

**ANNUAL REPORT  
2005-2006**



**THE ASSOCIATION FOR EQUALITY AND  
EXCELLENCE IN EDUCATION, INC.**

**May 1, 2006**

**El San Juan Hotel & Casino  
Isla Verde, Puerto Rico**

AEEE BOARD OF DIRECTORS  
2005-2006

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**Association for Equality & Excellence in Education  
Committee Chairs 2005-06**

<b>Committee</b>	<b>Chair/Co-Chair</b>
<b>Appeals</b>	<b>Paula Martin</b>
<b>Awards/Scholarships</b>	<b>Tony Davis Jonnie Deloatch Jason Collado</b>
<b>By-Laws</b>	<b>Sigrid Rosa Cassandra Davis Jorge Martinez</b>
<b>CAS Standards</b>	<b>Elliott Palais Khalida Haqq</b>
<b>Conference 2006</b>	<b>Maria Rios Jorge Martinez</b>
<b>Conference 2007</b>	<b>Karen Texeira</b>
<b>Emerging Leaders/Professional Development</b>	<b>Mary Ellen Mulvey Rhoda Miller Barb Thompson Paula Martin</b>
<b>Fair Share</b>	<b>Elliott Palais Linda Jones-George</b>
<b>Finance</b>	<b>Tim Stanfield Janet Davis-Dukes Jason Collado</b>
<b>Membership</b>	<b>Karen Texeira Jason Collado</b>
<b>Nominations &amp; Elections</b>	<b>Cassandra Davis Angelo Perna Karen Texeira</b>
<b>Publications</b>	<b>Carolyn Tragni Queen Jones</b>
<b>Policy Seminar</b>	<b>Angelo Perna Paula Martin</b>
<b>State Initiative</b>	<b>Barb Thompson Linda Jones-George</b>
<b>Strategic Plan</b>	<b>Frank Biafora</b>
<b>Trio Day</b>	<b>Maria Torres Barb Sadden Tony Davis</b>

## **Strategic Planning Committee Annual Report May, 2006**

**Chair: Frank Biafora**

During the year 2005-2006 one vacancy remained on the two-member Strategic Planning Committee. Frank Biafora held the Chair of the Committee and provided Board updates on the progress of strategic planning initiatives as they related to this fifth and final year of the AEEE 5-year Strategic Plan. The second member was terminated for being twice absent at Board meetings. During our January, 06 meeting members of the Board again recognized that we were in the midst of the last year of the current strategic plan. This plan was developed, approved and implemented in 2002. Now that we have come to the end of the planning cycle the Board agreed that the Strategic Planning Committee regroup immediately after the annual meeting in an effort to begin the next 5-year planning cycle. Assisting the Strategic Planning Committee in this endeavor will be the current President (Karen Texeira) and by the immediate past President (Rogernelle Griffin).

**Below is a brief summary of annual highlights from the Committee:**

The Committee reviewed strategic plans dating back to the master plan authored by Jeffrey Rosenthal and adopted by the board for FY 2002. As a reminder, the strategic plan has 6 main objectives (I – VI) and corresponding goals within each.

**Accomplishments to date:**

AEEE has made substantial progress in each of the outlined objectives in the 2002-2007 Strategic Plan. An extensive listing of accomplishments can be seen in the final report submitted by Linda Jones-George in the 2004-2005 Annual Report. Rather than repeat accomplishments section, below are specific remaining planning issues that were addressed this year:

1. Update the Web Site to reflect that the plan covers 2002 – 2007. *The Board addressed this issue and AEEE now has a new Web vendor and an updated site.*
2. Discuss membership survey to keep the pulse of the members. *The decision was to continue to conduct an open discussion of membership at the annual conference. This provided the most convenient forum to address member concerns for the upcoming year.*
3. Update membership directory and alumni contact roster. *Significant progress has been made in keeping track of membership. Today, AEEE has a complete membership directory and a membership committee that monitors regularly. The alumni roster remains a concern and one that the board will focus in the next planning cycle.*

4. Discuss future of newsletter, including content and delivery method. ***The newsletter has been revived. The discussion at the last Board meeting was to support a bi-annual newsletter.***

5. Continue to discuss and move towards alternative revenue streams. ***The Board acknowledges this to be an important issue and understands that the main funding stream remains the annual conference. The Board has created a sub-committee to explore new funding sources.***

6. Discuss scholarship funds from current budget to cover conference travel (also included should be a discussion for TRIO Achiever travel). ***The Board voted and approved that awardee travel is covered.***

Respectfully Submitted,  
Frank Biafora

# **President's Report**

## **May 1, 2006**

As I move toward the end of my term as president of this Association, I look back in awe. I could have never imagined that I even had the energy, stamina, temperance, or ability to stand among the dynamic, progressive professionals that have held this position before me. A quality I do share with our past presidents is passion, and a concern for the continuance of an organization that has the potential to reach far beyond our limited individual visions.

I cannot express my gratitude enough to the Board of Directors and the Past Presidents for their insight, wisdom and guidance. Seldom have I heard the words, "No", or "I won't be able to do that." Their support has been phenomenal, and has contributed significantly to the growth and stability of this Association.

### **Board Training and Service**

Despite a somewhat uneasy transition, new board members were acclimated to service thanks to the experience and dedication of their peers, who gladly shared the wealth of knowledge and experience they bring to their positions. A formal orientation that focused on the By-laws, P3, and Robert's Rules of Order, conducted by my Parliamentarian, brought needed insight to the entire board on how to conduct business in a more efficient and effective manner.

