



# MO-KAN-NE CHAPTER

of Mid-America Association of Educational Opportunity Program Personnel

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**Date:** Thursday, April 7<sup>th</sup>, 2022

**Location:** Marriott Country Club Plaza, Kansas City, MO

**Type:** General Assembly

**Attendees:** Board Members, Committee Chairs and Members, Chapter Membership

## MO-KAN-NE General Assembly 2022

- |  |                     |
|--|---------------------|
| I. Call to Order   | B. Jacobson         |
| II. Roll Call  | E. Sterup           |
| III. Establishment of Quorum                                   | Y. Wagoner          |
| IV. Approval of Agenda   | B. Jacobson         |
| V. Approval of Meeting Minutes<br>April 7 <sup>th</sup> , 2021 | B. Jacobson         |
| VI. President’s Report   | B. Jacobson         |
| VII. Past President’s Report                                   | S. Frank            |
| VIII. Treasurer’s Report                                       | R. James            |
| IX. Standing Committee Reports                                 |                     |
| 1. Membership and Certification                                | M. Wagoner          |
| 2. Research and Evaluation                                     | K. Azevedo/E. Miner |
| 3. Special Concerns and Affiliations                           | T. Waller           |
| 4. Legislation and Education                                   | C. Beggs            |
| a) Fair Share  | J. Loghry           |
| 5. Scholarships  | R. Thurber          |
| 6. Public Relations and Communications                         | S. Thompson         |
| 7. Professional Development                                    | M. Wagoner/S. Frank |
| a) Annual Conference   | M. Wagoner          |
| b) New Professionals   | C. Jackson          |

c) MILE	McDonald/Wolk Maddux
8. Student Initiatives and Conferences	A. Abdulaziz
a) McNair Heartland Conference	Azevedo
9. Finance	K. Bolen
<i>Report to be sent out after April 5<sup>th</sup> Committee meeting</i>	
10. Nominations and Elections	M. Patten/R. Prater
11. Technology	Conley/M. Wagoner
12. Advocacy and Recognition	J. Cayton
a) TRIO Day and First Gen Celebrations	B. Hammond
b) Alumni Engagement	TBD
c) MKN Achievers	L. Shepard
d) MKN Hall of Fame	M. Patten
X. Ad Hoc Committee Reports	
1. Scholarship Fundraising	A. McDonald
XI. State Representative Reports	
1. Missouri	B. Hammond
2. Kansas	K. Peterson
3. Nebraska	K. Rice
XII. Old Business	B. Jacobson
XIII. New Business	B. Jacobson
XIV. Announcements	
XV. Adjournment	





# MO-KAN-NE CHAPTER

of Mid-America Association of Educational Opportunity Program Personnel

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**Date:** Wednesday, April 7, 2021  
**Location:** Zoom  
**Type:** General Assembly  
**Attendees:** Board Members, Committee Chairs and Members, Membership

## MO-KAN-NE General Assembly 2021 Minutes

I. Call to Order at 10:23 am S. Eggers

II. Roll Call E. Sterup

- President, Shanna Eggers - present
- President-Elect, Monshonda Booker - present
- Past-President, Mark Patten – present
- Treasurer, Roxanna James - present
- Secretary, Erika Sterup - present
- MO State Representative, Brandon Hammond - present
- KS State Representative, Cheryl Rauh - present
- NE State Representative, Beth Jacobson - present
- Member at Large, Chris Beggs - present
- Member at Large, Anna McDonald – absent
- Member at Large, Margaret Shull - present
- Member at Large, Rita Thurber - present
- Member at Large, Tonya Waller - present
- Member at Large, Kara Woehler – present
- Parliamentarian Courtney McGinnis - present

III. Establishment of Quorum M. Booker/M. Conley  
-102 members present of 148 members registered for the Annual Conference

IV. Approval of Agenda S. Eggers  
*Motion to approve agenda by Courtney McGinnis; second by Ce Merrigan.*  
*Motion approved.*

V. Approval of Meeting Minutes S. Eggers  
*Motion to approve Meeting Minutes by Whitney Wolk Maddox; second by Kara Woehler.*  
*Motion approved.*

VI. President's Report S. Eggers  
*Written report submitted*  
-President Eggers reviewed details from her report, which are organized under 6 main

priorities for the year.

-Recognition and thanks regarding the hard work done this year by the committees.

*Motion to approve President's Report by Mike Conley; second by Rebecca Dukstein.  
Motion approved.*

#### VII. Treasurer's Report

R. James

*Written report submitted. Balances as of 3/19/21:*

*Checking - \$106,635.13*

*Money Market - \$98,135.45*

*Total - \$204,780.58*

-Treasurer James reviewed details from her report.

-The 2020 budget can now be considered closed; we are now working solely from the 2021 budget.

-Mike Conley asks whether the chapter is solvent; Roxanna James defers to the Finance Committee, as she cannot make that determination as Treasurer.

*Motion to receive Treasurer's report for review by Brandon Hammond;  
second by Ce Merrigan.  
Motion approved.*

#### VIII. Standing Committee Reports

##### A. Membership and Certification

M. Booker

*Written report submitted*

-Kristi Bolen asks for an estimate of our current membership numbers. The last report listed 224 current members. Shanna Eggers points out that participants in the Assembly who are not members should consider joining.

##### B. Research and Evaluation

K. Azevedo/ E. Miner

*Written report submitted*

-Emily Miner asks for questions; there were none.

##### C. Special Concerns and Affiliations

T. Waller

*Written report submitted*

-Tonya Waller asks for questions; there were none.

##### D. Legislation and Education

C. Beggs/J. Bloss

*Written report submitted*

-Chris Beggs invited everyone to contact him if they are interested in becoming members, or if they have questions or concerns for him or his committee; his email is in the chat.

-Chris pointed out that Jeremy Bloss has been active in following up on detailed concerns of members like scoring of grants, difficulties in submission process, etc.

##### 1. Fair Share

J. Loghry

*Written report submitted*

-Jacque Loghry reviewed what Fair Share and 10 for 10 is. To meet 10 for 10 goals, Kansas needs 5 more this year, MO may need 1 (some donations are being processed still), NE needs 4 more.

-States that meet their overall Fair Share goals receive a free Policy Seminar Registration.

-Percentage of goals reached, as updated from a meeting just today are 85% in MO,

63% for KS, and 56% for NE. Overall, EOA is at 67% of its goal.

-Jacque pointed out that our State Reps and President are offering to take pies in the face, and to make additional contributions to next year's drive if the states or chapter as a whole meet or exceed the set goals.

-A link to the donation form is in the chat.

-COE does important advocacy for our programs, both in times of crisis (like sequestration) and every day.

-Shanna Eggers reminded members that it is best not to fax donation forms in, but to send them by mail or email.

#### E.Scholarships

R. Thurber

*Written report submitted*

-Scoring has been completed for both MKN and EOA awards; MKN scholarship winners will be announced tomorrow after the keynote and MKN Achievers.

-Only had 41 applications for scholarships in MKN competition; there were over 80 for EOA scholarships.

#### F.Public Relations and Communications

S. Thompson/T. Hill

*Written report submitted*

-Shauntelle Thompson reported that social media has been and continues to be updated during the conference.

-State Reps and Roundtable facilitators – please send her information about what occurred in those meetings so it can be posted.

-Shauntelle will put links in the chat to social media handles for the chapter.

##### 1. Alumni Engagement

S. Velasquez

*Written report submitted*

-Scott Velasquez reviewed his report. He has been researching what other chapters in EOA have been doing to engage alumni, and is working with ELI members to help with this.

-Next step will be a focus group to assess alumni needs.

-Shanna Eggers suggested PR and Technology work together and consider posting some alumni profiles to the chapter webpage.

##### 2. TRIO Day & First-Gen Celebrations

K. Woehler

*Written report submitted*

*Newsletter submitted*

-Kara Woehler reviewed the color version of the newsletter that was sent out in March summarizing Trio Day activities.

-Kara encouraged members to submit activities their programs are doing for upcoming newsletters. Shanna Eggers pointed out that upcoming College Signing Day celebrations, graduations, and National First Generation celebrations are good opportunities to submit photos and summaries of activities member programs are doing on their campuses. Kara's email is in the chat.

##### 3. MKN Achievers

K. Peterson

*Written report submitted*

-Kurt Peterson reviewed the process of soliciting and reviewing nominations for this year's competition. The winners will be recognized during tomorrow morning's program, and info about the achievers will be posted on the conference web page after they are announced.

-Kurt recognized the committee members listed on his report for their work.

## G. Professional Development

M. Booker/M. Patten

*Written report submitted*

-Monshonda Booker reviewed professional development opportunities that are being conducted this week. The VUB Best Practices workshop held earlier this week had 36 registrants; UB and McNair Best Practices workshops will be held Friday, 4/9.

### 1. Annual Conference

M. Booker/Y. Wagoner

*Written report submitted*

-Monshonda Booker reviewed her written report. The final count was 201 total registrants for the conference. Complimentary tokens were mailed out at the end of last week to all participants; be watching for them.

