



Board Manual 2025-2026

**Serves Educational Equity Professionals to Ensure and
Advocate for Educational Opportunity**

WESTOP.ORG

<i>Table of Contents</i>	2
Introduction WESTOP Board Manual	4
WESTOP	
Vision, Mission and Values	5
Strategic Plan	6
History of WESTOP	7
Board Orientation	9
WESTOP Board Organizational Chart	10
Responsibilities of the WESTOP Board	
Basic Responsibilities	11
Fiscal Management	11
Internal Controls	11
Preventing Internal Fraud	12
Board Requirements	12
Nonprofit Board Regulations	12
WESTOP Board Purpose and Responsibilities	
President	13
President-Elect	15
Past President	16
Chief Financial Officer	17
Chief Financial Officer-Elect	18
Secretary	19
Parliamentarian	20
Chapter President	21
WESTOP Standing Board Committees	
Committee Structures Based on Bylaws	23

Committee Purpose	23
WESTOP Service Council	
Service Council Standing Committees	26
Archives	27
Conference	28
Equity, Diversity, and Inclusion	29
Legislation and Education	30
Membership and Elections	31
Public Relations	32
Professional Development	33
Technology	34
TRIO Alumni	35
Resource Development	39
WESTOP Board Meetings	36
WESTOP Annual Report	37
WESTOP Chapters	38
WESTOP Conferences	39
WESTOP Conflict of Interest Policy	46
WESTOP Code of Conduct	50
WESTOP Whistleblower Protection Policy	52
Appendix	
Past Presidents 1979-2022	54
Steve Holeman Award Past Recipients	55
WESTOP Region: COE Walter O. Mason, Jr. Award Recipients	56

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 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.¹

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).²

¹ www.Orgwise.ca

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

WESTOP

Vision, Mission and Values

The 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



Western Association of Educational Opportunity Personnel Strategic Plan 2022 – 2025
Approved May 2022

Goal #1: PROFESSIONAL DEVELOPMENT: Provide opportunities for college access and success professionals at all levels, which enhances knowledge and expertise in advocacy, diversity, educational equity, and social justice.

Objectives:

1. Grow and advance the leadership potential and skills of members through the WESTOP Leadership Institute.
2. Provide workshops, seminars, conferences, and mentoring opportunities for college access and success professionals, which support members' personal and professional growth.
3. Establish a process that ensures equity, diversity, and inclusion are at the forefront of professional development.
4. Create and maintain a repository of best practices to highlight successful program practices.
5. Develop a directory of WESTOP members with expertise in different areas.

Goal #2: TECHNOLOGY: Utilize technology to enhance communication, support professional development, streamline WESTOP operations, and connect members.

Objectives:

1. Invest in technologies that will enable WESTOP to provide high-quality hybrid, virtual, and in-person meetings.
2. Produce a style guide for all communications, including social media campaigns.
3. Select and maintain social media management software to manage social media and public relations.
4. Strengthen the focus and functionality of all WESTOP communication.
5. Develop and maintain a membership portal system that allows access to records, member-only services and events, and financials.

Goal #3: FINANCES: Strengthen WESTOP's strategic and financial position to ensure sustainability and future advancement.

Objectives:

1. Update the Fiscal and Accounting Policies (FAP) Manual to include WESTOP's policies and procedures related to electronic financial transactions and fiscal matters.
2. Form strategic partnerships with programs and organizations that will benefit WESTOP.
3. Refine membership benefits for each level of WESTOP membership.
4. Grow revenues from sponsorships and conference exhibitors each year.
5. Create systems that allow ease of access for donations and payments to WESTOP.
6. Enhance the scholarship program that will benefit WESTOP members.

Goal #4: ENGAGEMENT: Increase member participation in WESTOP through creating a sense of belonging, networking opportunities, and improved marketing.

Objectives:

1. Increase WESTOP's involvement with internal and external constituencies.
2. Provide onboarding for new members that includes welcome materials that address the history, benefits, and opportunities within WESTOP.
3. Select previous Rising Leaders' graduates for service in WESTOP positions during the period immediately following program completion.

4. Establish networking opportunities for professionals at all levels.
5. Create a system to connect members to volunteer opportunities within WESTOP.
6. Highlight the success of alumni to increase WESTOP visibility and advocacy efforts.

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 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.

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 universities 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’s 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’s Annual Conference at Honolulu, HI held the largest attendance in the history of WESTOP with 555 registered attendees.

2018 - The FY18 omnibus appropriation gave 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 – and is the first time in the history of TRIO of reaching a billion dollars in funding.

2021 - Due to the COVID-19 pandemic, travel bans placed on TRIO/equity personnel, and with government imposed social distancing, WESTOP held its first-ever virtual conference. The 43rd Annual Conference hosted over 600 attendees, making it the largest attendance ever for the Association. WESTOP launched the inaugural Rising Leaders Institute (formerly Emerging Leaders Institute) with 26 participants from all six chapters. The Equity, Diversity, and Inclusion Ah-hoc committee was approved as a permanent Service Council.

2023 – WESTOP formally adopts a Member Code of Conduct.

2025 - WESTOP held its first ever out-of-region Annual Conference in Portland, Oregon. The 47th Annual WESTOP Conference with the theme **Legacy of Growth: Building Tomorrow's Leaders Today** was held from March 2-5, 2025.

