**2023 NEOA Board Position**

**and Strategic Planning Objectives**



**President:** The president is the chief elected officer of the Association and presides at all general meetings of the delegate assembly. The President is the chairperson of the Board of Directors and, with the advice and consent of the Board, appoints all chairpersons of standing and ad hoc committees. The President will be an ex-officio member of all committees, except nominations and elections. The President shall in no way be employed by the Association. Priorities include: COE issues, educating lawmakers, disseminating information about the Association, encouraging regional and state affiliations, promoting membership involvement in committees, clarifying responsibility and accountability for committee chairs, and preparing the interim and annual reports to the membership.

**1.1 Create regional structures to enhance coordination with states**

* 1. Support and Attend annual state conferences.

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Coordinate information sharing for COE and NEOA (Clearinghouse, website) and policy-making organizations such as the New England Council.
2. Develop and provide Board Trainings for state leaders, and host a retreat annually.

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

* 1. Hold strategic advocacy events at the regional conference and throughout the year.

**2.2 Develop comprehensive professional development activities to meet member needs**

* 1. Provide outreach to states during the grant-writing period.

**3.1 Define and publicize various leadership opportunities within NEOA**

* 1. Provide information on leadership opportunities and benefits at each professional development day and state conference.

**3.2 Encourage board members to identify, recruit and mentor individuals for Board leadership roles**

1. Provide shadowing opportunities for each Board position.

**3.3 Encourage the involvement of Arnold Mitchem Leadership Institute (AMLI) alumni with NEOA**

* 1. Create and maintain a database of AMLI alumni.
	2. Inform and encourage AMLI participants and alumni to make a commitment to serve.

**3.5 Develop and promote leadership opportunities for state and regional board positions**

* 1. Reach out to non-members with information and opportunities to engage.
	2. Provide orientation as well as training and support for all Board positions.

**4.1 Create and maintain a financial management plan**

* 1. Establish Annual Budget reflecting Goals and priorities.
	2. Analyze annual budget and calculate amount of reserve needed

**4.2 Create an annual development plan to support NEOA activities each year**

* 1. Establish annual development goal.

**4.3 Develop and implement a marketing plan for NEOA**

* 1. Review and update existing marketing materials and media to support development plan.

**President - Elect Position Summary:** The President-Elect serves with the same powers as the President in the event that the President becomes incapacitated or resigns. The President-elect serves as "President in training". The priorities of this office include: coordinating fundraising efforts, spearheading the COE Fair Share campaign in the region, coordinating state liaisons, and responding to COE issues. Principal Responsibilities: \* Attend board orientation (September) and four (4) additional board meetings: December, February, April and June \* Oversee development efforts, and ensure NEOA meets its COE Fair Share \* Advise committee chairs on fundraising efforts \* Serve on Finance Committee \* Serves on the Development Committee \* Attend three COE Board Meetings (September, December, May) \* Serve on COE Board subcommittees as assigned by COE Board Chair \* Select site for following year's conference \* Represent the president as needed \* Assist president and committee chairs in achieving their goals \* Plan for up-coming year's activities \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate Ceremonial Responsibilities \* Organize Past President's Dinner at Annual Conference \* Select gift for President \* Select COE Annual Conference gift basket as assigned by president

**1.1 Create regional structures to enhance coordination with states**

1. Develop strategies to support states' ability to meet their individual goals and objectives.
2. Assess state needs from NEOA via an annual survey.

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Coordinate technology needs of professional development activities in respective states as needed.

**2.1 Identify and assess professional learning needs of membership (i.e. annual survey)**

* 1. Collect, analyses and share information from program round tables with the board.

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

1. Provide shadowing opportunities for each Board position.
2. Provide a training/ team building/getting to know you session with Board members

**Past - President Position Summary**: The main duty of the Past President is to chair the Nominations and Elections committee. The Nominating Committee shall be responsible for ensuring a slate of candidates for the annual election. The Past-President also serves as Advisor to the President. Principal Responsibilities: \* Attend board orientation (September) and four (4) additional board meetings: December, February, April and June \* Chair NEOA Nomination and Elections Committee \* Attend COE Board meetings (September, December, May) \* Serve on COE Board subcommittees as assigned by COE Board Chair \* Serve as "goodwill ambassador" by contacting new programs and program directors about NEOA \* Serve on Finance Committee if appointed by the president \* Serve on Public Relations committee as assigned \* Serve on other committees as assigned \* Follow-up on presidential goals and initiatives \* Provide advice and guidance to current officers and chairs \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate

**2.5 Distribute membership materials to EOP and new hires**

* 1. Communicate all new directors, new staff and new programs to provide information about NEOA and its professional development activities.

