

Annual Report of the Ohio College Personnel Association (OCPA) for July 1, 2018-June 30, 2019

Prepared by Dr. Ardy Gonyer, President



This document is a collection of reports prepared by the various members of the 2018-2019 OCPA Executive Board. While this report is not exhaustive in nature, it is a strong representation of the work that occurred and the achievements that were made throughout the stated year. Any questions regarding this report should be directed to Dr. Ardy Gonyer, Howard.Gonyer@utoledo.edu

President's Report-Dr. Ardy Gonyer

It was my honor to serve as President of OCPA for 2018-2019. At the beginning of the year, I identified three goals. The first was to improve communication with the OCPA membership, including the transparency of what the board was working on. Throughout the year, we worked extremely hard to improve the newsletter, in order to create a more robust monthly report. OCPA executive board members each signed up for a month in which they contributed an article. Additionally, I wrote a letter to the membership each month, providing an account of the board's monthly activities. Further, we included periodic budget updates in the newsletter.

Second, I wanted to ensure a creation of a strategic plan, and update the organization's bylaws. Both of these could not have been achieved without the leadership of President-Elect Dr. Colette Masterson and Past-President Rachel Tuttle. Each of them led a committee that worked on these two important documents, and ultimately, the association's membership adopted the revised bylaws. The strategic plan was created to be a guiding document for the next 3 years, and is currently being implemented.

Third, I wanted to improve the financial stability of the association to ensure that the organization could contribute to higher education in the state of Ohio for years to come. With the leadership of our treasurers, the budget was created to reduce the annual deficit. We slightly increased the cost of the annual conference, while jointly focusing on developing organizational sponsors to contribute to the conference. Additionally, we evaluated our cost of membership, and proposed a membership fee increase, which was approved by the association. These steps are just the beginning in ensuring financial solvency for years to come.

In addition to these items, the executive board was hard at work. On the following pages, you'll find their individual reports regarding their activities from the past year.

President-Elect's Report-Dr. Colette M. Masterson

During the 2018-2019 OCPA Board, we started our transition with a SWOT analysis among the new and old board members. This helped to inform the process for our strategic planning process over the year. We identified themes of Membership Experience, Financial, Professional Development, and Technology to focus on during 2019-2022 strategic plan.

OCPA Strategic Plan 2019 – 2022

Area: Membership Experience

Goal: Better understand our membership to better recruit a diverse and engaged membership, retaining them throughout their careers.

	Action Steps	Resources	Deadline	Person Responsible
1.	Outreach to formerly engaged members of OCPA and learn about lapses of membership (e.g. funding, professional role, interest) and review an ongoing system for tracking this moving forward.	Survey to past attendees (board members can reach out to colleagues who identify in this way)	Short	Membership Chair
2.	Outreach to members who do not participate in conferences or professional development institutes to learn why and understand ways we can better meet their needs.		Short	Membership Chair
3.	Analyze membership retention, demographics, professional roles.	Current and past membership data	Short	Technology/ Webmaster & Membership Chair
4.	Create a communication plan to assess outcomes and benefits of OCPA membership among existing OCPA members		Mid	Communications Chair & Membership Chair
5.	Increase the breadth and depth of OCPA membership.		Mid	Tri-Pres, SSAO Liaison, Faculty Liaison, Journal Chair
6.	Implement a process in NEON to gather more information about members	Neon	Mid	Technology/ Webmaster & Membership Chair
7.	Create a retention plan to address membership patterns and needs		Long	Members at Large and Membership Chair
8.	Create a recruitment plan to address membership patterns and needs.		Long	Members at Large and Membership Chair

Area: Financial

Goal: Increase the financial strength and stability of the organization.

	Action Steps	Resources	Deadline	Person Responsible
1.	Determine income needs and means to reach financial stability to implement organizational goals and initiatives.		Short	Treasurer and Assistant Treasurer
2.	Consider the financial impact of all board related decisions while still maximizing the value of membership.		Short	Full Board, Treasurer and Assistant Treasurer
3.	Determine a development philosophy for conferences and programs		Short	Conference Planning Chairs and Professional Development Chair
4.	Determine an income plan that is not dependent on membership or conferences		Mid	Development Chair
5.	Develop a philosophy of financial transparency and determine communication of same.		Mid	Treasurer, Assistant Treasurer
6.	Review the membership rate and appropriate rate for association expenses.		Mid	Membership Chair, Treasurer, Assistant Treasurer
7.	Determine a plan to create an OCPA endowment for long-term future initiatives and financial stability		Long	Treasurer, Assistant Treasurer

Area: Professional Development

Goal: Creating intentional and sustainable comprehensive professional development for members.