### **Internal and External Communication**

The Association's website has been redesigned and is updated through a professional webmaster. Features have been added to ensure that information is disseminated so membership can communicate with the appropriate committees. Members can also update their contact information automatically through the website. At the start of our 2006 Conference, the site is live, and the annual report, by laws, P3, and various forms can be downloaded.

The Association newsletter has been reactivated, and the committee welcomes your input, including announcements, photos, articles, etc. The first issue will be sent out in May.

The District Representatives have held meetings regularly and disseminated information on grants, professional development, and political advocacy.

Trio Day and Policy Seminar were extremely successful this year, promoting political advocacy with regard to the funding of our programs. The Association has been able to sponsor buses to Policy for the second consecutive year, a tradition I hope will continue.

## **Finances**

I am proud to report that the Association is financially healthy, and able to direct more resources toward professional development, scholarships and the pursuit of grants. An endowment has been established for the student scholarship fund, and for the first time, the Association has been able to cover transportation costs for awardees to our conference.

## **Fair Share**

Linda Jones-George has done a great job emphasizing the importance of our region's Fair Share contribution. She needs the assistance of every member of this Association to meet our goal. I realize the sacrifice being asked of you at a time when the very existences of the programs we serve remain at stake, but it is that very reason that fair share is important. Please consider making a personal contribution or subscribing to Equality before June 30<sup>th</sup>.

## **Nominations and Elections**

I was glad to see the enthusiasm of the membership through the willingness to run for offices this year, particularly first time candidates. Board service is a wonderful experience that I encourage every member to consider. While a number of members were nominated and ran for board positions this year, there remains a vacancy for the North Country District Representative position.

## **Representatives to the Council for Opportunity in Education**

Our Association is represented by three members of the AEEE Board to the COE Board of Directors and is one of ten regional associations which sit at the Board table. Each Association has three votes. Your President, President-Elect, and Immediate Past President all attend COE board meetings, and at the discretion of the Council President, serve on committees, task force, and/or other duties as assigned. This year our representatives are:

Rogernelle Griffin  
Co-Chair, National Trio Day Committee  
Member, Trio Achievers and Alumni Committee  
Member, Resource Development Committee  
Conference 2006 Committee Exhibits Chair

Karen Texeira  
Member, National Trio Day Committee  
Member, Professional Standards Committee

Cassandra Eileen Davis  
Co-chair, By-laws Committee  
Member, National Trio Day Committee  
Member, Strategic Planning Committee

**ASSOCIATION FOR EQUALITY AND EXCELLENCE IN EDUCATION, INC.  
BOARD OF DIRECTORS MEETING  
OCTOBER 21, 2005**

**PRESIDENT'S REPORT**

It was great seeing many of you at the COE Annual Conference in Washington last month celebrating the 40<sup>th</sup> Anniversary of the Higher Education Act. The conference was very successful and drew upon the strong sense of community we have as educators and the political power that strength yields. In spite of that fact, I can't help but reflect on the lows our community has suffered as well.

Trio programs in general and the Association in particular has faced some obstacles this past year, from the battle to save our Talent Search and Upward Bound programs, to the defunding of several Student Support Services Programs in New York State. As a result, our region did not reach our Fair Share contribution goal, and attendance was down at the 2005 Annual Conference. I would also be remiss if I did not mention the devastation our colleagues are facing in the Gulf Coast region as well. We may be down, but we are certainly not out.

Now is the time to come back stronger than ever, and it's an effort we each must commit to as trustees of this organization. I am making a concerted effort to both strengthen and broaden our communication to the membership by updating the Association website and administrative operations. I wish to thank the Board for your steadfast support as we begin "Charting the Course for Success" this year. There is much to be done.

As co-chair of Nation Trio Day with Immediate Past Board Chair Charles Dyson, I urge you to consider celebrating Trio Day this year as a National Day of Service. This will be an excellent way for students to contribute to relief efforts while increasing awareness of Trio programs. Our local public service efforts should draw the attention of media and elected officials, and possibly curtail another attempt to cut Federal funding to our programs. Please communicate plans for this effort to the campuses in your area as we continue to formulate plans for this national event.

**Respectfully submitted,  
Rogernelle Griffin,  
President 2005-06**

**ASSOCIATION FOR EQUALITY AND EXCELLENCE IN EDUCATION, INC.**  
**BOARD OF DIRECTORS MEETING**  
**January 27, 2006**  
**PRESIDENT'S REPORT**

First of all, I'd like to once again thank the Board of Directors in their diligence in **"Charting the Course for Success"** this year. Plans are underway for an exciting 29<sup>th</sup> Annual Conference, highlighted by both pre- and post-conference conference workshops, as well as attendance by **COE Chair Lucy Jones and President Arnold Mitchem** (his first appearance before our membership in three years). Please encourage constituents in our region to attend.

The Executive Board is working hard to improve services of the Association. The Membership committee is cleaning up the email list, and reaching out to former members. Communications will improve shortly with the completion of the new website in February, and the reactivation of the newsletter forthcoming.

Please urge your colleagues to run for board positions. It is great to have the wisdom and history of past presidents and board members continue their service to the Association through board membership, and I hope that continues, however, the organization can only thrive if we encourage and cultivate emerging leaders. I am requesting that each member of the board mentor a new colleague and/or member of the Association that has not served on a committee.

I'm very excited about the work of our Professional Development committee. The first Review Team training will be held this Saturday, January 28<sup>th</sup> at the Roger Mark Hotel in midtown. The Association has greatly improved its service to the membership, and we should all be proud of our collective effort.

The Association's **2006 National Trio Day of Service** will focus on **Voter Education and Advocacy for Education Opportunity**. Please support Tony Davis in his efforts to make this event a success.

