.
- Four of ASPIRE's six states were selected to receive COE State Initiative Grants (North Dakota, South Dakota, Montana and Wyoming).
- ASPIRE again sponsored state initiative grants at the regional level. Four states applied for and received matching grants in the amounts of \$250 each (Colorado, Montana, Utah, and Wyoming). All grants are designed to help states make progress toward goals established following completion of the State Score Cards.
- Several states within the ASPIRE region are considering going to a two-year state president term. Currently North Dakota and South Dakota operates under a two-year presidency model.
- Fort Collins, CO has been selected as the site for ASPIRE's 2013 annual conference.
- Shortly after the December board meeting, it was discovered that the ASPIRE region was in jeopardy of not being able to meet its Fair Share goals this year. Previous successes and pre-payments had resulted in not having enough institutions in the region to draw from for institutional membership during the current Fair Share year. With COE again offering a discount for pre-payments, it is believed that ASPIRE will now meet its Fair Share goal.

Regional Activities Related to the Council's Strategic Plan

Goal 1: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

- All state development chairs, being led by Carol Gritts, Regional Development Chair, started the year with promotion of the COE 10 for 10 campaign. Three states in the ASPIRE region (Montana, North Dakota, and Wyoming) met their state 10 for 10 campaign goals. All states in the ASPIRE region appreciated COE's willingness to offer Policy Seminar waivers with successful 10 for 10 campaigns rather than the waivers to the annual conference.
- Cheryl Kingsbury, Government Relations chair for ASPIRE, is in regular contact with the ASPIRE membership to keep everyone informed of legislative issues at the regional level and how they relate to the national scene.

Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

- All states in the ASPIRE region held state conferences between February and April. All states included activities that brought national, state and/or local leaders to their meetings.
- COE staff attended the Colorado, Montana, and Wyoming state meetings and participated in their state initiative activities.
- Legislative representatives were invited to attend TRIO day activities in all ASPIRE states.

Goal 3: Develop leaders to further the mission of the Council.

- All positions on the regional board have been filled following the early departures of Tammy Ward, President-Elect, and Ryan Ross, Past President. Those positions have been filled by Rachel Martinez and Lynne Brown, respectively.
- Planning is well under way for ASPIRE's annual Leadership Development Institute. This will take place the Saturday and Sunday prior to the conference opening in October.

Goal 4: Expand the state initiative to increase support for equal educational opportunity.

- Four ASPIRE states (Montana, North Dakota, South Dakota and Wyoming) were awarded COE state initiative matching grants. Montana will use the funds to print their state fact book and establish a best practices seminar. North Dakota used the funds to put on a state policy seminar. South Dakota funds were used to develop a state fact book and host a state-wide TRIO Day event. Wyoming used theirs to fund an alumni development project.
- ASPIRE funded regional state initiative activities with one-to-one matching grants up to \$250 per state. Four states chose to apply for the funds (Colorado, Montana, Utah, and Wyoming). All applications were awarded and will be used to build upon areas identified in their state score cards.

Goal 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.

- Significant challenges were identified this year in ASPIRE's ability to meet its Fair Share goals. Specifically, due to the number of institutions taking advantage of discounts to pre-pay institutional membership in previous years, there were not enough institutions in the region with due dates in the Fair Share year to make the goal possible to meet. Dawn Eckhardt, regional president, and Carol Gritts, regional Development Chair, have

- been in frequent contact with Al Phillips to identify the problem and solutions. With the new program to again offer discounts for pre-payments for institutions with due dates in July-December, we are confident that ASPIRE will again meet its Fair Share goal.
- ASPIRE has resubmitted their application for a group tax exempt status with the Internal Revenue Service. If approved, this group exemption will provide federal tax exemption to all states within the ASPIRE region.

Goal 6: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students.

- Opportunities for staff and students to participate in international opportunities sponsored by the Council are shared throughout the region.



CARIBBEAN ASSOCIATION OF TRiO PROGRAMS (CATP)

Puerto Rico and U.S. Virgin Islands

2010-2011 Officers/ Executive Board Members:

President: Dr. José A. Vargas-Figueroa
Torres

Vice-President: Dr. Ángel F. Olivares-Chicón

Treasurer: Lynnette Díaz

Historian: Dr. Cynthia Corujo

Past President: Dr. Evelyn Rivera-

Secretary: Edgardo Pérez

Public Relations: Carmen Rivera

Members: 217

Date: May, 2011

I. Regional News:

- a. CATP's Annual Conference will be held on May 4-6 at the Intercontinental Isla Verde Hotel, San Juan.
- b. An Emerging Leaders Institute will be held as a pre-conference activity on May 3.
- c. Most of the TRIO programs carried out activities to celebrate National TRIO Day. Different types of activities were celebrated; including awareness activities with local government officials art activities, awards ceremonies, and community services, among others. The legislature gave CATP a proclamation of congratulations for the accomplishments of the TRIO programs.
- d. CATP's Annual Assembly was held on Friday, April 8, 2011 at the Central University's Theater in Bayamón. During the assembly several matters were addressed such as the executive committee and committee chairs' reports, amendments to the Bylaws and the ratification of the strategic plan. Elections were held and resulted in the following Executive Committee: Luz Elena Sánchez, President; Bethzsaida Colón, Vice-President; Edgardo Pérez, Treasurer; Cynthia Corujo, Historian; Dr. Miriam Ruiz-Reyes, Public Relations Person; Marilyz Abreu, Secretary and Dr. José Vargas is now the Past-President.
- e. In May, CATP will offer the Leadership Congress. Participating students will have the opportunity to provide community services and

various Mayors from neighboring towns will receive them in their offices.

- f. CATP in partnership with the Regional Educational Laboratory, Northeast and Islands are in the planning stage to develop research regarding Puerto Rico's TRIO Programs.
- g. A general Factbook was updated and was utilized during the Policy Seminar and other advocacy activities.

II. Regional Activities Related to the Council's Strategic Plan:

COE Strategic Plan Goals for 2005-2010

Goal 1: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

1. From February 3 to 4, 2011, CATP conducted a professional development activity called "Directors' Meeting" at the Embassy Suites Hotel in Isla Verde. During this activity various topics of interest were presented to the audience
2. **Annual Conference:** CATP has organized the Conference including activities that respond to most of the COE's strategic goals.
3. **Policy Seminar and Seminar with the Department of Education:** Four members of the CATP Board attended the Seminars and also visited the Resident Commissioner's of Puerto Rico and the US Virgin Islands offices. Factbooks were provided for these visits.
4. CATP promoted members participation in COE's activities such as Webinars, seminars and proposal workshops.

Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

1. **Policy Seminar and Seminar with the Department of Education:** Four members of the CATP Board attended the Seminars and also visited the Resident Commissioner's of Puerto Rico and the US Virgin Islands offices. Fact books were provided for those visits.

Goal 3: Develop leaders to further the mission of the Council.

1. Three Executive Board members attended the Leadership Summit in March receiving valuable information and activities to be developed in our region.
2. CATP will provide for the second year a one day Emerging Leaders Institute prior to the Annual Conference on May 11, 2011.

Goal 4: Expand the state initiative to increase support for equal educational opportunity.

1. For the first time CATP submitted several applications for the 2010-2011 State Initiative Grant Competition. Unfortunately, our association was not funded based on the committees scoring of the slates. Nevertheless, based on the acquired experience we will continue participating in this initiative.

Goal 5: Develop and diversify resources to build the Council’s capacity to advance equal educational opportunity.

1. CATP has promoted an increase in personal contributions as well as institutional contributions for Fair Share.
2. Our Fair Share Committee Coordinator has been communicating with the decision makers in the institutions who are not institutional members and those with due memberships. The purpose of the communication is to convince them to become members.

Goal 6: Strengthen the Council’s role as a global leader and promote global opportunities for the least advantaged students.

1. CATP is in conversations with government officials from the Puerto Rico Office of Youth Affairs to apply for grants to financially support global opportunities for students.