-Monshonda recognized each of the members of the committee who contributed to the conference, Yosh Wagoner for her work on the website, and President Eggers for her assistance.

-Yosh Wagoner and Shanna Eggers recognized Monshonda's work on the conference.

### 2. MILE

Conley/Thompson/Zalite

*Written report submitted*

-Mike Conley thanks Liz Shepard and Julie Cayton for paving the way as last year's MILE trainers.

-Mike recognized the current MILE cohort members and reviewed his report.

-MILE participants are planning a drive-in training, including choosing the theme; they are members who know the needs of the chapter and are excited to respond with relevant professional development.

## H. Finance

M. Shull

*Written report submitted*

-Margaret Shull reported that the chapter is solvent.

-Margaret reviewed items from her report, highlighting the decision to open a chapter credit card (and safeguards taken), and to update the Fiscal Policy and Procedures manual to incorporate credit card fees into the stated cost of all conference registrations and items for sale.

## I. Nominations and Elections

S. Hatfield/R. Prater

*Written report submitted*

*Elections Timeline submitted*

-Shannon Hatfield reminds the members that nominations will open on April 12, and encourages members to consider running for open positions.

-This year we will use Club Express for voting, as EVote is not available at this time.

## J. Technology

M. Conley/S. Thompson

*Written report submitted*

-The committee has been working on the conference platform; Mike Conley points out that the chapter saved approximately \$30,000 by having Yosh Wagoner create the conference platform in-house instead of paying for one.

-Mike encourages members to join the committee; there is a goal to create a new website, and member ideas/feedback about what it should look like and do will be helpful.

-Shauntelle Thompson invites members to make suggestions for social media that should be added to the website, as well as any other ideas people have for things to post.

-Mike asks members who have high-quality HD pictures of students and staff from programs in the chapter to please submit them for inclusion on the website.

K.New Professionals  
*Written report submitted*

R. Dukstein/G. Heasty

-Rebecca Dukstein reviewed her report and the New Professionals workshop that took place earlier this week; approximately 35 attended.

*Motion to approve Standing Committee Reports by Corinne Nilsen; second by Ann Ellis.  
Motion approved.*

#### IX. Ad Hoc Committee Reports

A.Constitutional Revisions  
*Written report submitted*

K. Bolen

-Kristi Bolen points out that changes must be made this year to the MKN constitution in order to remain aligned with the EOA constitution, which underwent revisions this year.  
-Since her written report was filed, Kristi has submitted over 100 proposed changes (not all to content-some are technical changes like numbering or wording) for EOA to review. Once reviewed by EOA, the MKN board will approve the requested changes for a vote by the membership. The goal is to have this complete by November 2021.

B.Student Initiatives and Conferences  
*Written report submitted*

A. McDonald/J. Cayton

-President Eggers indicates that the committee has the latitude to plan innovative content and delivery this year; members are encouraged to contact Anna McDonald or Julie Cayton.

C.McNair Heartland Conference  
*Written report submitted*

M. Borders/S. Raymond

-Maggie Borders reports that the committee met on Monday and is leaning toward having the conference in person; they will email the McNair list serve to get feedback from potential participants about institutional policies, and will be watching CDC guidance.

*Motion to approve Ad Hoc Committee Reports by Chris Beggs; second by Kara Woehler.  
Motion approved.*

#### X. State Representative Reports

A.Missouri  
*Written report submitted*

B. Hammond

-Brandon Hammond recognized members who attended virtual Policy Seminar this year.  
-Brandon's focus from here will be on increasing Missouri membership.

B.Kansas  
*Written report submitted*

C. Rauh

-Cheryl Rauh reported that Kansas had excellent turnout for Policy Seminar.  
-Cheryl recognized Maggie Borders and Corinne Nilsen for editing the State booklet.  
-Next goals include working on Fair Share and increasing Kansas membership.

C.Nebraska  
*Written report submitted*

B. Jacobson

-Beth Jacobson said the virtual format increased participation in Policy Seminar this year.  
-Krystal Rice created a new State booklet that looks much more updated; thanks for that.

*Motion to approve State Representative Reports by Ce Merrigan;  
second by Rebecca Dukstein.  
Motion approved.*



XI.Old Business

S. Eggers

-None

XII.New Business

S. Eggers

-None

XIII.Announcements

-Monshonda Booker reminds members that the conference silent auction closes tomorrow, and the conference Funtivity is this afternoon at 3:00. Non-members or those not attending the conference can participate in either of those; links are in the chat.

-Two vendors are offering lunchtime activities today; links are on the conference page.

-Kansas Meal Program is this afternoon at 1:00.

XIV.Adjournment

*Motion to Adjourn by Mike Conley; second by Corinne Nilsen.*

*Adjourned at 12:05 pm.*



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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## President's Report

DATE: 4/7/2022

### Presidential Responsibilities:

- Conduct business in accordance with the MKN Constitution & approved Policies and Procedures;
- Preside over all meetings of the Chapter and serve as Chairperson of an preside at all meetings of the Board of Directors;
- Nominate Chairs of each standing committee;
- Serve as ex-officio members of all standing and ad hoc committees;
- Appoint Members-at-Large;
- Submit a written report to the membership at the annual General Assembly meeting and to the Board of Directors at each Board meeting;
- Submit to the Board an annual plan of operation and budget; and
- Serve as Chapter delegate to the Educational Opportunity Association Board of Directors.

### Updates and Activities:

- Since the last meeting, I have continued to provide support to committees as needed – sending out emails to membership as requested by board members for the Annual Conference, meeting notifications, Scholarships, Pre-Conference, Fundraising opportunities via the conference mugs and supplies, and information about the Raffle.
- Worked with the President Elect and committee for Annual Conference planning
- Worked with the Nebraska State Rep for Policy planning for Nebraska
- Attended Policy Seminar as a representative of MKN
- Read for scholarships
- Worked with State Reps on development of State Meetings
- Participated in several calls with COE for Connect Discuss Learn, State Leadership meetings, and Policy discussion sessions
- Worked with the Scholarship committee for a \$500 one-time scholarship to be added for 2022 from a donation by a MKN member
- Attended the EOA Legislation and Education meeting in early March and was notified MKN was to received two \$500 scholarships PER STATE to Policy attendance-which differed drastically from what was told prior. So, I worked with the State Reps to find those who needed assistance to use those scholarships from EOA: Nebraska-Joe Morrison and myself, Kansas-Kristi Bolen, and Missouri did not have any takers.
- Assisted the New Professionals committee in finding speakers.

### Recommendations:

Names to add to the Student Initiatives and Conferences committee as members. Assist finding institutions willing to propose hosting this conference.  
Bank of the West being changed to another institution due to a great deal of difficulties with customer service.  
Current funds in savings at Bank of the West need to be moved into a better investment.



# MO-KAN-NE CHAPTER

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## Past President's Report

DATE: April 7, 2022

### Committee Activities:

I have worked primarily on transition efforts for the Board and a few committees. Specific efforts have included assistance with bank transition and payment of bills until that was complete, answering questions from and aiding the conference planning committee, and guidance of new state representative from Kansas.

Toward the end of the 2021 Board year, we were given the opportunity to apply for Professional Development funds through EOA. We applied for and were awarded \$15,000 that supported the following activities in late 2021 and early 2022:

- 1) Micro-aggression training for MKN Board members, committee chairs, and MILE participants in December 2021
- 2) Enneagram assessments for MKN Board members, MILE participants, and committee chairs in December 2021 and a four-week Enneagram training in February 2022
- 3) Supplies and travel support for an in-person MILE training in December 2021
- 4) Support for the Chapter reception during the 2021 EOA conference
- 5) UB writing workshop led by Lucy Jones in December 2021. This had been planned as in-person but was changed to virtual due to weather and travel restrictions.

All activities have been completed and all RFC's have been submitted to EOA for reimbursement of costs.

The Paul Spraggins grant awarded to MKN in May 2021 for creation of a new website has been completed. The final evaluation for this project has been submitted to COE, making MKN eligible to apply for future awards. The RFC has been submitted to EOA for the COE funds and matching EOA funds to be released to MKN.

### Recommendations:

I have no recommendations at this time.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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## TREASURER REPORT

Roxanna James

DATE: April 7, 2022

Balances as of March 19, 2022:

Checking: 205,310.74

Money Market: 98,155.25

TOTAL \$ 303,465.99

### Treasurer Responsibilities:

- The Treasurer will represent the Chapter in assuring the receipt and expenditures of funds in accordance with the Fiscal Policies and Procedures;
- Serve on the finance committee;
- Submit a written report to the membership at the annual General Assembly meeting and to the Board of Directors at each Board meeting;
- Maintain appropriate financial records and submit an annual account's review at the end of each term;
- File all necessary tax returns and maintain the Chapter's incorporation and tax exemption status;
- Provide fiscal assistance as requested.

