EPI International is a Washington, DC based education research firm devoted to expanding opportunity in education. Our work with governments at the local, state, and federal levels, as well as school districts, institutions of higher education, and philanthropies, helps push forward education agendas by providing high-level, empirically-driven research.

Visit our website to learn more about EPI solutions at the K12 and postsecondary levels. We are EPI, and we can help.

EPI International — Improving Educational Policy & Practice Through Research
March 21, 2013

On behalf of the Educational Policy Institute, I am pleased and excited to welcome you to the Rosen Shingle Creek Resort and Spa in Orlando for the EPI Forum on Education & the Economy. This is our first conference of this ilk, and we hope that you find the speakers, facilitators, presenters, and other participants of great interest.

When planning for this year’s Forum, we set out to try and do something different. Different is always difficult, it seems. The central priority for us was to build conversations on critical issues in education, especially as they pertain to the global economy and social welfare of our citizens. Education as an economic lever is an important theme in politics and economics, but the dialogue on these issues is typically more rhetoric than empirical.

We created five strands for the event, each with at least one main plenary and followed by a dialogue led by speakers of the session but focused on participants and their questions and comments. All plenary sessions are being video taped for later use on educationalpolicy.org, and we will take all comments from plenaries and dialogues to create a monograph based on the Forum.

Thus, participation is the name of the game at the Forum. We are at a stage in education that we need to push the dialogue forward; not simply reflect on the past. The past is important to help us construct the future. However, hyper-focus on what has occurred only impedes growth. The Forum on Education & the Economy is designed to look forward, and we need your help to do this successfully. We want to foster the participation between presenters and participants in a shared style of democracy. The goal is knowledge. So be proactive—listen, ask, participate. That is your role.

The Forum would not have happened without the great help of our sponsors. First and foremost, USA Funds, our platinum sponsor, who provided the foundation upon which we built this event and also created our financial aid plenary. Our silver sponsors include The College Board, EPI International, AVID, InsideHigherEd.com, and Latinos in Higher Education. We are also proud to have the National Action Council for Minorities in Engineering (NACME) as an additional sponsor, and we thank them for pulling together the Corporate Panel on Saturday.

Please have a truly wonderful time here in Orlando. Take the opportunity to say hello to me when you have a chance, and tell your colleagues what a great time you had.

Best regards,

Watson Scott Swail, Ed.D.
President & CEO
Educational Policy Institute
At-A-Glance

THURSDAY, MARCH 21

12:00pm — 5:00pm  REGISTRATION
1:00pm — 1:45pm  PLENARY I. Want to Change the World? Invest in your Talent Dividend
1:45pm — 2:30pm  PLENARY II. Finding Superman: Debating the Future of Public Education in America
2:30pm — 3:30pm  BREAKOUT SESSIONS
3:30pm — 3:45pm  NETWORK BREAK
3:45pm — 4:45pm  BREAKOUT SESSIONS
4:45pm — 6:15pm  PLENARY III. Reinventing Higher Education: Disruption and Opportunity
6:15pm — 8:00pm  WELCOME RECEPTION

FRIDAY, MARCH 22

8:00am — 9:00am  PLENARY IV. In Search of Comprehensive Lifelong Education
9:00am — 10:00am  PLENARY V. The Challenge Ahead — Policy Directions for the Next Generation of College Students
10:00am — 11:00am  BREAKOUT SESSIONS
11:00am — 11:15am  NETWORK BREAK
11:15am — 12:15pm  BREAKOUT SESSIONS
12:15pm — 2:00pm  PLENARY VI. Is Education Worth It? From Cradle to Career
2:00pm — 3:00pm  BREAKOUT SESSIONS
3:00pm — 4:00pm  BREAKOUT SESSIONS
4:00pm — 4:15pm  NETWORK BREAK
4:15pm — 5:30pm  PLENARY VII. The Evolution and Current State of Student Financial Aid and Loan-Debt (and why you should care!)