Mark your calendars for these important dates:

<b>March 25-25</b>	<b>COE Leadership Summit</b>	<b>Washington, DC</b>
<b>March 26-28</b>	<b>COE Policy Seminar</b>	<b>Washington, DC</b>
<b>May 10-13</b>	<b>COE Board Meeting</b>	<b>New York, NY</b>
<b>Sept. 2-4</b>	<b>COE Board Meeting</b>	<b>New York, NY</b>
<b>Sept. 6-9</b>	<b>COE Annual Conference</b>	<b>New York, NY</b>

**Respectfully submitted,**

**Rogernelle Griffin,**  
**AEEE President 2005-06**

**ASSOCIATION FOR EQUALITY AND EXCELLENCE IN EDUCATION, INC.**  
**BOARD OF DIRECTORS MEETING**  
**April 7, 2006**  
**PRESIDENT'S REPORT**

Once again, I'd like to thank the board for your hard work and dedication to the growth and progress of this Association. Since our January board meeting, much has been accomplished to provide a stronger internal framework and extend the services available to the membership in their efforts to further the mission of educational access and opportunity to students in our region.

Our website is up and running, with enhanced features to increase communication with the membership. Your feedback is needed to maximize usage of site, so please review the current content and send me any additional information you wish to be displayed.

The board's efforts to encourage your colleagues to run for board positions have definitely paid off. I look forward to the results of the election, and to seeing some new faces on the board, which inevitably brings new ideas and energy. I am again requesting that each member of the board mentor our newcomers, and please seek them out at our conference.

Our region was well represented at the COE Policy Seminar last month. We received strong support from our elected officials in the quest to increase funding for Trio programs. A heartfelt thanks goes to Queen Jones, Donald Davis, Timothy Stanfield and Raymond Quinones for spearheading the buses from New Jersey and New York so students could make hill visits.

I look forward to seeing you all in Puerto Rico, as we continue "Charting the Course for Success"!

Mark your calendars for these important dates:

<b>May 10-13</b>	<b>COE Board Meeting</b>	<b>New York, NY</b>
<b>Sept. 2-4</b>	<b>COE Board Meeting</b>	<b>New York, NY</b>
<b>Sept. 6-9</b>	<b>COE Annual Conference</b>	<b>New York, NY</b>

**Respectfully submitted,**

**Rogernelle Griffin,**  
**AEEE President 2005-06**

# Treasurer's Report

The Treasurer is the Chairperson of the Finance Committee and works in conjunction with committee members to establish annual budgets, conduct research and implement new fiscal policies. Activities detailed in the Finance Committee Report are in direct relation to the duties of the Treasurer, and reflected in both reports.

## Budgeting

Each Standing Committee was awarded a budget based on the request of its chairperson and with regard to the previous year expenditures and taking into account the fiduciary responsibility of the Board of Directors. Once established, a committee could not increase its budgetary allotment without prior consent from the Board.

## Bank Transactions

All revenues, including membership dues were processed and deposited in a time fashion into the Association's savings account at HSBC Bank. All depositions were recorded via electronic submission. The Treasurer retained all deposit receipts for reconciliation and tracking purposes.

All payments and reimbursements to vendors, Board of Directors and Committee members were executed in a time manner. Invoices, receipts and reimbursement forms were retained by the Treasurer to ensure detailed accountability. Documentation of funds withdrawn from the Association's treasury was made electronically utilizing online banking software.

### AEEE Financial Report Checking and Savings

**Checking Account:**                      **April 24, 2006**

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<b>Ending Balance</b>	<b>\$96,269.70</b>
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**Savings Account:**                      **April 24, 2006**

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<b>Ending Balance for Quarter:</b>	<b>\$72,235.88</b>
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<b>Scholarship Endowment Annuity:</b>	<b>\$26,000.00</b>
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<b>Total Value for Quarter and Savings January 27, 2005</b>	<b>\$194,719.34</b>
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# Finance Committee Report

**Treasurer – Timothy Stanfield**

## **Committee Members:**

**Janet Davis-Dukes**

**Jason Collado**

## **Activities/Accomplishments:**

- 1) Applied for and Attained a Business Credit Card with American Express
- 2) Applied for a Credit Card through HSBC to create a credit history for AEEE
- 3) Changed the current interest rate of Money Market account from current rate of 1.5 percent to 3 percent.
- 4) Researched investment opportunities to establish endowment
- 5) Transferred 26,000.00 dollars into an annuity that gains 3.0 percent interest rate for the scholarship endowment.
- 6) Spoke with financial advisor at HSBC about alternatives for savings to ensure long term financial viability of AEEE. Established two options for reserve income.
- 7) Established free internet banking with HSBC
- 8) Financed trip for AEEE Delegates to attend policy Seminar
- 9) Financed a bus for students/parents/alums in Trio programs in NY and NJ can advocate for Federal Trio programs in Washington, DC

## **Taxes:**

A new accounting firm was hired to audit and prepare the Taxes for the association. Charles & Charles of New York, NY are currently working on the audit as well as preparing the taxes for 2005.

## **Recommendations:**

It is the recommendation of the Finance committee that the Board consider creating a financial secretary position. The responsibilities of the financial secretary will be to research opportunities for the board to create long term financial viability as well maintain relationships with financial firms, banks and accountants. The financial secretary will work closely with the treasurer.

