



## **Board Manual 2020-21**

Serves Educational Equity Professionals to Ensure and  
Advocate for Educational Opportunity

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## **INTRODUCTION WESTOP Board Manual**

WESTOP determined in the 2015-2018 Strategic Plan, that our association could greatly benefit in formally documenting, reviewing and updating our policies and procedures. The WESTOP Board Manual is a living document. It is revised upon the discretion of the WESTOP Board. The Board Manual is a detailed extension of the Bylaws. A change in the Bylaws requires a majority vote from the WESTOP membership while revisions in the Board Manual requires the majority vote of the Board. The first WESTOP Board Manual was approved by the Board on June 26, 2017.

The Board Manual provides the guidelines for the Board to function along with descriptions of the purpose and responsibilities of the Board and the Service Council. The Board Manual does not overrule the bylaws or the needs of the association as deemed by the Board President and Board.

### **The Purpose of a Board Manual**

Every successful board abides by a set of formal structures and processes that govern key board attributes and activities such as size, composition, roles and responsibilities. At its core, a board manual is a roadmap for directors, which contains key information on the organization, its strategy, and its governance structures/processes. For many boards, the primary function of a board manual is as a comprehensive reference guide, mainly used in the orientation of new board members. If treated as a constantly evolving guide to the board's decision-making processes and responsibilities, however, the manual can be valuable for more than the briefing of new recruits: it can also help to attract directors and ensure ongoing decision making effectiveness.<sup>1</sup>

### **The Purpose of Bylaws**

Bylaws are the written rules by which an organization is governed. They set forth the structure of the board and the organization. They determine the rights of participants and they determine the procedures by which rights can be exercised. In other words, bylaws guide the board in conducting business. Carefully crafted bylaws and adherence to them can help ensure the fairness of board decisions and provide protection against legal challenges.

Bylaws are legal documents. This means there are legal requirements for what should be included. Bylaws can help protect directors and officers from personal liability. For example, a nonprofit can protect its directors and officers from costs arising from wrongful lawsuits by including provisions regarding indemnification in the bylaws. (In California, see California codes 5238 and 9246 for more details).<sup>2</sup>

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<sup>1</sup> [www.Orgwise.ca](http://www.Orgwise.ca)

<sup>2</sup> <http://nonprofitanswerguide.org/faq/boards-governance/what-are-bylaws-and-why-do-we-need-them/>

## **WESTOP**

### **Vision, Mission and Values**

An effectiveness of the WESTOP Board is developed around our organizational vision and mission

**VISION:** Serves educational equity professionals to ensure and advocate for educational opportunity.

**MISSION:** To create and develop educational professionals who are able to advocate and provide educational opportunities for those who are underserved.

#### **VALUES:**

- Professional Excellence
- Integrity
- Diversity
- Social Justice

## **WESTOP Board Manual – 2020-2021**

### **Strategic Plan 2019 – 2022**

#### **Goal 1: Organize the sharing of WESTOP’s collective knowledge, skills, and abilities in the areas of advocacy, educational equity, retention, and student success.**

Objectives:

- 1) Develop a new professional’s tool kit to build historical knowledge and a professional foundation for educational equity (Initial draft to Board by January 2020).
- 2) Develop a recorded archive of seasoned professionals to capture their expertise. (Timeline and list of professionals to Board by October 2019).
- 3) Develop a library of professional development topics and make it available to WESTOP members. (Timeline, list of topics, and potential presenters to Board by January 2020)
- 4) Develop a template for chapters or programs to collect and share data that allows for the creation of reports and/or documents (Draft to Board by October 2019).

#### **Goal 2: Create a system to cultivate, prepare, and engage professionals to become highly qualified and passionate WESTOP leaders at the program, chapter, and regional levels.**

Objectives:

- 1) Identify three to five interested members, who have not previously held leadership roles, to recommend for ELI or mentorship program by December of each year.
- 2) Finalize and implement ELI based on models previously presented to the Board by August 2019.
- 3) Develop a mentoring program with an initial cohort at the WESTOP 2021 conference.
- 4) Draft a training curriculum and process for incoming board members by December 2019. Implement training by June 30 of each year.

#### **Goal 3: Form the fiscal infrastructure needed to strengthen, sustain, and propel WESTOP.**

Objectives:

- 1) Select and utilize bookkeeping/accounting services agency by September 2019.
  - a) Create a process whereby Chapter Presidents will ensure by the last business day of each month, the CFO and the chapter treasurer will have met to reconcile the monthly statement and that the information will be submitted to the bookkeeper, this process will be implemented by November 2019.
- 2) Establish a permanent address for WESTOP by February 2020.
- 3) Create a comprehensive on-boarding process for new CFO by September 2019.
- 4) By the last meeting of the service year the CFO will work with the appropriate committees to ensure that at least two corporate sponsorships and/or collaborations will be identified and pursued.

#### **Goal 4: Create and implement a branding and marketing plan for WESTOP to build uniformity, presence, and relevance both internal and external of the organization.**

Objectives:

1. Implement an ad-hoc committee by the end of 2019 that consists of a representative from each chapter and the regional Technology Chair to assist with the updating of the WESTOP webpage and mobile friendly technology by June 2020.
2. Public Relations Chair will work with Technology Chair to create/update a branding and style guide for WESTOP that will be on the WESTOP.org website by March 2020.
2. Public Relations Chair will develop a communications guide which will include parameters for social media and listservs by June 2020.
3. Public Relations Chair will strategically advertise WESTOP’s purpose and events through partnerships and national listservs.

## **History of WESTOP**

**1975-** Dr. Ratliff agreed to coordinate regular meetings of Upward Bound Directors in Southern California. Most of these meetings included conversations surrounding the need for a professional association.

**1976-** A small group of TRIO project directors convened in Long Beach to begin the process of writing a constitution and by-laws for what was originally called the Association of TRIO project Directors of Region IX. Recognizing the implied limitation on membership of the name, and the fact that it was not easily convertible to a neat acronym, the name was later changed to the Western Association of Educational Opportunity Programs. Finally, Programs was changed to Personnel.

**1977-** The WESTOP President and President-Elect attended the Mid America Association of Educational Opportunity Personnel (MAEOPP). Attendance at the conference awakened them to the real potential for WESTOP to serve as an organizational representative of professional educators throughout the region and as the champion of educational development for all low-income and underrepresented youth.

**1979-** The conclusion was made that there was a need to generate income in order to finance the activities of WESTOP. The easiest way would be to emulate the example of other TRIO based associations and sponsor a regional conference. Lake Tahoe was selected as the site and the first conference of WESTOP was held in February.

**1980-** A small contingent of newer association members had concluded that there was a great potential clout and influence in WESTOP and that there did not appear to be much opportunity for them or other new members to break into the small enclave of leaders.

**1996-** Throughout WESTOP's history, California had commanded a large influence on WESTOP in terms of activities, issues, and leadership. It wasn't until 1996 that WESTOP saw its first President form a chapter outside of California with Adrian Tanakeyowma of the Arizona Chapter.

**2001-** Leonard Woods became the first WESTOP President from the Nevada Chapter and the second from outside of California.

**2003-** At WESTOP's Annual Conference in Hawaii, the WESTOP membership voted to recognize the newly created Central California Chapter (CenCal). Previously, only two Chapters existed in California-- those being the Northern California (NorCal) and Southern California (SoCal) Chapters.

**2004-** James Oda became the first WESTOP President from the Pacific Islands Chapter.

**2005-** CenCal quickly created more WESTOP history when Jose Martinez-Saldana became the first WESTOP President from CenCal.

**2007-** WESTOP is running under a new leadership structure. The Board of Directors was once a Board of 22 people. Leadership now consists of a smaller sized Board of 11 which focuses on policy and a Service Council of 7 which provides services and activities.

## **WESTOP Board Manual – 2020-2021**

**2008-** WESTOP Board developed a 5-year Strategic Plan (2009-2014). WESTOP Board of Directors (BOD) held their first board meeting in Palau. BOD members met with TRIO programs on the island, as well as with the President of the Republic of Palau to discuss education issues. WESTOP Annual Conference at Kona, HI, worked in conjunction with University of Washington TRIO training.

**2010-** WESTOP Annual Conference at Long Beach, held the second Educational Summit with the CA Department of Education. Vice Presidents of university's and local instructors were present at the summit. The first was held at WESTOP Conference in Burlingame in 2007.

**2011-** Sergio Galvez was the first WESTOP President to serve two consecutive terms, 2011-2012 and 2012-2013. He served as Past President, 2013-2014 and fulfilled the duties of Past President, 2014-2015.

**2014-** TRIO Alum and U.S. House of Representative Steven Horsford (D-NV, 4th District) was a keynote speaker. Congressman Horsford is an alumnus from the University of Nevada, Reno, Student Support Services Program. WESTOP had the largest group representation at Policy Seminar 2014. WESTOP created a way to collect "real-time" reporting and calculating progress of our Capitol Hill visits with the assistance of President Elect Anita Blanco.

**2017** – WESTOP Annual Conference at Monterey, CA held the third Educational Summit with educational leaders from California Community College, HACU, and Arizona. WESTOP approves the first Board Manual.

**2018** – WESTOP Annual Conference at Honolulu, HI held the largest attendance in the history of WESTOP with 555 registered attendees.

**2018** - President Trump signed FY18 omnibus appropriation giving Federal TRIO Programs a total of \$1.01 billion. This legislation, which passed the House by a vote of 256-157 and Senate vote of 65-32 – is the first time in the history of TRIO of reaching a billion dollars in funding!

## **WESTOP Board Manual – 2020-2021**

### **The Board Orientation**

The purpose of Board orientation is to provide important information about WESTOP and about the Board's and Service Council roles and responsibilities.