### Activities:

- All financial records have been submitted and accepted.
- Provided financial records to the Finance Committee Chair for annual review.
- Assisted with each conference committee's registration collection.
- Assisted with new payment process through the website.
- Assisted with the development of the budget.
- Assisted with the acquisition of credit cards for President, President-Elect, and Treasurer.
- Created financial system with the implementation of credit cards.

Special Report:

- o EOA Assistance for 2021 TOTAL \$23,990.00
- o State Initiative - \$5164.89
- o Training/Professional Development - \$9,835.11
- o Policy Assistance \$1490.00
- o Paul Scraggins Grant (\$500 EOA/\$500 COE)
- o Scholarships ( 1/2 EOA and 1/2 EOAF) \$6,000.00
- o Hotel Expenses covered by EOA for board attendance (unknown amount charged directly to EOA)

<b>MO-KAN-NE 2022 Annual Budget</b>			
<b>Revenues</b>	<b>2022 Proposed</b>	<b>Actual</b>	<b>% of Proposed Budget</b>
Annual Conference	\$85,400.00	\$0.00	0%
EOA Membership Rebates	\$7,500.00	\$2,346.00	31%
Heartland Conference	\$105,000.00	\$0.00	0%
Interest Earned	\$15.00	\$4.23	28%
MILE Program	\$1,500.00	\$750.00	50%
Professional Development	\$1,000.00	\$0.00	0%
Prior Year Revenue over Expenses	\$6,427.07	\$0.00	0%
Scholarships Fundraising	\$5,000.00	\$1.00	0%
Student Initiatives and Conferences	\$35,000.00	\$0.00	0%
<b>Total Revenue</b>	<b>\$246,842.07</b>	<b>\$3,101.23</b>	
<b>Expenses</b>			
Annual Conference	\$59,093.00	\$106.63	0%
Awards and Recognitions	\$500.00	\$0.00	0%
Board Meetings/Travel	\$12,718.92	\$0.00	0%
Board Operational Activities	\$5,306.15	\$1,282.44	24%
ELI	\$2,500.00	\$662.25	26%
Finance Committee	\$300.00	\$0.00	0%
Heartland Conference	\$88,399.00	\$2,899.00	3%
MILE Program	\$4,000.00	\$0.00	0%
Nominations and Elections	\$500.00	\$0.00	0%
Officer Bonding and Insurance	\$1,150.00	\$0.00	0%
Outreach and Advocacy	\$10,000.00	\$0.00	0%
Pres and Pres. Elect travel	\$5,000.00	\$0.00	0%
Professional Development	\$7,500.00	\$0.00	0%
Scholarships	\$23,500.00	\$0.00	0%
Student Initiatives and Conferences	\$23,925.00	\$0.00	0%
Tax prep/review	\$1,700.00	\$0.00	0%
Technology	\$750.00	\$68.55	9%
<b>Total Expenses</b>	<b>\$246,842.07</b>	<b>\$5,018.87</b>	
Revenue over Expenses	\$ 0 -	-\$1,917.64	

\*Unaudited - As of March 23, 2022

MoKanNe

Statement of Revenue & Expenses

January 2021 through December 2021

Revenue

Conferences	
Annual	52,765.00
Heartland	111,599.75
Student	81,990.47
EOA Membership Rebates	7,036.00
Interest	25.67
MILE Program	
Registration	1,043.00
Drive-In	3,600.00
Professional Development	3,252.45
Scholarships/Fundraising	<u>686.00</u>
Total Revenue	\$261,988.34

Expenses

Conferences	
Annual	6,882.04
Heartland	78,002.70
Student	69,407.87
Board Meetings/Travel/Oper	8,179.99
President/Elect Travel	292.50
Scholarships	17,000.00
ELI	1,525.30
MILE	(136.50)
Professional Development	1850.00
Outreach and Advocacy	335.00
Insurance/Bonding	1.106.00
Tax Preparation	1,700.00
Technology	<u>3,235.58</u>
Total Expenses	\$211,033.24
<b>NET INCOME</b>	<b>\$50,955.11</b>

EXTENDED TO NOVEMBER 15, 2021

Form **990**

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

**2020**

Department of the Treasury  
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Open to Public Inspection

**A For the 2020 calendar year, or tax year beginning** \_\_\_\_\_ **and ending** \_\_\_\_\_

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>MO-KAN-NE</b> <b>CHAPTER OF MID-AM ASSOC OF EOPP</b> Doing business as		<b>D</b> Employer identification number <b>47-0817300</b>
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>125 S 2ND STREET</b>	<b>E</b> Telephone number <b>620-441-5253</b>	
	City or town, state or province, country, and ZIP or foreign postal code <b>ARKANSAS CITY, KS 67005</b>		<b>G</b> Gross receipts \$ <b>67,460.</b>
	<b>F</b> Name and address of principal officer: <b>ANNA MCDONALD</b> <b>SAME AS C ABOVE</b>		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions
	<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶

**J** Website: ▶ **WWW.MOKANNE.ORG**

**K** Form of organization:  Corporation  Trust  Association  Other ▶ **L** Year of formation: **1978** **M** State of legal domicile: **MO**

Part I Summary				
Activities & Governance	1	Briefly describe the organization's mission or most significant activities: <b>EDUCATIONAL SUPPORT</b>		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>13</b>
	4	Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>13</b>
	5	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	<b>5</b>	<b>0</b>
	6	Total number of volunteers (estimate if necessary)	<b>6</b>	<b>48</b>
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
	b	Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0.</b>
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	<b>7,977.</b>	<b>0.</b>
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>170,672.</b>	<b>59,535.</b>
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>1,324.</b>	<b>347.</b>
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>6,153.</b>	<b>7,578.</b>
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>186,126.</b>	<b>67,460.</b>
	14	Benefits paid to or for members (Part IX, column (A), line 4)	<b>11,481.</b>	<b>1,181.</b>
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>0.</b>		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>182,862.</b>	<b>54,505.</b>
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>194,343.</b>	<b>55,686.</b>
Net Assets or Fund Balances	19	Revenue less expenses. Subtract line 18 from line 12	<b>-8,217.</b>	<b>11,774.</b>
	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21	Total liabilities (Part X, line 26)	<b>167,793.</b>	<b>179,567.</b>
	22	Net assets or fund balances. Subtract line 21 from line 20	<b>0.</b>	<b>0.</b>
		<b>167,793.</b>	<b>179,567.</b>	

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer		Date
	<b>ANNA MCDONALD, PRESIDENT</b> Type or print name and title		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date
	<b>KIM K PEARSON</b>		
Firm's name	Firm's address	Firm's EIN	PTIN
	<b>DANA F COLE &amp; COMPANY, LLP</b> <b>9300 W 110TH ST, SUITE 145</b> <b>OVERLAND PARK, KS 66210</b>	<b>47-0526649</b>	<b>P00249568</b>
		Phone no.	
		<b>913-341-8200</b>	

May the IRS discuss this return with the preparer shown above? See instructions  Yes  No



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Membership & Certification

**CHAIRPERSON:** Yosh Wagoner -President Elect

**COMMITTEE MEMBERS:** Brandon Hammond, Kurt Peterson, Krystal Rice

**DATE:** March, 2022

**Committee Charges:**

1. Actively promote membership in the Chapter, certify the Chapter member list, and generally determine membership class and eligibility for purpose of participation in Chapter activities and Board positions.
2. Communicate the updated EOA membership types to membership via coordination with Technology and Public Relations and Communication committees.
3. Verify quorum for general assembly; monitor and tally votes when necessary.
4. Implement at least two membership drives to strive to increase membership with emphasis on Educational Opportunity Programs and new and inactive Missouri, Kansas, Nebraska (MO-KAN-NE) members.
5. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.
6. The President-Elect also serves as the Chapter delegate to the Association's Membership and Certification Committee.

**Committee Activities:**

President-Elect Yosh Wagoner and Committee members coordinated to create action plan to contact members with expired and coming soon expired memberships about renewal. Emails and other marketing tools have been discussed to increase membership and decrease high volume of duplicate emails for membership. Committee members joined the Fair Share Regional Meeting (ASPIRE, EOA, CAEOP, NAEOP, WESTOP) zoom meeting on March 8, 2022 to share regional breakdown of the Fair Share by State report as of 3/1/2022 to show personal contribution and institutional membership goals.

**State Membership**

Missouri Active Members: 84  
Kansas Active Members: 107  
Nebraska Active Members: 52

Please see MO-KAN-NE memberships below as of 3/25/22:



<b>Memberships</b>	<b>Membership Types</b>	<b>Jan</b>	<b>March</b>
Chapter: MO-KAN-NE	Active	218	243
Chapter: MO-KAN-NE	Expired	266	271
Chapter: MO-KAN-NE	Pending	3	5
Grand Total Members		487	519

**Recommendations:**

None.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Research and Evaluation

**CHAIRPERSON:** Kari Azevedo

**COMMITTEE MEMBERS:** Cheryl Rauh

**DATE:** March 2022

**Committee Charges:**

1. Design and distribute evaluation tools for Chapter events; collect and analyze data to share with the Board.
2. Promote research and evaluation related to the Chapter's mission, goals, and objectives; support the board and committees with the collection and analysis of data as needed to assist the Chapter in making data-driven decisions.
3. Highlight best practices in research and evaluation from programs across the Chapter.
4. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

Our initial committee communication included plans to focus on being available and providing assistance to the MKN Board and any MKN member in areas of evaluation for events or other data collection, organization, and analysis needs.