## 2005-2006 Annual Budget

Account	Description	Allocation	Exp Incurred	Percentage Used
5-0100	COE Fair Share	\$4,000.00	\$4,000.00	100.00%
5-0200	Legal and Professional Fees	\$1,500.00		
5-0305	COE Delegate Travel	\$5,000.00	\$2,651.20	53.00%
	Director Travel to Board			
5-0310	Meetings	\$7,000.00	\$2,373.37	33.90%
5-0315	District Rep Meetings	\$2,000.00		
5-0405	Mailbox Rental	\$160.00	\$136.00	85.00%
5-0410	Website Fee	\$1,435.00	\$1,435.00	100.00%
5-420	Postage	\$500.00		
5-0425	Printing	\$150.00		
5-0430	Telephone	\$50.00		
5-0500	Conference 2006	\$25,000.00		
5-0510	Speaker Fees	\$10,000.00		
5-0515	Speaker Travel	\$2,000.00		
5-0520	Audio Visual	\$1,000.00		
5-0525	Entertainment	\$1,000.00		
5-0530	Fun Run	\$800.00		
5-0535	Printing	\$3,000.00		
5-0535	Conference Materials	\$2,000.00		
5-0540	Misc Conference	\$1,000.00	\$5,455.87	545.00%
5-0545	Misc Scholarships (mailings)	\$1,500.00		
5-0550	Development	\$15,000.00		
5-0555	Student Scholarships	\$4,000.00	\$4,000.00	100.00%
5-0560	Schomburg Award	\$500.00	\$500.00	100.00%
5-0565	Trio Achievers Luncheon	\$250.00		
5-0705	Awards	\$200.00		
5-0710	Scholarships	\$300.00		
5-0715	Trio Day	\$4,000.00	\$3,983.31	99.50%
5-0720	Publications	\$2,000.00		
5-0725	By Laws	\$100.00		
5-0730	Training	\$1,000.00		
5-0736	State Initiative	\$200.00		
5-0740	Membership	\$500.00		
5-0450	Finance	\$0.00		
5-0750	CAS Standards	\$0.00		
5-0755	Emerging Leaders	\$150.00		
5-0760	Strategic Planning	\$0.00		
5-0765	Nominations and Elections	\$250.00		
5-0770	Policy Seminar	\$150.00		
5-0999	Miscellaneous	\$3,000.00		
Total		\$100,695.00		

# **AEEE Trio Day 2006 Committee Report**

**Chair:** Rogernelle Griffin

**Committee Members:** Jason Collado, Timothy Stanfield,  
Raymond Quinones, Tony Davis

## **Activities:**

The Association sponsored a Voter Education and Political Advocacy Forum for Trio Day 2006 on Saturday, February 26 at City College of New York.

One hundred and fifty students and staff from Upward Bound, Talent Search, and Student Support Services Programs attended, representing LaGuardia Community College, Queens College, John Jay College, City College and College of Mount Saint Vincent.

A presentation on Trio Programs and the funding process was conducted by Rogernelle Griffin and Nikki Youngblood, Director of Student Services for the Council for Opportunity in Education. Jason Collado and SSSP students from College of Mount Saint Vincent conducted a letter writing campaign advocating the benefits of TRIO to elected officials. City Councilman Robert Jackson, an Upward Bound alumnus, greeted the students and discussed his experience as a Trio students and the importance of the programs, and former Councilman Bill Perkins discussed voter education. The afternoon culminated in a engaging presentation from keynote speaker Will Mega, a grassroots hip hop generation political organizer.

## **Recommendations:**

It is the recommendation of the committee that space be reserved at the onset of the program year in New Jersey and New York since the event day does not change. It is more effective to have state-based activities since politicians and other interested parties are exclusive to each state.

# AEEE CONFERENCE 2005

## Cape May, New Jersey

**Chair:** Linda Jones-George  
**Co Chair:** Frank Biafora

### Gross Receipts

Exhibitors (4 @ \$345)	\$ 1380
Advertisement (1)	\$ 200
Fun Run	\$ 635
Silent Auction	\$ 589
Raffle	\$ 345
Dinner Donations	\$ 715
50/50	\$ 119
T-Shirts	\$ 202
 Total	 \$ 4,185.00

### Registration/Membership

New (24)	\$ 1320
Renewal (89)	\$ 4005
 Total	 \$ 5325

Additional Registration Fees	\$48,494.00
Membership	\$ (5325)
Discounts	\$ (1025)
Refunds	\$ (4850)

Lodging & Meals	\$62,158.52
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Total	\$113812.52
Less Refunds	(4850.00)

**Income** **\$108,962.52**

## Expenses

Lodging & Meals		\$ 45,899.66
Speakers		\$ 2,000.00
Entertainment		\$
Keith Marks Trio	\$ 2,500.00	
Mid-Atlantic Center for the Arts		
Lighthouse Passes	\$ 101.50	
Trolley Tour	\$ 200.00	
Elaine's Dinner Theatre	\$ 1148.00	
Total Entertainment		\$ 1449.50
Jazz CDs 150@\$10		\$ 1500.00
Jazz Passes 4@\$130		\$ 520.00
Badges/Bindings		\$ 193.44
DocuFiles 150@\$4.99		\$ 748.50
Printing		
Program	\$ 513.57	
Annual Report	\$ 286.74	
Total Printing		\$ 800.31
Scholarships		\$ 3000.00
Schomburg Award		\$ 500.00
Plaques/Awards		\$ 233.00
T-Shirts		\$ 53.40
Wyndham (2night '06)		\$ 451.40
Postage (donation)		
Miscellaneous		
<b>Total Expenses</b>		<b>\$ 59,849.21</b>
<b>Net Profit/Income</b>		<b>\$ 49,113.31</b>

# Awards Committee

Chairperson: Tony Davis

## Activities:

- Sent mailings (land, e-mail) to membership in reference to Felicita Rodriguez Torres Award of Excellence, and The Arturo A. Schomburg Distinguished Service Award requesting nominations for both. Eight candidates were nominated for Felicita after Deadline was extended to encourage more nominees. Three nominees declined to accept nomination. Only one nominee's name was submitted for the Arturo Schomburg award thus completing the process by announcing a winner by default. The winner of The Arturo Schomburg Award has been contacted and has accepted on behalf of the association.