III. Regional Activities Related to the Council Board Initiatives: (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: ***BUILDING STATES’ CAPACITY***

Please report on your States’/Chapters’ efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- | | | |
|---|--------------------------|------------------|
| <input type="checkbox"/> Membership and Recruitment Development | X | Alumni |
| X State Meeting/Conference | <input type="checkbox"/> | Fund Development |

X Leadership Development
Relations

- Government
- P.R. and Marketing

State Meeting/Conference

Progress to Date:

In May, we will hold the thirty-first annual conference. For this year all details are set.

“Promising Strategies” [Best Practices]:

It is an activity that combines professional training sessions with motivational activities. Furthermore, it is a space for exchange of ideas and information in a relaxed and attractive environment.

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?

Is activity X Committee or ____ Individual Driven? [Optional]

Leadership Development

Progress to Date:

Last year, under the leadership of Past President and the President we conducted the first leadership training activity aimed at emerging leaders. This year we will celebrate the second one, as a pre conference workshop on Tuesday, May 3, 2011 at Hotel Intercontinental San Juan Resort & Casino in Isla Verde.

“Promising Strategies” [Best Practices]:

The activity will be compulsory for elected officials of the Board. The topics are intended to learn about our association and the COE

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?

Is activity ___ Committee or X Individual Driven? [Optional]

Alumni Development

Progress to Date:

There is an island wide Constituted Alumni Board and three regional chapters. There is a recruitment campaign going on. They are working to establish the Alumni Association as a nonprofit corporation.

“Promising Strategies” [Best Practices]:

- Establish a committee appointed to the Board of Directors to serve as a catalyst and as mentors to the alumni.
- The organizational structure that includes a State Board and other regional facilitates recruitment.

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?

Is activity X Committee or _____ Individual Driven? [Optional]

**2010-2011
MAEOPP
Board of Directors
Executive Board**



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Juan Casas, **IN President Elect**
Jayna Woolridge, **IA President**
Kris Norem-Lowery, **IA President Elect**
Heidi Witucki, **MI President**
Janice Cook Johnson, **MI President Elect**
Wade Warner, **MN President**
Mari Tototzintle, **MN President Elect**
Kimberly Hill, **MOKANNE President**
Carleen Morris, **MOKANNE President Elect**
Bonita Bembry, **OH President**
TBA, **OH President Elect**
Judith Young, **WI President**
Reilly O'Halloran, **WI President Elect**

**MID AMERICA ASSOCIATION OF
EDUCATIONAL**

OPPORTUNITY PROGRAM PERSONNEL

**Illinois, Indiana, Iowa, Michigan, Minnesota,
MOKANNE, Ohio, Wisconsin**

*“Charting Our Course, Envisioning our Future: Leading
Beyond the Horizon”*

I. Regional News

MAEOPP members attended the Policy Seminar in March. Over 97 visits were made to members of Congress within the ten-state region. Additionally, members attended the National College Opportunity Leadership Summit in Washington, DC. Several MAEOPP members presented; Past-President Ngondi Kamatuka (“Building State Capacity: Raising the TRIO Profile”) and Iowa Past President, Katherine Whitsitt and Kathy Glimpe, SSS Director at St. Olaf College (“Success Stories from TRIO and Colleagues”).

The Association is exploring an initiative to pilot a “Promising and Best Practice Center for TRIO Programs.” This pilot project is an opportunity to develop and participate in a process devoted to the identification, validation and dissemination of best practices for TRIO Programs.

Chapter Spring Conferences were held during the months of April and May:

ILAEOPP	Springfield, IL
IMAEOPP	Indianapolis, IN
IA-MAEOPP	Sioux City, IA
MI-MAEOPP	Lansing, MI
Mn-MAEOPP	Chaska, MN
MO-KAN-NE	Kansas City, MO
OAEOPP	Columbus, OH
WAEOPP	Wisconsin Dells, WI

II. Regional Activities Related to the Council’s Strategic Plan:

Strategic Goal 1: Strengthen the Council’s capacity to enhance the quality of existing educational opportunity programs and increase the number of students served

- MAEOPP is positioned to meet its Fair Share goal of \$716,258 or 23% of the total Fair Share total. As of current contributions stands at 68%. Each chapter has at least two individuals assigned to the 2011 Fair Share efforts. Notable achievements include Minnesota (99%), Iowa (80%) and Michigan (73%). The majority of each state has a campaign to meet their Fair Share goals that has or will culminate at each State/Chapter conference.
- Continuation of the Media Ad Hoc Committee to address and develop marketing and communication efforts.
- The MAEOPP Technology Committee will continue to disseminate information electronically to the MAEOPP membership (i.e. Action alerts, activities of importance, Governmental relations calls, basic operational components etc.).

Strategic Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students

- Chapter Presidents will continue to meet benchmarks outlined in the State Report Card.
- Moving forward with the initiative to participate in a pilot project with the US Department of Education to develop promising or best practices for dissemination.
- Continue to cultivate relationships with key stakeholders in the educational opportunity community and business and industry.
- A key priority for the 2011 Board is to develop a comprehensive Marketing and Communication Plan for the Association.
 - Chapter Presidents received on-going media training at the March, 2011 board meeting in St. Louis, MO.
 - Efforts are underway to redesign the existing MAEOPP website to serve as resource for members and educate potential partners.

Strategic Goal 3: Develop leaders, both students and professionals, to further the mission of the Council

- The Emerging Leaders Institute (ELI) has identified 13 new participants. Training began in January 2011.
One activity of the class is to identify all educational opportunity stakeholders/partners within each state.

Strategic Goal 4: Build the capacity of regional and state organizations to increase support for equal educational opportunity

- Two MAEOPP chapters have published an Op Ed or article- Wisconsin and Kansas.
- Each chapter has made significant gains in the completion of the State Report Card.
- MAEOPP chapters have established partnerships with other organizations such as Illinois Student Assistance Commission, Illinois Committee on Black Concerns in Higher Education and National College Access Network (IL), State Policy meetings held (OH, MI, MN, and IA).
- Illinois chapter had alumni and staff to testify before the state elementary and secondary educational appropriations committee.

Strategic Goal 5: Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

- Chapters have developed relationships with state "Know How 2 Go initiatives (Wisconsin and Illinois)
- Ohio State Senator Charleta Taveres invited to the OAEOPP State Conference.
- Chapter events held at state capitals in IA, IL.

Strategic Goal 6: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students

- MAEOPP remains committed to providing financial support to students within the region who are interested in participating in COE global initiatives.

III. Regional Activities Related to the Council Board Initiatives: (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: ***BUILDING STATES' CAPACITY***

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- | | | | |
|-------------------------------------|----------------------------|-------------------------------------|----------------------|
| <input type="checkbox"/> | Membership and Recruitment | <input checked="" type="checkbox"/> | Alumni Development |
| <input checked="" type="checkbox"/> | State Meeting/Conference | <input type="checkbox"/> | Fund Development |
| <input checked="" type="checkbox"/> | Leadership Development | <input checked="" type="checkbox"/> | Government Relations |
| | | <input type="checkbox"/> | P.R. and Marketing |

Progress to Date

- Michigan received 501(c)(3) status.
- The majority of states in the region have efforts underway to raise money to meet their Fair Share goals and raise money for scholarships
- Chapters with the exception of one have representatives participating in the MAEOPP Emerging Leaders Institute.
- States developed a Fact Book which was distributed to congressional members at COE Policy Seminar.

“Promising Strategies” [Best Practices]:

- Iowa reached out to other EOP programs to encourage meeting/conference attendance and presentations. Highlighted keynote speakers to encourage participation. Invited legislators to present at conferences/meetings. Included membership registration with conference registration to encourage higher conference attendance. Participate in non TRIO conferences to broaden networking. Created Ad Hoc Partnership and Affiliation Advisory Committee to explore alternative options for creating a Non-TRIO advisory committee or adding non-voting members to the Board.
- Michigan had a successful press release announcing the State Conference.
- Minnesota successfully coordinated meetings with TRIO Alumni from Representative Betty McCollum's district and met with Aides from the offices of Rep. McCollum, Senator Franken, and Senator Klobuchar.
- Illinois chapter had alumni and staff to testify before the state elementary and secondary educational appropriations committee.