SATURDAY, MARCH 23

8:30am — 9:30am  BREAKOUT SESSIONS
9:30am — 10:30am  PLENARY VIII. Student Retention, Persistence, & Completion
10:30am — 11:30am  PLENARY IX. An International Comparison of Education Systems
11:30am — 11:45am  NETWORK BREAK
11:45am — 12:45pm  BREAKOUT SESSIONS
12:45pm — 2:30pm  PLENARY X. Corporate Panel: STEM Education, Workforce Development, and Global Competitiveness: The Challenge of Inclusion
2:30pm — 3:30pm  BREAKOUT SESSIONS
USA Funds® is a nonprofit corporation that works to enhance postsecondary education preparedness, access and success by providing and supporting financial and other valued services. USA Funds assists postsecondary institutions and their students with a comprehensive array of default prevention and student aid program compliance solutions, including financial literacy programs for college students, debt management and default prevention consultation and support, training for financial aid administrators, and student aid policy assistance. For more information, visit www.usafunds.org.

EPI International is an educational research firm that provides high-end evaluation and policy analysis services to private and public sectors. EPI International has conducted evaluations for the US Department of Education, school districts, and colleges and universities across the United States. Our work has focused on early childhood, academic preparation, school reform, college access and readiness, financial aid, and college retention and completion. For more information, visit www.epiint.net.

The College Board is a mission-driven not-for-profit organization that connects students to college success and opportunity. Founded in 1900, the College Board was created to expand access to higher education. Today, the membership association is made up of over 6,000 of the world’s leading educational institutions and is dedicated to promoting excellence and equity in education. Each year, the College Board helps more than seven million students prepare for a successful transition to college through programs and services in college readiness and college success — including the SAT® and the Advanced Placement Program®. The organization also serves the education community through research and advocacy on behalf of students, educators and schools. For further information, visit www.collegeboard.org.

AVID is a non-profit, proven college readiness and success system that closes the achievement gap. Today, AVID is implemented in more than 4,900 schools in 45 states and 16 countries/territories; AVID impacts more than 700,000 students in grades K-12, and in 28 postsecondary institutions. The AVID College Readiness and Success System transforms a school’s academic culture to increase the number of students who enroll in four-year colleges and succeed in higher education and beyond.

InsideHigherEd.com is the online source for news, opinion, and jobs for all of higher education. Inside Higher Ed provides what the 1.2 million higher education professionals who read it each month need to thrive in their jobs or to find better ones: breaking news and feature stories, provocative daily op-ed pieces and blogs, areas for comment on every article, practical career columns, and a powerful suite of tools that keep academic professionals well-informed about issues and employment opportunities and that help colleges identify and hire talented personnel.

LatinosinHigherEd.com is the first Latino professional employment web site designed specifically for the higher education community. It was launched in response to a growing concern about the need to promote career opportunities in higher education for the growing Latino population. This site helps employers connect with the largest pool of Latino professionals in higher education in the United States, Puerto Rico and internationally by disseminating employment opportunities to registered candidates and a national network of Latino-serving organizations. For more information visit www.LatinosinHigherEd.com.

NACME, Inc.
The National Action Council for Minorities in Engineering (NACME) is a non-profit organization dedicated to increasing the proportion of African American, American Indian, and Latino graduates in STEM education and careers. NACME’s metric is parity in the workforce by connecting the network of like-minded individuals and organizations that share a commitment to these aims.
In addition to his research and writing, Dr. Swail has taught in institutions of higher education around the world. He designed the Geometric Model of Student Retention that is used by student persistence in middle and high school. He also designed districts around the country with reforms designed to improve school reform initiatives and currently assists several school design and teacher professional development. He has worked for seven years while also becoming an expert in curriculum as a middle school teacher in Canada and the United States.

Dr. Swail has a very broad understanding of education. He served as a middle school teacher in Canada and the United States for seven years while also becoming an expert in curriculum design and teacher professional development. He has worked on school reform initiatives and currently assists several school districts around the country with reforms designed to improve student persistence in middle and high school. He also designed the Geometric Model of Student Retention that is used by institutions of higher education around the world.

In addition to his research and writing, Dr. Swail has taught educational policy and research at The George Washington University in Washington, DC, where he received his doctorate in educational policy. He earned his Master’s of Science from Old Dominion University in Norfolk, Virginia, and Bachelor’s of Education from the University of Manitoba, Winnipeg, Manitoba. Teachers College Press recently released Swail’s Finding Superman: Debating the Future of Public Education in America (2012) and he is working on his next book, The Higher Education Arms Race.
ARThUR LEVINE is the sixth president of the Woodrow Wilson Foundation. Before his appointment at Woodrow Wilson, he was president and professor of education at Teachers College, Columbia University. He also previously served as chair of the higher education program, chair of the Institute for Educational Management, and senior lecturer at the Harvard Graduate School of Education.