## Chairperson left with these individual assignments

- Deadline date for Felicita Rodriguez Torres vote is April 10, 2006 A final tally will be done on 4/10/06 by 6pm
- Contact treasurer about honorarium for Arturo Schomburg Award
- Order Plaque for Felicita Rodriguez Torres award winner 4/11/06

## Recommendations

Chairperson was contacted about extending the deadline for Felicita Rodriguez Torres award after deadline had already passed. Initially three candidates were on the ballot, which is what should have, gone out. After deadline was extended nine additional candidates were nominated. Chairperson opted to extend the deadline, which in essence compromised the process. Out of 121 AEEE members only **ONE** nomination was received for The Arturo Schomburg award of excellence however no request was made to extend the deadline. Chairperson' recommendation is for the Board to be more diligent in voting to set an example for membership. More correspondence/information needs to be sent out to membership year round to increase the credibility of these prestigious awards as well as the association.

# Scholarships Committee

**Chair:** Jason Collado

**Members:** Tony Davis

Raymond Quinones

Jonnine Deloatch

- **Objective(s):**

To effectively distribute scholarship information to membership

To award 1 scholarship to participants in each of the following programs

1. Talent Search
2. Upward Bound
3. Student Support Services
4. McNair Post-baccalaureate Achievement Program

To increase number of applicants to scholarships

To increase number of scholarship recipients in attendance at Awards Banquet

- **Activities:**

Met with scholarship committee twice to plan above objectives

Created efficient timeline for application distribution, collection, and reminders

Created promotional information to advertise scholarship

Received 23 scholarships and distributed amongst committee members for review

- **Accomplishments:**

Awarded 4 \$1,000 scholarships

Presented to AEEE board proposal to provide airfare for scholarship recipients to travel to Awards Banquet

Communicated with staff of all award recipients to coordinate airfare and plan for accommodations for award recipients

- **Recommendations for future planning:**

For the future it is best that all scholarships to be collected via e-mail or mail. Faxing scholarships is not an efficient method.

## By-Laws Committee

Chair: Sigrid Rosa

Members: Jorge A. Martinez Santiago

Elliott S. Palais

Cassandra E. Davis

- **Objective(s):** To serve as an advisory body to the Board of Directors. +To clarify any questions and or concerns related to the AEEE By-Laws that new & old Board members may have, as well as any questions or concerns members of the Association may have regarding the Association By-laws.
- **Activities:** We met three times to discuss various Board member concerns regarding the Association.
- **Accomplishments:** There were many questions regarding the procedures of Nominations & Elections and clarifications were made in regards to the Associations set by-laws.
- **Recommendations for future planning:** All Board members & the membership need to be referred to the By-laws when sending out certain Association information (i.e. election stuff should quote the By-laws on how the procedure is done; membership forms the same as above). All Board members need to continue to implement training's- and review By-laws. Everyone should really get to know this specific document, even before the P3 manual.

# PUBLICATIONS COMMITTEE

Queen Jones, Chair

Committee Members:

Khalida Haqq

**Objective: To re-activate the AEEE Newsletter for 2006.**

**Plan of Action:**

1. A letter will be sent out to all AEEE members soliciting articles and describing the intent of the Newsletter.
2. The Newsletter will be distributed to the membership via email and posted on the Association website. In addition, a hardcopy will be mailed to each Program Director.
3. All articles will be reviewed and determined eligible for inclusion in the Newsletter by the Publication/Newsletter Committee.

**Suggested Publication Dates:**

**The AEEE Newsletter will be distributed three (3) times per academic year.**

1. September (this date corresponds with the COE Annual Conference.)
2. January (mid-year)
3. May (this date corresponds with the AEEE Annual Conference.)

**Suggested Standing Columns:**

**The following editorials will be featured in each publication:**

**The President's Message**

The President will write a message on the status/health of the organization.

**District News**

Each district representative will be responsible for providing a summary of the concerns/highlights of their districts: including meeting schedules, activities & recommendations.

**Committee Highlights**

Committee chairs will provide an abstract of their objectives & achievements.

**Alumni Corner: "Baby Look at Me Now!"**

Programs will be invited to "brag about their graduates." They will share success stories, and encouraged to submit:

- Baby pictures or graduation photos
- Brief biographic profiles, and
- Professional distinctions

**Distinguished Scholars**

Program Directors will be encouraged to provide a listing of their students who have achieved a 4.0 GPA at the end of each semester (summer sessions will be included for schools that are on trimester schedules).

Respectfully Submitted,  
Queen Jones

# Nominations and Elections Committee

FY 2005-2006

**Chair:** Cassandra E. Davis, Immediate Past President

**Members:** Angelo Perna, North Jersey Representative  
Karen Texeira, President Elect

**Objective:**

- To determine openings on the Board for the succeeding year
- Solicit nominations from the membership in accordance with the Association's By-laws
- Hold elections in a timely manner in accordance with Association's by-laws