Scorecard Benchmark(s) Pursued: Is this a New or Continuing Activity?

Is activity Committee or Individual Driven? [Optional]

37th Annual MAEOPP Professional Conference
The Abbey Resort
Fontana, WI
November 13-16, 2011



MID-EASTERN ASSOCIATION OF EDUCATIONAL OPPORTUNITY PROGRAM PERSONNEL

Delaware / District of Columbia / Maryland / Pennsylvania / Virginia / West Virginia

**Regional Report
MEAEOPP**

**May 2011
Washington, DC**

OFFICERS

Corris Davis, President

**Rebecca Craft, President-Elect
President
Leo Conway, Treasurer**

**Diane Sandefur, Past-
Jay Wright, Secretary**

STATE PRESIDENT	PRESIDENT-ELECT	STATE/DISTRICT
Tonia Perry-Conley	Rosanna Brown	Delaware (DSTO)
Darian Cain (DCCES)	Sabrena Johnson	District of Columbia
Katrina Concholar	Vacant	Maryland (MECEO)
Leo Conway Assoc)	Michele Lagnese	Pennsylvania (PA TRIO)
Constance Kelly-Rice	Christie Hardbarger	Virginia (VAEOPP)
Scott Robertson TRIO Assoc)	Terri Philpott	West Virginia (WV)

I. REGIONAL NEWS

MEAEOPP held its 35th Annual Conference in scenic Morgantown, WV April 10 – 13, 2011. We were honored with attendance by Board Chair Mateo Arteaga, as well as video by Dr. Arnold Mitchem.

Everyone is invited to attend the 2012 MEAEOPP Conference to be held at the Doubletree Crystal City in Arlington, VA in March 2012. MEAEOPP continues to support College Goal Sunday in DE and MD as their fiscal agent. Pre or Post Conference Workshops are being considered with the Smithsonian Institutes and the National Zoo.

MEAEOPP awarded \$8000 in scholarships to 4 Pre-College and 4 Adult TRIO students.

MEAEOPP held its third 6th annual community outreach activity in conjunction with the 35th Annual Conference. Conference attendees contributed non-perishable goods to The Rack, a food pantry at West Virginia University designed to serve needy college students.

MEAEOPP adopted a new 3-year Strategic Plan which will begin October 1, 2011.

DCESS sponsored a service learning TRIO Day activity in which over 100 students volunteered at a DC Veterans hospital.

II. REGIONAL ACTIVITIES RELATED TO THE COUNCIL'S STRATEGIC PLAN

STRATEGIC GOAL 1: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

ACTIVITIES and ACCOMPLISHMENTS:

- All states are planning professional training opportunities for TRIO personnel in 2011-2012: PA TRIO October, 2011 Erie, PA; MECEO (MD) November 2011; VAEOPP (VA) and WV TRIO in Virginia Beach, VA October 2011. DSTO (DE) and DC (DCCES) Spring 2012. We want to thank COE Staff for their participation in the 2010 – 2011 MEAEOPP State conferences.

STRATEGIC GOAL 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

ACTIVITIES and ACCOMPLISHMENTS:

- Continue as the Fiscal Agent for College Goal Sunday for DE and MD and have added DC.
- WV TRIO applied was awarded a \$25,000 College Access Challenge Grant which was utilized to purchase i-Pads for each of their College Goal Sunday sites and to facilitate a successful Student Leadership Conference.
- WV TRIO is the Fiscal Agent for College Goal Sunday in West Virginia.

STRATEGIC GOAL 3: Develop leaders to further the mission of the Council.

ACTIVITIES and ACCOMPLISHMENTS:

- MEAEOPP continues to strengthen the region's Emerging Leaders Institute

- MEAEOPP plans continue to implement a board orientation manual and guide
- Redesigned our Newcomers programs to include a conference session as well as ongoing outreach to new personnel within the region
- VA is planning an Emerging Leaders Institute at the fall conference held in conjunction with WV TRIO. Planning is being spearheaded by for MEAEOPP Presidents Mike Henry and Ollie Tolliver.
- Both DC and WV sponsored a successful Student Leadership Conference during the Spring semester.

STRATEGIC GOAL 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.

ACTIVITIES and ACCOMPLISHMENTS:

- MEAEOPP is currently at 73% of its Fair Share but organizing to increase this percentage.

State	Equality	Membership	Contributions	Sum	Budgeted	Difference	%
DC	\$0.00	\$13,276.00	\$1,674.60	\$14,950.60	\$16,436.00	\$1,485.40	91%
DE	\$0.00	\$4,269.00	\$280.00	\$4,549.00	\$7,330.00	\$2,781.00	62%
MD	\$0.00	\$29,890.00	\$5,167.58	\$35,057.58	\$47,167.00	\$12,109.42	74%
PA	\$0.00	\$76,518.00	\$1,025.00	\$77,543.00	\$85,120.00	\$7,577.00	91%
VA	\$0.00	\$30,290.00	\$1,360.00	\$31,650.00	\$58,995.00	\$27,345.00	54%
WV	\$200.00	\$19,814.00	\$19.98	\$20,033.98	\$37,624.00	\$17,590.02	53%
MEAEOPP	\$200.00	\$174,057.00	\$9,527.16	\$183,784.16	\$252,672.00	\$68,887.84	73%

MD.

III. Regional Activities Related to the Council Board Initiatives:
(Items that the COE Chair or Board have highlighted for a given board year.)

2010-11 Board Chair Initiative: ***BUILDING STATES' CAPACITY***

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- ☑ Membership and Recruitment
 - Alumni Development
 - State Meeting/Conference
 - Fund Development
- ☑ Leadership Development
- ☑ Government Relations
- ☑ P.R. and Marketing

Progress to Date

- ☑ Membership and Recruitment
 - DC – President Elect made personal and individual calls to former members who have been inactive for some time, increasing DCESS membership by 10%
 - VA – experienced a 35% increase in membership over the last 12 months (since April 2010)
- ☑ Leadership Development
 - PA – holding a leadership summit in May to how to get members more involved in committee and ultimately leadership roles.
 - VA – holding an Emerging Leaders Institute at Fall conference
- ☑ Government Relations
 - MD and PA - held professional development activities around the importance of Advocacy and Government Relations prior to the Policy Seminar
 - WV – state leadership attended a legislative luncheon which provided the opportunity to share the importance of TRIO with members of the WV House of Delegates
 - MD – state leadership is in the early stages of planning a State Policy Seminar to familiarize state legislators with TRIO Programs.
- ☑ P.R. and Marketing
 - WV – Scott Robertson, WV TRIO President and TRIO Alumni penned an Op-Ed which was published in the Herald Dispatch which covers Ohio, Kentucky and West Virginia

All activities except the Op-Ed are committee driven



Corris PA Davis
MEAEOPP President

Northwest Association of Special Programs (NASP)

Officers/ Executive Board Members:

Vicki Trier	President
Lucila Loera	President-Elect
Neil McFarlane	Past President

Secretary:	Abigail Muro	Alaska President:	Ginny Schlichting
Treasurer:	Lois Rasmussen	Idaho President:	Donnie Hale
Active non-TRiO:	Dely Judal	Oregon President:	Mike Evans
Communications	Sari Byerly	Washington President:	Marc Coomer
Fair Share Coor.	Deborah Walker		

Date: November 16, 2010

I. **Regional News:**

NASP's next Annual Conference will be held in Spokane, Washington at the Davenport Hotel, October 23-26, 2011. The theme will be, "The Future Begins with U: Meeting the Challenges, Making the Connections."