	Action Steps	Resources	Deadline	Person Responsible
1.	Assess what OCPA members want and need for professional development.	Post conference survey	Short	PD Chair

2.	Explore ways to utilize technology through web/telecon options	Zoom, CampusGroups, Website	Short	Webmaster/ Technology, Communications, PD Chair
3.	Explore partnerships and strategies for engaging with other professional organizations for thoughtful and valuable experiences.		Short	Tri-Pres
4.	Increase the breadth and depth of professional development opportunities.		Mid	PD Chair
5.	Develop a professional development plan to address experiences beyond in-person experiences		Mid	Professional Development Chair
6.	Develop a professional development philosophy that addresses the in-person location diversification for conferences.		Mid	Professional Development Chair and Conference Chairs
7.	Determine a plan for engaging professionals to contribute to and utilize the OCPA Journal.	Faculty & SSAO Chairs	Long	Journal Chair

Area: Technology

Goal: Maximize efficient and effective utilization of technology

	Action Steps	Resources	Deadline	Person Responsible
1.	Evaluate the capabilities of our current technology.	Neon Dropbox Website	Short	Technology/Webmaster
2.	Evaluate conference technology support (e.g. CampusGroups) opportunities and resources		Short	Communications Chair
3.	Develop a social media plan to manage communication and enhance visibility	Social Media	Short	Communications Chair

4.	Develop a technology use plan.		Mid	Technology/Webmaster
5.	Procure/propose new or updated resources		Mid	Technology/Webmaster Chair Treasurer, Assistant Treasurer
6.	Implement full utilization of technology		Long	Technology/Webmaster Chair

Past-President's Report-Rachel Tuttle

The Past President role has the opportunity to serve as a historian, mentor, and consultant for the executive board and tri-president group. I sincerely enjoyed the opportunity to see Ardy and Colette grow into their role and I am sincerely pleased of the growth of the organization under their leadership. I am proud of how the organization has grown these past three years and am excited for the next group of leaders that will continue to move OCPA forward. Our newly approved strategic plan and new elected and appointed team is just what our organization needs to maintain our organizations impact and relevance in this ever-changing field. I am so proud of OCPA and am excited to see how it continues to grow, evolve, and support, and influence.

Past President Highlights:

By-Law Revision and Approval! During the 2018-2019, a small committee (Jennifer Vrobel, Sam Filkins, and Rachel Tuttle) tackled the revision of the OCPA By-Laws. The By-law revisions were completed in April and were up before a membership vote in May 2019. The By-law changes passed! The some of the By-law changes included highlighting new membership pricing, addition of executive board positions, and the use of more inclusive of language.

Weekly Tri-President Check-Ins:

Under Ardy's leadership, we continued our weekly tri-president check-in phone calls. These meetings provided the opportunity for the tri-presidents to discuss new or pressing OCPA-related situations/issues/opportunities, provide updates from our assigned counterparts, and to provide updates on any of working groups. Having the phone calls weekly allowed us to move quickly when making decisions and assisted us in prioritizing time for OCPA each week. I appreciated having this time to keep OCPA in the forefront of my professional priorities.

My 2018-2019 GOALS included the following:

- During the 2019 Annual Conference – hold an OCPA past presidents roundtable discussion.
- During the 2018-2019, connect at least once a month with each assigned executive board member (I know this is an expectation, but it can be hard to do this – especially with the past presidents make-up of members)

Unfortunately, I did not reach these goals as I did not prioritize the roundtable at the conference and I was not consistent with providing check-ins with all of my counterparts. These are realistic goals that I do challenge the future Past President to consider pursuing.

In all, my time on the board was a joy. I am going to miss being part of this team tremendously, but I look forward to the new ideas, experiences, and opportunities that will emerge from new leadership. OCPA is a special, important organization and it has been an honor to be part of its history.

Webmaster/Technology Chair's Report-Dennis LoConti

Goals:

- Continue updating the website to include updated Board Data and up to date event data.
- Further implementation of Neon Registration for OCPA Events.
- Analyze viability of continued used of Neon past the initial contract term and work to determine if a new platform is better moving forward.

Year in Review:

My three major goals for the past year were to continue making use of the OCPA Website and getting more detailed information uploaded, continue implementation of NEON services, and evaluate the overall effectiveness of NEON as we approached the end of the initial contract.

We continued to update the OCPA Executive Board page to include more detailed information about the board members in a much quicker time frame than in previous years. Updating this information at the transition meeting was a significant help in ensuring that our leadership are properly represented.

We once again used NEON for all registration forms for the Annual Conference and expanded its use for additional PDI's throughout the year. In addition to registrations, NEON was used for Conference Program Proposals, elections, standard communication to members and OCPA Membership votes.

The largest goal of this last year was to work with the OCPA Board to determine the overall effectiveness of the NEON Platform as we neared the end of the initial contract. Beginning at the Annual Conference, it became clear that our previous conference app, Guidebook, was no longer going to be an option. This, along with the overall non-user friendly experience of the NEON Platform ultimately lead to the suggestion to abandon the use of NEON in favor of another platform for membership management.

In collaboration with Jivanto, Campus Groups was identified as a suitable replacement for the NEON Membership Platform. Its comparative features along with additional capabilities coupled with a significantly more user-friendly interface was ultimately suggested to the OCPA Board for consideration and adopted. Transition from NEON to Campus Groups is currently underway and will continue through the summer with the plan to be in full implementation in time for the Careers Conference this fall.