**3.1 Define and publicize various leadership opportunities within NEOA**

1. Discuss opportunities for leadership as part of soliciting nominations for officer positions.
2. Promote leadership positions in newsletters and list serve.
3. Engage members in committee work.

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

1. Provide shadowing opportunities for each Board position.
2. Provide leadership workshops at NEOA annual and state conferences.
3. Promote leadership opportunities at Conference Newcomer's Reception.
4. Provide a training/ team building/getting to know you session with Board members

**3.4 Engage or re-engage veteran staff**

* 1. Engage veteran staff in recruitment for state and regional board positions.

**3.5 Develop and promote leadership opportunities for state and regional board positions**

* 1. Promote COE Emerging Leaders Institute as a leadership opportunity.
	2. Promote the AMLI Leadership Institute at the NEOA and state conferences.
	3. Conduct the NEOA AMLI alternating years.
	4. Reach out to non-members with information and opportunities to engage.
	5. Provide orientation as well as training and support for all Board positions.

**Vice- President Position Summary:** The primary duty of the Vice President is to serve as organizer and chairperson of the annual NEOA conference. The Vice-President serves with the same powers as the President-elect in the event that the President-elect becomes incapacitated or resigns Principal Responsibilities: \* Attend board orientation (September) and four (4) board meetings: December, February, April and June \* Work with president-elect to investigate and choose conference site, and to negotiate contract, if necessary \* Organize conference committee and delegate responsibilities to committee members \* Serves as an ex-officio representative on any committees as assigned by president \* Prepare a conference budget to be submitted to the Finance Chair for review of finance committee and approval of Board \* Develop theme and format of the conference within the constraints of the budget and with consultation of the board 5 \* Elicit workshop proposals/ideas and speaker suggestions from NEOA membership and outside organizations \* Work with president to invite and confirm dignitaries (COE Board Chair, Department of Education officials, others) \* Send registration materials to members, past members, other interested parties, (i.e. NEACAC members) and COE Board members \* Arrange for local transportation for special guests \* Select menus, workshops, speakers, and entertainment to ensure a successful conference in consultation with president and committee \* Keep track of registrations and membership information and submit all incoming funds and bills to the treasurer in a timely fashion \* Convene committee of state members, representatives from other states, technology chair and disability concerns task force chair \* Serve as liaison between the conference committee and Board; provide written reports in timely fashion to the board \* Send membership information to Membership Chair and coordinate with registration information \* Send information to web site manager as needed for notices and registration \* Maintain accurate records, timelines and budget for conference \* Adhere to conference budget \* Actively contribute to and participate in all board activities/discussions \* Contribute information from the committee to the NEOA newsletter as appropriate

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Consult/coordinate with technology, access chair and DEI Chair to make sure specific audiences are considered.

**2.1 Identify and assess professional learning needs of membership (i.e. annual survey)**

1. Summarize and share evaluations from annual conference with the Board.

**2.3 Provide professional development opportunities that are responsive to the needs of Educational Opportunity Personnel (EOP)**

* 1. Implement professional development activities including annual conference, professional development days, and leadership institute.
	2. Provide training to specific audiences such as veteran staff, new directors, and new members.

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

1. Promote leadership opportunities at Conference Newcomer's Reception.

**5.2 Provide information and training to promote connection between state and national advocacy issues**

* 1. Provide information and training on COE’s Fair Share initiatives.

**Treasurer Position Summary:** The Treasurer is responsible for the receipt and expenditure of funds in accordance with the fiscal policies established by the Board of Directors. The Treasurer maintains appropriate and adequate financial records and is prepared, at any time, at the direction of the board, to surrender such records and monies to the Board or succeeding Treasurer. The Treasurer will submit quarterly reports to the association, submit an audited report at the annual meeting, and shall be under such bond as may be determined by the Board of Directors. The Treasurer shall serve on the Finance Committee. Principal Responsibilities: \* Attend board orientation (September) and four (4) board meetings: December, February, April and June \* Participate in training on financial management software \* Carry out the fiscal activities of the Association according to the NEOA bylaws and fiscal policies manual \* Pay bills of the organization in a timely fashion \* Deposit income and coordinate deposits of the organization in a timely fashion \* Account for all fiscal transactions \* Serve on finance committee 6 \* Assist president and event chairs with contract negotiations \* Maintain accurate and detailed financial records \* Provide records to auditor for annual financial review and tax preparation \* Bill member states for state dues by October 1, payable by December 1 \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate

**4.1 Create and maintain a financial management plan**

1. Establish Annual Budget reflecting Goals and priorities.
2. Analyze annual budget and calculate amount of reserve needed.
3. Monitor, reconcile and report fiscal status on a quarterly basis.
4. Conduct monetary transactions, i.e. opening certificates of deposit and other forms of investment.
5. Prepare, file and submit state and federal forms by due dates.