The NASP Board has worked to more fully support our Peer Monitoring Program and have chosen a new Chair to coordinate this service. Dr. Karen McKinney, former McNair Director at Eastern Washington University has agreed to coordinate the service. We will also be looking for an additional co-chair who will coordinate the service for pre-college programs. Dr. McKinney will coordinate the process for college level programs. More information on the service can be found at:

<http://www.nasp-rio.org/index.php/Resources/MemberResources/PeerMonitoring/>

Those outside the NASP region can request this service as well for a slightly higher cost than NASP members.

II. **Regional Activities Related to the Council's Strategic Plan:**

Goal 1: Strengthen the Council's capacity to play a key role to enhance the quality of existing education opportunity programs and increase the number of students served.

- NASP will officially change its name to NAEOP (Northwest Association of Educational Opportunity Programs) on January 1, 2012.
- NASP's Board has added a Communications Chair, Sari Byerly (Boise State University) to assist with the transition and to improve the internal and external communications of NASP.
- All four states sent delegations to Policy Seminar along with 6 alumni.

Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

- Idaho, Oregon and Washington all held state leadership conferences for Trio students.

- Idaho, Oregon, and Washington have all held statewide association conferences to enhance professional development in the states.
- The Alaska association has been conducting phone meetings with their board and have representation from UAA and UAF.

Goal 3: Develop leaders to further the mission of the Council.

- The second Emerging Leaders class comprising 20 participants representing all four states was convened prior to the annual conference.
- Neil McFarlane and Dely Judal are this year’s facilitators.
- The NASP Board has put together an ELI steering committee headed by Dely Judal to outline curriculum for the training.
- A good portion of the curriculum along with additional resources are on the NASP website (www.nasp-trio.org).

Goal 4: Expand the state initiative to increase support for equal educational opportunity.

- See III.

Goal 5: Develop and diversify resources to build the Council’s capacity to advance equal educational opportunity.

- NASP’s fair share coordinator, Mrs. Deborah Walker of Washington State, is working very hard to galvanize the membership and get fair share up to the 100% mark.
- All states in the region have identified Fair Share Coordinators: AK-Ginny Schlichting, Idaho-Traci Birdsell, OR-Don Boderman, WA-Deborah Walker.
- NASP is taking a community approach to the campaign because our region is small.
- As of April 22, NASP has reached 67% of Fair Share, Idaho is at 99% and the other states are at 60% or higher.

Goal 6: Strengthen the Council’s role as a global leader and promote global opportunities for the least advantaged students.

- Alejandra Torre (Grays Harbor College, WA) will participate in COE’s *2011 International Leadership Training Program* in Spain. This is the second student in as many years from Grays Harbor College to attend.
- NASP continues to set aside funds totaling \$2500 to assist students who are accepted by COE to attend the study abroad experience.

III. Regional Activities Related to the Council Board Initiatives:
(Items that the COE Chair or Board have highlighted for a given board year.)

2010-11 Board Chair Initiative: ***BUILDING STATES’ CAPACITY***

Please report on your States’/Chapters’ efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and

monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- | | |
|--|--|
| <input checked="" type="checkbox"/> Membership and Recruitment | <input type="checkbox"/> Alumni Development |
| <input checked="" type="checkbox"/> State Meeting/Conference | <input checked="" type="checkbox"/> Fund Development |
| <input type="checkbox"/> Leadership Development | <input checked="" type="checkbox"/> Government Relations |
| | <input type="checkbox"/> P.R. and Marketing |

Progress to Date

Three of the four states in NASP have become 501(c)(3) non-profit organizations (Idaho, Oregon, Washington). Alaska has submitted supplementary materials and is awaiting a final decision by the IRS. Both the Idaho and Washington organizations have begun fundraising for scholarships.

All states have held some sort of state meeting or leadership development meeting and have full state leadership slates with the exception of Alaska. Alaska’s president, however, continues to work with the leadership of the other states to develop their leadership.

All four states sent delegations to Policy Seminar.

Oregon and Alaska both received COE State Initiative grants.

“Promising Strategies” [Best Practices]:

As of October 2010, NASP has added a Communications Chair to our Board. Sari Byerly from Boise State University agreed to take on the positions and has begun to work with the leadership in each of the states to write op ed pieces and was helpful in advising those new to Policy Seminar on how to schedule appointments, etc. We are currently working to update the NASP website to better reflect the needs of the membership and to promote the services NASP offers including Peer Monitoring.

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?

Is activity ___ Committee or ___ Individual Driven? [Optional]



NEOA Regional Report
Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Reggie Jean (President), Pati Gregson (President-Elect), Karen Madden (Past President)

May 2011

I. Regional News

The 35th annual NEOA Conference, *The Power of Educational Opportunity*, took place April 6-8, 2011 in Portland, ME. Speakers and guests included Dr. Arnold Mitchem, Mateo Arteaga, Mayor Jill Duson (former Upward Bound participant), Julia Tower, Kimberly Jones, and Linda Byrd-Johnson (and others from the DOE staff). 85.7% rated "Excellent" or "Good" on the statement "The workshops were valuable for my professional growth". NEOA Awards were given to **Senator Susan Collins**, Julia Towers and Alan Glotzer. The NEOA Achiever and Rising Star Awards were also presented. The preconference included the nationally recognized Skip Downing On Course training, a financial literacy training by ASA, and a GEAR UP director's meeting.



TRIO Day

First the first time, NEOA has implemented webinars as a resource for professional development. The topics were Money Matters - What Your Students Really Need to Know (Jan 27, 2011 in Partnership with FAME), and Classroom Management: Strategies to Build Communication, Cooperation & Success (April 25). One more webinar on working with boys is planned for June.

NEOA has formalized the use of Google Docs to archive and easily transfer information within boards and between board years.

II. Activities Related to COE Strategic Goal:

1. **Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served**

NEOA is at 65% of its Fair Share. As Regional Fair Share Coordinator, Pati Gregson has had several planning conversations with Alvin Phillips and is organizing a state fair share coordinator conference call. Pati also organized a very successful Fair Share Raffle that raised \$4,000 for fair share. NEOA Board members and Past Presidents have been asked to contribute to Fair Share. This year the goal is to have every program have two fair share contributors.

NEOA recently purchased a table at the COE Conference Dinner and will be submitting a Basket for the Auction.

2. Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students

Through NEOA membership with the New England Council, NEOA members have attended forums for Senators Susan Collins (ME), Jeanne Shaheen (NH), Congressmen Frank Guinta (NH), Charlie Bass (NH), Richard Blumenthal (CT), David Cicilline (RI), Richard Neal (MA), and Mike Michaud (ME) within the last four months. The events are free for NEOA members to attend.

NEOA held an Alumni Dinner at the Policy Seminar in DC (March 8), an Alumni Reception in Portland, ME (April 6) and will present a workshop for alumni on May 27 in Boston, MA on The Art of Networking by Natascha Saunders.

NEOA has partnered and obtained financial support totaling 22,500 from ASA, Lumina Foundation, MEFA (MA), NHHEAF (NH), RIHEAA (RI), RISLA (RI), and the Lintilhac Foundation (VT). NEOA will use the generous support to enact activities to carry out its mission and to implement green practices.

In April, Heather Valentine, the NEOA President, President-Elect, Legislative and Education Co-Chairs, MA State Liaison, MA President and NEOA members in Massachusetts held a conference call to discuss approaches to raising the profile of the TRIO programs in Senatorial offices.

Professionals from the College Board, MEFA and Yale admissions joined 2010-2011 NEOA Achievers Award Committee.

At TRIO Day (Feb 24), Sarah Morrell, NEOA's Legislative and Education Co-Chair led a session and collected about 600 hundred letters from attendees about their experiences in their programs. The letters will be hand delivered to their congressional reps in DC by Heath Alexander. Thanks, Heath!

3. Develop leaders, both students and professionals, to further the mission of the Council



The 2010-2011 NEOA Leadership Institute class had 14 graduates from throughout New England and western NY. **Dr. Arnold Mitchem** held a special session on leadership with the LI graduates at the 2011 Annual conference. In addition to team building, there were presentations on facilitative leadership, understanding behavioral styles related to the DISC inventory, and the connections between regions, states and COE; and TRIO and GEAR UP. Sigh Searles is the director of the Institute.