As my term as webmaster comes to an end, the summer will also consist of the transition of responsibilities to the new webmaster.

Membership Chair's Report-Dave Vale

Current OCPA Membership: 400

- Professional: 248
- Graduate Student: 152

Membership Type:

- 151 Graduate Students (2-Year)
- 136 Professional (1-Year)
- 74 Professional (Lifetime)
- 39 Professional (5-Year)

My goal of increasing the OPCA membership by 20% was not reached and was a bit ambitious. OCPA membership increased from 366 in May of 2018 to 400 in May of 2019, which is an increase of 9.15%.

Current number of higher education institutions represented in OCPA: 46

- May 2018: 44

My goal of increasing the higher education institutions represented in OPCA 10% was not reached. We increased from 44 in May of 2018 to 46 in May of 2019, which is an increase of 5%. The institutions with an added membership included Columbus College of Art & Design and Muskingum University.

For both of these unreached goals, I believe I could have utilized the Member Recruitment and Retention sub-committee more often in reaching out to recruit both new members as well as reach out to additional institutions. Moving forward in the Membership Chair position, I will focus more on these efforts, especially in reaching out to try and get more individuals from large institutions (who are underrepresented in OCPA's membership) involved with OCPA.

One of the major responsibilities over the last year was the proposal to increase membership fees for all OCPA members. Due to increasing costs of renting space, utilizing various platforms, processing electronic transactions, and more, OPCA was looking at the long-term financial future of OCPA with the proposal. In addition, we benchmarked association rates and fees and determined our rates compared with similar association/organization rates were much lower. It was decided to increase membership costs by \$5 per year for both professionals as well as graduate students. We introduced this proposal at the 2019 Annual Conference, shared the proposal via email in March 2019, and members were asked to vote on the proposals in May 2019. The results of this ballot proposal will be shared soon.

Awards Chair's Report-Ali Martin Scoufield

2018-2019 SMART Goals:

1. SMART Goal 1: Further engage general membership through role on awards selection committee(s).
2. Specifics of the goal: Shift the award review process to a blind review and selection process

Accomplishments:

1. Complete Awards review process and distribution for Annual Conference and Careers Conference, distributing awards for all categories except for Outstanding Contribution to Literature or Research Award
2. All Award categories had at least 2 nominations
3. Transitioned Awards to a blind review process as outlined in SMART goal number two
4. Recruited additional award reviewers outside of the OCPA executive team including engaging a graduate member
5. Streamlined some of the process and forms in Dropbox for future Awards processes

2019-2020 SMART Goals:

1. Transition Awards nomination process into new system, away from google forms and into Campus Groups (I believe)
2. Recruit Awards Committee members
3. Increase number of nominations submitted
4. Encourage attendees of award recipients

Equity and Inclusion Chair's Report-Anna Wagner

Since officially accepting the Equity & Inclusion Chair role in January, I have worked made progress on both of my SMART Goals that Colette and I discussed back in February.

- Goal 1: Collaborate with Lacey to plan and execute an OCPA digital book club PDI focused on an E&I related book
 - This goal has been somewhat of a success. Lacey was open to the book club collaboration, and we are currently in progress for the summer book club right now. That being said, we only had 5 people register and had to cancel the first meeting due to attendance issues. This is something I would like to revisit moving forward in the term, perhaps at a different time of the year or with a different type of text.
- Goal 2: Meet with Julie to discuss ways that the E&I chair can be more involved in the equity and inclusion efforts at the annual conference
 - This goal has been a success. Julie and I were able to meet and discuss ways that I can collaborate more intentionally to make the annual conference more inclusive. We discussed a few tangible action items (pronoun stickers at the registration tables, an E&I focused roundtable session, potentially another book club who has their opening or closer session at the conference, more closely defining what the E&I session track looks like, etc.). I have also reapplied to the annual conference planning committee, and so hope that serving with that group again will allow me a close connection to the annual conference.

I am excited to begin a full two-year term in the role and set greater stretch goals to accomplish more as the E&I Chair.

Communications Chair's Report-Jivanto van Hemert

Current Status/ Numerical Overview:

48	individual contributions to the OCPA newsletter (excluding Board contributions)
45	Neon email messages
18,753	individual emails sent
1706	click troughs
15	opt-outs
47%	open rate
59	LinkedIn Followers
1.158	LinkedIn Group Members
755	Twitter Followers
620	Facebook "Likes"

Key Successes:

- Research, pitch, and initial implementation of new association platform, CampusGroups (to include membership management, communications, and more)
- Development & launch of the Association Communications Team (ACT)
- (Re-)Establishment of regular newsletter email communication (via Neon)
- Development and roll out of a reoccurring schedule
 - Newsletter sent 8am on the first Tuesday of every month
 - Contributions due (via this link) by the 25th of the preceding Month
 - Proof sent to board & contributors at least one day in advance
- Expand e-blast newsletter by including at least one (1), 150-word minimum, contribution from an executive board member in each regularly scheduled monthly newsletter. [SMART goal #1]
 - 23 scheduled
 - Successfully completed by: Rachel, Ardy, Leah, Lacey F., Alexis, Jenny V., Julie, Sam F., Colette, Mark, Cindy, Todd, Dennis, Dave, Luke, & Jivanto [16]
 - Not completed: Kristen L., Timmy [2]
 - Rescheduled: Henrique [1]
 - Still to come: Ali Martin Scoufield [1]
 - Never signed up: Nasser Razek [1]
- Develop and vet a compressive communication timeline for the annual conference by the conclusion of the 2019 conference. [SMART goal #2]
- Increased social media communications
 - Development of standard operating procedures for individual share requests.