**Activities:**

- Selected individuals from Association to serve on committee
- Determined openings on the Board for the succeeding year in accordance with Committee objectives
- Submitted proposed procedures for executing annual elections to the Board of Directors for approval (December 21, 2005)
- Mailed via United States Postal Service and via electronic email Nomination Form to membership (December 23, 2005)
- Responded to email inquiry concerning Nominations (January 19, 2006)
- Sent email reminder to membership with Nomination Form attachment (January 19, 2006 and January 26, 2006)
- Obtained member certification from Association's Treasure for members who were nominated for office (March 2, 2006)
- Mailed via United States Postal Service official ballots to membership
- Submitted request to Board of Directors to waive 60 day prior notice requirement to the membership as outlined in Article VI Section 3:Election Ballot of the by-laws (March 3, 2006)
- Received majority vote from the Board of Directors to waive 60 day prior notice requirement (March 7, 2006)
- Responded to email inquiries concerning ballot
- Contacted member whose name appeared on the ballot twice to determine the office of their preference
- Tallied ballots
- Reported election results to President (April 18, 2006)

**Accomplishments:**

- Chaired Nominations and Elections Committee
- Served as a delegate to the Council for Opportunity in Education
- Obtained Nominations and Election material from former Immediate Past President
- Obtained adequate nominations from membership to conduct election, save for Northern New York Representative
- Conducted election
- Received 51 completed ballots from membership
- Obtained clarification from President regarding the number of times a member can run for office on the same ballot

**Recommendations for future planning:**

- Maintenance of accurate accountability for service terms of officers and board members
- Orientation regarding by-law procedures as they relate to nominations and elections

Respectfully Submitted,

*Cassandra E. Davis*

**Immediate Past President, AEEE, Inc.**

# COE Policy Seminar 2006

**Co-Chair:** Paula J. Martin

**Members:** Jorge Martinez  
Karen Texeira  
Robert Levine

**I. Strategic Goal:**

Encourage New York TRIO projects to attend the COE Policy Seminar  
Coordinate the setting of visits to Congressional Offices and provide schedule to COE

**II. Objective(s):**

- Schedule as many visits as possible to New York Congressional offices
- Restore funding for Talent Search, Upward Bound and GEAR UP in the 2007FY Budget
- Educate Congressional offices about the impact of TRIO in New York

**III. Activities:**

- Visit the offices of New York Congressional representatives on March 28
- Distribute information to Congressional offices relating to TRIO nationally and its impact in New York
- Hold meeting with New York teams to assure appointments and team members are coordinated in efforts

**IV. Accomplishments:**

- The New York contingent visited 19 Congressional offices and both Senators offices

**V. Recommendations to help with future planning:**

- Educate members to the fact that TRIO grant money cannot be used for this activity
- Suggest alternative means for persons to participate in this endeavor
- Be certain that there is representation from all areas of the state so that the visits are maximized and the essential Congressional offices are visited
- Develop a directory and profile of NY TRIO programs to be distributed to Congressional offices
- Encourage more student and alumni participation in this event
- Provide an accurate and updated AEEE membership list and e-mail addresses

**Co-Chair:** Angelo Perna (NJ)

**Members:** Linda Jones-George      Queen Jones  
                  Angelica Benitez         Anthony Culpepper

**I. Objective(s):**

- Schedule and facilitate congressional visits on Tuesday, March 28
- Garner congressional support for the restoration of UB & TS in the TRIO budget and an increase of \$100 million in the overall TRIO budget
- Shore up congressional opposition to the novice set aside provision for TRIO in the reauthorization of the Higher Education Act

**II. Activities:**

Visits with the 12 NJ House Representatives and the state's 2 Senators were scheduled and accomplished (one House seat is vacant)

**III. Accomplishments:**

A busload from NJ of TRIO parents, alumni and staff augmented the teams of TRIO personnel on Tuesday afternoon

**Team 1** – Andrews & LoBiondo will sign the new Cole/Payne Letter

**Team 2** – Garrett will revisit signature request

Rothman sits on the appropriations committee (as a matter of form appropriators do not sign on to letters to themselves) will support the legislation

Payne is a co-sponsor of the "Dear Colleague Letter"

Pallone/Pascrell Jr./Ferguson agreed to sign the letter or have signed

**Team 3-** Senators Menendez & Lautenberg have signed the Landrieu/Collins/Lincoln "Dear Colleague Letter" circulating in the senate – both are supporting the \$100 million increase for TRIO

**IV. Recommendations for future planning:**

- identify a co-chair from each state (stagger terms –novice/veteran)
- establish a tip policy for Policy bus drivers
- the association help to defray the cost of district reps at policy
- district reps be standing members of the policy seminar committee
- the association develop an educational program on TRIO policy matters for students, alumni & friend

# Fair Share

**Chair:** Linda Jones-George/Elliott Palais

**Members:** Khalida Haqq

**I. Strategic Goal #\_4\_:**

Ensure that AEEE through strong board leadership meets its fair share

2005-2006 AEEE Fair Share assessment \$131,163.00 NJ (\$33,097) NY (\$94,066)

**II. Objective(s):**

- Increase AEEE-COE institutional membership
- Increase subscriptions to COE publications and other COE services
- All Board members make a personal contribution to COE and AEEE

**III. Activities:**

- Encouraged personal contributions from Region 2 TRIO personnel to COE
- Canceled AEEE January Phone-a-thon Plans due to lack of funding
- Reviewed Council Fair Share region/state reports
- Canvassed SSS Directors on institutional membership & COE subscriptions
- Informed Board Treasurer of the omission in payment of regional membership assessment
- Reviewed P3 Development section

**IV. Accomplishments:**

- Regional Assessment target at 63% (\$80,425)
- NJ at 55% (\$18,150) NY at 66% (\$62,275)

**V. Recommendations to help with future planning:**

- Budget funds for a AEEE/COE phone-a-thon
- Develop additional funding streams for Fair Share assessment
- District Reps promote Fair Share concerns during district meetings
- District Reps standing members of the Fair Share Committee
- P3 review