NEOA held elections for officers for the 2011-2012. Each state will have a state liaison and Evette Layne (MIT/Wellesley Upward Bound) was elected President-Elect. She will join the COE Board in December. Evette will be a strong leader for NEOA.

On February 24-25, TRIO Day 2011 hosted **670 students and staff** of the educational opportunity programs of New England! TRIO Day provides a chance for individuals in TRIO, GEAR UP, and other educational opportunity programs, to network; learn about college opportunities and obstacles; and celebrate higher education! Speakers included, RI Governor Lincoln Chafee, National TRIO Achiever Tyrone J. Flowers, Warwick Mayor Scott Avedisian, and RI Commissioner of Higher Education Ray M. Di Pasquale. Students attended college tours, workshops and a college fair (with 79 colleges from throughout the country). Students also participated in an intense Scholar's Bowl.



As part of the TRIO Day Service Project, students and staff donated cash and 352.35 lbs. of food to the Westbay CAP Marketplace! Thanks for making a difference in the lives of Rhode Island families. The event was featured in The Providence Journal and the Warwick Beacon and can be seen in the NEOA Pressroom. NEOA created and posted a "What is TRIO Day?" video: <http://www.youtube.com/watch?v=oOhSchfwqnE> to give stakeholders,

programs and potential participants a sense of what TRIO Day in New England is all about. One of our partners, ThinkTank Promotional, donated 700 vinyl backpacks to the event.

4. Build the capacity of regional and state organizations to increase support for equal educational opportunity

NEOA prepared and disseminated to the NEOA membership Round 2 of the NEOA State Initiatives RFP and Welcome letter. The RFP has a closing date of December 15 for this round, and the amount is limited to a \$250 award, and one per state, as funds allow. A maximum of \$750 has been allocated for this purpose this round. The NEOA board approved a second round maximum of \$1000

NEOA hosted an online auction to couple with the silent auction that takes place at the annual conference. "**The Truly New England Auction**" was launched in March and ended on April 5. Thank you to the COE Board members that took part in this unique event. Go to www.biddingforgood.com/neoa to look at the sold online items. \$5,000 was raised through the online auction. As far as we know, this is the first time a regional association held an online auction.

As a member of the New England Council, NEOA members attended nine (9) events with business and higher education leaders from throughout New England in the last 4 months.

Massachusetts received COE's SI award to cultivate their Alumni Initiatives.

5. Develop a framework of economic sustainability and organizational stability to build the Council's capacity to advance equal educational opportunity

NEOA has partnered with and obtained financial support totaling more than \$22,000 from ASA, Lumina Foundation, MEFA (MA), NHHEAF (NH), RIHEAA (RI), RISLA (RI), and the Lintilhac Foundation (VT). NEOA will use the generous support to enact activities to carry out its mission and to implement green practices.

NEOA has just approved the planning goals and timelines for a new strategic plan (2010-2015). Michael Dennehy led board members through the process.

NEOA formalized the use of Google Docs to archive and easily transfer information within boards and between board years.

6. Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students

NEOA saw a record number of applicants and has 5 students participating in the COE Study Abroad opportunity in Saltimachia, Spain. The NEOA Board President is an active member of COE Global Initiatives committee.

III. Regional Activities Related to the Council Board Initiatives: (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: BUILDING STATES' CAPACITY

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES and Progress to Date

Leadership Development

Rhode Island does not have a current state president and state liaison. Last week RI elected a State Liaison and is in discussion on organizing leadership for the coming year. RI members held an impressive TRIO Day event on February and several members attended the NEOA Conference. **RI Governor Lincoln Chafee,**

Warwick, RI Mayor Scott Avedisian, a representative from Congressman Cicilline's office, and RI Commissioner of Higher Education Ray M. Di Pasquale attended the 2011 TRIO Day.



Government Relations

New Hampshire - NHEOA was represented by 5 TRiO professionals and 2 alumni at the COE Policy Seminar in March. Although visits with legislators were difficult, the team left Washington DC determined to be vigilant in educating legislators about the impact of their voting on TRiO programs, and to work with NEOA and COE to act swiftly when legislation is pending.

Maine - Sent State Liaison and President Elect to Policy with two Alumni who articulated the importance of TRiO/GU to senators and representatives. Also, President-Elect Jess Berry attended a breakfast meeting with Senator Susan Collins and Laurie Davis attended a breakfast with Representative Mike Michaud.

"Promising Strategies" [Best Practices]:

Use NEOA Resources to attend events with elected officials and provide leadership opportunities to state association members.

If you have any questions about the report or NEOA, contact Reggie Jean at reggie@bu.edu

**Southeastern Association of Educational Opportunity Program
Personnel**

Tracy Lyons

SAEOPP President

Vice President: Michael Maxwell
Treasurer: Rodney Adams
Parliamentarian: Dr. Ronnie Gross

Secretary: Stephen Hendrix
Past President: Celeste Brooks

STATE PRESIDENTS

Alabama – Dr. Tracy Payne
Brown

Florida – Dr. Frank Haynes
Foreman

Georgia – Sherontae Maxwell
Hunt

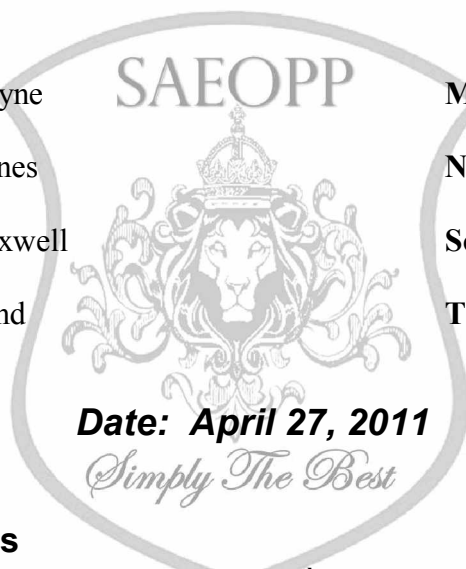
Kentucky – Tom Rowland

Mississippi – Dr. Loria

North Carolina – John

South Carolina – Connie

Tennessee – Jeanne Stokes



I. Regional News



(a.) SAEOPP's 39th **Annual SAEOPP Conference** kicked off with an exciting and inspiring speech from TRIO Alumni and renowned political analyst, **Donna Brazile**. Ms. Brazile participated in the Upward Bound Program and attributes her success in part to TRIO. Dr. Arnold Mitchem addressed the audience on the funding crisis facing TRIO. Dr. Linda Byrd-Johnson gave an update from the new U.S. Department of Education - Student Services unit. SAEOPP recognized seven TRIO Achievers during the conference: 1) *Dr. Bryan D. Samuel*, University of Tennessee at Chattanooga, 2) *Juan R. Ortiz*, Shell Company, 3) *Stephaine J. Buffaloe*, Appleton Senior Solutions, Inc, 4) *Maurice Leonard Calhoun*, IT Architect Nobility Inc., and 5), 6), and 7), the Mississippi Triplets featured on the Oprah Winfrey Show - *Warren Louis Martin, Jr.*, *Deshun Terrell Martin*, and *Kenya Reese Martin*, Attorneys at Law. There were also a variety of concurrent sessions for the 518 attendees.

SAEOPP's Day of Service, in conjunction with the Annual Conference, was a resounding success. We partnered with the Atlanta Day Shelter for Women and Children and donated several boxes of books, supplies and toiletries. This event kicked off at

TRIO Day on Saturday, February 25th, where 1,200 students came to celebrate TRIO Programs. Our guest speaker for TRIO Day was COE TRIO Achiever, *Tyrone Flowers*.

The new officers were installed at the close of the Conference: *Tracy Lyons*, President; *Michael Maxwell*, Vice-President; *Stephen Hendrix*, Secretary; *Rodney Adams*, Treasurer and *Celeste Brooks*, Past President.

(b.) The SAEOPP Center is funded for one TRAINING GRANT through September 2012.