Annual Conference Chair's Report-Mark Zeno

This report outlines the strategic goals and outcomes from the Annual Conference Committee. The committee had three goals they sought out to accomplish this year: 1. Develop an engaging and interactive OCPA Annual Conference Program by supporting and encouraging several professional volunteers; 2. Improve the upcoming OCPA Annual Conference to reach over 350 participants; and 3. Grow additional partnerships/sponsorships for the OCPA Annual Conference.

Goal 1. The conference committee was able to accomplish this goal by creating an exciting theme (Story Telling) that identified stories from higher education professionals that supported networking, addressed a variety of functional areas in higher education, and supported professional development opportunities at all levels of our profession. With over a 92% satisfaction rate from participants in the conference this past year, we believe the committee attained its goal.

Goal 2. Though the conference committee did not reach the lofty goal of 350 participants this year, we were able to serve over 240 professionals, including vendors and sponsors. The committee will reassess this number for 2020, by focusing on improving more mid to upper-level sessions, market heavily to SSAO and Faculty members, and look at additional partnerships with other Ohio associations (i.e., ASCA) as an opportunity to grow participation.

Goal 3. The sponsorship team did an excellent job raising over \$3000 this year in conference sponsorships. Implementing a tiered system for vendors and sponsors allowed us to collect additional revenue for OCPA this year. As the committee assesses ways to grow attendance, additional sponsors may be identified to address those participant needs.

Additionally, from the annual assessment data collected each year, the 2020 OCPA Conference team will be looking to implement a new mobile platform and engagement program that will help connect conference attendees. Expanding conference sessions to be more inclusive of entry, mid, and senior-level interest. Utilize more pre-conference information for members, including marketing materials for members to share with colleagues regarding the conference. Finally, being open to target more faculty and other higher education professionals beyond Student Affairs will be a goal for the 2020 team.



Assessment Report

At a glance...

- 218 attended the 2019 OCPA Annual Conference
- 97 OCPA constituents participated in the Annual Conference Assessment
- Of the 97, 84 attended the conference, and 13 provided feedback about why they did not attend
- 63 session proposals reviewed, narrowed to 59 sessions presented during 9 blocks
- 92% of participants were satisfied or very satisfied with the 2019 Annual Conference
- 86% of participants are somewhat or very likely to attend the 2020 Annual Conference
- 45% of participants attended for educational program sessions or were presenting a session
- 48% of participants attended for professional networking or reconnecting with colleagues
- Regular registration cost \$160
- The 2019 Annual Conference cost \$32,726.35 but was offset with a revenue of \$33,240.00, including \$3,000.00 in sponsorship

Diving deeper...

Educational Sessions

- 40 sessions were evaluated by 91 attendees
- 89% of participants were satisfied or very satisfied with knowledge gained from sessions
- 80% of evaluators said the presentations mostly or fully met their expectations
- 82% of evaluators said the presenters were knowledgeable and engaging
- 84% of evaluators said they would take ideas back to their own campus
- 40% of participants attended 5 or 6 sessions

Educational Session Pathways

- 14% followed Mid-Level Managers; 21% followed Equity & Inclusion
- 65% of participants did not utilize either of the pathways offered

Conference Social

- 100% of participants were satisfied with an off-site social experience and crafting opportunities
- Approximately 85% of participants were satisfied with the food quantity and quality

Faculty/SSAO

- Create a more flexible experience for Faculty/SSAO
- Elevate quality of accepted submissions by including Faculty/SSAOs in the review process

Conference Elements

- 81% of attendees were satisfied or very satisfied with John Frazier's keynote
- 85% of participants were satisfied or very satisfied with the meal quality, however the hotel had notable difficulty with dietary restrictions
- 97% of participants were satisfied or very satisfied with the quality of the hotel, except for room temps

Strengths of the Conference

- Local networking
- Intimate setting; good location
- Value and accessibility of the conference
- Applicable to a variety of functional areas

Why Members Did NOT Attend

- Started a new job
- Did not have enough funding
- Could not take time away
- Prior engagements

Top 5 Improvements to Consider

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| 1. Return to using a mobile platform for the conference book and push notifications for announcements | 2. Create more opportunities for those beyond "entry-level" roles in student affairs | 3. Eliminate references to conference theme in the educational session proposal form | 4. Provide more pre-conference information sent to all participants prior to the start of the event | 5. Encourage more evidence-based research or practice sessions to be submitted and presented |
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Assistant Annual Conference Chair's Report-Julie Humbel-Courtney