There is no standing committee identified as fair share

Separate out Fair Share sub points from Development section

At least 5 current sub points are specific to fair share

# Emerging Leaders Committee Report

**Chair:** Mary Ellen Mulvey

**Members:** Barbara Thompson  
Rhoda Miller

Elliott Palais

## **I. Objective(s):**

- To develop leadership within the organization
- To identify and train volunteer peer reviewers

## **II. Activities:**

- Research, organize, and present opportunities for leadership development to the AEEE membership

## **III. Accomplishments:**

- Created Peer Review Process Policies and Procedures Manual
- Researched/estimated expenses and submitted budget proposal for Peer Review Process to AEEE
- Investigated sites/times for trainings
- Committee members met three times during the year and communicated regularly by email and phone
- Submitted proposal for presentation of Peer Review Training in two sessions at 2006 conference. Proposal was accepted.
- Peer review Manuals compiled for distribution at conference training sessions
- Information about this training was sent to membership by email and US mail
- Reviewed feedback from members throughout planning process
- Reviewed P3 and found no problems with Emerging Leaders Committee information

## **IV. Recommendations to help with future planning:**

- Creation of an AEEE membership directory with updated contact information would assist implementation of this project

# Pre and Post Grant Writing Workshops

**Chair:** Paula J. Martin

**Members:** Karen Texeira                      Conference Committee

**I. Strategic Goal:**

Maximize the potential success of AEEE Upward Bound and McNair programs' in the upcoming grant competition  
Provide AEEE members with a development workshop  
Respond to membership's expressed need

**II. Objective(s):**

- Set up a pre-conference Upward Bound grant writing workshop
- Set up a post-conference McNair grant writing workshop
- Contract with presenters for the workshops

**III. Activities:**

- Establish dates for workshops with Conference committee
- Assure that Conference committee sets up an additional block of rooms covering those dates to accommodate the attendees
- Develop a flyer/registration form for distribution to AEEE members, TRIO projects, grants offices at area colleges/universities, advertise workshops on TRIO List serve
- Establish a deadline for registration
- Establish a grid of registrants with payment status and key information
- Notify registrants of workshop time schedules and room for workshop at conference site.

**IV. Accomplishments:**

- Over 45 individuals and 26 institutions registered for the 2 workshops (this number may change, as still receiving registrations).
- Negotiated the contract with the presenters
- Workshops also helped to increase registrations for the Conference as persons from other regions also registered for the Conference.

**V. Recommendations to help with future planning:**

- Be sure that potential attendees have advance notice of the workshops with pertinent information included such as cost, time and place
- Look into setting up a way of accepting credit card payment
- Consider providing for AEEE members to get a reduced cost to attend the workshop(s) that might encourage more participation and serve as a perk for membership in the organization
- Coordinate sending of grant writing workshop information with Conference registration materials to members to lessen cost of mailings.
- Provide an accurate and updated AEEE membership list and e-mail addresses

# **Membership Committee Report**

**Committee Chair- Karen K. Texeira**

**Committee Members: Jason Collado, Madeline Nieves, Raymond Quinones, Timothy Stanfield, Dr. Khalida I. Haqq, Sigrid Rosa**

**Objective: To increase the Membership of AEEE and produce an accurate Membership/Email Directory.**

## **Activities/Accomplishments:**

- 1- Conference labels were emailed to the 2006 Conference Chair and other committee members as requested.**
- 2- Committee worked closely with 2006 Conference Committee, Treasurer, Ms. Griffin & Ms. Davis to insure that AEEE reached former and current members.**
- 3- Individual membership have been sent out (via email) to all individuals that have requested 2006 Conference Packages.**
- 4- Approximately 13 individuals New/renewed Membership via the 2006 Conference Registration Committee.**
- 5- The Membership committee will compare attendees at the 2005 Cape May, NJ Conference with the list of the 2006 Pre-registered Conference attendees. Individuals that do not appear of 2006 Conference Registration list will be contacted via email and sent an invitation to renew their AEEE Memberships.**
- 6- The Membership Committee and the 2006 Conference Committee are working closely to compile an AEEE Current Member Directory to be distributed at the 2006 Conference in Puerto Rico.**

## **Shortcomings:**

- 1- Everyone that appeared in the compiled database are not all currently active members or still in TRIO. We are working to update this information in order to increase the membership and conference registration. This process will be on going.**

Respectfully submitted  
Karen K. Texeira

# State Initiatives

**Chair:** Linda Jones-George/\_\_\_\_\_

**Members:** Khalida Haqq Queen Jones  
Angelo Perna

## **I. Strategic Goals:**

Initiate state focused activism to garner government support at state and local levels for TRIO programs in New Jersey & New York. Undertake a public awareness campaign to garner public support for TRIO. Solicit financial and political support for TRIO-AEEE and TRIO students from key individuals.