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.

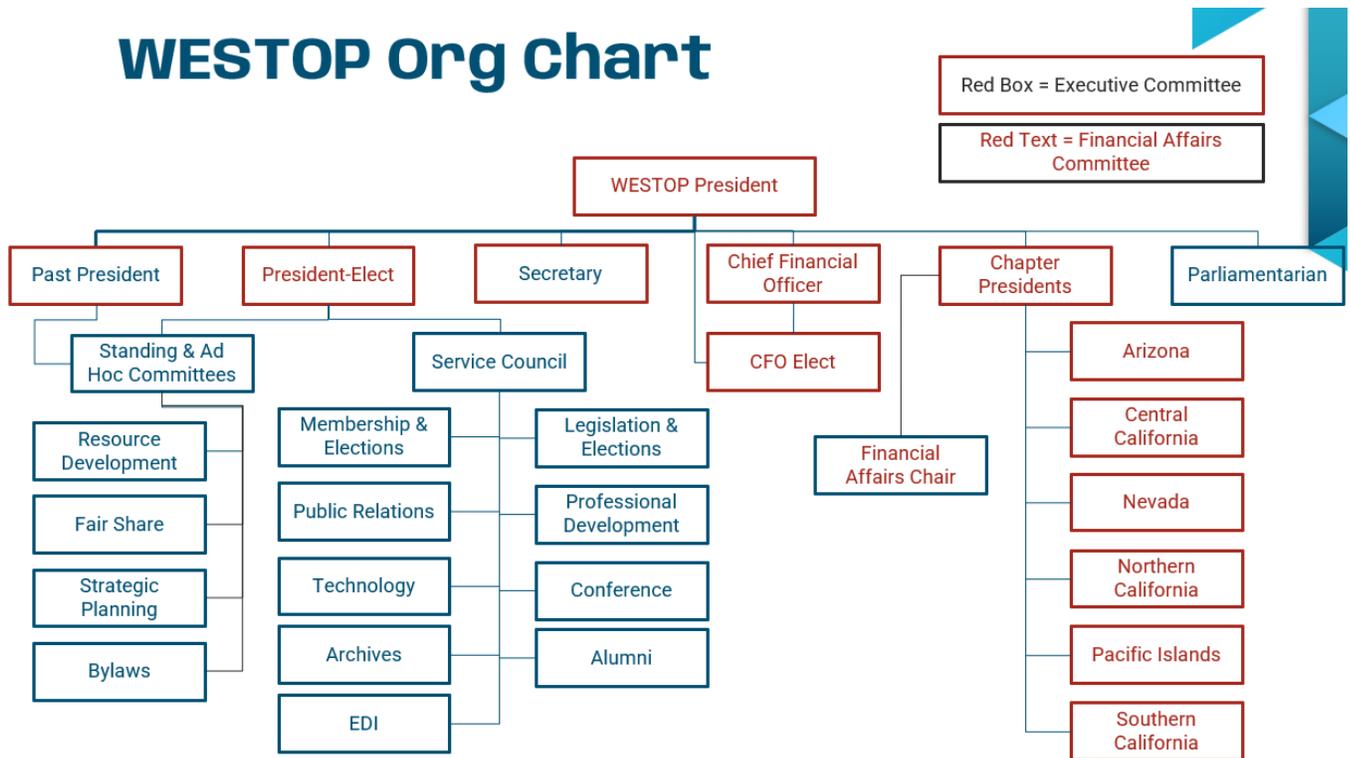
Board Orientation Training should include a binder or cloud-based storage with the following information:

- 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 2024-25

WESTOP Org Chart



Red Box = Executive Committee
 Red Text = Financial Affairs Committee

PRESIDENT, PRESIDENT-ELECT, PAST PRESIDENT, CHIEF FINANCIAL OFFICER, CHIEF FINANCIAL OFFICER ELECT, SECRETARY, CHAPTER PRESIDENTS, PARLIAMENTARIAN, SERVICE COUNCIL, STANDING COMMITTEES AND AD HOC COMMITTEES

Responsibilities of the WESTOP Board

WESTOP is a Nonprofit Board (501c3 Number 94-2865220). 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 Requirements³

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 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 ensure 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.

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.

³ Guide for Charities, California Attorney General, 2005

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.

Statement of Information - California Secretary of State

The Statement of Information (Form SI-100) with the California Secretary of State, which updates WESTOP's list of officers and addresses, must be filed annually by October. Please use the following links for guidance during the filing process:

- General site for Statements of Information Filing Tips:
<https://www.sos.ca.gov/business-programs/business-entities/statements>
- To update officers and addresses:
<https://bizfileonline.sos.ca.gov/>

It is the board's responsibility to act ethically and with 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 purposes 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 the 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 the CFO on preparing and submitting an Association budget at the May/June WESTOP Board meeting for approval. The budget must include both projected and actual expenses for the calendar year. Review the current budget and consult with the Executive Board as necessary.
6. Provide a President's report, including 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 achieving 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. Assembles a working group of WESTOP Directors, Past-Presidents and Conference Chairs to seek bids for future WESTOP Conference, three years in advance, 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 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.

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 (weeklong) 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

President's 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 support the activities of the WESTOP membership.

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 the association's objectives, activities, procedures and services.