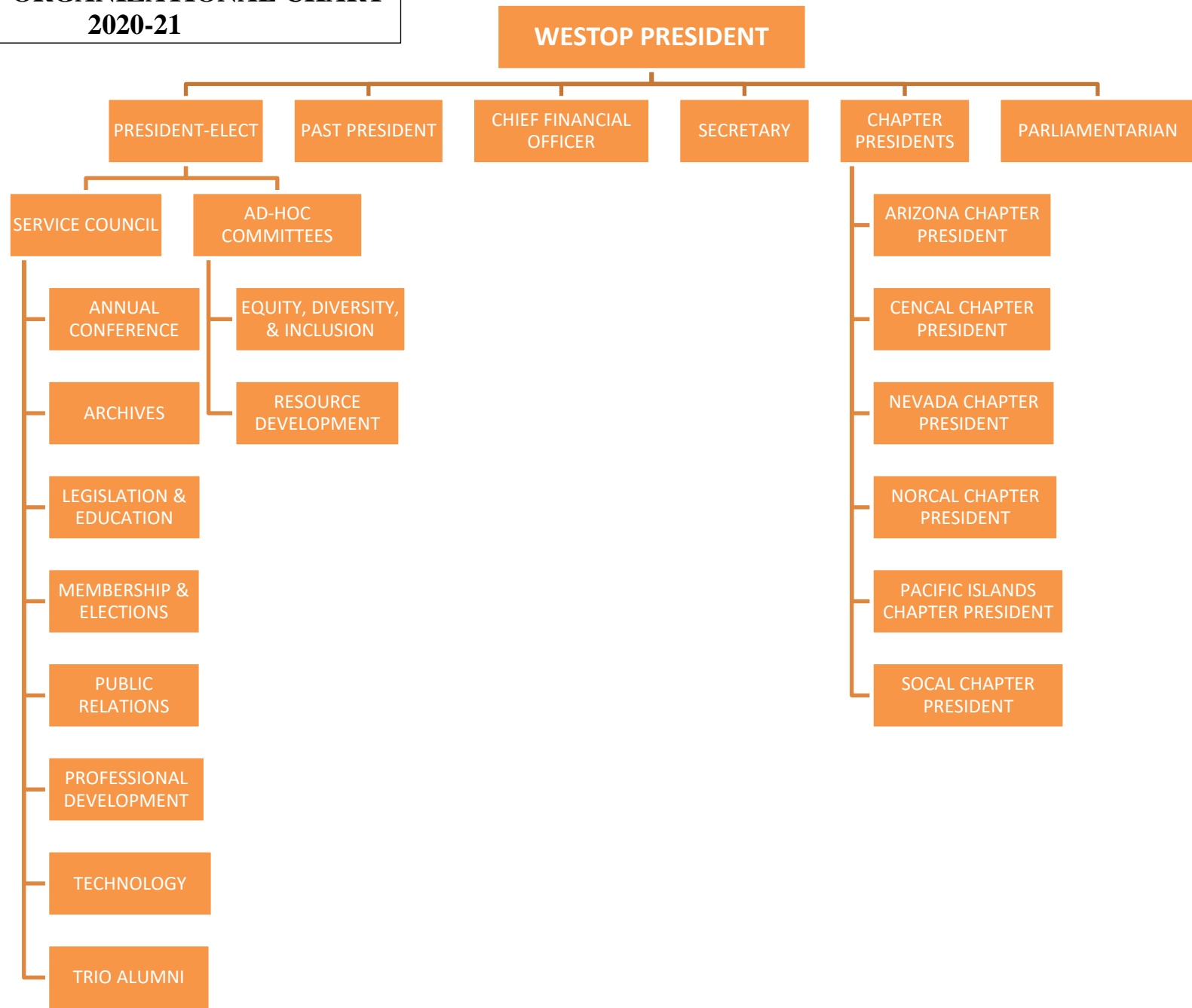
Board Orientation Training should include a binder or a cloud-based storage with the following information:

- History: Outlines the History of WESTOP.
- Staff Organizational Chart.
- WESTOP Bylaws, Board Manual, Strategic Plan
- Program Highlights for the Year to Date: A brief document that highlight accomplishments and new initiatives underway.
- Board Roles and Responsibilities.
- List of All Current Board Members with bios.
- List of Board Committees, Purpose and Responsibilities
- List of Upcoming Board Meetings
- List of upcoming events, COE Conference, WESTOP Conference, Chapter PDS, COE Policy Seminar, and COE Board Meetings.
- Approved Budget for the calendar year
- The Purpose of COE and the importance of Fair Share
- Board meeting minutes from the last board meeting
- Agenda for the first board meeting

*Careful recruitment and good orientation are the first crucial steps in retaining solid board and service council members. The most common reason for members to resign from an organization is misunderstanding of what is expected of them or the feeling that their services were not truly needed.*



**WESTOP ORGANIZATIONAL CHART**  
**2020-21**



## **Responsibilities of the WESTOP Board**

WESTOP is a Nonprofit Board. The National Center for Nonprofit Boards in Washington, DC cites the following in their publication “Ten Basic Responsibilities of Nonprofit Boards”:

- Determine the organization’s mission and purposes.
- Select the executive staff through an appropriate process.
- Provide ongoing support and guidance for the executive; review his/her performance.
- Ensure effective organizational planning.
- Manage resources effectively (the ultimate responsibility is on the board).
- Determine and monitor the organization’s programs and services.
- Enhance the organization’s image.
- Serve as a court of appeal.
- Assess its own performance.
- The board of directors of a nonprofit organization is entrusted with the legal responsibility of setting directions within parameters of the bylaws, and for overseeing all of an organization’s activities.

The WESTOP Board sets policy, establishes committees, reviews and approves the annual budget, conducts long-range planning, raises funds and evaluates its own organizational operations and programs.

### **Fiscal Management: Bookkeeping, Accounting Reporting Requirements<sup>3</sup>**

Efficient and accurate fiscal management is very important to all charitable organizations. The directors are responsible for organizing and documenting the financial affairs of the charity. It may be useful for the charity to hire an accountant, controller, or other fiscal manager. In choosing a method of fiscal management, the needs of various users of the accounting information must be considered. There are two general categories of users: (1) internal users -- management staff, board of directors and members; (2) external users -- governmental agencies, grant making organizations, banks and other financial institutions.

### **Internal Controls Over the Fiscal Management System**

The goal in establishing internal controls over the fiscal management of a charity is to prevent error, fraud, theft, or mismanagement. Good internal controls safeguard charitable assets and insure reliability of financial records. Items which make up an effective control system include budgets, segregation of duties, policy and procedures manuals, clear definition of, and adherence to, set procedures for management authority, and periodic review of the control system. A system requiring two signatures on all the corporation's checks is an important control measure. Continuing cost-benefit analysis by charity managers is vital to effective operation and survival.

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<sup>3</sup> Guide for Charities, California Attorney General, 2005

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The charity's directors play a key role in establishing internal controls for the charity. Their approval of policies and procedures determines the fiscal management system. The minutes of the board meetings should reflect these important policies.

Many charity directors seek expert advice from a professional accountant to assist in designing and implementing the fiscal management system. Choose an accountant carefully and be specific about the charity's needs. Ask the accountant about his or her experience with other charitable organizations. Check references.

### **Preventing Internal Fraud and Theft of Charitable Assets**

Fraudulent diversion of charitable assets by employees, officers, or directors with control over those assets can occur at either the receipt or the disbursement phase. Charities may receive many donations in the form of cash, checks, and electronic funds. The person who receives and records the cash and checks could, without proper controls, deposit those funds into unauthorized bank accounts and divert the funds to personal use, without the knowledge of other employees or directors. For this reason, it is very important to separate the function of recording cash receipts from responsibility for access and control over the receipts. Assigning different people to the separate tasks of recording receipts and making bank deposits minimizes the risk of fraud.

### **Board Requirements**

- Attendance at meetings
- Reading minutes carefully to ensure accuracy.
- Recording objections and ensuring a debate on controversial or difficult issues. It is the duty of the board to review plans and policies and how they are implemented.
- Ensuring that all income taxes are paid.
- Scheduling time with an insurance agent who is well versed in board liability matters, and having them explain: general liability, professional liability, workers compensation, asset protection, and directors' and officers' insurance. Make certain that the policy covers employee suits against the organization.
- Reviewing financial statements carefully and clarifying areas of concern to ensure a comprehensive understanding.

### **Nonprofit Board Regulations**

Contractual Obligations: Nonprofit organization through the signature of the board president or one of the other officers can enter into contractual agreements. A board officer's signature obligates the organization not the individual who signs.

*It is a board's responsibility to act ethically and with the full knowledge of all contractual agreements.*

## **WESTOP Board Purpose and Responsibilities**

**WESTOP Board:** The process for the elections of the WESTOP Board are outlined in the WESTOP Bylaws. The following are outlined purpose and responsibilities of the WESTOP Board.

**Position:** President (**Bylaws Section 7.2. President-Powers and Duties.**)

**Purpose:** Provide Executive Leadership that provides vision and ensure all programmatic and fiscal operations of the association are functioning properly.