Over the past year, I served as the 2019 OCPA Annual Conference Co-Chair, where I assisted Mark Zeno with the planning and implementation of the 2019 Annual State Conference. The theme of the 2019 Conference was "storytelling." The conference took place on January 24-25, 2019 at the Hilton Doubletree Hotel in Worthington, Ohio. We had 240 attendees at the conference. Some of the other highlights included:

- Sponsorship program was initiated. The success of the sponsorship was due to Mark Zeno's savvy and networking skills and \$3000 came in as support.
- Conference Social at local businesses in Downtown Worthington
- 92% satisfaction rate from participants

Additionally, I was able to achieve my second goal by attending all of the OCPA Board meetings either in person or via Zoom/phone. My attendance at meetings allowed me to become more familiar with Roberts Rules and the facilitation of productive meetings for a state organization. I also participated in the Strategic Planning sub-group that was led by Colette (President-Elect). I enjoyed that process and am proud to have contributed to that important document.

Careers Conference Chair's Report-Dr. Henrique Alvim

2018 presented new opportunities to continue to expand on the meaningful work that OCPA has been doing in what pertains to one of its conferences. In my view, the model established by the Executive Board of appointing an Assistant Conference Chair to work alongside the Chair affords a unique learning and collaborative experience. This model also speaks to the great potential that OCPA has to offer conference attendees a quality event.

The 2018 OCPA Careers in Student Affairs Conference attracted to Walsh University (in North Canton, OH) an expressive number of undergraduate and graduate students, student affairs/higher education professionals, and several faculty members. The goal was to capitalize on the success that David Vale and I experienced while co-chairing the previous conference in 2017, hosted at The University of Akron. That said, in view of a particular conversation we had as a Board, my goal was to reach out even more intentionally to institutions of higher education that have not had a significant presence in previous conferences – particularly smaller colleges and universities in Ohio.

Building on the list created in 2017, I revisited and revised the Excel spreadsheet, adding new contact information for various professionals and faculty involved in Student Affairs work (e.g., key functional areas and all professional preparation graduate programs in Ohio and institutions in neighboring states, closer in proximity to the conference site). This time, the list was further expanded to include nearly all smaller institutions in our state. Despite multiple intentional efforts leading up to the conference to reach out to colleagues at these institutions, I did not observe a significant increase in their participation in the 2018 Careers Conference. Yet I am hopeful that new seeds were planted. With that, I encourage the Executive Board – and future Career Conference Chairs – to continue its outreach to these particular institutions.

Another goal of mine was to increase involvement of graduate students in the Careers Conference. Their attendance in 2018 was equally significant compared to the previous year. In light of my role as a graduate faculty member in the student affairs preparation program at Walsh University, I was able to intentionally involve 5 Walsh graduate students, members of our Alpha Gamma Chapter of Chi Sigma Alpha, the Student Affairs Honor Society, who served as volunteers during the 2018 Careers Conference. These students modeled the way for other graduate students. Afterwards, they attested to the meaningful experience they had working alongside OCPA Board members.

Despite the smaller number of attendees to the 2018 Careers Conference (yet still noteworthy, considering the history of this conference), we exceeded, once again, our anticipated numbers. In fact, what's also worth highlighting is that, in light of Walsh University's commitment to the success of this conference and generous financial support (including the sponsorship – first in this Conference's history – of the program booklet), the nearly 165 attendees (compared to 220 in 2017) still allowed us to generate more revenue for OCPA than in recent years. This past conference generated a total income of \$1,670.75.

The meaningful and collaborative work of our Executive Board, the assistance of many Board members both prior and during the Careers Conference, continues to largely account for the great success that OCPA has been experiencing in providing a conference that adds value to the personal and professional development of attendees within a hospitable and welcoming space.

Assistant Careers Conference Chair's Report-Jenny Vrobel

As a first-year member of the OCPA Executive Board, my SMART goal was to learn more about the position and the conference so that I could transition into the Conference Chair the next year. To accomplish this SMART Goal, I worked with the Careers Conference Chair to plan and establish conference details including: presentation locations on Walsh University's campus, meal choices, program reviewers and proposals, and keynote speaker panel. In addition, I was asked to be tasked with the following projects: a timeline to prepare for the conference, organization of program proposals, and an assessment of the conference.

In my first few weeks, I helped the Careers Conference Chair create a general timeline for the conference. However, it was a much more fluid timeline than what we needed for the conference. Based on that experience, I asked my new Assistant Chair to create a more rigid timeline with what absolutely needed to be accomplished before the date. For the timeline, I included the due dates for final numbers for university's printing, conference services, and catering. This document template can be used for future chairs to plan out their event and what needed to be completed once the Assistant Conference Chair was chosen. This also shaped how I would plan the Careers in Student Affairs conference at Capital University. I started collaborating with Capital's conference services immediately after 2018 conference. We planned the date, times, and areas where we would be hosting the conference. This helped me with my transition from Assistant Chair to Conference Chair because I had already completed some major planning with the university. This allowed me to start establishing other tasks that needed to be completed once I had an Assistant Chair.