**State Presidents Position Summary:** The State Association Presidents shall be full members of the Association Board of Directors and shall represent the interests of the members of their respective States. Annual priorities include: developing state level action plans, building organizational structures and identifying resources to foster state and community support of TRIO, recruiting and promoting TRIO leadership at the state level, disseminating information about NEOA and COE within the state, and reporting to the Board on state activities.

**1.1 Create regional structures to enhance coordination with states**

1. Support and attend annual state conferences.
2. Support state level professional development activities, event planning and resource-sharing and communicate through NEOA resources i.e. website, Board meetings, online platforms, etc.
3. Provide support for the state initiative grant process and the COE grant proposal process.
4. Provide outreach materials and welcome packets to states for newly funded programs.
5. Develop strategies to support states' ability to meet their individual goals and objectives.

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Support state in scheduling meetings with elected officials, representatives and Congressional staff and provide Policy Seminar training for board members and others, annually.

**2.5 Distribute membership materials to EOP and new hires**

* 1. Generate and distribute a list of all new programs in the region at conclusion of each program competition.
	2. Communicate all new directors, new staff and new programs to provide information about NEOA and its professional development activities.

**3.1 Define and publicize various leadership opportunities within NEOA**

1. Provide information on leadership opportunities and benefits at each professional development day and state conference.

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

1. Provide shadowing opportunities for each Board position.

 **3.5 Develop and promote leadership opportunities for state and regional board positions**

1. Promote COE Emerging Leaders Institute as a leadership opportunity.
2. Promote the AMLI Leadership Institute at the NEOA and state conferences.

 **5.2 Provide information and training to promote connection between state and national advocacy issues**

1. States identify advocacy needs and write State Initiative grant applications to address those needs.

**5.3 Expand TRIO/GEAR UP alumni presence in NEOA to assist advocacy efforts**

* 1. Recognize success of EOP alumni i.e.; NEOA Achievers, NEOA Alumni List Serve, and COE/NEOA’s TRIO Alumni Online Network.
	2. Engage alumni through alumni database, social media and at Policy Seminar.
	3. Secure alumni presence at conference and Policy Seminar.

**State Liaisons Position Summary:** The State Liaisons shall be full members of the Association Board of Directors and shall be elected by and represent the interests of the NEOA members in their respective states. Annual priorities include: coordinating crisis mobilization strategies at the state and regional levels, participating in state level action plans, disseminating information about NEOA and COE within the state, coordinating state policy events and state participation in national policy seminars, and reporting to the state on NEOA activities. Principal Responsibilities: \* Attend board orientation (September) and four (4) board meetings: September, December, February, April and June \* Represent NEOA members on Board and provide a written report of activities in the state at Board meetings in conjunction with state president \* Report to state on regional activities \* Represent NEOA at state organization meetings and disseminate information from NEOA \* Coordinate crisis mobilization strategies at state and regional level \* Initiate and support interaction between TRIO and EOP personnel and state/federal legislators in conjunction with state president \* Serve on NEOA membership committee \* Maintain E-mail, phone, fax tree and other communications systems \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate.

* + See State Presidents
	+ Each state has additional roles and responsibilities for the State Liaison position

**NEOA STANDING COMMITTEES**

**Finance Chair Position Summary:** This is a standing committee. The Finance Committee monitors all fiscal matters pertinent to the Association's activities. The Treasurer and the President Elect are members of this committee along with two additional persons appointed by the President with the consent of the Board. Annual priorities include the development and implementation of an effectively structured fiscal plan, including a formal budget and written policies for expenditures Principal Responsibilities: \* Attend board orientation (September) and four (4) board meetings: December, February, April and June \* Work with treasurer and president and committee chairs to develop an annual operating budget \* Chair finance committee and set and conduct periodic meetings \* Review quarterly financial reports provided by the Treasurer prior to submission to Board \* Serve as a consultant to committee chairs concerning fiscal matters and policies \* Work with committee chairs to ensure that activities stay within budget \* Implement the long-range fiscal goals of NEOA; maintain fiscal stability \* Review, update and communicate NEOA fiscal policy to Board \* Actively participate and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate

**4.1 Create and maintain a financial management plan**

1. Establish Annual Budget reflecting Goals and priorities.
2. Analyze annual budget and calculate amount of reserve needed.
3. Monitor, reconcile and report fiscal status on a quarterly basis.
4. Investigate investment options for reserve funds.
5. Create and maintain a reserve equal to one-half of annual expensesEstablish annual budget reflecting goals and priorities.