### **Key Responsibilities:**

1. Oversee the Executive Board: President-Elect, Past-President, Secretary and Chief Financial Officer, and Parliamentarian.
2. Implement the WESTOP Strategic Plan by assigning duties and responsibilities to Executive Board, Chapter Presidents, Service Council
3. Plan, organize and facilitate Association Board meetings to ensure a two-way flow of communication and information between the WESTOP Board and membership. Make arrangements for WESTOP board meeting held, to include meeting room space, hotel and/or ground transportation. The President discretion may provide continental breakfast(s), lunch and/or refreshments during Board meetings and may inform Chapter members in advance as a courtesy of the Board meeting being held in their Chapter.
4. Provide a report on the status of WESTOP to the Meeting of the Members.
5. Work with CFO on preparing and submitting an Association budget at the May/June WESTOP Board meeting for approval. Budget must include both projected and expenses for the calendar year. Review the current budget and consult with Executive Board as necessary.
6. Provide a President's report, include Association activities and financial status at each WESTOP Board meeting and submit annual and other reports as required.
7. Ensure that Executive Board and Chapter Presidents reports are submitted to the WESTOP President seven days prior to each Board meeting.
8. Ensure that all financial information is forwarded to the WESTOP Chief Financial Officer in the timely manner for tax reporting purposes.
9. Appoint the Service Council positions for members who have completed their term or who have left the position.
10. Appoint Ad-hoc Committee Chairs deemed appropriate to meet the Strategic Plan.
11. Oversee the Conference Chair, and other committees as deemed by the President.
12. Evaluates annually the performance of the organization in achieve its Mission.
13. Work with Past-President to identify issues that need revising in the WESTOP Bylaws and Board Manual.
14. Work with the Conference Co-Chairs to assist in the organization and implementation of the conference.
15. Seek bids for future WESTOP Conferences and bring information to the Board for a vote.
16. Approve the WESTOP website content and updates.
17. Ensure the Secretary completes all electronic file maintenance and record keeping.
18. Serve as Association Representative to the Council for Opportunity in Education Board meetings.
19. Work on COE Committees as assigned by the current COE Board Chair.
20. Expectation to support COE financially.
21. Ensure that WESTOP is up to date as a nonprofit organization.
22. Other duties as assigned by the WESTOP Board related to overall purpose and good of the Association.

## **WESTOP Board Manual – 2020-2021**

**Elected by:** WESTOP President is elected at the WESTOP conference as President-Elect by the membership during the WESTOP Annual conference. The person becomes the President upon completion of the first year or if the current President is unable to complete his/her year.

**Term Length:** 1-year

**Time commitment:** 3 years total

1. President elect (1-year term), President (1-year term), and Past President (1-year term)
2. Four Association Board meetings annually. Additional meetings may be held on a web/conference call.
3. Attend each Chapter PDS (6) and the WESTOP annual conference
4. Attend COE Policy Seminar
5. Attend 3 mandatory (week long) COE Board meetings (December, May, and September each year)

**Report to:** WESTOP Membership

### **Recommended Skills/Talents**

- A commitment to the Association's mission: This results in the proper allocation of time to provide the leadership, to help shepherd the Association, and to work with its, members, executive leaders and staff
- Knowledge of fiduciary duties within non-profit organizations
- The President should possess the ability to articulate the WESTOP vision and drive the Association toward achievement of that vision
- Good organizational skills, intelligence business knowledge and an advocate for the Association
- Strong, decisive leader with excellent judgment and a willingness to take responsibility for the Association's actions
- A good listener, the President should listen as much as talk and should seek out information from WESTOP stakeholders, ability to bring people to consensus and translate the consensus into meaningful action

### **Resources for the President**

#### **Presidents Council**

Comprised of past presidents to counsel the Board and serve the membership on any issue related to WESTOP. Particularly, provide guidance where precedent, rationale and intent of previous actions, and lessons learned from past events are important considerations in the decision-making process for current issues. Perform studies, inquiries, or other actions, either self-initiated or at the request of the Board or membership. The Council serves as a resource for historical information and to support the activities of the WESTOP membership, Board and Committees as directed by the President. The Council will advise the Executive Board on issues of importance to WESTOP.

#### **Steve Holeman Award Council**

The Steve Holman Award Council are members who have been awarded the highest level of recognition in the WESTOP Association. These members serve as a resource for leadership guidance along with assisting with the mentoring of the Board, Service Council and Rising Leaders Institute. These individuals have proven their integrity and devotion to the needs of the Association and have a wealth of information and to support the activities of the WESTOP membership.

## **WESTOP Board Manual – 2020-2021**

**Position:** President-Elect (**Bylaws Section 7.4. President Elect-Powers and Duties.**)

**Purpose:** Work closely with the President to acquire the skills, competencies, and knowledge of association's objectives, activities, procedures and services.

**Key responsibilities:**

1. Work with President for direction on goals and objectives of each position especially how they relate to Strategic Plan. Ensure that Service Council turns in Board reports seven days prior to WESTOP Board meeting.
2. Oversees all WESTOP Service Council positions and serves as Chair of the COE Fair Share Committee.
3. Attend all Association Board meetings and assist President in forming of the Board agenda.
4. Report to the Board on the progress and outcomes of the Service Council in relations to the goals of the year and the Strategic Plan.
5. Participate in WESTOP and Service Council committees as needed.
6. Prepare and submit an overall Service Council report seven days prior to the WESTOP Board meeting.
7. In case of the absence or disability of the President, to temporarily exercise all the power and perform all the duties of the president.
8. In case of vacancy of the President, to succeed to the office of the president for the remainder of that term of office as well as his/her subsequent term of office as President.
9. Ensure that we are up to date as a nonprofit organization.
10. Submitting an ad for the current year conference to inform members of the following year's conference. This is the conference where this person will be the sitting President for his/her WESTOP Conference.
11. Identifying Service Council members prior to the WESTOP Conference so they could be sworn in at the current year conference.
12. Prepare for Post-Conference meeting with Board and Service Council.
13. Any other duty and task as assigned by the President, which is related to the overall purpose of the good of the Association.
14. Serve on COE committees, attend COE trainings, meetings, and conferences.

**Elected by:** WESTOP membership during the annual conference. Candidate must be available for meeting at the conclusion of next year's WESTOP conference. During the president-elect term, the candidate must attend WESTOP Board meetings.

**Term length:** 1-year

**Time commitment:** 3 years total

1. President elect (1-year term), President (1-year term), and past President (1-year term)
2. Four Association Board meetings annually. Additional meetings may be held on a web/conference call.
3. Meeting monthly individually with each Service Council Chair to provide guidance and direction.
4. Attend Annual WESTOP Conference.
5. Recommended to attend COE Policy Seminar
6. Attend 3 mandatory (week-long) COE Board meetings (December, May, and September each year)

**Report to:** President

**Recommended Skills/Talents** (See President Purpose and Responsibilities)

## **WESTOP Board Manual – 2020-2021**

**Position:** Past-President (**Bylaws Section 7.5. Past President-Powers and Duties**)

**Purpose:** Work closely with the President and President-Elect to provide support and knowledge related to Association Strategic Plan, goals and objectives, activities, procedures and services.

**Key responsibilities:**

1. The Past-President acts as the Bylaws Chair for the Association which will oversee, maintain and update the Associations Bylaws.
2. Maintain a file of current Bylaws and Board Manual of the Association.
3. Assist and act as a resource on Bylaws for the Board.
4. Recommend changes to WESTOP Board Manual.
5. Recommend amendments to WESTOP Bylaws which are to meet the needs of the Association.
6. Present proposed bylaws changes WESTOP Board at the Fall/Winter Board meeting for the first reading. For discussion only and no action will be made. All proposed changes must be approved, after the second reading, by a two-thirds vote of Board before submission to the Membership for Adoption vote.
7. Past-President will submit any amendment proposal approved by the Board to the Members at least 30 days prior to a required vote for adoption.
8. Work in conjunction with the Membership and Elections chair to prepare and distribute the Bylaws ballot to all WESTOP members during the Annual Membership Meeting.
9. Work with the Membership and Elections Chair to verify who is able to vote for the proposed changes in the Bylaws.
10. Report the results to the Bylaws changes proposed at the Annual WESTOP Banquet.
11. Transfer files to new Past-President upon completion of term.
12. In case of the absence or disability of the President and President-Elect, to temporarily exercise all the powers and perform all the duties of the president.
13. Serve on the WESTOP Professional Development committee, and assists Professional Development Chair on the implementation of Emerging Leadership Institute.
14. Attend Association meetings, executive committee meetings, and conference calls.
15. Prepares a written report seven days prior to scheduled Association meetings and submit them to the President.
16. Ensure that we are up to date as a nonprofit organization.
17. Support the President Elect on WESTOP the strategic plan.
18. Any other duties and task as assigned by the President, that is related to overall and the good of the Association.

**Elected by:** WESTOP Membership.

**Term Length:** 1-year

**Time commitment:** 3 years total

1. President elect (1-year term), President (1-year term), and Past President (1-year term)
2. Four Association Board meetings annually. Additional meetings may be held on a web/conference call.
3. Attend WESTOP Conference.
4. Recommended to attend COE Policy Seminar
5. Attend 3 mandatory (week-long) COE Board meetings (December, May, and September each year)

**Reports to:** President

**Recommended Skills/Talents** See President Purpose and Responsibilities



## **WESTOP Board Manual – 2020-2021**

**Position:** Chief Financial Officer (CFO) (**Bylaws Section 7.7. Chief Financial Officer-Powers and Duties**)

**Purpose:** CFO will define the process and implement the infrastructure/systems needed to support substantial growth of the Association. CFO will manage effective and streamlined administrative/financial systems (financial and accounting). Maintains accurate and ethical records of all financial transactions of the Association.