Key responsibilities:

1. Work with the President for direction on goals and objectives of each position, especially how they relate to the Strategic Plan. Ensure that the Service Council turns in Board reports seven days prior to the 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 the President in forming 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 a post-conference meeting with the 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)

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. Maintain a file of current Bylaws and Board Manual of the Association.
2. Assist and function as a resource on Bylaws for the Board.
3. Recommend changes to WESTOP Board Manual.
4. Recommend amendments to WESTOP Bylaws which are to meet the needs of the Association.
5. 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 the Board before submission to the Membership for Adoption vote.
6. 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.
7. 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. Work with the Membership and Elections Chair to verify who is able to vote for the proposed changes in the Bylaws.
8. Report on the results of the Bylaws changes proposed at the Annual WESTOP Banquet.
9. Transfer files to the new Past-President upon completion of term.
10. 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.
11. Serve on the WESTOP Professional Development committee and assists the Professional Development Chair on the implementation of the Emerging Leadership Institute.
12. Attend Association meetings, executive committee meetings, and conference calls.
13. Prepares a written report seven days prior to scheduled Association meetings and submit them to the President.
14. Ensure that we are up to date as a nonprofit organization.
15. Support the President Elect on WESTOP the strategic plan.
16. Any other duties and tasks as assigned by the President, which are 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 the 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

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 submission 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 the 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 requests 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.
13. 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 may be held on a web/conference call.
2. Attend the WESTOP Conference.

Reports to: President

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

Position: Chief Financial Officer-Elect (CFO-Elect) (**Bylaws Section 7.8. Chief Financial Officer-Elect Powers and Duties**)

Purpose: CFO-Elect works closely with the CFO to acquire the skills, competencies, and knowledge of the association’s finances, activities, and procedures.

Key Responsibilities:

1. To work closely with the Chief Financial Officer to acquire the skills, competencies, and knowledge of WESTOP objectives, activities, procedures, and services,
2. In case of vacancy of the Chief Financial Officer, the Chief Financial Officer-Elect will succeed to the office of the Chief Financial Officer for the remainder of that term of office as well as for his/her subsequent term of office as Chief Financial Officer,
3. To serve on the Financial Affairs committee,
4. To serve on the Executive committee,
5. Generally, to exercise such other powers and duties as may be prescribed by the Board, and
6. To perform other duties as assigned by the President as needed.

This is a non-voting position on the Board of Directors.

Elected by: WESTOP Members during the WESTOP conference.

Term Length: 1 year

Time commitment: 1 year total

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

Reports to: President

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

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

Purpose: The Secretary is responsible for ensuring accurate written and sufficient 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), list 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. Maintain orderly records of activities and timelines relevant to his/her position during the term and
5. Provide a copy via email of unapproved and approved minutes to members upon request.
6. 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 conference 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 may be held on a web/conference call.
2. Attend the 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.

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, and 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 assists the President during Association meetings in matters of parliamentary procedure.
7. Intercede during Association meetings to ensure proper procedures are being observed.
8. Provide a request for motion form. If a motion form is passed, ensure that the wording of every motion is clear before being stated and for the 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 term" is appointed in the absence of the parliamentarian. "Pro term" means "for this time only."

Term Length: 1-year

Time commitment:

1. Four Association Board meetings annually. Additional meetings may be held on a web/conference call.
2. Attend the 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.

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. As part of their key responsibilities, current chapter presidents should abstain from running for the position of WESTOP President until their chapter term has concluded.

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 ad hoc committees as needed to meet Chapter goals for the year.
3. Plan, organize and facilitate meetings and chapter activities with chapter executive board.
4. President 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 the 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 meetings held at the Chapter region.
10. Submit Chapter budget to the WESTOP Board for approval during the May/June Board meeting. The budget must be reviewed with the Treasurer, and it should reflect projected expenses for next fiscal year.
11. Provide a Chapter President's report at the WESTOP Board meeting. Reports must be sent seven days prior to meetings and must cover; Chapter News, Chapter Activities Related to WESTOP's Strategic Plan, and Financial Status.
12. Work with the Treasurer to ensure that all financial information is forwarded to the WESTOP Chief Financial Officer in a 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 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 may be 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

Elections

WESTOP Elections Timeline

4 Months Before Conference - Notification sent to listserv and social media that nominations will be coming soon and a description of which offices are up for election.

3.5 Months Before Conference - Reminder that nominations will open on. preselected date.

3 Months Before Conference - Nominations application sent out on listserv, email, etc. Notification of absentee voting/proxy procedures.

Every week following - fliers, videos, etc. to entice nominations.

2 Months Before Conference - Nominations are due.

1 Month Before Conference - Confirm acceptance of nominations due, and platform questions sent to candidates.

2 weeks Before Conference - Platform statements are due and published to listserv. Absentee ballot request due to Membership and Elections Chair.

Members of the WESTOP Board of Directors and Service Council should not be nominated or self-nominated for any vacant positions until they have completed their current term.

WESTOP Elections Procedures

Prior to in-person voting

Absentee ballot requests will be sent two to three weeks prior to the first day of the conference with a deadline of at least three days before the actual voting begins. All members that request absentee ballots will receive instructions on when and how to submit their votes. Candidate platform statements will be emailed out and/or posted to the app for review. The ballot will be e-mailed at the morning of voting.