**Legislative and Education Committee Chair Position Summary**: This is a standing committee, and responds to national issues affecting TRIO and educational opportunity; provides technical assistance and information for state level policy seminars, and provides technical assistance to state liaisons regarding crisis mobilization strategies. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Coordinate NEOA Political Action Network with state presidents 9 \* Educate the membership regarding the reauthorization process and its implications for TRIO \* Inform the membership, in a timely fashion, of reauthorization issues as they arise out of Department of Education and Congress \* Disseminate information about higher education issues that impact NEOA members and students, via the NEOA newsletter, state meetings, and other communication systems. \* Solicit input from members on legislative and educational issues and concerns \* Provide technical assistance to state presidents regarding the COE Policy Seminar \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate.

**1.1 Create regional structures to enhance coordination with states**

1. Help to coordinate information to state liaisons with asynchronous terms on NEOA Board.

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Strategically plan for a dedicated advocacy budget for state outreach to newly elected members of Congress.
2. Strategically plan for a dedicated state initiative budget that addresses state needs and regional and state strategic plans.

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Hold strategic advocacy events at the regional conference and throughout the year.
2. Support state in scheduling meetings with elected officials, representatives and Congressional staff and provide Policy Seminar training for board members and others, annually.

**5.1 Ensure strong advocacy efforts**

* 1. Develop advocacy goals.
	2. Charge committees to address advocacy goals.
	3. Establish a plan for outreach to members of Congress.

**5.2 Provide information and training to promote connection between state and national advocacy issues**

* 1. Provide advocacy training on pertinent political issues.
	2. Provide advocacy training prior to Policy Seminar for state leaders.

**Membership and Credentials Chair Position Summary**: This is a standing committee. Responsibilities of this position include: the active promotion of membership in the association; determining membership type and eligibility for purposes of participation in association activities; certification, for each association meeting, of the names of eligible voters; monitoring and tallying of votes when necessary. Annual priorities include: increasing membership, disseminating membership data, and developing an effective membership dues collection system. Principal Responsibilities: \* Attend board orientation (September) and four (4) board meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Maintain membership and New England-wide database for membership directory \* Produce mailing labels as requested \* Facilitate membership committee meetings and communicate with membership committee between meetings via e-mail, letters and phone calls \* Make written reports to Board on membership activities \* Encourage association growth through identifying new members \* Administer membership surveys and membership renewal reminder \* Actively participate and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

* 1. Provide shadowing opportunities for each Board position.

**3.4 Engage or re-engage veteran staff**

1. Maintain an NEOA directory including veteran staff identification.

**Professional Development Chair Position Summary:** This is a standing committee. The Professional Development Chair is responsible for organizing activities to address the professional development needs of the NEOA membership. She/he convenes the committee and oversees the development of useful and appropriate annual trainings for the membership. 10 Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Develop and update the professional development event RFP on the NEOA web site annually \* Encourage members to apply for funds in support of professional development activities, trainings and presentations \* Respond in a timely fashion to proposals for PD events after consultation with President; confirm funding availability and amount, request budget and evaluation \* Actively encourage and support PD activities for all program types and audiences \* Coordinate activities and trainings to educate the membership regarding the reauthorization and legislative process, higher education issues \* Maintain records of event descriptions, activities, participants, costs, and event evaluations for association archives \* Assess membership needs for training on an annual basis through surveys and other means \* Actively participate and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate.

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Coordinate technology needs of professional development activities in respective states as needed.

**2.1 Identify and assess professional learning needs of membership (i.e. annual survey)**

1. Summarize and share evaluations from annual conference with the Board.
2. Collect, analyses and share information from program round tables with the board.
3. Survey members by program annually using accessible online tools.

 **2.2 Develop comprehensive professional development activities to meet member needs**

1. Establish vision for professional development.
2. Consult and coordinate with technology and DEI chair to make sure specific audiences are considered.
3. Provide outreach to states during the grant-writing period.