**Key responsibilities:**

1. Ensures that the Association files tax returns by the due date each year.
2. Ensure that the Association maintains its 501C3 status.
3. Ensure that forms are completed and submitted for the Association to implement fundraising activities i.e. raffles.
4. Present the Board with a complete financial report at each scheduled meeting.
5. Assist the President with preparing the annual budget for submittal and approval by the WESTOP Board.
6. Provide training and assistance to Chapter Treasurers as requested or needed.
7. Deliver the Financial State of the Association report at the Meeting of the Members.
8. Submit Financial Report to the President for inclusion in Association End of the Year Report.
9. Ensure that all funds expended are in accordance with WESTOP Fiscal AND accounting policies, maintain detailed records of all financial transactions (QuickBooks, Cvent, etc.), including archiving check reimbursement request with original receipts, invoices, or other evidence.
10. Requests that Chapters submit any necessary reports/information to complete tax returns and other financial reports that are needed to maintain the solvency of the Association.
11. Ensures that all taxes are filed in a timely manner, all non-profit requirements are met, and all fiscal requirements are properly executed.
12. Attend all Association meetings, executive committee meetings, and conference calls.
13. Initiates annual review of insurance needs of the Association.
14. Other duties assigned by the WESTOP Board related to the overall purpose of and the good of the Association.

**Elected by:** WESTOP Members during the WESTOP conference.

**Term Length:** 2 years

**Time commitment:** 2 years total

1. Four Association Board meetings annually. Additional meetings maybe held on a web/conference call.
2. Attend WESTOP Conference.

**Reports to:** President

**Recommended Skills/Talents:** Understanding of General Accounting Principles for Non-Profits



## **WESTOP Board Manual – 2020-2021**

**Position:** Secretary (**Bylaws Section 7.6. Secretary-Powers and Duties**)

**Purpose:** The Secretary is responsible for ensuring accurate written and sufficient and documentation of board meetings and business that meet legal requirements.

**Key Responsibilities:**

1. Records minutes of meetings, ensures their accuracy, and availability, proposes policies and practices, submits various reports to the board, maintains membership records
2. Minutes are required to include at a minimum:
  - date, time, location of meeting;
  - list of those present and absent;
  - list of items discussed;
  - list of reports presented;
  - text of motions presented and description of their disposition.

The Secretary signs a copy of the final, approved minutes and ensures that this copy is maintained in the corporate records.

3. *Custodial of Record:* The secretary ensures that the records of the organization are maintained as required by law and made available when required by authorized persons. These records may include founding documents, (e.g. letters patent, articles of incorporation, social media logins), lists of directors, board and committee meeting minutes financial reports, and other official records.
4. E-mail and/or post draft of minutes for each Association meeting two weeks after each meeting.
5. Provide a copy via email of unapproved and approved minutes to members upon request.
6. Maintain orderly records of activities and timelines relevant to his/her position during the term and supply the incoming Secretary with those records to ensure a smooth transition.
7. Prepares a writing report (unapproved meeting minutes from the previous meeting) one week prior to scheduled meetings and submit them to the president.
8. Attend all Association meetings, executive committee meetings, and conferences calls.
9. Participate in WESTOP Board and Service Council committees as needed.
10. Provide a summary of motions and descriptions of their disposition.
11. Set up conference/web meetings.
12. Other duties as assigned by the WESTOP board related to the overall purpose of the chapter and the good of the association.

**Elected by:** WESTOP Members during the WESTOP conference

**Term Length:** 2 years

**Time commitment:**

1. Four Association Board meetings annually. Additional meetings maybe held on a web/conference call.
2. Attend WESTOP Conference.

**Reports to:** President

**Recommended Skills/Talents:** Excellent communication skills, both verbal and written, and the ability to interact with board members, directors and the organization's membership.

## **WESTOP Board Manual – 2020-2021**

**Position:** Parliamentarian

**Purpose:** The Parliamentarian is an expert in rules of order and the proper procedures for the conduct of meetings of deliberative assemblies. The Parliamentarian assists the Association in the drafting and interpretation of bylaws and rules of order, and the planning and conduct of meetings.

**Key Responsibilities:**

1. Ensures that the Association meetings are conducted according to proper parliamentary procedures following the Roberts' Rules of Order.
2. Provide the members and the Executive Board with training on simple parliamentary procedures; how to state a motion, rules of debate, quorums.
3. Assist the President in meeting preparation, when requested.
4. Advise presiding officer, when requested, on questions of parliamentary procedure. Parliamentarians do not "rule." Only the President has the power to rule on a question of order. If the parliamentarian has expressed an opinion at the request of the Chair, the Chair must still make the ruling.
5. Assist the presiding officer by keeping track of the order of those wishing to speak, motions, amendments, voting, etc., during meetings.
6. Provides advice and assist the President during Association meetings in matters of parliamentary procedure.
7. Intercede during Association meetings to ensure proper procedures are being observed.
8. Provide request for motion form. If motion form is passed, ensure that the wording of every motion is clear before being stated and for secretary to include accurately in the minutes.
9. Attend all Association meetings, executive committee meetings, and conference calls.
10. Participate in WESTOP and committees as needed.
11. Provide support and training for chapter parliamentarians.
12. Other duties assigned by the WESTOP Board related to the overall purpose and the good of the association.

**Elected by:** The parliamentarian is an officer appointed by the President, subject to ratification by the executive board. A parliamentarian "pro tem" is appointed in the absence of the parliamentarian. "Pro tem" means "for this time only."

**Term Length:** 1-year

**Time commitment:**

1. Four Association Board meetings annually. Additional meetings maybe held on a web/conference call.
2. Attend WESTOP Conference.

**Reports to:** President

**Recommended Skills/Talents:** Have experience of serving on Boards and understanding proper parliamentary procedures following the Roberts' Rules of Order.

## **WESTOP Board Manual – 2020-2021**

**Position:** Chapter Presidents

**Purpose:** Voting Director on WESTOP Board. Provide Executive Leadership to Chapter Executive Board, Service Council, and Chapter members. Ensures all programmatic and fiscal operations of the Chapter are functioning properly.

### **Key Responsibilities:**

1. Oversee the Chapter Executive Board: President-Elect, Past-President, Secretary, Treasurer, Treasurer-elect, Parliamentarian, and all Service Council to include Fair Share Coordinator.
2. Appoint the Professional Development Seminar and Student Leadership Conference committee chairs, Parliamentarian, and Service Council. Chapter Service Council should mirror WESTOP Service Council positions. Add adhoc committees as needed to meet Chapter goals for the year.
3. Plan, organize and facilitate meetings and chapter activities with chapter executive board.
4. Preside Chapter meetings using the Roberts Rule of Order.
5. Implement the WESTOP Strategic Plan by assigning duties and responsibilities to Chapter Executive Board and Service Council.
6. Represent the Chapter during all WESTOP Board Meetings.
7. Work closely with Legislation & Education chair to collect all FACT Book/Sheet data for Policy Seminar.
8. Ensure that any contractual obligations are approved by WESTOP
9. Invite Chapter members to attend board meeting held at the Chapter region.
10. Submit Chapter budget to the WESTOP Board for approval during the May/June Board meeting. Budget must be reviewed with Treasurer and it should reflect projected expenses for next fiscal year.
11. Provide a Chapter President's report at the WESTOP Board meeting. Report must be sent seven days prior meetings and must cover; Chapter News, Chapter Activities Related to WESTOP's Strategic Plan, and Financial Status.
12. Work with Treasurer to ensure that all financial information is forwarded to the WESTOP Chief Financial Officer in the timely manner for tax reporting purposes.
13. Assist the Awards Committee with the selection process for WESTOP Achiever's, Friend of WESTOP, Staff of the Year, Steve Holeman, and Service Awards during WESTOP Conference.
14. Ensure the Treasurer and Secretary completes all electronic file maintenance and record keeping.
15. Other duties as assigned by the WESTOP Board related to overall purpose and good of the Association.

**Elected by:** The membership as a WESTOP President-Elect during the WESTOP Annual Conference.

**Term Length:** 1 year

**Time commitment:** 3 years total

1. President elect (1-year term), President (1-year term), and Past President (1-year term)
2. Four Association Board meetings annually. Additional meetings maybe held on a web/conference call.
3. Attend Chapter PDS and WESTOP annual conference
4. Recommend that Chapter President Elect attend COE Policy Seminar

**Report to:** WESTOP Chapter Membership

**Recommended Skills/Talents:** See President Purpose and Responsibilities

## **WESTOP Board Manual – 2020-2021**

### **ANNUAL TIMELINE FOR CHAPTER PRESIDENTS**

#### **JULY**

- Review WESTOP Strategic Plan
- Set Goals and Objectives for the fiscal year
- Tentatively Plan the fiscal year services and activities with chapter Executive Board and Service Council.

#### **August**

- Prepare Chapter President report for WESTOP Board meeting
- Attend WESTOP Board Meeting

#### **September**

- Hold Chapter Meeting

#### **October**

- Hold Chapter PDS

#### **November**

- Attend WESTOP Board meeting
- Submit Chapter President Report

#### **December**

- TBD

#### **January**

- Attend WESTOP Board Meeting
- Submit Chapter President Report

#### **February**

- Work with Legislation & Education service council to collect FACT BOOK Data for Policy Seminar.

#### **March**

- Attend WESTOP Conference
- Submit Chapter President Report
- Attend COE Leadership Summit
- Attend COE Policy Seminar

#### **April**

- TBD

#### **May**

- Hold Chapter Meeting
- Present Proposed Budget for next fiscal year to the membership for approval.
- Attend last board meeting of the fiscal year
- Submit Chapter President Report

#### **June**

- Submit Proposed Budget for next fiscal year to WESTOP Executive Board for approval.

## **WESTOP Standing Board Committees**

WESTOP operates with two types of committees, the existence of which are outlined in the by-laws. These are 1) standing committees and 2) Ad-hoc committees. Standing committees are those that WESTOP believes are necessary for our continuing effectiveness in the operation of our association. Standing committees should be evaluated every (3 years) to ensure it is still relevant. Ad hoc committees are those created to deal with particular problems or opportunities over a specific, limited period of time. When its purpose has been achieved, the Ad-hoc committee ceases to exist. If an Ad-hoc committee continues to exist for a long period of time (3 years), then the Association must reevaluate if it needs to be a standing committee.