The second major task within my position was first organize the program proposals that were submitted as possible presentations for the conference and to gather program reviewers who would review and rank those program proposals. I would then collect and organize the ranking data that was submitted by these program proposals. We did a call out through the OCPA newsletter and a separate communication for volunteers to review the program proposals. I brought this data to be reviewed by the Careers Conference Chair and myself to decide which proposal would be allowed to present at the conference.

The final major task within my position was to create an assessment survey for the conference. I collaborated with the President-Elect to come up with different questions and scales to ascertain what went well with the conference and how could we improve the event. Through this assessment, we realized that participants felt they were not given the opportunity to network with other individuals and participants in the conference. This was an issue because this is one of the objectives to the conference. As a result, we are incorporating a networking event within the conference which will allow the participants of that conference to connect with others in the field.

Although the SMART goal was related to my position on the Executive Board, it helped me construct and decipher what are the important tasks that need to be completed before the Assistant Chair is selected and what could wait till after that transition. I also realized what the tasks that were directly related to my preparation for the conference at Capital University needed to be completed earlier than the Assistant Chair's involvement. In my transition document, I will include what dates and meetings I had with my university's conference services that helped me feel prepared for the transition to conference chair.

Assistant Treasurer's Report-Ben Daleiden

For the 2019 Fiscal year, I worked with the Treasurer, Luke Ahrens, to collaboratively manage various processes and projects related to the Treasury of OCPA. These included implementing the FY19 budget process and developing an efficient timeline, working with the Annual Conference and Development chairs on an income strategy, integrating QuickBooks into the Treasury practices, and creating greater transparency with the OCPA Board and membership on the financial health of the organization.

A budget for the 2018-2019 fiscal year was approved on September 14, 2019. The approved budget accounted for Total income of \$58,260 and expenses of \$62,039.11. This approved a projected loss of \$3,779.11 for FY19. Through 11 months of the year, the actual loss is at \$760.74. The Board worked well collaboratively to consider the financial strength of the organization. The budget process timeline has been considered over the course of a few fiscal years, in the hopes to align approval of the annual budget prior to the start of the fiscal year. The FY20 budget has a timeline of voting on a proposed budget at the June 28, 2019, OCPA Board Transition Meeting.

A goal that was set as a part of the SMART goals was to integrate financial transparency to the OCPA Newsletter. Updates on the financial health of the organization were provided to membership at key times of the year. Namely, this was done after the approval of the 2019 budget, and updates after the conclusion of the Careers in Student Affairs Conference and 2019 Annual Conference. It will be important for the Treasury to find additional ways to provide greater transparency and clarity on the financial position of OCPA outside of these key times.

Another SMART goal was to add the integration of Quickbooks into regular practices and recordkeeping. This provides an opportunity for consolidated financial information into one system. However, a continuation and improvement of this goal will be to format this information in a way that can easily be digested by both the Board and the OCPA membership to increase informed decision-making.

The Annual Conference team and the Development Chair were diligent in contributing additional income to OCPA through the identification of sponsors at the Annual Conference. Eleven sponsors offered \$3,550 of financial support to the conference, highlighting Adirondack Solutions, Inc. who contributed \$1,500 of that total. This practice is a great addition to the overall OCPA budget, and we will continue to work with that team to identify ways to bolster these sponsorships to increase membership value.

The Treasury will continue its efforts in assisting OCPA to identify and implement practices that produce strong fiscal stewardship.

Graduate Student Affairs Conference Chair's Report-Alexis Mynio

This past year as the GSAC Chair has been full of growth for myself and the conference as a whole. It was the second year of the conference, but the first year being affiliated with OCPA. There is still a lot of room for growth, but GSAC is headed in the right direction. GSAC gives an opportunity for graduate students to take on professional development opportunities and network with fellow graduate students who will be their colleagues in the future. It also provides a comfortable environment for graduate students to give presentations and gain conference experience.

The first big accomplishment for the GSAC chair and committee was creating a standing resolution to become part of OCPA. It took a while to create and edit but successfully passed both bodies. Another big accomplishment that was achieved was based on the second SMART goal. We were able to select and announce the next GSAC host by the end of 2018. This was important to give them ample time to transition and plan while giving the previous chair a chance to complete most of the transition by the end of the academic year, especially if they are graduating. The timeline worked and the committee may have an extra week or two next year if they keep the same timeline due to the conference being earlier.

Unfortunately, we did not meet SMART goal 1, which was to have 75 participants. The conference had almost half of our goal. It was disappointing, especially because of all our marketing efforts. We think that the weekend it was on might have impacted numbers as well as not being able to include the registration link with some of our early marketing materials. The committee was able to adjust to the difference in projected numbers though and still broke even financially. I expect that registration will be higher for the next conference as long as marketing efforts are continued and there is clear communication about expected timelines.