**2.3 Provide professional development opportunities that are responsive to the needs of Educational Opportunity Personnel (EOP)**

* 1. Implement professional development activities including annual conference, professional development days, and leadership institute.
	2. Coordinate with individuals willing to chair professional development events.
	3. Provide training to specific audiences such as veteran staff, new directors, and new members.

**2.4 Maximize technology as a vehicle for information gathering and dissemination**

* 1. Send information to listserv and post on website and social media pages.
	2. Utilize technology to deliver professional development activities.
	3. Explore and expand technology to include webinars, podcasts, reading groups, etc.
	4. Work with technology committee to coordinate technology needs of professional development activities as needed.

**Public Relations Chair Position Summary:** This is a standing committee. The Public Relations Committee Chair oversees and has responsibility for association public relations and communications activities and shall in other appropriate ways encourage scholarly efforts toward publications related to and supportive of association philosophy and goals. This position has responsibility for reviewing and updating documents and materials representing the association, for coordinating public outreach and advocacy campaigns, and for providing relevant professional development to members. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Work with Technology Chair regarding web site and electronic publications \* Work with membership chair, professional development chair and others to coordinate NEOA public messages and member/alumni/donor outreach \* Review and update brochures, publications, web sites, electronic media representing the association \* Coordinate with Conference Chair, TRIO Day Chair and other event chairs to prepare press releases and obtain press coverage for major NEOA events 11 \* Provide technical assistance to board and members on public relations campaigns \* Coordinate NEOA political action network and communication matters with state presidents \* Assist in the dissemination of information about higher education issues to members via the NEOA newsletter and other communication systems \* Provide technical assistance on public relations to state presidents and liaisons regarding policy seminars \* Actively participate and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Coordinate the publication of regional, state and national TRIO/GEAR UP events to elected legislative officials and staff in the respective states.

**2.4 Maximize technology as a vehicle for information gathering and dissemination**

1. Send information to listserv and post on website and social media pages.

 **2.5 Distribute membership materials to EOP and new hires**

1. Communicate all new directors, new staff and new programs to provide information about NEOA and its professional development activities.

 **3.1 Define and publicize various leadership opportunities within NEOA**

1. Promote leadership positions in newsletters, social media, and list serve.

**4.3 Develop and implement a marketing plan for NEOA**

1. Review and update existing marketing materials and media to support development plan.
2. Identify target audiences including New Directors, membership, funders and elected officials.
3. Develop customized messages to reach target audiences.
4. Evaluate plan effectiveness and results.

**TRIO Day Chair Position Summary:** This is a standing committee. The TRIO Day Committee Chair shall be responsible for organizing the Annual NEOA TRIO Day Program. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Convene committee meetings to select hotel site with board approval \* Identify and invite speakers \* Organize a regional college fair, and local area college tours \* Organize a student rally with local leaders, present history of political process and TRiO history; lead a march in support of TRiO \* Arrange for entertainment and meals for students \* Communicate with Technology Chair and web site manager in a timely fashion for notices and registrations \* Generate a timeline and share other materials with incoming chair \* Actively participate in and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate.

**Goal 1: Strengthen and support state associations**

**1.1 Create regional structures to enhance coordination with states**

**1.2 Dedicate appropriate resources to strengthen and support state associations**

1. Strategically plan for a dedicated advocacy budget for state outreach to elected members of Congress.

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Coordinate the publication of regional, state and national TRIO/GEAR UP events to elected legislative officials and staff in the respective states.

**Goal 3: Foster Leadership within NEOA**

**3.1 Define and publicize various leadership opportunities within NEOA**

1. Promote leadership positions in newsletters and list serve.
2. Engage members in committee work.
3. Engage in conversations and programing promoting diversity, equity and inclusion.

**Goal 4: Build and strengthen NEOA’s Financial & Organizational Resources**

**4.1 Create and maintain a financial management plan**

1. Establish an annual budget (TRIO Day) reflecting goals and priorities.

**4.2 Create an annual development plan to support NEOA activities each year**

1. Establish annual development goal.
2. Represent Association in public arena to potential funders to identify and cultivate contacts.

**Goal 5: Strengthen NEOA's capacity to advocate on behalf of EOP students**

**5.1 Ensure strong advocacy efforts *(for TRIO Day)***

1. Develop advocacy goals.
2. Charge committees to address advocacy goals.
3. Establish a plan for outreach to members of Congress.