PRIORITY #3 – *Assessment of Student’s Needs, Proven Retention and Graduation Strategies, and the Use of Educational Technology, in Order to Design and Operate a Model TRIO Program.* The next training will be offered in San Juan Puerto Rico, August 3-5, 2011.

(c.) During the Spring, the following State Conferences were convened:

March 27 –30, 2011 The first Tri-State joint spring conference for FAEOPP, (Florida), GASPP (Georgia) and SCCEOPP [South Carolina], was held at the Sea Palms Resort on St. Simons Island.

April 3 – 5, 2011 The annual joint spring conference for AAEOPP (Alabama) and MAEOPP (Mississippi) was held at the Hilton Hotel in Jackson, Mississippi.

April 7, 2011 KAEOPP Meeting at Buffalo Trace Distillery

April 12, 2011 NCCEOP Meeting at Davidson Community College

II. Regional Activities Related to the Council’s Strategic Plan

Goal 1: Strengthen the Council’s capacity to enhance the quality of existing educational opportunity programs and increase the number of student’s served.

Pre-Conference workshops were conducted prior to the start of SAEOPP’s 39th Annual Conference, targeting UB and McNair staff and providing information and suggested strategies for writing Upward Bound and McNair proposals. These workshops were offered with the hope of obtaining more grants in the SAEOPP region, which will result in an increased number of students served. A Pre-Conference workshop on Technology tools was also offered to enhance program service delivery.

Over 200 SAEOPPians marched on Capitol Hill to fight against cuts to TRIO funding. Staff were joined by a College President from Murray State (KY) and several Vice-Presidents and Deans of colleges and universities.

SAEOPP will again host Training for new SSS staff, July 9-10, at the Hilton in Downtown Atlanta. This is the ONLY training for SSS staff that is focused on program implementation.

Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

SAEOPP held its annual Student Initiatives competition on April 16th, 2011 at Atlanta Metropolitan College. All eight states sent teams to the competitions which included: Scholar's Bowl, Academic Bowl, High Q and the SSS/McNair Debate. Though there were individual winners, by and large, Kentucky won the most awards.

SAEOPP will hold its 17th Annual McNair/SSS Scholars Research Conference, June 23-26, at the Hilton in Downtown Atlanta. Jose Hernandez, COE TRIO Achiever, is the keynote speaker.

Goal 3: Develop leaders to further the mission of the Council.

As a precursor to SAEOPP's 39th Annual Conference, the Emerging Leaders Institute was conducted, February 26-27, 2011. The institute consists of 1st and 2nd year participants, and is designed to develop successful leaders who will pursue leadership roles in TRIO at the state, regional and national level. The program has led to graduates going on to serve both the state and the region. In fact, **all six** of the Executive Officers and **seven of the eight** state presidents all graduated from SAEOPP's Emerging Leaders Institute.

Goal 4: Expand the state initiative to increase support for equal educational opportunity.

SAEOPP congratulates State Presidents Victor Neal (NC) and Rod Adams (SC) for their states' achievement in receiving a COE State Initiative Grant for 2011. North Carolina was funded to enhance Technology and South Carolina was funded to enhance TRIO Alumni efforts.

On April 4, 2011, Angelica Vialpando with COE attended the AAEOPP/MAEOPP and presented the opportunity for staff from Mississippi TRIO programs to submit proposals to *USA Funds* to assist students.



Mary Jo Buff, at the University of Montevallo, has garnered a relationship with Cambridge to secure free testing materials for students. She shared the information with attendees at the SAEOPP Conference and again at the joint AAEOPP/MAEOPP Conference.

Goal 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.

SAEOPP's most recent Fair Share conference call facilitated by COE's AL Phillips took place on April 25, 2011 at 4:00 a.m. EST. The regional fair share coordinators, Dr. Fernandra Ferguson and Ms. Patti White, along with SAEOPP President Tracy Lyons discussed strategies to help SAEOPP make its Fair Share. Similar to May COE Board

meeting, state presidents will make phone calls to directors/institutions who can take advantage of the \$300 savings which expires May 31st. Also discussed was the strategy to stress the point of gaining institutional members (big ticket). Additionally, state presidents and their Fair Share coordinators will be asked to push for personal contributions – especially important to keep SAEOPP first in the number of COE Champions

Goal 6: Strengthen the Council’s role as a global leader and promote global opportunities for the least advantaged students.

SAEOPP received 75 applications for general scholarships and awarded 24 students with either a \$1,500 or \$1,000 scholarship.

SAEOPP received nine (9) applications for a Study Abroad Scholarship. After a review of the submissions, three (3) applicants were awarded scholarships in the amount of \$1,500 each, for travel to occur during the Spring, Summer or Fall of 2011. The recipients were *Jesse Shelton*, East Tennessee State University, *Shalonda Patterson*, University of Alabama at Birmingham, and *Elizabeth Follis*, University of Tennessee, Chattanooga. In an effort to better inform SAEOPP staff and students about opportunities and resources associated with study and travel abroad, new “links” have been activated on the SAEOPP website under Study Abroad.

III. Regional Activities Related to the Council Board Initiatives: Building States’ Capacity

Scorecard Benchmark(s) Pursued: In an effort to stimulate activity in the area of state capacity building and advocacy for TRIO Programs, SAEOPP held a “Strategy Meeting with Dr. Arnold Mitchem on February 27th during the SAEOPP Conference. State Presidents from the SAEOPP Region and their Board members were invited to engage in a dialogue with Dr. Arnold Mitchem, in order to fully understand the crisis facing the TRIO community. This was a very productive session with all States being represented, and most Board members in attendance. This effort was spearheaded by then SAEOPP VP and State Initiatives Committee Chair, Tracy Lyons. Is this a New or Continuing Activity?

Progress to Date: Results from the State Chapter Benchmarks scorecard will be discussed and compiled at SAEOPP’s May Board of Directors meeting to be held May 1-4 at the Wynfrey Hotel in Birmingham, AL, and will be provided as an addendum to this report.

Is activity Committee or Individual Driven? [Optional]

*Submitted by Tracy Lyons, SAEOPP President
April 27, 2011*



Southwest Association of Student Assistance

Officers/ Executive Board Members:

Deborah Evers, President
Lynette Bates, President Elect
Barry Lofton, Past President
Keylan Morgan, Treasurer
Sandra Reyes-Garcia, Secretary

Date: May 20, 2010

I. Regional News:

Arkansas Association of Student Assistance Programs (AASAP)

AASAP held its TRiO Day celebration March, 2011. AASAP sent a delegation of 10 to the Policy Seminar in Washington, D.C.

Louisiana Association of Student Assistance Programs (LASAP)

TRiO Night at the Hive was March 12, 2011. It is collaboration between the New Orleans Hornets and LASAP to promote TRiO and motivate TRiO students. LASAP sent a delegation of 12 to the Policy Seminar in March. Another successful LASAP Annual Conference was held in New Orleans, LA April 18th through the 21st.

New Mexico/West Texas Association of Student Assistance Programs (NM/WT)

TRiO Day activities were celebrated on February 24, 2011 in Santa Fe, New Mexico. The Annual State Meeting was held April 13th through 15th in EL Paso, TX. Heath Alexander and his team were secured to present a program on financial aid. NM/WT was able to send a delegation of 6 to the Policy Seminar in March.

Oklahoma Division of Student Assistance Programs (ODSA)

ODSA celebrated TRiO Day at the capitol on February 23, 2011. Over 800 students, staff and legislators attend this event. A delegation of 16 was sent from ODSA to the Policy Seminar. ODSA held another successful state conference March 31st through April 2nd.

Texas Association of Student Special Services Support (TASSSP)

A very productive TASSSP Annual Conference was held March 20-23, 2011 in Austin, Texas. TASSSP sent a delegation of 15 members to the Policy Seminar.