## **II. Objective(s): 1-5**

1. Advocate for equal educational opportunity for low-income, first-generation students, individuals with disabilities, and others from disadvantaged backgrounds
2. Provide members with professional development opportunities that enhance their professional skills
3. Effectively and routinely communicate the Association's actions, activities, and positions with its members and potential members
4. Strengthen the Association's strategic and financial position
5. Instill in members a shared responsibility for leadership

## **III. Activities:**

- Linda attended a "Friends for Rutgers" (FOR) organizational meeting to garner insight into establishing a similar state initiatives program in New Jersey for TRIO. As a precursor to implementing within AEEE the FOR model for state initiatives appropriate for TRIO purposes, Linda also participated in other FOR training activities so as to explore the scope of activities available.
- At district meetings explored the issue of state initiative activities with attendees
- With Dr. Glenn Lang, Executive Director of the Educational Opportunity Fund, explored the possibility of EOF-TRIO collaborative state initiatives in New Jersey.
- A New Jersey TRIO Profiles Booklet is being developed.
- Participated in COE state initiatives chat sessions
- Attended the COE sponsored Leadership Summit
- Reviewed P3 for info with reference to State Initiatives

## **IV. Accomplishments:**

- Increased committee membership
- Secured a COE sponsored alumni initiatives grant
- Will be presenting a workshop on alumni initiatives at AEEE conference

**V. Recommendations to help with future planning:**

- Appoint State Initiatives co-chairs 1 each from New York & New Jersey
- Elected district representatives should be standing members of their respective states state initiatives sub-committees
- Identify additional members/ TRIO program staff to form a functional committee in each state
- Review committee structure.-overlap co-chairs terms and members tenure
- AEEE budget should reflect a commitment to state initiatives.
  - Support of leadership development activities (Leadership Summit)
  - Support Pre-Freshman Summer Leadership Institute (7/21/06 –MCCC)
- AEEE Board identified initiatives rolled out in each state should be guided by the strategic plan.
- State Initiatives and TRIO Day committees should collaborate on state initiatives.
- Timely committee notification of COE adopted state initiative goals for the year
- P3 review
  - There is no State Initiatives standing committee referenced in P3

# **AEEE Committee/District Representative Report**

**Name of District:** Central/Northern New York  
**District Representative:** Barb Sadden

## **ACTIVITIES:**

- ✓ Talked with Elaine Leavitt of SUNY Plattsburg and filled her in on the happenings within AEEE. She offered to pass the information on to the North Country Directors and Programs.
- ✓ Asked Jean Vizvary if she would run for the Central New York representative position. We discussed what the position entailed and Jean agreed. Jean is the director of the Student Support Service program at SUNY Ulster and is familiar with the programs in the Central New York region.
- ✓ Created an AEEE brochure and printed samples for the Board to review. Made minor adjustments per Board's recommendation and was informed of the \$250 budget line for printing.
- ✓ Sent a package of information including the AEEE brochure to update New York UB Directors. Peter Corfield completed the application on the brochure and sent a \$45 check to cover the renewal of his membership.
- ✓ Both Mary Wygmans of SUNY Binghamton and Peter Corfield of SUNY Ulster offered to host a Central New York meeting. Due to winter conditions and traveling time, a meeting was not held.
- ✓ Per Board motion each member is to review and update P3 for best practices and the chair of each committee is to review their section and update. Reviewed TRiO day and have no changes. Suggestions for general changes to P3 include: update mileage reimbursement on p17 and p18, in Reimbursement of Travel Expenses on 17 change persona to personal, think about adding information on tax exempt status and AEEE credit card and when changes are made on a page, add to page number the date the page was revised for example: 15 (revised 4/27/06)
- ✓ As Acting Secretary, took notes at January 27, 2006 Board meeting and distributed to Board members.

# AEEE WNY District Representative Report

Chair: Mary Ellen Mulvey

## I. Objective(s):

- Communicate AEEE goals, concerns, and initiatives to members within the WNY District
- Implement AEEE-endorsed initiatives within the district
- Promote membership

## II. Activities:

- Annual Fall meeting
- Annual TRIO Day Celebration held in March/April
- Communication Updates, i.e. COE and AEEE information
- General assistance to members

## III. Accomplishments:

- Held district meeting on November 4<sup>th</sup> at Bohn's Conference Center in Batavia, NY
- Formed committee for 2006 WNY TRIO Day. Leasa Rochester from UB accepted the chair position for this event.
- Decided on book collection for our community service project. Deborah Titus from GCC offered to chair this effort.
- Communicated information on the new peer review process and encouraged members to attend peer reviewer training
- Held WNY TRIO Day Celebration on April 7<sup>th</sup> at Fanny's Restaurant in Amherst, NY
- Hosted the April 7<sup>th</sup> AEEE Board Meeting at SUNY Buffalo
- Worked with Dr. Biafora on 2006 TRIO Achievers' Luncheon
- Worked with Barbara Thompson on evaluations for 2005 and 2006 conferences
- Reviewed P3 and found no problems with district representative information

## IV. Recommendations to help with future planning:

- Send regular updates of AEEE membership information to all district representatives
- Create an AEEE membership directory to facilitate communication with and among members

# South/Central District

**Chair:** Dr. Khalida Haqq-Central Jersey  
Linda Jones-George-South Jersey

**Members:** Queen Jones \_\_\_\_\_  
\_\_\_\_\_

**I. Strategic Goal #\_3\_:** Effectively and routinely communicate the Association's actions, activities, and positions with its members and potential members

**II. Objective(s):**

- Develop a knowledgeable cadre of active AEEE members within the district

**III. Activities:**

- Hosted an SSS directors meeting on Friday, January 20 at Georgian Court University
- Communicated via e-mail with members to relay AEEE & COE notices
- Disseminated via e-mail summary notes of district and board meetings
- Convened 2 district meetings (10/14-Mercer County Community College, 2/17-Rider University)
- Responded to the queries of members
- Reviewed P3 District Representatives section

**IV. Accomplishments:**

- Several district members have run for association offices
- Participation in Policy Hill visits increased
- 
- 

**V. Recommendations to help with future planning:**

- Budget for district activities should be increased.
- A mentoring program for district and at-large representatives should be established
- AEEE should underwrite the attendance at the COE Leadership Summit for current district representatives and several potential district leaders.
- P3-NJ districts (3) are North/Central/ **South**  
Regional references should be changed to **district** to reflect territory assignment