If/when voting software is being used, absentee ballots will not need to be requested as members that are not in attendance at the conference will have access to the voting process through the voting software.

Prior to the conference, members will be notified that if they intend on nominating someone from the floor, it can only be done on day 1 of the conference and the platform statement must be submitted by midnight before the candidate's forum.

An elections/voting table will be set up in an easily accessible and visible area location with high foot traffic.

Each candidate will be allowed to have a copy of their platform statement as well as a photo at the table (all in the same template as to not influence voters).

During Conference

Day 1(Opening Session) - Nominations from the floor. NO NOMINATIONS AFTER DAY 1.

Day 2 (Full day)- Candidate’s Forum, Candidates must read their platform statements and take questions at the Candidate Forum. (Statement template/questions should be followed). Written platform statements from candidates nominated from the floor, published on listserv. Candidates have the option to speak at chapter meetings on Day 2.

Day 3 - (Full day) Voting after the meeting of the members. Absentee ballot email sent. Results announced at the evening event.
Volunteers at the Elections Table must remain neutral.

Day 4 - Installation of Officers

Voting process

- One device (laptop, Chromebook, iPad, tablet) will be set up per chapter.
- An updated list of all active voting members will be printed and distributed to the elections table volunteers.
- Once a member is verified as an active voting member, they will be allowed to vote anonymously via an online platform. The elections volunteer will check them off the list.
- Members will be allowed to vote for a candidate or write in an alternative candidate.
- No campaigning or campaign materials will be allowed within 50 ft of the voting site. Candidates who are found breaking this rule will automatically forfeit their candidacy.
- Once the member has voted, they will be given a pin or sticker.

Counting Votes

- All six Chapter Membership and Elections Chairs and WESTOP Membership and Elections Chair meet to certify election results immediately following the close of the elections.
- If a chapter does not have a M&E chair, the chapter president should appoint someone (not from any candidate’s institution) prior to the time of counting votes to stand in.
- The candidate who receives a majority of the votes will be declared the winner.
- In the event of a tie, the executive board members (President, Past President, President-Elect, chapter presidents, Chief Financial Officer) as representatives of the voting members, will break the tie in a secret ballot.

The results will be sent to the memberships and elections chairs to ratify the vote.

- In order for a write-in candidate to be declared a winner, they must receive a majority of votes.
- The WESTOP president will contact the winner and information of the results and ask if they accept the position.
- If the write in candidate does not accept the nomination, the position will be declared vacant and bylaws for filling the position will be followed.
- The Board of Directors reconvene Board Meeting for ratification of election results. Immediately after the ratification of the results, the WESTOP President will contact candidates to reveal results.
- Announcement of Results
- Once the vote is ratified, the WESTOP president will contact candidates and inform them of the results.
- Members will be notified of results at the President’s banquet. Following the official announcement, an email will be sent to all WESTOP members informing them of the results.

Swearing-in

The Swearing-in ceremony for WESTOP Board and Service Council members must be presided over by a President’s Council member(s). This duty shall not be delegated to any member or non-member who has not served as a WESTOP President.

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

Standing Board Committees	Function <u>Section 8.10. (a) Board Committees of Members.</u>
Executive Committee	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.

<p>Financial Affairs Committee</p>	<p>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.</p>
<p>Strategic Planning Committee</p>	<p>The Past President shall chair this committee. The voting Members of this committee shall consist of the Chapter Presidents; the non-voting, and other members as appointed by the President.</p>
<p>Bylaws Committee</p>	<p>The Past President shall chair this committee. 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.</p>
<p>Fair Share Committee</p>	<p>The President Elect shall chair this committee. 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.</p>

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.

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 the 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 an online seminar/conference call) and have a thorough understanding 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 to 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 are 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 the President. This report must provide benchmarks on the progress of the Strategic plan related to this target goals.
10. Participate in the WESTOP Pre-Conference Board meeting.
11. Attend the WESTOP Conference.
12. Prepare a Meeting of the Members Report to highlight the accomplishments of this committee.
13. Participate in the WESTOP End of Year/Transitional meeting held in May/June.
14. Attend WESTOP meetings as requested by the WESTOP President.
15. 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.”

Standing Service Council Committees	Function
Archives	The Archive Committee shall be responsible for collecting records of the WESTOP organization. It shall have the responsibility of encouraging WESTOP officers, past and present, to transfer essential records to the WESTOP Archives. WESTOP and Chapter Secretaries and CFOs are part of this committee.

Annual Conference	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.
Equity, Diversity & Inclusion (EDI)	The EDI committee shall have the responsibility to review and make recommendations to the full Board regarding issues of equity, diversity, and inclusion. The committee shall facilitate equity, diversity, and inclusion by setting the tone for shaping a diverse and inclusive environment for WESTOP members, at the regional and chapter levels, through collaboration, research, education, and professional development.
Legislation and 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.
Membership and 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.
Public Relations	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.
Professional Development	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 the pre-conference trainings at the Annual Conference.
Technology	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.
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.
Resource Development	The Resource Development Committee shall have the responsibility for implementation and planning of resource development initiatives at the guidance of the President and WESTOP Board of Directors.