**NEOA AD-HOC COMMITTEES**

**Development Chair Position Summary:** This is an ad- hoc committee. The main responsibility of this committee is to identify and implement fundraising for the Association. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Establish a committee of members from each state \* Maintain and foster relationships with existing funders and supporters \* Prepare letters and other communication for underwriting sources to support major NEOA activities and events such as the Annual Conference and TRiO Day \* Solicit new sources of financial support for NEOA initiatives. \* Actively contribute to and participate in all board activities/discussions Contribute information to the NEOA newsletter as appropriate.

**Goal 4: Build and strengthen NEOA’s Financial & Organizational Resources**

**4.2 Create an annual development plan to support NEOA activities each year**

1. Establish annual development goal.
2. Represent Association in public arena to potential funders to identify and cultivate contacts.
3. Generate and update a list of partners and supporters for the development plan.
4. Expand Development Committee to include a point person for each program as members of the Development Committee.

**4.3 Develop and implement a marketing plan for NEOA**

* 1. Review and update existing marketing materials and media to support development plan.
	2. Identify target audiences including New Directors, membership, funders and elected officials.
	3. Develop customized messages to reach target audiences.
	4. Evaluate plan effectiveness and results.

**Disability Concerns Task Force Chair Position Summary:** This is an ad-hoc committee. The responsibilities of this committee are to represent the concerns of the disabled community in planning for NEOA events, such as TRiO Day and the Annual Conference; to ensure that appropriate accommodation plans are made for events and activities sponsored by NEOA; to ensure accessibility of NEOA materials such as the web site and newsletter; to serve as a resource for the membership and board of directors on ongoing related matters. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Serve on the Conference and TRiO Day committees \* Meet/confer with Professional Development event chairs \* Regularly review NEOA materials, contracts and practices \* Serve as a resource for NEOA membership and board \* Actively contribute to and participate in all board activities/discussions Contribute information to the NEOA newsletter as appropriate

**Historian/Archivist Position Summary:** This is an ad-hoc committee. This position is responsible for the ongoing collection, preservation and maintenance of NEOA materials and historical records and documents. This position shall be active in securing historical records from members, organizing materials (electronically and otherwise), preserving board meeting minutes and other records; soliciting materials from members and others relevant to the history of NEOA; making efforts to secure a permanent home and library services for all physical materials. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Meet with past-presidents, board members and others to solicit materials of interest to the archives. \* Meet with librarians and archivists; proper methods of records preservation; train other NEOA members. \* Actively contribute to and participate in all board activities/discussions Contribute information to the NEOA newsletter as appropriate

**Goal 3: Foster Leadership within NEOA**

**3.1 Define and publicize various leadership opportunities within NEOA**

* 1. Engage members in committee work.
	2. Engage in conversations and programing promoting diversity, equity and inclusion.

**3.2 Encourage board members to identify, recruit and mentor individuals for**

 **Board leadership roles**

1. Provide shadowing opportunities for each Board position.
2. Provide leadership workshops at NEOA annual and state conferences.
3. Promote leadership opportunities at Conference Newcomer's Reception.
4. Provide a training/ team building/getting to know you session with Board members

**3.3 Encourage the involvement of Arnold Mitchem Leadership Institute (AMLI) alumni with NEOA**

* 1. Create and maintain a database of AMLI alumni.
	2. Inform and encourage AMLI participants and alumni to make a commitment to serve.

**3.4 Engage or re-engage veteran staff**

* 1. Provide monthly Director Meetings for each program.
	2. Maintain an NEOA directory including veteran staff identification.
	3. Engage veteran staff in recruitment for state and regional Board positions.

**NEOA Achievers Chair Position Summary:** This standing committee has responsibility for the identification and selection of deserving NEOA program alumni candidates for special recognition at the annual NEOA conference. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Form committee with representation for each state \* Solicit recommendations from NEOA members of potential NEOA Achiever candidates; coordinate process \* Convene subcommittee to recommend awardees for recognition \* Contact awardees and arrange for their participation at the Annual Meeting \* Preside at NEOA Achievers luncheon at Annual meeting \* Actively participate in and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate.

**5.3 Expand TRIO/GEAR UP alumni presence in NEOA to assist advocacy efforts**

a. Recognize success of EOP alumni i.e.; NEOA Achievers, NEOA Alumni List

**Newsletter Chair Position Summary:** This is an ad-hoc committee. This committee has responsibility for generating a regular, quarterly publication on news of general interest to the NEOA membership, as a benefit of membership. Topics covered will include major NEOA events and activities, announcements of opportunities for training and professional development, best program practices, education news, political trends and other relevant items. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* The Newsletter Committee shall be responsible for the NEOA Newsletter. \* Collaborate with different Committees to generate submissions for the Association’s Newsletter \* Develop and distribute the Association’s Newsletter \* Actively contribute to and participate in all board activities/discussions Contribute information from the committee to the NEOA newsletter as appropriate

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Coordinate the publication of regional, state and national TRIO/GEAR UP events to elected legislative officials and staff in the respective states.