Professional Development Chair's Report-Lacey Filkins

2018-19 Professional Development Institutes:

- **October 2018:** Collaborated with the 4-year private member at-large to plan/host a virtual PDI specifically for OCPA members at 4-year private institutions.
 - **Title:** *Election Day Considerations: What is our obligation to our students, our institution, and the law?*
 - **Description:** *In the current political climate, it can be hard to know how to provide programs and services that will be supportive of students across the political spectrum. The issues are important to our students but also important to us as professionals so it can be difficult to balance our personal passion, self-care, support for all students, and potential PR issues for the institution. In this virtual PDI we will talk about these different considerations and strategies to do the best balance these concerns.*
 - **Led by:** Sam Filkins, OCPA 4-year Private Member At-Large
 - Presented to members on Zoom in a presentation/webinar style with a Q&A portion.
- **November 2018:** Collaborated with the graduate members at-large to plan/host a virtual PDI specifically for OCPA members who are current graduate students embarking on a job search.
 - **Title:** *The Job Search: A Virtual PDI for Grad Students*
 - **Description:** *Join professionals from around the state of Ohio as they share tips and tricks on how to make yourself stand out above the rest during your job search. This PDI will be a virtual panel format with time for questions of the panelists.*
 - **Presenters:** Brad Pulcini, Ohio Wesleyan; Kristen Giaquinto, Heidelberg University; Sam Filkins, Kenyon College
 - **Moderated by:** Todd Simmons, OCPA Graduate Member At-Large
 - Presented to members on Zoom in a presentation/webinar style with a Q&A portion.
- **December 2018-January 2019:** Planned and hosted a hybrid virtual/in-person winter break bookclub
 - **Book:** *"Dare to Lead: Brave Work. Tough Conversations. Whole Heart"* by Brené Brown
 - **Description:** *If it is not about titles, salary-level, or status, then what is leadership? According to Dr. Brené Brown, it is taking responsibility to recognize the potential in others and developing that potential. During the month of December and over winter break we will be reading "Dare to Lead: Brave Work. Tough Conversations. Whole Heart" by Brené Brown to discuss how to be better leaders in our own lives. In this hybrid book club, we will meet twice virtually and then have an in-person meeting at the OCPA Annual Conference (for those who can make it).*
 - **Led by:** Lacey Filkins, OCPA Professional Development Chair
 - **Format:** Met several times via Zoom to discuss what we read and once in person at the OCPA Annual Conference.
- **February 2019:** Collaborated with Josh Nolan of Bricker & Eckler Attorneys at Law, to plan and host a state-wide Legal Issues in Student Affairs Drive-In event
 - **Title:** Legal Issues in Student Affairs Drive-In Conference
 - **Description:** *The Ohio College Personnel Association (OCPA) in conjunction with Oberlin College and Bricker & Eckler LLP are hosting a drive-in conference regarding legal issues and student affairs. Presentations will include legal updates on emerging issues in Title*

IX litigation and due process cases, emotional support animals and related policy development, student protests and First Amendment issues, and other current legal challenges impacting student affairs professionals. Registration includes food and access to presenters' materials.

- **Location:** Oberlin College
- **Format:** Presentations by Higher Education Attorneys on legal issues related to higher education

Upcoming Planned Professional Development Institutes:

- **May-June 2019:** Collaborated with Anna Wagner, OCPA Equity & Inclusion Chair to plan/host a virtual summer book club.
 - **Book:** *Why Aren't We There Yet?: Taking Personal Responsibility for Creating an Inclusive Campus* a collection of seven essays edited by Jan Arminio, Vasti Torres, and Raechele L. Pope.
 - **Description:** *This summer we will be reading Why Aren't We There Yet?: Taking Personal Responsibility for Creating an Inclusive Campus, a collection of seven essays edited by Jan Arminio, Vasti Torres, and Raechele L. Pope. The contributors to this book seek to offer new insights to improve student affairs, emphasizing action that recognizes this is a complex and multi-faceted process, and beginning with the assertion that, without recognizing the influences of privilege and inequality, we educators cannot promote truly welcoming environments.*
 - **Led by:** Anna Wagner, OCPA Equity & Inclusion Chair
 - **Format:** Four virtual meetings via Zoom
- **July 2019:** Collaborated with Kathy Fahl, Ohio University to help plan a drive-in PDI focused on basic needs.
 - **Title:** *Serving Under-resourced Students through Basic Needs Programs; A drive-in Networking and Resource Sharing Event*
 - **Description:** *National data would indicate the rates of food insecurity on college campuses range from 36%-42% and 36%-46% of students are housing insecure or homeless. Basic needs are becoming a staple service on college campuses, from food pantries to emergency grants and others services in between. Join us for an afternoon opportunity to meet with others doing basic needs work in Ohio; or if you are considering adding these services to your campus, come and hear what others have already started. Roundtable discussions and presentations will cover food pantries, meal swipe programs, emergency grants, case management, and SNAP.*
 - **Led by:** Kathy Fahl, Ohio University
 - **Hosted by:** Otterbein University
 - **Format:** Presentations on best practices related to supporting students with varying needs.