WESTOP Service Council Purpose and Responsibilities

Archives Chair (Section 8.11. (7) Service Council Committees of Members)

Purpose: The Archivist shall be responsible for collecting records of the WESTOP organization. It shall have the responsibility of 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.

Conference Chair (Section 8.11. (6) Service Council Committees of Members)

Purpose: 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

1. Develop the Conference Master Plan
2. Establish a planning timetable
3. Advise on the conference theme
4. Select conference subcommittee 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 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.

Equity, Diversity, and Inclusion (Section 8.11. (9) Service Council Committees of Members)

Purpose: This committee shall have the responsibility to review and make recommendations to the full Board regarding issues of equity, diversity, and inclusion. The committee shall facilitate equity, diversity, and inclusion by setting the tone for shaping a diverse and inclusive environment for WESTOP members, at the regional and chapter levels, through collaboration, research, education, and professional development.

Position: The chair is charged with setting the tone for shaping a diverse and inclusive environment for WESTOP members – both at the chapter and regional levels – through collaboration, education, professional development and policies.

Key Responsibilities:

1. Assist the WESTOP Board in collecting and analyzing data concerning the professional needs of members from diverse backgrounds.
2. Finds ways to provide opportunities for positive and appropriate interactions (both social and professional) among members from diverse backgrounds.
3. Help Conference Committee Chairs ensure that the annual conference addresses issues of equity, diversity, and inclusion, as well as the cultural needs of our members.
4. Responds to requests from the WESTOP Board and Conference Committee Chairs seeking names of speakers and presenters from diverse backgrounds.
5. Serves as a liaison for WESTOP members from diverse backgrounds, disseminating information to the Board and vice versa.
6. Recruits new members to build a robust pool of energetic committee members who will contribute to the committee's ability to carry out its charge.
7. Develops policies, strategies and goals for a more inclusive and equitable association at the chapter and regional level.

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

Term Length: One year position

Time commitment: 1-2 hours a week; attend WESTOP Conference

Reports to: President-Elect

Recommended Skills/Talents: Knowledgeable of EDI related topics, research, etc.; ability to successfully articulate EDI issues to internal and external constituents; and possess good communication and organization skills for successful member engagement.

Legislation & Education (Section 8.11. (2) Service Council Committees of Members)

Purpose: 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 in how to schedule and conduct visits with the congressional representative.
9. Ensure that each Chapter completes the Fact Book and ensure accuracy.
10. Representing 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 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.

Membership & Elections (Section 8.11. (1) Service Council Committees of Members)

Purpose: 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 composed 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 renewed members and maintains accurate member records.
8. Provides membership fee information to the 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 mentoring new members and requests that they be acknowledged at their respective Chapter activities. As appropriate, 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 position 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 the 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 the WESTOP End of Year/Transitional meeting held in May/June.

22. Attend WESTOP meetings as requested by the WESTOP President.
23. Other duties 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 position

Time commitment: 5 hours weekly

Reports to: President-Elect

Recommended Skills/Talents: Knowledgeable of the 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.

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 the 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 update WESTOP stationery 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 develop marketing materials that will be used for soliciting 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 these 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 the 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 the WESTOP End of Year/Transitional meeting held in May/June.
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 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.

Professional Development (Section 8.11. (4) Service Council Committees of Members)

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 the pre-conference training at the Annual Conference.

Key Responsibilities:

1. Chair the WESTOP Rising Leaders Institute (RLI).
 - a) Overseeing and implementation of the Rising Leaders and Chapter President-Elect onboarding.
 - b) Developing curriculum
 - c) Set up meeting dates for online/web meetings and classes
 - d) Invite guest speakers
 - e) Assist the RLI 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.

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 the 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. 10. Participate in the WESTOP End of Year/Transitional meeting held in May/June.
11. Attend WESTOP meetings as requested by the WESTOP President.
12. Other duties 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.

TRIO Alumni (Section 8.11. (8) Service Council Committees of Members)

Purpose: 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.

Key Responsibilities:

1. Attend board orientation (September) and four (4) meetings: December, February, April and June.
2. Submit a budget request to the 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 the 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 the TRIO Alumni network connected.

Resource Development (Section xx (x) Service Council Committees of Members)

Purpose: This committee shall be responsible for identifying and obtaining external resources to support the function of the Association.

Key Responsibilities

1. Work with the President-Elect to achieve the resource development goals for the year.
2. Report on progress of resource development goals to the President
3. Work with Chapter Resource Development Chairs on regional and chapter initiatives.
4. Work with Conference Chairs to coordinate resource development activities, partner relations, exhibits, and sponsorships
5. Support conference through solicitation of exhibitors, sponsors, and strategic partners.
6. Track exhibitor and sponsorship contributions yearly
7. Research and apply for external grant opportunities at the direction of the President with the support of the BOD Executive Committee
8. Work with Past-President on policies and procedures to solicit corporate sponsorships
9. Contribute to WESTOP Strategic Plan resource development goals
10. Any other duty and task as assigned by the President, which is related to the overall purpose of the good of the Association.

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

Term Length: 2-Year

Time commitment: 6-10 Hours per week

Reports to: President-Elect

Recommended Skills/Talents: Ability to develop and maintain relationships with new and continuing partners. Strong communication skills. Ability to negotiate with partners and sponsors on behalf of WESTOP. Can provide guidance to chapters on resource development strategies.