### **Recommendations Regarding Committees**

The use of committees by the WESTOP Board is at the core of board/service council relationships. Through committee work, the blend of volunteer perspective and professional staff skills offer many opportunities for joint decision making. All nonprofit boards utilize committees in one form or another. In volunteer organizations, committees serve as the main tool for implementing organizational objectives. The objective of the committee is to provide recommendations for board approval. After Board approval committees are in charge of implementing Board mandates.

### **WESTOP Committee Structures Based on Bylaws**

<b>Standing Board Committees</b>	<b>Function</b> <b><u>Section 8.10. (a) Board Committees of Members.</u></b>
<b>Executive Committee</b>	This committee shall consist of all 5 officers (President, President–elect, Past President, Chief Financial Officer, and Secretary) and the Financial Affairs Committee Chair. This committee is empowered to make decisions on behalf of the Board of Directors between meetings of the Board only in a situation deemed an emergency. Prior to such occurrence, the entire Board must be notified of the issue(s) to be addressed and the meeting time. Any and all decision(s) shall be brought before the full Board of Directors at the following meeting for inclusion in the minutes for public record.
<b>Financial Affairs Committee</b>	This committee shall be chaired by one of the Chapter Presidents at the agreement of the entire committee. The voting Members of this committee shall consist of the Chapter Presidents; the non-voting, ex-officio Members of this committee shall consist of the Chief Financial Officer, the President-Elect, and the President. This committee shall be responsible for preparing WESTOP's annual budget and subsequent revisions, and for proposing fiscal policies and procedures for Board approval.
<b>Strategic Planning Committee</b>	This committee shall be chaired by the Past President. The voting Members of this committee shall consist of the Chapter Presidents; the non-voting, and other members as appointed by the President.
<b>Bylaws Committee</b>	This committee shall be chaired by the Past President. This committee shall be responsible for reviewing the bylaws periodically to correct errors and eliminate inconsistencies, requesting recommendations for amendments from the Board and the Membership, and overseeing the amendment process. The committee shall have representation from all chapters.
<b>Fair share Committee</b>	This committee shall be chaired by the President Elect. The Fair Share Committee shall be responsible for coordinating the region-wide campaign to ensure that the monetary Fair Share goal is achieved with contributions from each of the four states. Contributions include institutional memberships, personal contributions, and subscription packages.

## **WESTOP Board Manual – 2020-2021**

### **Position: Executive Committee Chair – Chaired by President**

**Purpose:** This committee shall consist of all 5 officers (President, President–Elect, Past President, Chief Financial Officer, and Secretary) and the Financial Affairs Committee Chair. This committee is empowered to make decisions on behalf of the Board of Directors between meetings of the Board only in a situation deemed an emergency. Prior to such occurrence, the entire Board must be notified of the issue(s) to be addressed and the meeting time. Any and all decision(s) shall be brought before the full Board of Directors at the following meeting for inclusion in the minutes for public record.

**Reports to:** Executive Board and Members of WESTOP

### **Position: Financial Affairs Committee – Chaired by a Chapter President**

**Purpose:** This committee shall be chaired by one of the Chapter Presidents at the agreement of the entire committee. The voting Members of this committee shall consist of the Chapter Presidents; the non-voting, ex-officio Members of this committee shall consist of the Chief Financial Officer, the President-Elect, and the President.

**Key responsibilities:** This committee shall be responsible for preparing WESTOP's annual budget and subsequent revisions, and for proposing fiscal policies and procedures for Board approval.

**Elected by:** FAC Committee

**Term Length:** 1-year

**Reports to:** WESTOP Executive Board

**Recommended Skills/Talents:** Knowledge of FAC Manual

### **Position: Bylaws Committee– Chaired by Past-President**

**Purpose:** This committee shall be chaired by the Past President. This committee shall be responsible for reviewing the bylaws periodically to correct errors and eliminate inconsistencies, requesting recommendations for amendments from the Board and the Membership, and overseeing the amendment process. The committee shall have representation from all chapters.

**Term Length:** 1-year

**Time commitment:** 3 hours per month

**Reports to:** President

**Recommended Skills/Talents:** Have an overall understanding of the current WESTOP Bylaws and how one change may affect another section of the bylaws. Ability to articulate recommendations to the Board on the need for any changes that are brought forth for review.

## **WESTOP Board Manual – 2020-2021**

**Position:** Fair Share Chair – Chaired by President Elect

**(Bylaws Section 8.10.)**

**Purpose:** Fair Share Committee: This committee shall be chaired by the President-Elect. The Fair Share Committee shall be responsible for coordinating the region-wide campaign to ensure that the monetary Fair Share goal is achieved with contributions from each of the eight states. Contributions include institutional memberships, personal contributions, and subscription packages.

**Key responsibilities:**

1. Develop a marketing campaign along with Public Relations Chair on the importance of the Fair Share and the need to WESTOP Fair Share goal for the year.
2. Attend Fair Share Training (usually a webinar/conference call) and have a thorough understand of Fair Share and its purpose.
3. Participate in monthly COE Fair Share conference calls.
4. Call institutions whose COE membership have expired or will expire and encourage them to renew.
5. Come up with creative ways to encourage members to contribute, especially in the 10 t 10 campaign.
6. Review contribution sheets monthly (sent by COE via email) and monitor personal contributions for the association.
7. Update COE institutional membership log contact information if updates found.
8. Maintain records of WESTOP members' personal contribution.
9. Prepare a written report seven days prior to the scheduled Association meetings and submit it to President. This report must provide benchmarks on the progress of the Strategic plan related to this target goals.
10. Participate in WESTOP Pre-Conference Board meeting. Attend the WESTOP Conference.
11. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
12. Participate in WESTOP End of Year/Transitional meeting held in May/June.
13. Attend WESTOP meetings as requested by the WESTOP President.
14. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** 3-6 Hours per week

**Reports to:** President

**Recommended Skills/Talents:** Past-WESTOP President. This person understands the importance of achieving Fair Share and has historical knowledge on how to achieve the current year's goal.

## **WESTOP Service Council**

The WESTOP President will seek guidance from the Executive Board and Chapter Presidents to fill roles in the Service Council. When inviting and encouraging members to serve on the Service Council, it is important to provide a concise statement of the expectations, such as time commitment, and responsibilities as a member, especially the importance of attending the Board meeting when the Service Council member is required to attend. President-Elect is to provide list of Service Council members to be voted on before end of fiscal year prior to his/her presidency.

As stated in the Bylaws section 5.3. “Unless otherwise provided in these Bylaws, appointment of members to serve on both standing and special committees shall be made by the sitting President from among the individual members in good standing of the Association. The Chairperson of each committee shall be designated by the sitting President with the advice and consent of the Board. The Chairpersonship of standing committees should be rotated at least every third year.”

### **Service Council Committees Description**

**As stated in bylaws section 8.11.** “These committees will be chaired by WESTOP Members not currently seated on the Board. The Service Council committees may only perform duties and take actions as authorized by the Board. The Service Council committees shall not take any actions contrary to board policies, procedures, and bylaws.”



## WESTOP Board Manual – 2020-2021

<b>Standing Service Council Committees</b>	<b>Function</b>
<b>Archive</b>	The Archive Committee shall be responsible for collecting records of the WESTOP organization. It shall have the responsibility for encouraging WESTOP officers, past and present, to transfer essential records to the WESTOP Archives. WESTOP and Chapter Secretaries and CFO's are part of this committee.
<b>Conference</b>	The Conference committee shall be responsible for planning and arranging for appropriate speakers and guests, registration, exhibits, hospitality, evaluation, and other activities as necessary. The conference site and date are selected by the Board who also approves the recommended theme and sets registration fees.
<b>Legislation and Education</b>	This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (e), (f), (g), (h) and (i). Additionally, this committee shall make every effort to educate the Membership on pertinent legislative issues and the legislative process.
<b>Membership and Elections</b>	This committee shall be responsible for actively promoting, recruiting and retaining Membership in WESTOP. This committee shall also be responsible for developing the procedures to be used in the election of directors, developing lists of individuals eligible to be nominated and vote, and overseeing the counting of votes. If the committee chair is a candidate for the WESTOP Board, the President Elect will Chair the Elections. This committee is also responsible for certifying to the Corporation the membership list according to membership category; to determine eligibility for purposes of participation in WESTOP activities; and to prepare and issue to WESTOP Members such cards, certificates, or other evidence of membership, if any, as the Board may direct.
<b>Public Relations</b>	This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (b) (e), and (i). This committee will be responsible for all aspects of public relations regarding the WESTOP Association.
<b>Professional Development</b>	This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (a) This committee shall be responsible for organizing and coordinating activities that enhance the professional development of WESTOP Members. This committee will also be responsible for organizing and coordinating of the pre-conference trainings at the Annual Conference.
<b>Technology</b>	This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (c). This committee shall be responsible for the promotion of the Association's use of technology and training.
<b>TRIO Alumni</b>	The TRIO Alumni Committee shall have the responsibility for planning and implementing the expansion of the TRIO Alumni Society. It shall oversee the maintenance of the alumni database. The Committee shall facilitate alumni engagement at the regional and chapter level.

**WESTOP Service Council Purpose and Responsibilities**

**Archives Chair**

**Purpose:** The Archivist shall be responsible for collecting records of the WESTOP organization. It shall have the responsibility for encouraging WESTOP officers, past and present, to transfer essential records to the WESTOP Archives. Archivists rely on historical knowledge to select records and information that have value. Archivists preserve records to ensure materials are available in the long term.