2018-19 SMART Goals Summary

- **SMART Goal 1:** To host/coordinate at least one webinar for grads/new professionals
 - **Was this goal met:** Yes

- **Why/Why Not:** Collaborated with the graduate members at-large to plan/host a virtual PDI in November 2018 specifically aimed at OCPA members who are current graduate students embarking on a job search.
- **SMART Goal 2:** To coordinate with the at-large members to create/plan/manage PDIs that meet the specific needs of the populations that they represent.
 - **Was this goal met:** Yes
 - **Why/Why Not:** Collaborated with the 4-year private member at-large to plan/host a virtual PDI in October 2018, specifically aimed at OCPA members at 4-year private institutions. An additional PDI with the 4-year public member at-large was planned and advertised for February 2019, but was cancelled due to low sign-ups.

4-Year Public Member-at-Large's Report-Leah Schuh

SMART Goal 1: Engage with at least three public institutions that are underrepresented in OCPA. I worked with the 4-year private member at large and graduate members at large to create a joint scholarship opportunity for underserved institutions for registration, lodging, or travel expenses for the annual conference. This scholarship application yielded three submissions. One of those submissions was from a 4-year public university staff member at University of Cincinnati. This institution has not been represented as much as other institutions. This scholarship allowed the staff member the ability to attend the conference and bring representation from another institution. In the future I hope to increase the number of applicants by working with the membership chair to identify more underrepresented institutions.

SMART Goal 2: Find a campus liaison at least three public institutions that underrepresented in OCPA. I was able to identify two campus liaisons at underrepresented universities. These campus liaisons are staff members at Miami University and University of Cincinnati. My hope is to use these liaisons in the future to gain a better sense of any campus trends at public universities. I hope to also continue identifying campus liaisons at other underrepresented universities.

I also set up a professional development institute (PDI) on the topic of affordability and decreased federal funding, specifically at public institutions. I worked with the professional development chair to set up the PDI with Tiffany Polite and Derrick Tillman-Kelly, recommendations from Rachel Tuttle. Unfortunately due to a lack of registration we were unable to host the PDI. I'm unsure if it was the topic or time of year that resulted in a low turnout, but I will work to create a new PDI next year.

Graduate Members-at-Large's Report-Cindy Deng and Todd Simmons

The following executive report provides an overview of Todd Simmons (Ohio University) and Cindy Deng's (Kent State University) yearlong efforts—all of which were purposefully catered to meet our shared goals and appeal to the graduate student community:

- To provide further resources for graduate students as they enter their first or second year of their graduate program, or postgraduate endeavors
- To increase participation for the Robert A. Dubick Case Study Competition by marketing a more appealing and meaningful professional development learning experience

Recruitment & Engagement Efforts

Looking ahead of the competition, there was a need to establish a relationship with the new and current cycle of Ohio graduate students. We crafted an up-to-date contact list (with the help of the Faculty Chair of the Conference Committee) of faculty program coordinators and graduate student leaders at several Ohio programs—including those not represented in membership. A personal introductory email was then sent with our contact information (as well as the GSAC Chair), helpful OCPA resources and upcoming OCPA events.

To recruit competition judges, we compiled a list of reputable individuals—many whom represent varying experience levels and focus areas in higher education. We secured Lou Stark, VPSA at Case Western Reserve University; and Ashley Rastetter, AD of Student Engagement at Kenyon College. Due to unforeseen circumstances, we had a confirmed faculty member judge who dropped without notice, so Jenny Hall Jones, Senior Associate VP & Dean of Students at Ohio University, stepped in as our third judge. And last, but not least, Conni Dubick served as a guest judge and featured Case Study speaker at the awards ceremony.

As part of the 4-month communications effort to amp up excitement for the annual conference, we submitted teaser blurbs for the monthly e-newsletter, re/shared OCPA social media content within our networks, promoted the association through GSAC and the Careers in Student Affairs Conference, and co-hosted a virtual graduate student-only PDI about the job search.

Case Study Development & Logistics

When first considering how the case study should be structured and what content it should contain, we referenced previous material within the GSMAL Dropbox folder. There are a variety of ways that one can obtain a case study (textbooks, faculty, literature searches, etc.), but we created our own based off of current issues and trends within student affairs. After a rough draft had been created, it was then shared with our own faculty and Tri-President liaison. The feedback given then influenced the final product of the case study.

Leading up to the conference, ample communication was made between the GSMAL and the pre-registered participants regarding the timeframe, expectations, case study content, scoring rubrics, and a Doodle poll to select a time. An extra sign-up sheet was also provided to volunteers at the conference welcome table to encourage more students to participate. As a result of our collective efforts, we booked a full back-to-back schedule of case study participants. To ensure that, logistically, we were staying on track, we stayed outside of the presentation room to help rotate groups in/out as they

arrived/finished. Upon conclusion, we conversed with the judges and were given a decision on the winning team. The names of the candidates were then typed onto award certificate templates and printed within the hotel lobby for the award ceremony the following day.