WESTOP Board Meetings

Duties of the WESTOP President include determining the dates and locations of the Board meetings. This includes but not limited to, site contracts, board agenda, and assisting 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 U.S. 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 to be completed by the President and CFO of the prior fiscal year (July 1 to June 30) by September 30th 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 offices similar to the WESTOP Board of Directors. Their duties and responsibilities shall be developed by each Chapter within the provisions of 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)
 - Chief Financial Officer-Elect (1-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

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

The WESTOP Board of Directors will assess the top three WESTOP Annual Conference destinations

WESTOP Board Manual – 2025-2026

to streamline the selection process and maximize conference attendance and participation. The new conference rotation takes effect beginning spring 2027.

2022 Pacific Islands (Kona, HI)
2023 Nevada (Reno, NV)
2024 Central California (San Jose, CA)
2025 Arizona (Portland, OR)
2026 Pacific Islands (O’ahu, HI)
2027 SoCal (San Diego, CA)

Conference Locations 2028-2032

2028 Reno, NV
2029 California
2030 Nevada
2031 Arizona
2032 Hawaii

Hotel Contracts

Site selection, all terms of WESTOP engagement, and all negotiations are the sole responsibility of the President and designated Conference pre-planning site committee. These duties cannot be delegated to any entity outside of WESTOP. This requirement is uniformly applicable to all WESTOP Chapters.

Hotel Points

Hotel points earned as a result of any WESTOP event are property of WESTOP. All contracts should include the WESTOP loyalty program corporate account number/information associated with WESTOP and have an email that ends with the westop.org domain.

Conference Chair(s)

Conference Co-Chair(s) shall be appointed based on relevant experience, subject matter expertise, and demonstrated leadership in conference planning and organizational initiatives. The purpose of this role is to provide strategic oversight and ensure the successful coordination and execution of all conference-related activities. To promote efficiency and accountability, the number of Conference Co-Chairs shall not exceed two (2).

Peggy J. Whitehead Scholarship

TRIO/EOP PRE-SECONDARY ENROLLED STUDENTS)

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 Scholarship

TRIO/EOP/College Access Member Programs (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

WESTOP Board Manual – 2025-2026

their participation in a TRIO/Educational Opportunity Program (EOP). College students could be graduating during the Spring semester or be continuing college participants in a TRIO/EOP program.

Scholarship Rotations 2028-2032

2028 Pacific Islands

2029 Nevada

2030 CenCal

2031 Arizona

2032 NorCal

WESTOP Board Manual – 2025-2026

A. Conflict of Interest Policy

Protection: Purpose

The purpose of the conflict-of-interest policy is to protect WESTOP's tax-exempt interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of WESTOP or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Definitions

1. Interested Person

Any director, or member of a committee with Board of Directors or Service Council delegated powers, who has a direct or indirect financial interest as defined below, is an interested person. If a person is an interested person with respect to any entity in WESTOP of which the organization is a part, he or she is an interested person with respect to all entities.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which the Association has a transaction or arrangement, or
- b. A compensation arrangement with WESTOP or with any entity or individual with which WESTOP has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which WESTOP is negotiating a transaction or arrangement. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. Financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the appropriate Board of Directors or Service Council committee decides that a conflict of interest exists.

Procedures

1. Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given

the opportunity to disclose all material facts to the Board of Directors and Service Council members of committees with board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the Board of Directors or Service Council committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board of Directors or Service Council committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest

a. An interested person may make a presentation at the Board of Directors or Service Council committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

b. The president of the Board of Directors or Service Council committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

c. After exercising due diligence, the Board of Directors or Service Council Committee shall determine whether WESTOP can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board of Directors or Service Council shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in WESTOP's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflicts of Interest Policy

a. If the Board of Directors or Service Council Committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board of Directors or Service Council committees determine the member has failed to disclose an actual or possible conflict of interest, it shall

take appropriate disciplinary and corrective action.

5. Records of Proceedings

The minutes of the WESTOP Board of Directors and Service Council committees with board-delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board of Directors and Service committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

6. Compensation

- a. A voting member of the Board of Directors who receives compensation, directly or indirectly, from the Association for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from WESTOP for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the Board of Directors, Service Council, or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from WESTOP either individually or collectively, is prohibited from providing information to any committee regarding compensation.

7. Annual Statements

Each Board of Director, Chief Financial Officer and member of the Service Council committee with delegated board powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands that WESTOP is charitable and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

8. Periodic ■Reviews

WESTOP Board Manual – 2025-2026

To ensure WESTOP operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the WESTOP's written policies, are properly recorded, reflect reasonable investment or payment for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.
- c.

WESTOP Code of Conduct

Purpose

The Western Association of Educational Opportunity Personnel (WESTOP) is committed to events and activities where everyone can participate in a welcoming, inclusive, respectful and safe environment.

WESTOP events (and activities) are guided by the highest ethical and professional standards. All participants are expected to act with integrity, professionalism, and respect towards others.

Scope and Applicability

The Code of Conduct applies to all WESTOP activities—whether in-person, virtual, or hybrid—including meetings, workshops, conferences, exhibits, receptions, social events associated with WESTOP programs, and any other event organized, hosted, or sponsored (in whole or in part) by WESTOP. This Code also applies to WESTOP-managed online platforms and social media spaces related to these activities. Members, participants, volunteers, speakers, guests, and representatives agree to follow this Code and all applicable WESTOP policies and procedures.