**Key Responsibilities:**

1. Locate original materials produced in a variety of formats, including photographs, documents, recordings and film. This position preserves these materials in a digital format for long-term storage and preservation.
2. Organize records, using a process that involves cataloging them and preparing them for access if needed.
3. Write descriptions of the preserved records, which future Boards and members may use to locate materials.
4. Create multiple copies of source materials to provide the public with wider access to historical records.
5. Make suggestions for the implementation of new technologies that make historically significant documents more readily accessible to the Board.

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** 1-6 Hours per month

**Reports to:** President Elect

**Recommended Skills/Talents:** To perform these tasks, archivists generally possess the organizational skills required to manage large amounts of data and the interpersonal skills to assist Board members. Archivists typically also possess analytical and research abilities needed to determine which records are worthy of preservation.

## **WESTOP Board Manual – 2020-2021**

**Conference Chair:** The Conference Chair shall be responsible for planning and arranging for appropriate speakers and guests, registration, exhibits, hospitality, evaluation, and other activities as necessary. The conference site and date are selected by the Board who also approves the recommended theme and sets registration fees.

**Position:** This is a service council committee chair role whose priority is to oversee the planning and implementation of the annual WESTOP conference. Conference Co-Chairs are appointed by the President.

**Key responsibilities (\*Board Approval Requirement):**

1. Develop the Conference Master Plan
2. Establish a planning timetable
3. Advise on the conference theme
4. Select conference sub-committee chairs
5. Implement policies and guidelines as described in the Conference Manual such as:
  - a. Setting audiovisual equipment policy
  - b. Determine the approach to the technical and social programs and special events
  - c. Plan for membership involvement in the conference
  - d. Planning conference publicity and publications
  - e. Preparing a tentative budget: determining sources of funding and projecting costs
  - f. Selecting workshops and speakers
  - g. Establishing a management system for handling submitted papers, author correspondence, and requests for information
  - h. Making final arrangements with the conference hotel
  - i. Work within budget provided by the Board
  - j. Anticipate and manage contingencies identifying potential problem areas on an initial walk-through
  - k. Review conference arrangements with the hotel staff
  - l. Oversee the opening of registration
  - m. Be available to answer questions and resolve difficulties
  - n. Coordinate post-conference activities such as evaluations and reports to Board
  - o. Writing letters of appreciation
  - p. Settle all balances incurred on behalf of Conference Committee
  - q. Set the stage for the next year's conference

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** 6-10 Hours per week

**Reports to:** President

**Recommended Skills/Talents:** One of the co-chairs should have knowledge of the local area. Should have experience with major event planning at either the regional or chapter level.

## **WESTOP Board Manual – 2020-2021**

**Legislation & Education:** This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (e), (f), (g), **(h) and (i)**. Additionally, this committee shall make every effort to educate the Membership on pertinent legislative issues and the legislative process.

**Position:** Serve as WESTOP Service Council Legislation & Education Committee Chair. Researches and reports on any state and national legislation which has an impact on educational equity programs and/or first generation, low income students, or students with disabilities. The position also serves as the liaison between the Council for Opportunities in Education (COE) and WESTOP. The committee will be comprised of all chapter level chairs.

### **Key responsibilities:**

1. Keep WESTOP membership informed via email and in person at Association meetings on issues related to national and state legislation.
2. Provide information on proposed grant Request for Proposals (RFP). Assist membership in writing comments to address issues related to the preliminary RFP that would have a negative effect on educational equity programs.
3. Provide information on upcoming grant competitions.
4. Encourage membership to continue advocating for TRIO and the other educational equity programs while congressional representatives are at home.
5. Provide information about the annual COE Policy Seminar and promote attendance.
6. Support members who are interested in attending COE Policy Seminar by providing a template to request funding from their institutions.
7. Organize legislative teams and appoints team leaders for the COE Policy Seminar.
8. Provide assistance and training about how to schedule and conduct visits with the congressional representative.
9. Ensure that each Chapter completes the Fact Book and ensure accuracy.
10. Represent WESTOP at the annual COE Policy Seminar.
11. Participate in WESTOP committees as needed.
12. Prepare a detailed report of all activities conducted during Policy Seminar and send it to the President-Elect prior to the next Board meeting.
13. Prepare a written report seven days prior to the scheduled Association meetings and submit them to the President-Elect. This report must provide benchmarks on the progress of the Strategic plan related to this position and/or the President's goals for the year.
14. Participate in Strategic Planning for the Association.
15. Attend the WESTOP Conference.
16. Attend WESTOP meetings as requested by the WESTOP President.
17. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

**Elected by:** Appointed by the President and approved with the consent of the WESTOP Board

**Term Length:** 1-year

**Time commitment:** 5 hours a week during years of grant competitions; attend COE Policy Seminar

**Reports to:** President-Elect

**Recommended Skills/Talents:** Ability to articulate the Federal Policies, RFP's, seek advice from experienced grant writers/directors; send information to membership on how to make comments on proposed RFP's; good communicator and organizer for large groups to meet with federal representatives.

## **WESTOP Board Manual – 2020-2021**

**Membership & Elections:** This committee shall be responsible for actively promoting, recruiting and retaining Membership in WESTOP. This committee shall also be responsible for developing the procedures to be used in the election of directors, developing lists of individuals eligible to be nominated and vote, and overseeing the counting of votes. If the committee chair is a candidate for the WESTOP Board, the President Elect will Chair the Elections. This committee is also responsible for certifying to the Corporation the membership list according to membership category; to determine eligibility for purposes of participation in WESTOP activities; and to prepare and issue to WESTOP Members such cards, certificates, or other evidence of membership, if any, as the Board may direct.

**Position:** Serve as WESTOP Service Council Membership & Elections Chair. Promote and recruit personnel of equity and access programs with colleges that are not part of WESTOP Association. Overall see aspects of the election process. Election process includes: a current list of eligible candidates, familiarity with the voting process, and tallying ballots. The committee will be comprised of all chapter level chairs.

### **Key responsibilities:**

1. Promote, recruit, and retain membership information in the WESTOP membership.
2. Work with Chapter Membership and Elections Chair to conduct phone banking to institutions that are not currently WESTOP members in the Chapter.
3. Develop and update current procedures to be used in the election of the WESTOP Board Officers.
4. Oversee all elections procedures and ensure compliance of bylaws for elections.
5. Maintain a current list of paid WESTOP Members
6. Create and make available Membership Directory.
7. Processes memberships for new and renewing members and maintains accurate member records.
8. Provides membership fee information to CFO.
9. Sends a welcome letter to each new member with information on listserv, social media sites.
10. Collects demographics on new and renewing members and ensures that information is updated in member directory and member contact lists.
11. Manages annual membership drive from October through January of each year.
12. Coordinates dissemination of member application information at WESTOP and Chapter events.
13. Works with the Board of Directors in the mentoring of new members and request that they be acknowledges at their respective Chapter activities. As appropriate pairs new members with experienced WESTOP members.
14. Prepares a roster of members with contact information for the Board of Directors.
15. Reports on membership activity at each board meeting.
16. Prepare a written report seven days prior to the scheduled Association meetings and submit them to the President-Elect. This report must provide benchmarks on the progress of the Strategic plan related to this positions and/or the President's goals for the year.
17. Participate in Strategic Planning of the Association.
18. Participate in WESTOP Board Orientation and first WESTOP Board meeting of the year.
19. Participate in WESTOP Pre-Conference Board meeting. Attend the WESTOP Conference.
20. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
21. Participate in WESTOP End of Year/Transitional meeting held in May/June.
22. Attend WESTOP meetings as requested by the WESTOP President.
23. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

## **WESTOP Board Manual – 2020-2021**

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year position

**Time commitment:** 5 hours weekly

**Reports to:** President-Elect

**Recommended Skills/Talents:** Knowledgeable of benefits of being a WESTOP member, friendly, strong networker, and team builder. Familiar with how to navigate Cvent. Able to utilize publishing software such as Word, Publisher, and Adobe.

## **WESTOP Board Manual – 2020-2021**

**Position:** Public Relations Chair (**Bylaws Section 8.11. (4) Service Council Committees of Members**)

**Purpose:** Serves as WESTOP Service Council Public Relations Committee Chair. Identifies public relations opportunities and events to promote WESTOP, TRIO and other equity programs.

**Key responsibilities:**

1. Advise Board on strategies and development for various marketing communications channels and web presences including, electronic/social media (e.g. Facebook, Twitter, LinkedIn, etc.),
2. Contribute expertise to assist Board in establishing organizational marketing, branding and communication plans and initiatives.
3. Creative market outreach program to increase membership.
4. Create and disseminate WESTOP Online Newsletter on a quarterly basis i.e. September, December, March, and May of each year.
5. Create and or update WESTOP stationary to be used for the business of WESTOP
6. Assist with the marketing of the WESTOP Conference
7. Work with the Technology Chair to ensure the WESTOP website is accurate and up to date.
8. Provide articles to the Technology Chair to be uploaded on the WESTOP website.
9. Work with Research Chair and Resource Development Chair to development marketing materials that will be used for solicit corporate and private donors.
10. Gather news information from each Chapter to be uploaded on the WESTOP website.
11. Prepare a written report seven days prior to the scheduled Association meetings and submit them to the President-Elect. This report must provide benchmarks on the progress of the Strategic plan related to this positions and/or the President's goals for the year.
12. Participate in Strategic Planning of the Association.
13. Participate in WESTOP Board Orientation and first WESTOP Board meeting of the year.
14. Participate in WESTOP Pre-Conference Board meeting. Attend the WESTOP Conference.
15. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
16. Participate in WESTOP End of Year/Transitional meeting held in May/June.
17. Attend WESTOP meetings as requested by the WESTOP President.
18. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** The time commitment is approximately 2-4 hours per month

**Reports to:** President-Elect

**Recommended Skills/Talents:** Highly collaborative style; experience developing and implementing communications strategies; Excellent writing/editing and verbal communication skills; High energy, maturity, and leadership with the ability to serve as a unifying force; sincere commitment to work collaboratively with all constituent groups, including board members; self-starter, able to work independently, and entrepreneurial; enjoys creating and implementing new initiatives

## **WESTOP Board Manual – 2020-2021**

### **Professional Development**

**Purpose:** This committee shall specifically address itself to the concerns mentioned in Sections 2.2 (a) This committee shall be responsible for organizing and coordinating activities that enhance the professional development of WESTOP Members. This committee will also be responsible for organizing and coordinating of the pre-conference trainings at the Annual Conference.