Currently working with MKN Conference Committee to prepare evaluation for MKN Annual Conference

**Next Steps:**

Reach out to chairs of MKN events with offer to provide assistance.

Provide MKN Conference Committee with link for Annual Conference Evaluation and provide assistance with analysis and summary of results.

**Recommendations:**

None at this time.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Special Concerns and Affiliations

**CHAIRPERSON:** Tonya Waller

**COMMITTEE MEMBERS:** Riccardo Harris, Verneta White, Marilyn Chavez

**DATE:** March 22, 2022

**Committee Charges:**

1. Ensure the representation and/or input of special groups in activities of the Chapter and in decision-making procedures. Specifically, to make sure GEAR UP voices and perspectives are represented. Coordinate with other committees to ensure representation.
2. Handle issues and programs requiring a close working relationship between representatives of higher education and of secondary education.
3. Help the Board stay abreast of changing needs of membership, programs, and students due to COVID-19. Make suggestions for appropriate actions.
4. Assume a proactive role in proposing programs and areas of cooperation to the Board.
5. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

- Brainstorming ideas to increase GEAR UP involvement in MKN.
- Planning outreach to GEAR UP programs in Kansas and Nebraska (MO does not currently have a GEAR UP program). This outreach will include documentation regarding the benefits of MKN participation. Many GEAR UP programs think MKN is for TRIO only, so the committee hopes to dispel those beliefs.

**Recommendations:**

None at this time.



# MO-KAN-NE CHAPTER

of Mid-America Association of Educational Opportunity Program Personnel

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**COMMITTEE:**       **Legislation and Education**

**CHAIRPERSONS:**   Chris Beggs and Jeremy Bloss

**COMMITTEE MEMBERS:** Michelle Ciesielski, Kurt Peterson, Krystal Rice, Jacque Loughrey, Valdis Zalite, Brandon Hammond

**DATE:** March 27, 2021

**Charge:**

- Develop meaningful responses to issues and concerns affecting the educational resources and environment of participants and to encourage the development and expansion of a communications network among those professionally involved in equal access to educational opportunity programs.
- Specifically address committee to the Chapter goals and disseminate to the Chapter up-to-date information related to the U.S. Department of Education and education issues that impact TRIO/EOP programs.
- The chair of this committee shall serve as the Chapter's delegate to the Association's Legislation and Education Committee.
- Update the congressional guide for each state by March in coordination with the State Team Leaders and State Representatives.
- Present a final report to the MO-KAN-NE Board at the Sept/Oct. Board meeting.

**Activities:**

- Discussed lifting member concerns to EOA and COE levels.
- Discussed aligning activities with EOA
- Participated in 2021 Policy Seminar: TRIO UNITED FOR A NEW ERA

**Recommendations:**

- The chapter, via this committee, collects data regarding legacy legislative restrictions that impact programs ex: limited research stipends in McNair that undermine recruiting, narrow definitions of cultural engagement activities in SSS programs
- The committee plans to educate membership in practical advocacy tactics in affecting legislation by co-presenting at the annual MKN conference.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Fair Share

**CHAIRPERSON:** Jacque Loghry

**COMMITTEE MEMBERS:** Brandon Hammond-MO, Krystal Rice-NE & Kurt Peterson-KS

**DATE:** 3.30.22

**Committee Charges:**

1. Contact members of the Chapter for the purpose of meeting the Chapter's contribution goal to the Council for Opportunity in Education (COE) through program subscription to Equality, institutional membership, and personal contributions.
2. Work with the EOA Fair Share Chair and COE to provide updates and information on the Chapter's progress toward set goals.
3. Develop Fair Share "drive" friendly competitions to incentivize personal contributions.
4. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting. MO-KAN-NE State Representatives will assist the Fair Share Chair(s) through the following:
5. Maintain contact with current and potential COE Institutional Members within their respective states.
6. Reach out to institutions that have expired Institutional Memberships.
7. Disseminate information about the COE 10 for 10 personal contribution campaign to Chapter members.
8. Stay abreast of and provide membership with relevant information pertaining to Fair Share per membership requests.

**Committee Activities:**

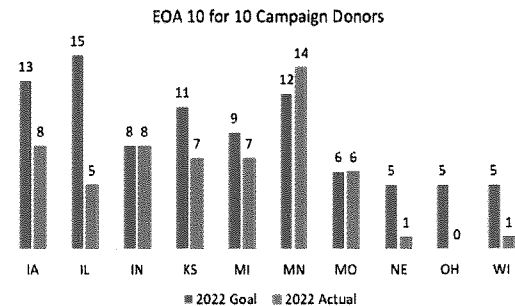
1. The committee has been working to contact members of the Chapter and help MO-KAN-NE meet the annual goals established by COE for personal contributions and institutional memberships.
  - a. MO-KAN-NE membership lists that would help with the personal contribution campaign have been difficult to get in a useable format from EOA's club express system. Past State Representatives Cheryl Rauh (KS) and Beth Jacobson (NE) have provided guidance for that.
  - b. COE has provided monthly reports about institutional memberships.
2. Committee members have attended COE's monthly Regional Fair Share Zoom Meetings about progress toward the goals and have shared that information out with the Chapter periodically.
  - a. COE added Vanessa Ramirez to the Fair Share team with Al Phillips and Chelsea Murray. They created an online tool box with information to help improve communications.
  - b. EOA's Fair Share Chair, Cindy Cowell (IL) left TRIO and Cody Pritchard (IA) filled the position.
  - c. COE provided updated monthly reports showing each state's progress toward annual goals.

- i. There have been issues with personal contributions getting processed by COE and credited to each state's report.
  - ii. Donors let the committee know about donations being made, and then the committee reached out to COE staff who helped find the donations and get credits applied.
3. State Representatives developed friendly competitions to incentivize personal contributions for the Fair Share campaign drive to meet the 10 for 10 pledge goals by February 15<sup>th</sup> (pledges must be on track to reach a total donation of \$100 by June 2021)\*:

Representative	Goal	Actual (as of 3.7.22)	Incentive Message
MO: Brandon Hammond <a href="mailto:bhammond1@sfccmo.edu">bhammond1@sfccmo.edu</a>	6	6	To get Missouri members to donate, Brandon is willing to take a <i>pie in the face</i> at the MO-KAN-NE Conference in April from each 10 for 10 donors from MO.
KS: Kurt Peterson <a href="mailto:kurt.peterson@gcccks.edu">kurt.peterson@gcccks.edu</a>	11	7	To get Kansas members to donate, Kurt would be willing to <i>dye his blonde hair</i> for the MO-KAN-NE Conference and let the 10 for 10 donors from KS vote on the color. This would only happen if the KS goal is met by Feb. 15.
NE: Krystle Rice <a href="mailto:KrystalRice@creighton.edu">KrystalRice@creighton.edu</a>	5	1	Nebraska colleagues, Krystle asks you to consider donating to Nebraska's fair share contributions! See the <i>Nebraska newsletter for engagement details</i> for your state!

\*Note: COE extended the deadline for the 10 for 10 goals, which allowed MO to receive a free policy seminar registration. Note that MO met the goal; KS had the most donors, but had a higher goal to reach; and while NE only had 1 of 5 personal contributions, they reached the highest total Fair Share amount (see 82% in one of the charts below).

### EOA "10 for 10" Campaign Results



4. COE Fair Share updates as **March 7, 2022**:  
COE is at 76%; EOA is at 76%; and MO-KAN-NE is at 74%.

## EOA is at 76%

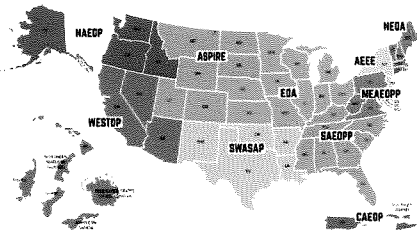
State	Equality	Membership	Contributions	Sum	Budgeted	Difference	%
IA	\$0.00	\$42,975.00	\$863.34	\$43,838.34	\$71,196.00	\$27,357.66	62%
IL	\$0.00	\$184,600.00	\$1,300.00	\$185,900.00	\$216,421.00	\$30,521.00	86%
IN	\$0.00	\$31,700.00	\$880.00	\$32,580.00	\$38,858.00	\$6,278.00	84%
KS	\$0.00	\$35,675.00	\$1,680.00	\$37,355.00	\$54,187.00	\$16,832.00	69%
MI	\$0.00	\$89,375.00	\$950.00	\$90,325.00	\$115,297.00	\$24,972.00	78%
MN	\$0.00	\$61,425.00	\$3,500.00	\$64,925.00	\$98,654.00	\$33,729.00	66%
MO	\$0.00	\$48,500.00	\$1,090.00	\$49,590.00	\$69,091.00	\$19,501.00	72%
NE	\$0.00	\$33,950.00	\$180.00	\$34,130.00	\$41,693.00	\$7,563.00	82%
OH	\$0.00	\$70,000.00	\$120.00	\$70,120.00	\$101,550.00	\$31,430.00	69%
WI	\$0.00	\$68,025.00	\$1,837.52	\$69,862.52	\$86,342.00	\$16,479.48	81%
EOA	\$0.00	\$666,225.00	\$12,400.86	\$678,625.86	\$893,289.00	\$214,663.14	76%

5. Power of Persistence—new fair share campaign by COE to encourage personal contributions of any amount from those who have never donated before.