**2.4 Maximize technology as a vehicle for information gathering and dissemination**

1. Send information to listserv and post on website and social media pages.

 **3.1 Define and publicize various leadership opportunities within NEOA**

1. Promote leadership positions in newsletters, social media, and list serve.

**5.3 Expand TRIO/GEAR UP alumni presence in NEOA to assist advocacy efforts**

* 1. Recognize success of EOP alumni e.g. NEOA Achievers, NEOA Alumni List Serve, and COE/NEOA’s TRIO Alumni Online Network.
	2. Engage alumni through alumni database, social media and at Policy Seminar.

**State Initiatives Chair Position Summary:** The State Initiatives Chair is responsible for coordinating the Association’s State Initiative campaign with the help of a committee representing each state. The goal is to help the New England states develop effective strategies to influence state policy, achieve greater legislative and fiscal support, and gain increased recognition. Specific goals include establishing stronger relationships with state legislators, business leaders, civic leaders and foundation executives; establishing local and statewide alumni associations; building stronger state TRIO Associations; impacting state and local appropriations for higher education; generating additional revenue sources for TRIO; establishing stronger relationships with similar organizations and introducing annual campaigns to demonstrate that TRIO programs are effective and good, solid investments. Principal Responsibilities \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* The Chair and committee are responsible for developing and distributing an RFP to all State Associations \* The Chair will acknowledge the receipt of all proposals, convene the State Initiatives Committee to review and recommend funding for state initiative proposals, and make a full report back to the board 15 \* Each funded proposal shall provide a final report that will be evaluated by the committee who will, in turn, report back to the Association. \* Convene committee meetings in conjunction with the board meetings to encourage and brainstorm proposals \* Facilitate State Initiatives Committee meeting with state presidents and liaisons \* Develop and distribute RFP’s to help meet the needs of individual states and state associations \* Offer assistance in developing fundable proposals \* Review and recommend funding proposals to the committee and to the board \* Evaluate funded proposals one month after event takes place \* Contribute information to the web page: information, highlights, and a list of funded proposals \* Offer assistance in developing SI proposals for COE funding \* Align with the Council for Opportunity in Education (COE) state initiative campaign goals. \* Actively contribute to and participate in all board activities/discussions Contribute information to the NEOA newsletter as appropriate.

**Goal 1: Strengthen and support state associations**

**1.1 Create regional structures to enhance coordination with states**

1. Support state level professional development activities, event planning and resource-sharing and communicate through NEOA resources i.e. website, Board meetings, online platforms, etc.
2. Provide support for the state initiative grant process and the COE grant proposal process.
	1. **Dedicate appropriate resources to strengthen and support state associations**
3. Strategically plan for a dedicated state initiative budget that addresses state needs and regional and state strategic plans.

**Goal 2: Provide Professional Learning Opportunities for Membership**

* + 1. **Identify and assess professional learning needs of membership**

**Goal 3: Foster Leadership within NEOA**

**3.1 Define and publicize various leadership opportunities within NEOA**

1. Provide information on leadership opportunities and benefits at each professional development day and state conference.
2. Discuss opportunities for leadership as part of soliciting nominations for officer positions.
3. Promote leadership positions in newsletters and list serve.
4. Engage members in committee work.
5. Engage in conversations and programing promoting diversity, equity and inclusion.

**Goal # 5: Strengthen NEOA's capacity to advocate on behalf of EOP students**

**5.2 Provide information and training to promote connection between state and national advocacy issues**

* 1. States identify advocacy needs and write State Initiative grant applications to address those needs.

**Technology Committee Chair Position Summary:** This is an ad-hoc committee. The responsibilities of this position include oversight and management of the NEOA web site; interaction with committee chairs and support of major NEOA activities through development and promotion of website materials; and assistance in meeting technology needs for NEOA events and initiatives. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Provide schedule of when content for website should be delivered to all appropriate committee members or board members \* Regularly update website \* Assist Conference Committee Chair in meeting technology needs for conference, including online registration \* Assist TRIO Day Committee Chair in meeting technology needs for TRIO Day, including online registration \* Update and prepare Technology Committee timeline/manual for future Technology Committee Chairs \* Actively contribute to and participate in all board activities/discussions \* Contribute information to the NEOA newsletter as appropriate.