Definitions:

- “Harassment” means a single severe incident or persistent or pervasive conduct that is demeaning, abusive, offensive, or creates a hostile environment, whether verbal, physical, visual, or digital.
- “Sexual harassment” includes unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature.
- “Discrimination” means adverse treatment based on a protected characteristic or other status protected by applicable law or WESTOP policy.

- “Bullying” means repeated or severe aggressive behavior likely to intimidate, degrade, or humiliate.
- Examples are illustrative and not exhaustive.

Accessibility and Accommodations: WESTOP strives to make events accessible. Participants who need reasonable accommodation are encouraged to notify WESTOP in advance or contact on-site staff. WESTOP will make reasonable efforts to accommodate such requests.

Members and all participants (including guests) agree to follow the WESTOP Code of Conduct and all applicable guidance and procedures.

Professional Expectations

All participants are expected to:

1. Present themselves, and communicate in a professional, constructive manner in all interactions and settings.
2. Treat others with courtesy, dignity, respect, and in a collaborative way, including when providing feedback or engaging in disagreement.
3. Refrain from demeaning, harassing, discriminatory, or exclusionary behavior, materials or speech.
4. Handle dissent or disagreement with courtesy, dignity and an open mind. Be respectful when providing written and verbal feedback.
5. Be mindful of and respectful of cultural contexts and differences among participants.
6. Be aware of surroundings; alert organizers if a situation appears unsafe or if someone is in distress.
7. Include and collaborate with other members by allowing for input, insights, and contributions from others.
8. Attribute ideas and materials to their sources where applicable.
9. Respect privacy and personal boundaries; seek consent for personal interactions, and honor limits.

Prohibited conduct

Harassment, intimidation, discrimination, or bullying in any form will not be tolerated.

Prohibited conduct includes (illustrative, not exhaustive):

- Harassment or discrimination based on protected characteristics or other status protected by law or WESTOP policy.
- Sexual harassment includes, unwelcome sexual advances or conduct, requests for sexual favors, sexually suggestive comments, jokes, or imagery; unwanted touching; and persistent solicitation of intimacy, and other verbal or physical conduct of a sexual nature.
- Threatening, bullying, abusive, or profane language directed toward others, property damage, deliberate intimidation or stalking; doxxing; deliberate intimidation.
- Unauthorized photography, recording, or screenshots where a reasonable expectation of privacy exists or where expressly prohibited by WESTOP or the speaker. Respect “no photo/recording” requests.
- Disruption of sessions or operations (including video-teleconferencing hijacking or “Zoom-bombing”).
- Damage to property or interference with venue operations.

- Possession or use of weapons in violation of venue rules or applicable law.
- Illegal drug use; irresponsible or disruptive alcohol consumption.
- Inappropriate contact with minors; failure to follow WESTOP guidance related to minors or other vulnerable populations.

Privacy, Media, and Social Media

Respect the privacy of participants. Obtain consent before capturing or sharing images, recordings, or content featuring identifiable individuals, and comply with posted speaker or session preferences. When engaging on social media, do not disclose private or sensitive information about others without consent.

Complaint process

Inappropriate behavior will not be tolerated. Anyone asked to stop unacceptable behavior is expected to comply immediately. If a participant engages in unacceptable behavior, the conference/event organizers may take any action they deem appropriate, up to and including expulsion from the conference/event without warning or refund.

Participants may report concerns by: Speaking with a conference/event organizer and/or WESTOP members of the Board and Service Council as soon as possible. Using designated phone, email, or online reporting channels announced for the event or posted on the WESTOP website.

Where available, submitting an anonymous report through WESTOP's reporting form. WESTOP will handle reports promptly and as discreetly as feasible. While WESTOP endeavors to maintain confidentiality consistent with a thorough review, complete confidentiality cannot be guaranteed.

WESTOP prohibits retaliation against anyone who, in good faith, reports a concern or participates in a review.

WESTOP Board and Service Council can assist with contacting venue security or local law authorities, providing escorts, or to otherwise helping participants feel safe during the events. You can report unacceptable behavior to any member of the WESTOP Board and Service Council.

WESTOP may take any appropriate action, including but not limited to verbal or written warning; required separation of parties; removal from sessions or events without refund; modification or revocation of participation privileges; referral to venue security or law enforcement when warranted; and membership discipline consistent with WESTOP governing documents.

WESTOP may implement reasonable interim measures to protect safety and event operations. Outcomes will be determined based on available information and the severity and context of the conduct.

WESTOP Whistleblower Protection Policy

(Adopted by Western Association of Educational Opportunity Personnel, a 501(c)(3) nonprofit organization)

1. Reporting Responsibility

The Western Association of Educational Opportunity Personnel (WESTOP) is committed to lawful and ethical conduct, transparency, and accountability in all its operations. As representatives of WESTOP, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations. This Whistleblower Policy is

intended to encourage and enable employees, volunteers, board members, and others associated with the organization to raise concerns regarding suspected misconduct without fear of retribution.