## Power of Persistence Campaign

Celebrate the Power of Persistence, Doubling the Power of TRIO

This shows our Personal Contributions goal only.



**FAIR SHARE 2022**



**CELEBRATE THE POWER OF PERSISTENCE**  
*DOUBLE THE POWER OF TRIO*



**FAIR SHARE 2022**



As of February 28, 2022, \$126,252.39 in personal contributions had been raised to support the mission and vision of the Council for Opportunity in Education.

- COE has been focusing on doubling the support of Pell and TRIO. To support these advocacy efforts, COE is asking for its members to “Start, Increase, or Double” their personal contributions, which are treated as unrestricted funds.
- For example: if someone has not given, could they give \$20; if they have given \$40, could they give another \$40; if they have given \$60, could they give another \$40?
- All donations are needed and welcomed to support the expansion of Pell and TRIO.

6. Spring campaign is going on for Institutional Memberships that expire between July 1-December 31, if renew by May 31, 2022:

COE COUNCIL FOR OPPORTUNITY IN EDUCATION

## Institutional Membership

**Winter Campaign**  
 Memberships that expire between January 1- June 30  
 get a \$300 discount if they renew by February 15<sup>th</sup>

**Spring Campaign**  
 Memberships that expire between July 1- December 31  
 get a \$300 discount if they renew by May 31<sup>st</sup>

Membership is based on the number of Federal TRIO Programs at an institution/agency, see table below.

Number of TRIO Programs at an institution	Cost of Membership (Effective January 1, 2022)
0-1 TRIO Program	\$3425
2	\$3825
3	\$4225
4	\$4625
5	\$5025
6	\$5425
+1 TRIO Program	\$400

**Need an invoice?**  
 Click [here](#) to complete the membership renewal form.

coenet.org

7. COE’s next Regional Fair Share Zoom Call for our EOA Chapters is scheduled for April 12, 2022.

**Recommendations:** MO-KAN-NE needs to keep working to achieve 100% of the COE FY22 campaign year goals by June 30, 2022. All TRIO/GEARUP professionals who can, please consider donating any amount possible utilizing the “10 for 10” COE donation form.



**MAKE A ONE-TIME DONATION HERE**



Respectfully Submitted, Jacque Loghry, MKN Fair Share Chair



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Scholarships

**CHAIRPERSON:** Rita Thurber/Nick Horne

**COMMITTEE MEMBERS:** Roxanna James; Julie Cayton; Brandon Hammond; Jenna Henry; Brenda Armstrong

**DATE:** 03/30/2022

**Committee Charges:**

- 1) Review the number and types of different scholarships offered, criteria for each scholarship, timeline, and application process.
- 2) Make recommendations to the Board regarding a cohesive scholarship plan moving forward with respect to the aforementioned four areas (offerings, criteria, timeline, process).
- 3) Upon approval from the board, create an updated policies and procedures document for Chapter scholarships

**Committee Activities:**

- 1) Scoring EOA scholarships to determine winners
- 2) Assigning and scoring MOKANNE scholarships
- 3) Developed applications for MKN scholarships

**Recommendations:**

- 1) No recommendations at this time





# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE: Public Relations & Communications**

**CHAIRPERSON:** Shauntelle Thompson

**COMMITTEE MEMBERS:** Brooke Sullivan, Jasmine Lewis

**DATE:** 3-29-2022

**Committee Charges:**

1. Work with the Chapter's Board members and committee chairs to ensure the dissemination of information pertinent to the Chapter via all available means, including email listserv, website, and social media.
2. Work collaboratively with the Technology committee to ensure that the website is maintained with current program information and relevant MO-KAN-NE documents.
3. Promote branding of and information about the Chapter to external entities.
4. Maintain the Chapter's social media accounts and encourage the membership to engage in connecting with other members via these platforms.
5. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

1. MILE has created a flyer to promote Funtivity on FB and Twitter Public Relations and Communications Committee have helped promote the Funtivity Activity currently and during the conference.
2. MILE and Public Relations and Communications Committee help make updates and changes to the FB event for Funtivity.
3. Public Relations and Communications Committee has added newsletters to the MKN Chapter website from State Reps sharing current events about TRIO/GEAR UP Programs
4. Public Relations and Communications Committee has been working closely with the Annual Conference Committee, Funtivity with MILE, and Technology Committee.
5. Public Relations and Communications Committee has been working with the Technology Committee on working on the new website and working on the updates for the MKN Chapter website
6. Public Relations and Communications Committee has worked with adding new updated speakers' information and conference schedules on the MKN website and Conference Website.
7. Public Relations and Communications Committee has helped promote the following committees on all social media platforms, New Professional Development, Enneagram Pre-Conference, Scholarship, Call of Proposals, Annual Conference, MKN Swag for the MKN Chapter website.

**Recommendations:**



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Annual Conference/Professional Development

**CHAIRPERSON:** Yosh Wagoner -President Elect and Co-chair Shauntelle Thompson

**COMMITTEE MEMBERS:** Julie Cayton, Erika Sterup, Shauntelle Thompson, and Whitney Maddux

**DATE:** March, 2022

**Committee Charges:**

1. Coordinate all aspects of planning, implementing and evaluating the Annual Conference. Responsibilities include, but are not limited to, program development, registration, budget, selection of speakers, sponsorships/exhibits, publicity, entertainment, lodging, and other logistical arrangements.
2. Submit a budget for the annual conference that projects at least \$10,000 revenue over expenses.
3. Coordinate with Technology and Public Relations and Communications committees to ensure the membership, and non-member colleagues, are informed of the conference information.
4. Develop plans that remain nimble enough to meet the needs of membership whether the event is virtual and in person.
5. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting

**Conference Committee Activities:**

-President-Elect Yosh Wagoner and Conference Co-Chair Shauntelle, have been coordinating with conference committee members weekly to prepare and release the MO-KAN-NE (MKN) 44<sup>rd</sup> Annual Conference Call over several different platforms to reach participants. Each committee has been meeting weekly with conference chairs to prepare. Banquet Program, Achievers Selection, Fundraising, Scholarships have been selected/completed for the conference by conference chairs. Conference website will be tentatively completed and released on Wednesday March 30, 2022. Last Call for conference was sent on March 25, 2022 as deadline for meal count is due on March 27, 2022.

**Annual Conference**

**Registrations**

*Total 181 Registered (In-Person 146 & Virtual 35 #'s from 3/25/22)*

**Advertising**

*7 Vendors Update /Sending out Upcoming Call this week 3/25/22 (3 in person and 4 virtual)*

**Proposals**

*15 proposals*

**Professional Development Committee Activities:**

President-Elect Yosh Wagoner and committee members for the pre-conference workshop and new professionals coordinated during MKN conference weekly planning meeting. Professional develop training has been confirmed for the Annual MKN Conference for Wednesday, April 6, 2022 from 9:00am to 12:00am for New Professional Workshop and from 9:00am to 12:00am Pre-Conference Workshop. Registration closed on March 27, 2022.

**Professional Development**

**Pre-Conference Workshops**

*16 participates Enneagram Updates*

**New Professional**

*31 Total Registered*

**Recommendations:**

None.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** New Professionals

**CHAIRPERSON:** Carolyn A. Jackson

**COMMITTEE MEMBERS:** Marvin Bullard and Caitlin Palmer

**DATE:** March 24, 2022

**Committee Charges:**

- To conduct a virtual and in person New Professional Workshop for the 44<sup>th</sup> Annual MO-KAN-NE Professional Conference.
- Revised the New Professional Resource Handbook made up of TRiO Mentors, regional and national TRiO and EOP information to serve as a resource for new professionals.
- Provide new professionals with presentations to enhance their knowledge of TRiO.