 **Goal 1: Strengthen and support state associations**

* **1.1 Create regional structures to enhance coordination with states**
	+ Support annual state conferences.
	+ Support state level professional development activities, event planning and resource-sharing and communicate through NEOA resources i.e. website, Board meetings, online platforms, etc.
	+ Provide support for the state initiative grant process and the COE grant proposal process
* **1.2 Dedicate appropriate resources to strengthen and support state associations**
	+ Consult/coordinate with Technology, Access and Diversity, Equity and Inclusion (DEI) Chairs to make sure specific audiences are considered.
	+ Coordinate technology needs of professional development activities in respective states as needed

**Goal 2: Provide Professional Learning Opportunities for Membership**

* **2.1 Identify and assess professional learning needs of membership**
	+ Summarize and share evaluations from annual conference with the Board.
* **2.2 Develop comprehensive professional development activities to meet member needs**
	+ Consult and coordinate with Technology and DEI chairs to make sure specific audiences are considered.
	+ Provide outreach to states during the grant-writing period.
* **2.4 Maximize technology as a vehicle for information gathering and dissemination**
	+ Send information to listserv and post on website and social media pages.
	+ Utilize technology to deliver professional development activities.
	+ Explore and expand technology to include webinars, podcasts, reading groups, etc.
	+ Work with Technology Committee to coordinate technology needs of professional development activities as needed.

**Goal 3: Foster Leadership within NEOA**

* **3.1 Define and publicize various leadership opportunities within NEOA**
	+ Provide information on leadership opportunities and benefits at each professional development day and state conference.
	+ Promote leadership positions in newsletters and list serve.
	+ Engage members in committee work.
* **3.2 Encourage board members to identify, recruit and mentor individuals for Board leadership roles**
	+ Provide shadowing opportunities for each Board position.
* **3.3 Encourage the involvement of Arnold Mitchem Leadership Institute (AMLI) alumni with NEOA**
	+ Create and maintain a database of AMLI alumni.
* **3.4 Engage or re-engage veteran staff**
	+ Maintain an NEOA directory including veteran staff identification.

**Goal 4: Build and strengthen NEOA’s Financial & Organizational Resources**

**Goal 5: Strengthen NEOA's capacity to advocate on behalf of EOP students**

**TRIO Alumni Society Chair Position Summary:** 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. Principal Responsibilities: \* Attend board orientation (September) and four (4) meetings: December, February, April and June \* Submit a budget request to president and finance committee for board approval \* Maintain and update the NEOA TRIO Alumni database, including TRiO program-like alumni \* Coordinate access for state presidents to verify alumni in NEOA registry \* Act as a resource for suggestions for alumni activities and events \* Promote and encourage the development of TRIO Alumni Societies in the region and member states \* Provide information and technical assistance to region about the establishment of TRIO Alumni Societies \* Plan for information tables and workshop(s) at conferences, state meetings and reunion events as appropriate. \* Provide alumni information to NEOA members \* Develop and maintain a regional TRIO Alumni Newsletter (quarterly) \* Assist COE TRIO Alumni Chair with implementation of goals. \* Actively participate in and contribute to all board activities/ discussions \* Contribute information from committee to newsletter as appropriate

**1.3 Facilitate and support attendance of members and alumni at state and national advocacy events.**

1. Hold strategic advocacy events at the regional conference and throughout the year.
2. Support states in scheduling meetings with elected officials, representatives and Congressional staff and provide Policy Seminar training for Board members and others, annually.
3. Coordinate the publication of regional, state and national TRIO/GEAR UP events to elected legislative officials and staff in the respective states.

**3.3 Encourage the involvement of Arnold Mitchem Leadership Institute (AMLI) alumni with NEOA**

1. Create and maintain a database of AMLI alumni.
2. Inform and encourage AMLI participants and alumni to make a commitment to serve.

**5.3 Expand TRIO/GEAR UP alumni presence in NEOA to assist advocacy efforts**

1. Recognize success of EOP alumni e.g. NEOA Achievers, NEOA Alumni List Serve, and COE/NEOA’s TRIO Alumni Online Network.
2. Engage alumni through alumni database, social media and at Policy Seminar.
3. Secure alumni presence at conference and Policy Seminar.
4. Provide advocacy training prior to Policy Seminar for state leaders.