2. Scope

This policy applies to all directors, officers, members, volunteers, and contractors of WESTOP. It covers, but is not limited to, concerns about:

- Fraud, waste, or abuse of organizational resources
- Financial improprieties or accounting irregularities
- Violations of laws, regulations, or organizational policies
- Conflicts of interest or unethical behavior
- Harassment, discrimination, or unsafe practices

3. Reporting Procedure

WESTOP has an open door policy and suggests that members share their questions, concerns, suggestions or complaints with the Ethics Committee Chairs and/or Board Chair. If you are not comfortable speaking with Chairs and are not satisfied with the Chair's response, you are encouraged to speak with their respective Chapter President. The Board of Directors and Service Council are required to report complaints or concerns about suspected ethical and legal violations in writing to WESTOP Board Chair and/or Ethics Committee Chairs, who have the responsibility to investigate all reported complaints. Members with concerns or complaints may also submit their concerns in writing directly to their respective Chapter President.

Reports should include as much detail as possible to facilitate investigation.

4. Investigation

All concerns will be taken seriously and investigated promptly and thoroughly. The responsible party (Board Chair, Ethics Committee, or external investigator if appropriate) will determine the scope of the investigation and take corrective action if necessary.

5. Confidentiality

Violations or suspected violations may be submitted on a confidential basis by the complainant. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

6. No Retaliation

It is contrary to the values of WESTOP for anyone to retaliate against any board member, officer, member or volunteer who in good faith reports an ethics violation, or a suspected violation of law, such as a complaint of discrimination, or suspected fraud, or suspected violation of any regulation governing the operations of WESTOP. A member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of membership status.

7. Acting in Good Faith

Anyone filing a written complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

8. Oversight & Recordkeeping

The Ethics Committee (or designated body) shall receive a summary of all whistleblower reports and their resolution on at least an annual basis. Records shall be maintained securely and confidentially.

9. Distribution

This policy will be distributed to all members, volunteers, board members, and contractors of WESTOP, and each shall acknowledge receipt and understanding of the policy.

Adopted by the Board of Directors of Western Association of Educational Opportunity Personnel in November 2025. *This Whistleblower Protection Policy was adapted from the National Council of Nonprofits.*

WESTOP Past-Presidents

Dr. Charles Ratliff President 1978-79 and 1979-80 California State Univ, Long Beach	President 1986-87 California State Univ, Hayward	President 1996-97 Northern Arizona University
Robert Norris President 1980-81 University of San Francisco	Janice Dirden-Cook President 1988-89 and 1991-92 University of San Francisco	Dr. Connie Baker President 1997-98 San Jose State University
Keith Hori President 1981-82 University of California, Berkeley	Munyiga Lumumba President 1990-91 University of California, Berkeley	Joe Ramirez President 1998-99 California Lutheran University
David Godoy President 1982-83 California State Univ, Los Angeles	David Ferguson President 1992-93 California State University, Chico	Gerald Bryant President 1990-00 University of the Siskiyous
Dr. Juan Mestas President 1983-84 and 1987-88 San Jose State University	Sergio A. Lopez President 1993-94 Imperial Valley College	D. Matthew Benny President 2000-01 Embry-Riddle Aeronautical University
Michael Dang President 1984-85 Asian-American Communities for Education	Cheryl Arnold-Moore President 1994-95 California State Univ, Long Beach	Leonard Woods President 2001-02 University of Nevada, Reno
Sandy Matsui President 1985-86 and 1989-90 California State Univ, Bakersfield	Denise K. Benton President 1995-96 California State Univ, San Bernardino	Irvin L. Coin President 2002-2003 Arizona State University
Dr. Harold Campbell	Adrian Tanakeyowma	Darlene Conwell President 2003-04 University of San Francisco

WESTOP Board Manual – 2025-2026

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Victor Rojas Jr. President 2023-2024 Mount San Antonio College	Dalia R. Hernandez President 2024-2025 California State University, San Bernardino	

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 Univ, 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 Rengiil 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, Univ of California, Davis
2010 Martina Granados, Upward Bound, California State University, Fresno
2011 Gustavo Ocegüera, TRIO Programs, Norco College
2012 Michele Scott, Educational Opportunity Center, California State University, Long Beach
2013 Emalyn Lopus, 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
2021 Dalia R. Hernandez, Upward Bound, California State Univ, San Bernardino
2022 Tomasa Mauricio, Barrio Logan College Institute
2023 Jen “JD” Dyke, Upward Bound, Cal Poly Humboldt
2024 Sam Blanco, III, Upward Bound and Educational Talent Search, UC Davis
2025 Lia Magua, Educational Talent Search, California State University, San Marcos

WESTOP Walter O. Mason, Jr. Award Recipients

2024 – Dr. Lydia Perez, Director, Student Support Services, Mesa Community College
2018 – Dr. Joy Brittan, Senior Director, Early Outreach and Support Program, California State University, Monterey Bay
2017 – Michele Scott, Director, Educational Opportunity Center, California State Univ-Long Beach
2016 – Yoichi K. Rengiil, Director, TRIO Programs, University of Guam, Mangilao, Guam
2012 – José Martínez-Saldaña, President and Founder, EDvolution, Inc.
2010 – Dr. 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, Univ of Nevada, Las Vegas, and Executive Director, Center for Academic Enrichment and Outreach, Las Vegas, NV
1997 – Monte Perez, President, Perez & Associates, Tucson, AZ

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