**Committee Activities:**

- Workshop agenda includes a welcome and overview of the day, History of TRiO and COE Video, A TRiO Kahoot game that requires interactive activities, prizes, and three speakers.
- Each attendee will receive the web address to find the updated New Professional Resource booklet. The mentors' sections include pictures of mentors.
- New professional workshop will be virtual and in person, again.
- Currently 18 new attendees have registered.
- Lunch will be provided for participants at the new professional workshop

**Recommendations:**

- New professionals' workshop should not be in competition with pre-conference activities.
- New professionals' workshop should have its own budget for planning activities.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** MILE

**CHAIRPERSON:** Anna McDonald & Whitney Wolk Maddux

**COMMITTEE MEMBERS:**

**DATE:** March 29, 2022

**Committee Charges:**

1. Develop and implement the selection process for application to the MILES Program
2. Plan and deliver a leadership curriculum that creates a network of engaged TRIO professionals, increases knowledge of MKN/EOA/COE, encourages advocacy efforts, and inspires participants to critically think about ways to enhance the quality of the MKN chapter.
3. Submit a MILE budget to the committee.
4. Help the cohort identify and address a need they see within the Chapter (i.e. a cohort project).
5. Develop plans that remain nimble enough to meet the needs of the cohort whether the trainings are in person or virtual.
6. Present regular reports to the MKN Board and a final report during the final board meeting.

**Committee Activities:**

- MILES participants: Sara Eckinger (Avila University), Ingrid Pohl (Kansas State), Brooke Sullivan (University of Nebraska-Lincoln), Lisa Kelley Jones (Emporia State), Angela Zarybnicky (Northwest Missouri State).
- MILES completed the Enneagram workshop with the Board in February.
- We have been meeting monthly to discuss sections of the book Atomic Habits by James Clear. We have met in January, February, and March for that. We will wrap the book up in May.
- We are also using The Leadership Challenge by James M. Kouzes and Barry Z. Posner to work through a professional challenge they have identified with Anna and Whitney.
- MILES met last on March 29 and will meet on Tuesday prior to the annual conference.
- MILES has been working hard to plan the Funtivity for the MKN Conference. They are very excited to see everyone at Hamburger Mary's Wednesday evening.
- Our next meeting after the conference is April 26.

**Recommendations:** None at this time



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Student Initiatives and Conferences

**CHAIRPERSON:** Abdulaziz Abdulaziz and Alexis Johnson (Co-chairs)

**COMMITTEE MEMBERS:** Jeanna Henry, John Vanderpool

**DATE:** 03/30/2022

## Committee Charges:

1. Call for proposals to institutions to host 2022 student leadership conferences.
2. Develop a plan for student/participant programming in both pre-college and college programs.
3. Present a preliminary budget to the President prior to the Board of Directors transitional meeting in December that projects at least \$10,000 revenue over expenses across all initiatives.
4. Coordinate with Technology and Public Relations and Communications committees to ensure the membership is informed of all student opportunities.
5. Implement all aspects of the initiatives.
6. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

## Committee Activities:

1. Drafted & sent a "Call for proposals" email to MKN President Beth Jacobson (03/25/2022).
2. Working on a Needs Survey to help develop a plan for student/participant programming in both pre-college and college programs.
3. Committee budgetary requirements will be decided, after selecting a host institution(s) for the conference(s), and other associated costs.
4. Will work with the technology committee to set up online registration for conference(s) and the public relations communications committee to advertise and inform the community.
5. No initiatives developed as yet.
6. The first report of this committee is being presented.

## Recommendations:

1. The committee is looking for additional members.
2. The committee would like to get a budget template and other pertinent documents (such as survey summaries, conference agendas, etc.) from last year's committee.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Finance

**CHAIRPERSON:** Kristi Bolen

**COMMITTEE MEMBERS:** Roxanna James (Treasurer), Miosha Wagoner (President-elect),  
Jacquie Loghry

**DATE:** April 7, 2022

**Committee Charges:**

- 1) Monitor all fiscal matters pertinent to Chapter activities.
- 2) Review the overall budget and each event/committee budget (for those required charged with submitting a budget) and submit an overall budget to the Board for approval.
- 3) Review the Fiscal P&P manual and update as needed.
- 4) Develop and submit to the Board of Directors a new investment plan by April 2022.
- 5) Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

- 1) Held in-person committee meeting on April 5, 2022
  - Items discussed
    - a. Budget Report
    - b. Paying or collecting registration: new
    - c. New investment plan: old
    - d. New bank search: old
- 2) Held virtual committee meeting on February 9, 2022
- 3) Held virtual meetings with full committee on December 8, 2021.
- 4) Submitted meeting minutes to the committee from the December 8<sup>th</sup> meeting.
- 5) Met to review 2020-2021 MKN Budget, 2021-2022 MKN Budget, Annual Conference budget, Student Initiative and Conferences, and Heartland Conference at Avila on December 9, 2021.
- 6) Present to the MKN Board of Directors 2021-2022 overall budget, Annual Conference budget, Student Initiative and Conferences, and Heartland Conference for approval by the MKN Board of Directors.

**Recommendations:**

Respectfully submitted by Kristi Bolen



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Nominations & Elections

**CHAIRPERSON:** Mark E. Patten Sr.,

**COMMITTEE MEMBERS:** Mark E. Patten Sr., Michelle Czelinski, Rona Prater

**DATE:** April 2022

**Committee Charges:**

- Work towards finding a new elections platform.
- Submit the proposed procedures for executing the annual elections including timelines and method of voting to the Board for approval during the February Board Meeting.
- Publicize the offices for which nominations are being sought, coordinating with Technology and Public Relations and Communications committees as necessary.
- With assistance from the President and President-Elect, actively encourage members to be candidates for the MO-KAN-NE office or to nominate another member with a goal of a minimum of two nominees for each office.
- Conduct the election of the Chapter officers as stipulated in the Constitution and Bylaws.
- Submit a final slate of officers to the Chapter Board by July.
- Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

- Researched different election platforms {OpaVote, ElectionBuddy, and Boardable} and
- Reached out EOA Chair Catalina Rodriguez for insight (Indiana uses a Google platform).
- I also reached out to the EOA Board Technology Committee to inquire what the EOA Board was using as an election platform.
- Receive reply from EOA Board Technology Committee on whether or not they could host MKN Chapter Elections? They responded, that this could be accomplished and other chapters have done so, as well.

**Recommendations:** I recommend that we utilize the support from EOA for our chapter elections



**Timelines for MO-KAN-NE Nominations and Elections 2021-2022**

<b>Actions Required</b>	<b>Date(s)</b>
Nominations and Elections process will be explained to the membership at the MO-KAN-NE Annual Conference (General Assembly Meeting).	April 6-8, 2022
Nomination request forms and position descriptions e-mailed to membership by EVoteonline.com.	April 11, 2022
State Representatives are encouraged to call members (in their respective states) to stimulate nominations.	April 12-22, 2022
Deadline for receiving nominations (mailed or e-mailed to the EOA Technology Committee) completing Nominations process.	April 22, 2022 by 11:59 pm CST
Nominations and Elections Chair presents names of prospective nominees to MO-KAN-NE Board President by e-mail or telephone. In turn, MO-KAN-NE President notifies Board members in order to get approval of proposed slate.	April 25, 2022
Eligible candidates/nominees notified are sent materials for candidacy by e-mail.	April 29, 2022
Deadline for Nominations and Elections Chair to receive candidacy materials by e-mail.	May 6, 2022 By 11:59 pm CST
Nominations and Elections Committee Chair prepares a final slate of candidates and presents it to the MO-KAN-NE President by e-mail or telephone. In turn, MO-KAN-NE President notifies Board members of names on final slate.	May 12-13, 2022
Officially notify candidates they are on the ballot by telephone or e-mail (confirmation requested).	May 13, 2022
Nominations and Elections Chair contacts EOA Treasurer/Registrar and requests membership information be e-mailed to EOA Technology Committee, to conduct the elections process.	May 13, 2021
EOA Treasurer/Registrar e-mails membership information to EOA Technology Committee to begin the elections process.	May 16, 2021
Nominations and Elections Chair e-mails election materials to EOA Technology Committee in order to begin elections process.	May 17, 2021

**Timelines for MO-KAN-NE Nominations and Elections 2019-2020 (Continued)**

<b>Actions Required</b>	<b>Date(s)</b>
Campaigning Period	May 13-20, 2022
Elections material e-mailed to membership (from EOA Technology Committee) and elections process begins	May 23, 2022
Voting/Elections process takes place.	May 23-June 3, 2022
Deadline for receiving ballots to EOA Technology Committee completing Elections process.	June 3, 2022 By 11:59 pm CST

Nominations and Elections Committee Chair presents results of election to the MO-KAN-NE President by e-mail or telephone.	June 6, 2022
President to notify (by e-mail) the Board and all individuals who ran for the various Board positions the results of the elections.	June 10, 2022
Nominations and Elections Committee Chair presents results of election to the MO-KAN-NE Board of Directors at the June or October Board meeting.	June or October 2022



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Technology

**CHAIRPERSON:** Mike Conley

**COMMITTEE MEMBERS:** Yosh Wagoner & Shauntelle Thompson

**DATE:** 4.5.22

**Committee Charges:**

1. Submit a budget for meeting the technology needs of the Chapter.
2. Provide technology support, management, and maintenance for the Chapter, Board, and committees.
3. Provide meeting support for chapter meetings.
4. Implement technologies to enhance communication, online meetings, and professional development webinars and other opportunities and events.
5. Maintain the MO-KAN-NE website makes changes as needed and requested by the board.
6. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

1. Committee members have been working on an ongoing basis to refine the Chapter website and drive test payment systems and processes.
2. Gathered or requested the necessary hardware for the Annual Conference. This includes projectors, laptops, etc. Prior to the Annual Conference we will set up rooms as per tech needs. Additionally, we set up streaming cameras to broadcast specific events (plenary speakers, Achievers Ceremony).
3. Collaborated with other EOA chapters to ensure MKN has enough Zoom licenses to adequately host virtual sessions during conference.
4. Working with Proposals Chair to confirm the technology needs of presenters.