#### **Key responsibilities:**

1. Chair the WESTOP Leaders Institute (WLI).
  - a. Overseeing and implementation of the Rising Leaders and Chapter President-Elect onboarding.
  - b. Develop curriculum
  - c. Set up meeting dates for online/web meetings and classes
  - d. Invite guest speakers
  - e. Assist the WLI in developing a project to be presented at the Annual Conference
2. Responsible for organizing and coordinating the recurring roundtables and Pre-Conference component of the Annual Conference.
3. Establish Small Groups designed to bring WESTOP members together around a variety of commonalities.
4. Work with Conference Chair and President on Pre-Conference
5. Prepare a written report seven days prior to the scheduled Association meetings and submit them to the President-Elect. This report must provide benchmarks on the progress of the Strategic plan related to this positions and/or the President’s goals for the year.
6. Manage RFP application process for Professional Development fund.
7. Participate in Strategic Planning of the Association.
8. Participate in WESTOP Board Orientation and first WESTOP Board meeting of the year.
9. Participate in WESTOP Pre-Conference Board meeting. Attend the WESTOP Conference.
10. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
11. Participate in WESTOP End of Year/Transitional meeting held in May/June.
12. Attend WESTOP meetings as requested by the WESTOP President.
13. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** The time commitment is approximately 5 hours weekly

**Reports to:** President-Elect

**Recommended Skills/Talents:** A Past President of WESTOP or Chapter President. Demonstrated leadership in WESTOP; this is an important position because the Emerging Leadership Institute was created for WESTOP succession planning and training of future leaders.



## **WESTOP Board Manual – 2020-2021**

**Position:** Technology Chair (**Bylaws Section 8.11. (7) Service Council Committees of Members**)

**Purpose:** Serves as WESTOP Service Council Technology Committee Chair. Provide technology information to membership, board, and service council.

**Key responsibilities:**

1. Maintain the WESTOP website.
2. Distribute technology tips and resources available to members.
3. Assist the President in maintaining and updating the WESTOP Listserv to aid in communication among board and membership.
4. Work with Public Relations on determining news articles and information that should be on the website.
5. Prepare a written report seven days prior to the scheduled Association meetings and submit them to the President-Elect. This report must provide benchmarks on the progress of the Strategic plan related to this positions and/or the President's goals for the year.
6. Participate in Strategic Planning of the Association.
7. Participate in WESTOP Board Orientation and first WESTOP Board meeting of the year.
8. Participate in WESTOP Pre-Conference Board meeting. Attend the WESTOP Conference.
9. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
10. Participate in WESTOP End of Year/Transitional meeting held in May/June.
11. Attend WESTOP meetings as requested by the WESTOP President.
12. Other duties as assigned by the WESTOP Board related to the overall purpose and the good of the Association.

**Elected by:** Appointed by the President and approved by the WESTOP Board

**Term Length:** 1-year

**Time commitment:** The time commitment is approximately 2-4 hours per week.

**Reports to:** President-Elect

**Recommended Skills/Talents:** Have basic knowledge of website design; creative and knowledgeable of the association information that is needed on the website for potential members, donors, sponsors and so forth.

## **WESTOP Board Manual – 2020-2021**

**TRIO Alumni:** The TRIO Alumni Committee shall have the responsibility for planning and implementing the expansion of the TRIO Alumni Society. It shall oversee the maintenance of the alumni database. The Committee shall facilitate alumni engagement at the regional and chapter level.

**Position:** This is an ad hoc committee chair role whose annual priority is to encourage the development of TRIO Alumni Societies. The chair works with the National TRIO Alumnae Society Chair and state alumni bodies wherever possible.

### **Responsibilities:**

1. Attend board orientation (September) and four (4) meetings: December, February, April and June.
2. Submit a budget request to president and finance committee for board approval.
3. Maintain and update the WESTOP TRIO Alumni database (to be purchased)
4. Coordinate access for state presidents to verify alumni in WESTOP registry
5. Act as a resource for suggestions for alumni activities and events
6. Promote and encourage the development of TRIO Alumni Societies in the region and member states.
7. Provide information and technical assistance to region about the establishment of TRIO Alumni Societies.
8. Plan for information tables and workshop(s) at conferences, state meetings and reunion events as appropriate.
9. Provide alumni information to WESTOP members
10. Develop and maintain a regional TRIO Alumni Newsletter (quarterly)
11. Assist COE TRIO Alumni Chair with implementation of goals.
12. Actively participate in and contribute to all board activities/ discussions
13. Contribute information from committee to newsletter as appropriate

Elected by: Appointed by the President and approved by the WESTOP Board

Term Length: 1-year

Time commitment: 3-6 Hours per week

Reports to: President-Elect

**Recommended Skills/Talents:** This person understands the importance of the TRIO Alumni database and organizing activities to keep TRIO Alumni network connected.

## **WESTOP Board Meetings**

Duties of the WESTOP President include determining the dates and locations of the Board meetings. This include but not limited to, site contracts, board agenda, and assist with Board travel (see President Duties).

### **Board Meeting Attendance**

WESTOP Bylaws Section 4.5. Removal of Director for Cause. The board may declare vacant the office of a director who has: (a) been absent from two Board meetings (absent is defined as missing more than 50% of a Board meeting). Therefore, it is imperative that the Directors attend the Board meetings.

### **Proxy Vote Note Allowed**

WESTOP Nonprofit status is filed in California and the Board must follow the rules of the state. California law sets forth several rules that only apply to directors of a nonprofit corporation. Directors must be present at a board meeting to vote and cannot vote by proxy. The Directors present at a board meeting can only have one vote per issue voted on. The Chapter Presidents may send a representative to report on behalf of the Chapter but attendance will not be counted towards meeting quorum nor will the representative be allowed to vote on action items. This rule will be enforced at all three states and US territories of WESTOP, (no matter the location of the Board meeting)

## **Bylaws Section 10.1. Annual Report**

The Board shall cause an annual report to be sent to the Voting and Non-Voting Members not later than 120 days after the close of the corporation's fiscal year. Such report shall contain in appropriate detail the following:

- (1) the assets and liabilities, including the trust funds, of the corporation as of the end of the fiscal year;
- (2) the principal changes in assets and liabilities, including trust funds, during the fiscal year;
- (3) the revenue or receipts of the corporation, both unrestricted and restricted to particular purposes, for the fiscal year;
- (4) the expenses or disbursements of the corporation, for both general and restricted purposes, during the fiscal year;
- 5) any information required by Section 10.2.

The Annual Report is be completed by the President and CFO of the prior fiscal year (July 1 to June 30) by September 30<sup>th</sup> of each year. Please review sections 10.1 and 10.2 of the Bylaws for additional details.

## **WESTOP Chapters**

**Section 3.3. Regulations of Operation.** The Chapters shall:

- (a) be governed by all provisions of WESTOP Bylaws,
- (b) keep current Membership rosters,
- (c) submit all operational budgets to the WESTOP Board of Directors for approval, and
- (d) provide written reports of current financial status of the Chapter and Membership update at each WESTOP Board of Directors meeting.

**Section 3.4. Membership.** All Members of the Chapters must be Members of WESTOP.

**Section 3.5. Officers.** Each Chapter shall have a Chapter President, who will chair chapter meetings, will act as spokesperson for the Chapter, and will be the Chapter Representative on the Board of Directors. The Chapters may have other officers similar to the WESTOP Board of Directors. Their duties and responsibilities shall be developed by each Chapter within the provisions of the WESTOP Bylaws. All Chapter officers shall be elected by the Membership of the respective chapter.

**Section 8.14 Chapter Committees of Members.** It is the task of each Chapter to have standing committees that reflect the Service Council committees. Members of these committees at the Chapter level will work with the Chairperson of the Service Council standing committees.

**Section 9.13. Special Provisions Relating to Election of Elected Directors.**

- (b) **Elections.** Elections shall be held at each annual meeting of the Membership. Board Members to be elected shall be:
- President
  - Elect Secretary (2-year term)
  - Chief Financial Officer (2-year term)
  - Chapter President Elects (6)

The office of President shall be automatically succeeded to by the preceding year's President-Elect. The office of Chapter President shall be automatically succeeded to by the preceding year's Chapter President Elect. The office of the Past President shall be automatically succeeded to by the preceding year's President. The office of the Chapter Past President shall be automatically succeeded to by the preceding year's Chapter President. The term of elected and appointed board members is two years and shall begin on the first day of the following fiscal year excluding the President, President Elect, Past President and Chapter President Elect.

Chapter Presidents Term

Year 1	Year 2	Year 3
President-Elect	Chapter President	Past-President

## **WESTOP Board Manual – 2020-2021**

### **Chapter Executive Board**

The Chapter Presidents are to bring a list of their Chapter Executive Board names and positions for approval at the August Board meeting. This approval acknowledges the Chapter Executive Board and provides authority to vote related to Chapter business.