II. Regional Activities Related to the Council's Strategic Plan:

Strategic Goal 1: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

- Several SWASAP state presidents participated and presented at the State Leadership Caucus and at COE's Annual Conference in San Diego.
- Information received from COE continues to be forwarded to SWASAP state presidents to disseminate to their members accordingly.
- Barry Lofton (Fair Share Chair) and his committee are working hard to help **SWASAP exceed its 2010-2011 COE Fair Share goal.**

Strategic Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

- All of SWASAP's state presidents, compiled data from their state to be added to the Regional Report Card requested by Past Chair Northcross.

Strategic Goal 3: Develop leaders to further the mission of the Council.

- The 2011 SWASAP ELI is made up of nine members from states in the region. It is being co-chaired by Rene Guillaume and Jeff Kahlden.
- The 2010-2011 ODSA Emerging Leaders class graduated at their annual conference in late March. They developed and implemented two service projects including a silent auction that's proceeds went to Fair Share and a letter campaign for the troops is association with TRiO Day at the Capitol.

Strategic Goal 4: Expand the state initiative to increase support for equal educational opportunity.

- All SWASAP state presidents participated in or presented at COE's Policy Seminar in March, 2011.
- Louisiana and Oklahoma have exceeded their Fair Share. NM/WT, AR and TX are continuing to work hard to meet Fair Share
- By speaking at state conferences and sending reminders, I promoted the 2011 July – December Institutional Membership discount opportunity

Strategic Goal 5: Develop and diversify resources to build the Council's capacity to advance equal educational opportunity.

- Barry Lofton (Fair Share Chair) and his committee continue to press on to the goal of helping **SWASAP exceed its 2010-2011 COE Fair Share goal. OK and LA have made their Fair Share**

- Advocacy has been the topic of the SWASAP Presidential Welcome at 4 of the 5 region's state conferences

Strategic Goal 6: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students.

- SWASAP continues to encourage members and students to participate in study abroad programs and global opportunities presented and offered by COE.

III. Regional Activities Related to the Council Board Initiatives:
(Items that the COE Chair or Board have highlighted for a given board year.)

2010-11 Board Chair Initiative: ***BUILDING STATES' CAPACITY***

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

Please check the categories on which you are reporting.

SCORECARD CATEGORIES

- | | |
|---|--|
| <input type="checkbox"/> Membership and Recruitment | <input type="checkbox"/> Alumni Development |
| <input type="checkbox"/> State Meeting/Conference | <input type="checkbox"/> Fund Development |
| <input type="checkbox"/> Leadership Development | <input checked="" type="checkbox"/> Government Relations |
| | <input type="checkbox"/> P.R. and Marketing |

Progress to Date

- I have attended 4 of 5 state conferences from the SWASAP region. I spoke on the importance of Advocacy at all levels.
- Participated in COE's emergency executive board conference call related to 26.6 million dollar cut for TRiO
- Drafted a letter containing information from the COE board vote and including the bullet points from Kimberly Jones. Letter sent to all state presidents on Friday, April 22nd with request to send to membership of each state.

“Promising Strategies” [Best Practices]:

- Expand on the Alerts sent by COE to include examples specific to the region
- Include Op/Eds that have been run in local and more rural newspapers so members can see exactly what they need to include for their specific area

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?
 Is activity X Committee or X Individual Driven? [Optional]Both

III. Regional Activities Related to the Council Board Initiatives:
 (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: ***BUILDING STATES' CAPACITY***

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

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Progress to Date

- Presented at SWASAP Emerging Leaders Session One in February
- SWASAP Emerging Leaders were paired up with current board members in a mentoring partnership
- SWASAP ELI Class had lunch with the SWASAP Board at the completion of their first ELI training and participated in board orientation in February, 2011
- SWASAP ELI Class of 2009-2010 presented a template of a TRiO Fact Book to the SWASAP Board in November. This will help each state produce a uniformed TRiO Fact Book. Each state president is expected to bring a working draft of their fact book to May, 2011 SWASAP Board meeting

- SWASAP ELI Class of 2010-2011 is working to combine marketing and alumni in their service project. They meet 4 times in person in 2011 and have multiple conference and video conference calls which the SWASAP President is integrally involved

“Promising Strategies” [Best Practices]:

- Connecting Regional and State Emerging Leaders together by meeting through video conference calling seems to be much more effective than just emailing

Scorecard Benchmark(s) Pursued: Is this a ___ New or X Continuing Activity?
Is activity X Committee or X Individual Driven? [Optional]Both



Western Association of Educational Opportunity Personnel
Arizona ξ Central California ξ Nevada ξ Northern California ξ Pacific Islands ξ Southern California

Regional Report

2010 - 2011 Executive Board Members:

Presidents:

Rafael Topete - President

Donelle Davis - President- Elect
California

Michele Scott - Past President

Lia Mauga - Chief Financial Officer
California

Dr. Marsha Gable - Secretary

Jose Martinez-Saldana - Parliamentarian *
California

* Non-voting member

2010 - 2011 Chapter

Michelle Thomas - Arizona

Cesar Margarito - Central

Jennifer Bieth - Nevada

Anette Dennett - Northern

James Oda - Pacific Islands

Sergio Galvez - Southern

Date: April 26

1. Regional News:

- A. The 33rd Annual WESTOP Regional Conference “Strengthening our Alliances Uniting for Educational Equity” was held February 28th – March 3, 2010 in Las Vegas, NV. Conference attendance was 354. The Pre-Conference workshop on “Implementing the New TRiO Regulations for Success” had 31 in attendance. Conference speakers included Chelsie Campbell, Corporate Communications for NV Energy; Las Vegas City Councilman and TRiO Alumni Ricki Barlow; TRiO Alumni Dr. Maria Cecilia Roman-Steans, Hospitalist Site Leader at Carilion Clinic in Roanoke, Virginia; Maria Silva, News Anchor for Local Fox Affiliate; Mateo Arteaga, Chair- COE Board of Directors; and a recorded message from Congresswoman Shelly Berkley.
 - Visit the WESTOP website to view conference workshops: <http://westop.org>
- B. WESTOP members attended the 26th Annual Seminar on Relations with the U.S. Department of Education. Good mixed messages from both House Members and Senators: Messages ranged from “we have no money” to “they will have a fight if they want to cut TRiO budget.” While members were walking the Hill, held the “Take 3 minutes to CALL 3” campaign that asked WESTOP Members to call 3 people and have them call their Congressional Reps to voice their support for TRiO.
- C. WESTOP Members Rafael Topete, Leonard Woods, Laura Mangham, and James Oda met with the Ambassadors from the Republic of Palau and the Federated States of Micronesia. They agree to help with what they could on behalf of TRiO Programs. The meeting was organized with the assistance of Yoichi Rangel.
- D. WESTOP is working with California Lutheran Upward Bound Alumni Karina Arrellano-Weber to start a WESTOP Alumni Association. Facebook and LinkedIn accounts have been created, and they are currently working on developing a website.

II. Regional Activities Related to the Council's Strategic Plan: COE Strategic Goals for 2010-2015

Goal 1: Strengthen the Council's capacity to enhance the quality of existing educational opportunity programs and increase the number of students served.

- A. Research and Technology committees are developing data analysis tools to promote projects effectiveness. The goal is ask programs to submit Annual Performance Report data for analysis. The evaluation tools will enhance the quality and delivery of program services.
- B. The President or President Elect has forwarded Action Alerts sent by COE to the WESTOP members via the listserv
- C. Action Alerts and WESTOP activities are posted on the website

Goal 2: Cultivate and strengthen relationships with all stakeholders to maximize educational opportunities for the least advantaged students.