**Recommendations:** None



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** TRIO Day and First-Generation Celebration

**CHAIRPERSON:** Brandon Hammond

**COMMITTEE MEMBERS:** Jeremy Bloss, Ingrid Pohl

**DATE:** 2/11/22

**Committee Charges:**

1. Promote TRIO Day, National First Generation Day, College Signing Day, and other relevant national events to membership.
2. Collect data on states' and programs' past celebrations to compile suggestions to share with all chapter programs. With collaboration of technology and PR and Communication committee, highlight best practices on website and via social media.
3. Gather press releases and relevant information regarding events across the chapter and submit to the EOA TRIO Day Chair.
4. Suggest and promote virtual and in-person celebration ideas and how programs can work together to put on virtual to build community and help students better recognize the scope of their programs.

**Committee Activities:**

- Working on gathering information from the Membership on how programs celebrated TRIO day
- Next step is to work with Committee on how to proceed with the gathered information and work with the Tech Committee to get this information on the new website.

## Columbia College Student Support Services & University of Missouri McNair

TRiO SSS at Columbia College took the day to celebrate our TRiO students. We met the students on campus in the dining hall during the lunch hour to connect and celebrate the ways TRiO SSS has helped to support their process.

Later that evening we collaborated with TRiO SSS and the McNair Scholars Program from the University of Missouri Columbia. Our goal was to recognize and celebrate students achieving their goals through the support of TRiO Programs and Services. It was a casual event meant to recognize our TRiO students, to celebrate their accomplishments, and to honor the special support TRiO provides in helping them reach their academic, professional, and personal goals. The event provided an opportunity for our students to mingle with other TRiO students, TRiO Staff, and administrators from both institutions who are integral to the success of TRiO across all programs. It was a fabulous night on the town and many connections were made.



## Southeast Community College Upward Bound

35 upward bound students attended an educational session to discuss the history of the TRIO programs, how upward bound got started and famous alumni from TRIO programs. Food and cookies were provided for the celebration.

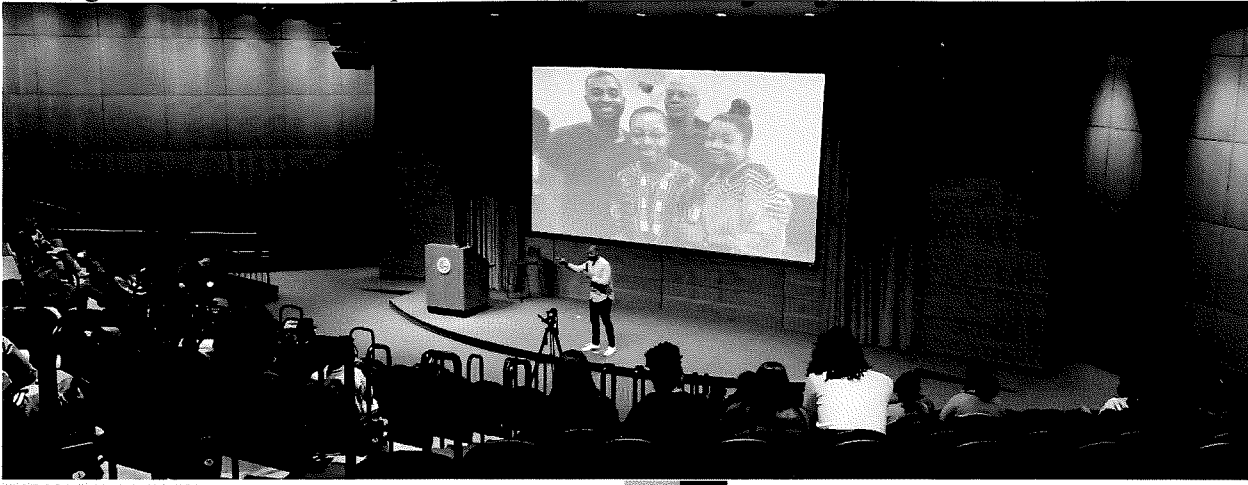
## Truman State University TRIO Programs

On Saturday, February 26, Truman TRIO Programs, McNair Scholars Program and Upward Bound, hosted a National TRIO Day event in collaboration with the Truman State University Office of Advancement. We put on a campus wide screening of the film Malignant and hosted a virtual Q&A with the film screenwriter and Truman TRIO McNair alum Akela Cooper. Current Scholars and Alums from the Truman Upward Bound and McNair Scholars Program moderated the Q&A. In addition, McNair Scholars hosted Instagram takeovers the week prior to the event to share about their TRIO experiences and TRIO history.



## Creighton University TRIO Programs

Creighton's TS, UB, and SSS programs came together for a day of celebration! Students heard from two keynote speakers about following their passions and combating feelings of imposter syndrome, and then wrapped up the day with a ceremony honors seniors and their next steps. Students received professional head shots, graduation stoles and diploma frames.



## State Fair Community College Upward Bound-SCHS

SFCC TRIO Upward Bound students at Smith-Cotton High School in Sedalia, MO participated in a day of service at the Community Café in Pettis County. The Community Café serves meals nightly to homeless or needy individuals in the City of Sedalia or Pettis County. Students made burritos, rice and brownies. Upward Bound students and staff also made cookies and packaged them for each teacher, administrator, and support staff at their target school (Smith-Cotton) for TRIO day, thanking them for their continued support of the Upward Bound program.







# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** MKN Achievers

**CHAIRPERSON:** Liz Shepard

**COMMITTEE MEMBERS:** Verneta White, Julie Cayton and Brandon Hammond

**DATE:** April 5, 2022

**Committee Charges:**

1. Solicit nominations and select 2-3 Achievers for recognition at the MO-KAN-NE Annual Professional Conference.
2. Coordinate with the MO-KAN-NE Annual Professional Conference Chair(s) to plan the Achievers Award Ceremony.
3. Coordinate arrangements for the Achievers' recognition with the MO-KAN-NE Annual Professional Conference Chairs(s) including travel if the conference is held in person.
4. Coordinate with Technology and Public Relations and Communication committees to have profiles of Achievers on the MKN website and social media platforms.
5. Encourage nominators to submit nominees for the EOA Achievers' regional award.
6. Present regular reports to the MO-KAN-NE Board and a final report during the final board meeting.

**Committee Activities:**

**FEBRUARY:** I have sent emails to all member of MOKANNE. And have answered some questions. I have readers secured. The program is in progress and details are being worked out. Sent reminder emails to the MOKANNE members that the deadline was approaching. Received two nominations.

**MARCH:** Sent out final email for achiever and ended up receiving four nominations. I sent the nomination packets to the readers, along with a scoring rubric. When I received the rubrics, I added the score and the top two score were our winners. They winners and nominators were contacted. Those that were not chosen, and their nominators, were also contacted. The names were given to Julie Cayton so they could be added to the room list. Both winners will be at the banquet on Thursday, April 7, 2022.

**Recommendations:**

None at this time.

## **SCORING RUBRIC FOR MKN ACHIEVER NOMINEE**

### **NOMINEE:**

Be a former TRIO/GEAR UP program participant who was enrolled in and successfully completed a TRIO/GEAR UP program in the MO-KAN-NE Region.

**YES**

**NO**

Have enrolled in and successfully completed a post-secondary program of study resulting in a baccalaureate or terminal degree from an accredited institution of higher education.

**YES**

**NO**

Must be a person of high stature within his/her profession or has received recognition for outstanding academic achievement.

**1**

**2**

**3**

**4**

**5**

Must currently be employed above the entry level designation for his/her profession or enrolled in a program for a degree above the baccalaureate degree. Special preference is given to nominees who have been out of school for five or more years.

**1**

**2**

**3**

**4**

**5**

Must have made significant civic, community, or professional contributions.

**1**

**2**

**3**

**4**

**5**

Acknowledge that participation in the TRIO/GEAR UP project had significant impact upon the candidate in obtaining his/her educational and/or professional objectives.

**1**

**2**

**3**

**4**

**5**



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** HALL OF FAME

**CHAIRPERSON:** Mark E. Patten Sr., Shanna Eggers

**COMMITTEE MEMBERS:** Mark E. Patten Sr., Shanna Eggers

**DATE:** April 2022

**Committee Charges:**

1. Work with the Annual Conference and chair of the Advocacy committee for Hall of Fame members to be recognized because of their service and commitment to the mission of MKN.