### **Chapter President Elect Vacancy**

In the event, that a Chapter President Elect is vacant prior to taking office, the Chapter President will remain as Chapter President until the Chapter is able to vote on a new Chapter President Elect or Chapter President depending on the vacant position. The voting must take place within 60 days of the resignation.

### **Chapter Past-President Vacancy**

In the event, that the Chapter Past President is vacant prior to completing the term of office, it is recommended that the Chapter President appoint this position to a former Chapter Past President. If no former Past Presidents are able to take on the duties of this position, the Chapter President may either leave the position vacant or assign a Chapter member to complete the duties of this position.

### **WESTOP Conference Rotation**

Beginning 2018, the WESTOP Conference will be hosted by the Pacific Island Chapter every four (4) years. The following is the rotation schedule of WESTOP Conferences:

2018	Pacific Islands
2019	Arizona
2020	Southern California
2021	Virtual/ Northern California
2022	Pacific Islands
2023	Nevada
2024	Central California
2025	Arizona
2026	Pacific Islands

### **Peggy J. Whitehead Scholarship**

Mrs. Peggy J. Whitehead began her career with the U.S. Department of Education in 1965. For the following 37 years, she worked tirelessly for the good of TRIO students until her retirement in 2002. To recognize and honor Peggy's commitment and dedication to TRIO students, the Western Association of educational Opportunity Personnel (WESTOP) created the Peggy J. Whitehead Scholarship Award to assist TRIO high school seniors with their educational goals.

*The scholarship is to follow the WESTOP Conference rotation schedule.*

### **WESTOP Founder's Award Scholarship Application** **(TRIO/EOP POST-SECONDARY ENROLLED STUDENTS)**

Every year, professionals convene at the annual WESTOP conference to participate in professional development activities that are designed to propel conference attendees to the next level as we serve participants enrolled in college access and success programs. The WESTOP Founder's Scholarship (formerly known as the Post-secondary Award Scholarship) selects one college student from applicants who exemplifies participation, tenacity and dedication throughout their participation in a TRIO/Educational Opportunity Program (EOP). College students could be graduating in Spring 2020 or be continuing college participants in a TRIO/EOP program.

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### WESTOP Past Presidents

Dr. Charles Ratliff  
President 1978-79 and 1979-80  
California State University, Long  
Beach

Robert Norris  
President 1980-81  
University of San Francisco

Keith Hori  
President 1981-82  
University of California, Berkeley

David Godoy  
President 1982-83  
California State University, Los  
Angeles

Dr. Juan Mestas  
President 1983-84 and 1987-88  
San Jose State University

Michael Dang  
President 1984-85  
Asian-American Communities for  
Education

Sandy Matsui  
President 1985-86 and 1989-90  
California State University,  
Bakersfield

Dr. Harold Campbell  
President 1986-87  
California State University, Hayward

Janice Dirden-Cook  
President 1988-89 and 1991-92  
University of San Francisco

Munyiga Lumumba  
President 1990-91  
University of California, Berkeley

David Ferguson  
President 1992-93  
California State University, Chico

Sergio A. Lopez  
President 1993-94  
Imperial Valley College

Cheryl Arnold-Moore  
President 1994-95  
California State University, Long  
Beach

Denise K. Benton  
President 1995-96  
California State University, San  
Bernardino

Adrian Tanakeyowma  
President 1996-97  
Northern Arizona University

Dr. Connie Baker  
President 1997-98  
San Jose State University

Joe Ramirez  
President 1998-99  
California Lutheran University

Gerald Bryant  
President 1990-00  
University of the Siskiyous

D. Matthew Benny  
President 2000-01  
Embry-Riddle Aeronautical University

Leonard Woods  
President 2001-02  
University of Nevada, Reno

Irvin L. Coin  
President 2002-2003  
Arizona State University

Darlene Conwell  
President 2003-04  
University of San Francisco

James Oda  
President 2004-05  
Leeward Community College

Jose Martinez-Saldana  
President 2005-06  
California State University Monterey

Lydia Perez  
President 2006-07  
Arizona State University

Dr. Joy Brittain  
President 2007-08  
Pasadena City College

Tomasa Mauricio  
President 2008-09  
San Diego State University

Michele Scott  
President 2009-10  
California State University, Long  
Beach

Ralph Topete  
President 2010-11  
Edvolution, Inc.

Donelle Davis  
President July 2011  
University of California, Davis

Sergio Galvez  
President 2011-12 and 2012-13  
California Lutheran University

Olga Diaz  
President 2013-2014  
Arizona Department of Transportation

Anita Blanco  
President July 2014-January 2015  
Stanford University

Cristina Aguirre  
President 2014-15 and 2015-16  
Barrio Logan College Institute

Dr. Diana Tapia-Wright  
President 2016-17  
Reedley College

Samuel Blanco III  
President 2017-18  
University of California, Davis

Michelle Thomas  
President 2018-19  
Arizona Western College

Bernardo Reynoso  
President 2019-2020  
Fresno City College

## WESTOP Board Manual 2020 - 2021

### STEVE HOLEMAN AWARD

In 1979, the “It’s Tough to be a Director Award” was initiated to honor our most senior directors. When Steve Holeman, one of WESTOP’s founders, passed away in 1983, the award was amended to honor his legacy. The award now acknowledges the accomplishments of directors of educational equity programs who have demonstrated continuing dedication to the cause of excellence and equity, who show concern for the development of their students’ potential and who demonstrate professionalism in the administration of their programs.

#### IT’S TOUGH TO BE A DIRECTOR AWARD PAST RECIPIENTS

1979	Lack Lima	Upward Bound, Humboldt State University
1980	Arturo Oosterveen	Upward Bound, University of California, Santa Barbara
1981	Octavio Boubion	Upward Bound, Harvey Mudd College
1982	Charlene Folsom	Educational Talent Search, PACT San Francisco

#### STEVE HOLEMAN AWARD PAST RECIPIENTS

1983	Keith Hori	Upward Bound, University of California Berkeley
1984	Robert Norris	Upward Bound, University of San Francisco
1985	Dr. Juan Mestas	Upward Bound, San Jose State University
1986	Dr. Charles Ratliff	Educational Opportunity Program, California State University, Hayward
1987	Rosalie Lopez	Upward Bound, Imperial Valley College
1988	Dr. Sylvia Lopez-Romero	Educational Opportunity Program, California State University, Chico
1989	Janice Dirden-Cook	Upward Bound, University of San Francisco
1990	David Ferguson	Upward Bound, California State University, Chico
1991	Mary Anne Hamann	College Readiness, Monterey Peninsula College
1992	Lawanda McCullon	Upward Bound, Mills College
1993	Yoichi Rengil	TRIO Programs, University of Guam
1994	Jack Rolinger	Student Support Services, Phoenix College
1995	Irvin L. Coin	Upward Bound, Arizona State University
1996	Melvin Yoshimoto	Student Support Services, University of Hawaii, Manoa
1997	Dr. Connie Baker	ASPIRE/McNair, San Jose State University
1998	Sandi Matsui	TRIO Programs, Windward Community College
1999	Dr. Cynthia Park	Pre-College Program Institute, San Diego State University
2000	Robert Zuniga	Upward Bound, East Los Angeles College
2001	Cornelia Anguay	Upward Bound, University of Hawaii, Hilo
2002	Loretta Enriquez-Najera	Educational Talent Search, Imperial Valley College
2003	Norris Sanders	Educational Talent Search, University of California, Berkeley
2003	Denise Benton	Upward Bound, California State University – San Bernardino
2004	Maria Godoy	Upward Bound, California State University, Los Angeles
2005	Susan Madrid-Simon	Upward Bound, Occidental College
2006	Ron Muriera	Upward Bound, Japanese Community Youth Council
2007	Dolores Diaz	Educational Talent Search, Imperial Valley College
2008	Ping Chan	Upward Bound, University of California, Davis
2009	Liane Richelieu-Boren	College Options/Educational Talent Search, University of California, Davis
2010	Martina Granados	Upward Bound, California State University, Fresno
2011	Gustavo Ocegueda	TRIO Programs, Norco College
2012	Michele Scott	Educational Opportunity Center, California State University, Long Beach
2013	Emalyn Lapus	AACE Talent Search and SF College Access Center, Japanese Community Youth Council
2014	Dr. Joy Brittain	Early Outreach and Support Programs, California State University, Monterey
2015	Leonard Woods	TRIO Student Success Programs, University of Hawaii, Hilo
2016	Cesar Velasquez	Upward Bound, California State University – Monterey, Ca
2017	Lydia Perez	Student Support Services, Mesa Community College
2018	Sara Boquin	Upward Bound Program, Barrio Logan College Institute
2019	Matt Benney	Associate Vice President Student Affairs, Sonoma State University
2020	Norma Romero	Upward Bound, Loyola Marymount University

## **WESTOP Board Manual – 2020-2021**

### **WESTOP Walter O. Mason, Jr. Award Recipients**

**2018** – Dr. Joy Brittian, Senior Director, Early Outreach and Support Program, California State University, Monterey Bay

**2017** – Michele Scott, Director, Educational Opportunity Center, California State University-Long Beach

**2016** – Yoichi K. Rengiil, Director, TRIO Programs, University of Guam, Mangilao, Guam

**2012** – José Martínez-Saldaña, President and Founder, EDvolution, Inc.

**2010** – Cynthia Darché Park, Professor, College of Education, and TRIO Director, Pre-College Programs, San Diego State University, San Diego, CA

**2008** – Irvin L. Coin, Director of TRIO Programs, Arizona State University, Tempe, AZ

**2005** – William W. Sullivan, Associate Vice President for Retention and Outreach, University of Nevada, Las Vegas, and Executive Director, Center for Academic Enrichment and Outreach, Las Vegas, NV

**1997** – Monte Perez, President, Perez & Associates, Tucson, AZ