- A. Legislation and Education chair coordinated WESTOP participation in the Annual COE Policy Seminar to advocate increase TRIO appropriations for the FY 2012 budget process.
- B. Nevada and California Chapters were able to have TRiO students attend the 2011 COE Policy Seminar and relations with the Department of Education.
- C. Arizona Chapter held TRIO Day activities on Saturday, February 26th through Facebook.
- D. CenCal Chapter will have their 10th annual Summer Jam. **Summer Jam** is a friendly competition amongst Central California TRiO Programs. It's a one day event scheduled to take place on **Friday, June 24, 2011 at College of the Sequoias in Visalia, CA**. The event was created to provide an avenue for TRiO students from different colleges and universities to meet, network, team up and compete in educational and physical competitions. Students are divided into "color" teams rather than by school or programs to motivate interaction with students from participating institutions.
- E. Nevada Chapter - UNLV Center for Academic Enrichment and Outreach hosted a NV TRiO/GEAR UP Day on March 5th in Las Vegas.
- F. NorCal's Student Leadership Conference took place on Saturday, April 2 at the UC Davis Campus. The event was chaired by Sam Blanco III. Students were welcomed with a message from me (NorCal Chapter President), various campus entertainers (California Aggie Marching band and MK Vintage Dance Troupe), and our keynote speaker Mr. Mark Q. Jones (consultant, motivational speaker and entrepreneur). Workshops were facilitated by current UC Davis students as a means to build rapport to attendees, most of whom were first time conference goers! Topics included reflecting and understanding identity, evaluating personal strengths/areas to improve, and designing personal action plans to becoming effective leaders.

- G. Pacific Island Chapter helped to set-up a meeting with the Ambassadors from the Republic of Palau and the Federated States of Micronesia. They agree to help with what they could on behalf of TRIO Programs. The meeting was organized with the assistance of Yoichi Rangel.
- H. SoCal Chapter will be having their SLC and TRiO Day activities on May 29th at the University of Southern California.
- I. All the Chapters within WESTOP hosted a Professional Development Seminar in the 2010 – 2011 Board Year and are already reserving their dates and locations for this upcoming year Professional Development Seminars.

Goal 3: Develop leaders to further the mission of the Council.

- A. Continue the development of leadership initiatives. Leadership Development Institute, identifying with one participant from each chapter.
- B. Chapter Presidents have been asked identify future leaders in their respective chapters.
- C. TRIO training opportunities are forwarded via the WESTOP listserv
- D. University of Washington held Priority 1 and 3 trainings in conjunction with the Pacific Islands Professional Development Seminar February 22-26, 2011 in Honolulu, Hawaii.
- E. WESTOP provided a transition meeting for 2010-11 and 2011-12 Board of Directors and Service Council members.

Goal 4: Expand the state initiative to increase support for equal educational opportunity

- A. 2012 Annual Conference to be held in Sacramento, CA. Will look into setting up meetings with State of California Leaders and politicians.

Goal 5: Develop and diversify resources to build the Council's capacity to advance educational opportunity.

- A. Resource Development Committee is researching external funding sources, partnerships, donations and sponsorships for the association. They identified 10 potential sponsors, letters were sent to each group.
- B. Chapter Presidents, Fair Share Coordinators, WESTOP Presidents continue to participate in conference calls with COE Fair Share staff to discuss strategies and incentives to meet our goals.
- C. Fair Share Coordinators and Chapter Presidents continue to educate the membership regarding Fair Share and identify strategies to successfully meet our regional goal

Goal 6: Strengthen the Council's role as a global leader and promote global opportunities for the least advantaged students.

- A. Continue to encourage members and students to participate in study abroad programs.

III. Regional Activities Related to the Council's Initiatives:

See New Format below

III. Regional Activities Related to the Council Board Initiatives: (Items that the COE Chair or Board have highlighted for a given board year.

2010-11 Board Chair Initiative: ***BUILDING STATES' CAPACITY***

Please report on your States'/Chapters' efforts to increase the awareness about and visibility of educational opportunity efforts at the State/Chapter level. The State/Chapter Association Scorecard will assist you in benchmarking and monitoring the progress made in building capacity in targeted areas. Report on at least two (2) of the following benchmarks that have proven successful in building a stronger infrastructure at your state/chapter level to benefit the TRIO Movement.

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Progress to Date

State Meeting/Conference:

- J. Arizona Chapter held TRIO Day activities on Saturday, February 26th through Facebook.
- K. CenCal Chapter will have their 10th annual Summer Jam. **Summer Jam** is a friendly competition amongst Central California TRiO Programs. It's a one day event scheduled to take place on **Friday, June 24, 2011** at **College of the Sequoias** in **Visalia, CA**. The event was created to provide an avenue for TRiO students from different colleges and universities to meet, network, team up and compete in educational and physical competitions. Students are divided into "color" teams rather than by school or programs to motivate interaction with students from participating institutions.
- L. Nevada Chapter - UNLV Center for Academic Enrichment and Outreach hosted a NV TRiO/GEAR UP Day on March 5th in Las Vegas.
- M. NorCal's Student Leadership Conference took place on Saturday, April 2 at the UC Davis Campus. The event was chaired by Sam Blanco III. Students were welcomed with a message from me (NorCal Chapter President), various campus entertainers (California Aggie Marching band and MK Vintage Dance Troupe), and our keynote speaker Mr. Mark Q. Jones (consultant, motivational speaker and entrepreneur). Workshops were facilitated by current UC Davis students as a means to build rapport to attendees, most of whom were first time conference goers! Topics included reflecting and understanding identity, evaluating personal strengths/areas to improve, and designing personal action plans to becoming effective leaders.

- N. Pacific Island Chapter helped to set-up a meeting with the Ambassadors from the Republic of Palau and the Federated States of Micronesia. They agree to help with what they could on behalf of TRIO Programs. The meeting was organized with the assistance of Yoichi Rangel.
- O. SoCal Chapter will be having their SLC and TRiO Day activities on May 29th at the University of Southern California.

“Promising Strategies” [Best Practices]:

All the Chapters within WESTOP hosted a Professional Development Seminar in the 2010 – 2011 Board Year and are already reserving their dates and locations for this upcoming year Professional Development Seminars.

Scorecard Benchmark(s) Pursued: **State Meeting/Conference**

Is this a New or Continuing Activity? Both... Professional Development Seminars have been used by chapters over the years. This year, we were able to have ALL 6 chapters host/co-host a PDS. By doing this, we are able to host state/chapter-wide meetings.

Is activity Committee or Individual Driven? [Optional]

Progress to Date

Alumni Development

- A. Began work with TRiO Alumni to help develop a WESTOP TRiO Alumni group. WESTOP has created a WESTOP TRiO Alumni Facebook Page and a LinkedIn Group. The group will continue to reach out to Alumni throughout WESTOP. We are also working with the National TRiO Alumni Network to share resources and ideas. Work is being led by Karina Arellano-Weber, a California Lutheran Upward Bound Alumni.

“Promising Strategies” [Best Practices]: WESTOP is working with a group of alumni to bring this into fruition.

Scorecard Benchmark(s) Pursued: **Alumni Development**

Is this a New or Continuing Activity?

Is activity Committee or Individual Driven? [Optional]

Government Relations

- A. Legislation and Education chair coordinated WESTOP participation in the Annual COE Policy Seminar to advocate increase TRIO appropriations for the FY 2012 budget process.

- B. Nevada and California Chapters were able to have TRiO students attend the 2011 COE Policy Seminar and relations with the Department of Education.
- C. Arizona Chapter held TRiO Day activities on Saturday, February 26th through Facebook.
- D. Nevada Chapter - UNLV Center for Academic Enrichment and Outreach hosted a NV TRiO/GEAR UP Day on March 5th in Las Vegas.
- E. Pacific Island Chapter helped to set-up a meeting with the Ambassadors from the Republic of Palau and the Federated States of Micronesia. The Ambassadors will be forwarding our concerns to all the Members of Congress that work with the Ambassadors.

“Promising Strategies” [Best Practices]:

- A. Using Social Media to coordinate efforts and reach out to more members and friends of WESTOP.
- B. Reaching out to the Ambassadors of the Pacific Islands that have TRiO programs and using their political contacts to help get the TRiO message out.

Scorecard Benchmark(s) Pursued: **Government Relations**

Is this a X New or Continuing Activity?

Is activity X Committee or Individual Driven? [Optional]

Respectfully Submitted,
Rafael Topete, WESTOP President