**Committee Activities: Met with Advocacy Committee Chair, (3 times);**

- Distributed call for Hall of Fame nominations to MKN Membership; in partnership with MKN Achievers.
- Did not receive any nominations for Hall of Fame

**Recommendations:** None at this time



# MO-KAN-NE CHAPTER

OF THE EDUCATIONAL OPPORTUNITY ASSOCIATION

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COMMITTEE: MCNAIR HEARTLAND CONFERENCE

CHAIRPERSONS: Kari Azevedo (interim), Valdis Zalite (interim), Stephanie Raymond (on temporary leave)

COMMITTEE MEMBERS: Margaret Shull, Ashley Cervantes, Cheryl Rauh, Heather Cianciola, Jeremy Bloss, Shanna Frank, Mulu Lemma, LaWanda Holt-Fields, Anthony Parker-Gills, Wendell Stapleton, Ryan Kirton

DATE: March 16, 2022

Charge:

1. Plan and coordinate the McNair Heartland Conference.
2. Present a conference preliminary budget to the President prior to the Board of Directors transitional meeting in December.
3. Present a conference preliminary timeline and committee membership during the MO-KAN-NE annual conference in March/April.
4. Post conference information and registration on the MO-KAN-NE website by May.
5. Invite Educational Opportunity Programs to participate in the conference.
6. Administer the awarding of the Heartland McNair Scholarships.
7. Present regular reports to the MO-KAN-NE Board and a final report during the September/October Board meeting.

Activities:

The 26th Annual MKN Heartland McNair Research Conference will be held at the Kansas City Country Club Marriott on September 23-25, 2022. The committee is planning for an in-person conference, but will need to make a decision by mid-May if it needs to be virtual. The committee is not prepared for a fully hybrid event and would likely choose one or the other.

If the conference is in-person, it will follow the traditional schedule:

- Friday, September 24: Pre-Conference Workshops, Graduate School Recruitment Fair, Financial Literacy Seminar
- Saturday, September 25: Presentations and keynote
- Sunday, September 26: Breakfast

If the conference is online, it will follow the same schedule as the 2020 conference:

- Friday, September 24: Graduate School Recruitment Fair, Graduate Student Panel
- Saturday, September 25: Presentations

The Committee is meeting during the annual MKN Conference to work on planning for the upcoming conference.

Recommendations:

No recommendations at this time.



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Missouri State Representative

**CHAIRPERSON:** Brandon Hammond

**COMMITTEE MEMBERS:**

**DATE:** April 2022

### Committee Charges:

The State Representatives shall serve as duly elected officers charged with communicating the needs, concerns, and interests of Chapter members from his or her state to the Board of Directors.

1. Serve as a member of the Membership and Credentials committee.
  - a. Actively promote membership in the Chapter.
  - b. Assist the President-Elect to increase membership by promoting the Chapter to Educational Opportunity Programs in his/her respective state.
2. Serve as a member of the Fair Share committee.
  - a. Maintain contact with current and potential COE Institutional Members within his/her respective state.
  - b. Reach out to institutions that have expired Institutional Memberships.
  - c. Disseminate information about the 10 for 10 personal contribution campaigns to members within his/her respective state.
  - d. Stay abreast of and provide membership with relevant information pertaining to Fair Share per membership requests.
3. Organize the State's Policy Seminar activities in Washington DC.
4. Assist in organizing the state's TRIO Day activities, if applicable.
5. Hold a state meeting at the MO-KAN-NE conference
6. Present regular reports to the MO-KAN-NE Board and a final report during the September/October Board meeting.

### Committee Activities:

1. Working with President-Elect on expiring memberships for renewal.
2. Meeting monthly with KS and NE state representatives.
3. Prepared legislative meetings for Policy Seminar in Washington, D.C.
4. Thank you to Nicholas Horne, Director of UB at Missouri State University, for taking the lead in Washington, D.C. at Policy. He did an amazing job as my "boots on the ground" leader.
5. The Missouri Team was able to meet with 6 of our 8 Representatives and both Senators.
6. The main ask at Policy this year were:
  - a. \$170 million increase in funding for FY23 to serve over 1 million students across the nation
  - b. For the Member of Congress to sign onto the TRIO funding letter, which is co-lead by Vicky Hartzler (District 4 Rep for MO)
  - c. Include TRIO programs as a part of their top 5 priorities in Appropriations for Labor-HHS and Education.
7. Missouri had:
  - a. 100% support for a funding increase for TRIO programs

- b. 75% support in signing the TRIO funding letter
  - c. 75% stated that TRIO would be one of their top 5 priorities in appropriations.
- 8. BIG NEWS from Policy: Senator Hawley's office openly expressed support and commitment to TRIO programs, hoping they continue the legacy of Senator Blunt's office.
- 9. Working with Fair Share committee to get Missouri to our 10 for 10 goal, and to meet our donations for the FY.
  - a. As of 3/24/2022, Missouri is:
    - i. 10 for 10 Campaign - Missouri met its goal of 6
    - ii. Missouri is setting at 72% of contributions, we have until June 30 to meet 100%
- 10. Various Committee work:
  - a. New Professionals
  - b. Legislation and Education



# MO-KAN-NE CHAPTER

of the Educational Opportunity Association

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**COMMITTEE:** Kansas State Representative

**CHAIRPERSON:** Kurt Peterson

**COMMITTEE MEMBERS:**

**DATE:** March 18, 2022

**Committee Charges:**

Support Kansas members in their work and encourage their continued membership.  
Disseminate information to new Kansas TRIO and GEAR UP staff and recruit them to become members.  
Plan and execute the Kansas Legislative Breakfast.  
Motivate and encourage members to contribute to Fair Share.

**Committee Activities:**

I have been consumed with preparations for the Kansas Legislative Breakfast at the 2022 Policy Seminar and it is very close to being ready, thanks to the help of my predecessor Cheryl Rauh and many MO-Kan-NE colleagues. I ordered the food, booked the venue, updated the Kansas fact book, received commitments from Kansas US Senators and the same from the legislative aides of Kansas US Representatives, and wrote a tentative script for the meeting.

The incumbent Kansas Rep is continuing to contact those whose individual membership is expiring and being renewed. Also, I have been making contacts with new MKN members. In addition, I have been working with Jacque Loghry, MKN Fair Share Coordinator, and COE staff to help track donations to Fair Share. Unfortunately, Kansas did not meet its 10 for 10 goal by the February 17 deadline for a free state Policy Seminar registration. I've had a visit with Vanessa Ramirez at COE about institutional memberships so I will be calling project directors at some Kansas institutions to follow up on that.

The final checks for the December MKN Upward Bound/McNair grant writing workshop have come in so I forwarded those to Roxanna for deposit.

**Recommendations:**

none at this time



## **COMMITTEE: Nebraska State Representative Report**

**CHAIRPERSON: Krystal Rice**

**DATE: 3.25.22**



### **Committee Charges:**

The State Representatives shall serve as duly elected officers charged with communicating the needs, concerns, and interests of Chapter members from his or her state to the Board of Directors.

Serve as a member of the Membership and Credentials committee.

Actively promote membership in the Chapter.

Assist the President-Elect to increase membership by promoting the Chapter to Educational Opportunity Programs in their respective state.

Serve as a member of the Fair Share committee.

Maintain contact with current and potential COE Institutional Members within their respective state.

Reach out to institutions that have expired Institutional Memberships.

Stay abreast of and provide membership with relevant information pertaining to Fair Share per membership requests.

Organize the State's Policy Seminar activities in Washington DC.

Assist in organizing the state's TRIO Day activities, if applicable.

Hold a state meeting at the MO-KAN-NE conference

### **Annual Committee Activities:**

- Emailed expired membership
  - NE MKN Membership status:
    - March: 58 active members
- Updated Nebraska TRIO director contact list
  - New directors found for SSS & VUB WNCC, UB Southeast, SSS Wayne State, UB MCC, SSS UNK, UB AIM, and SSS UNO is still vacant
- Developed NE TRIO Director Newsletter
- Facilitated TS, EOC, SSS APR Help webinars
- Facilitated UB & McNair Grant Writing Circle webinars
- Created form submission template for TRIO Day
- Created and distributed NE TRIO Factbook for Policy Seminar
- Contacted and facilitated four virtual meetings with state congressional representatives for the Policy Seminar
- Attended the following conferences/webinars/committee meetings:
  - EOA annual conference 11.7-11.11
  - Membership and Certification Meetings
  - Monthly MKN State Rep Meetings
  - New Professional Committee Meetings
  - Weekly Enneagram Board Meetings in February
  - Bi-Monthly MKN Board Meeting
  - Policy Seminar Hill Team Leader Meetings
  - Monthly Fair Share Regional Meeting
  - Monthly State Leadership Monthly Meeting
  - COE McNair Pre-Application Webinar 3.9
  - COE Policy Seminar Know Before You Go Webinar 3.15
  - COE Public Service loan Forgiveness Webinar 1.18.22
  - COE EOA CDL webinars
  - State Leadership Monthly Meeting 3.17
  - NE Congressional Prep Meeting 3.22
  - Congressional Representative Meetings 3.23
- Developing State Representative Procedure Manual