Dr. Levine is the author of dozens of articles and reviews, including a series of reports for the Education Schools Project on the preparation of school leaders, teachers, and education researchers. Dr. Levine’s numerous commentaries appear in such publications as The New York Times; The Los Angeles Times; The Wall Street Journal; The Washington Post; Education Week; and The Chronicle of Higher Education.

His most recent book is Generation on a Tightrope: A Portrait of Today’s College Student (with Diane Dean, 2012). Among his other volumes are Unequal Fortunes: Snapshots from the South Bronx; When Hope and Fear Collide: A Portrait of Today’s College Student (with Jeanette S. Curen); Beating the Odds: How the Poor Get to College (with Jana Nidiffer); Higher Learning in America; Shaping Higher Education’s Future; When Dreams and Heroes Died: A Portrait of Today’s College Students; Handbook on Undergraduate Curriculum; Quest for Common Learning (with Ernest Boyer); Opportunity in Adversity (with Janice Green); and Why Innovation Fails.

Dr. Levine was also previously President of Bradford College (1982-1989) and Senior Fellow at the Carnegie Foundation and Carnegie Council for Policy Studies in Higher Education (1975-1982). He received his bachelor’s degree from Brandeis University and his Ph.D. from the State University of New York at Buffalo.

DATE: THURSDAY, MARCH 21
TIME: 2:30pm — 3:30pm
STRAND: Education & the Economy
ROOM: SANDLAKE
SESSION TITLE: DIALOGUE: Plenary I & II
DESCRIPTION: This session will follow-up the plenaries and talk about education and the economy. Participants are encouraged to attend and lend their thoughts.
MODERATOR: Jason Lane, SUNY Provost Fellow and director of educational studies and senior fellow at the Nelson A. Rockefeller Institute of Government, State University of New York
SPEAKER(S): Lee Fisher, President & CEO, CEOs for Cities, Arthur Levine, President, Woodrow Wilson Foundation, Watson Scott Swail, President & CEO, Educational Policy Institute

JASON E. LANE is the SUNY Provost Fellow and director of educational studies and senior fellow at the Nelson A. Rockefeller Institute of Government, the public policy think tank of the State University of New York. He is also an associate professor of educational policy, senior research at the Institute for Global Education Policy Studies, and co-director of the Cross-Border Education Research Team (C-BERT) at SUNY-Albany. His research focuses on the organization and leadership of higher education institutions as well as their relationship to governments. Most recently he has been studying the globalization of higher education, with a specific interest in the role of colleges and universities in economic and community development. Lane has written numerous articles, book chapters, and policy reports and authored or edited seven books, including Colleges and Universities as Economic Drivers (SUNY Press, 2012 w/ Bruce Johnstone), Multi-National Colleges and Universities: Leadership and Administration of International Branch Campuses (Jossey-Bass, 2011, w/ Kevin Kinser), Academic Leadership and Governance of Higher Education (Stylus Press, 2012, w/ Robert Hendrickson, James Harris, and Rick Dorman).

He has served on the boards of the Comparative and International Education Society (CIES), Council for International Higher Education (CIHE), and the Gulf Comparative Education Society (GCES). He was recently named one of the top tweeters (@profjasonlane) in international higher education by the Institute of International Education.

DATE: THURSDAY, MARCH 21
TIME: 2:30pm — 3:30pm
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 33
SESSION TITLE: Increasing Student Retention & Graduation: ASAP Comprehensive Supports & Assessments
DESCRIPTION: The City University of New York’s (CUNY) Accelerated Study in Associate Programs (ASAP) is designed to improve graduation rates by removing barriers to full-time study, providing a structured pathway with comprehensive supports, and building a sense of community. ASAP has proven to be one of CUNY’s most successful community college programs, with an average 3-year graduation rate of 55% compared to 23% for a CUNY comparison group, and 16% for urban community colleges nationally. In this session, participants will hear about ASAP’s program design, enhanced assessment practices and impressive student outcomes.

SPEAKER(S): Daniela Boykin, CUNY ASAP Assistant Director, City University of New York
DATE: THURSDAY, MARCH 21
TIME: 2:30pm — 3:30pm
STRAND: Career & College Readiness
ROOM: ST. JOHNS 31
SESSION TITLE: Student Ownership of Learning: Key to College/ Career Readiness & Common Core Success
DESCRIPTION: Forty-five states have signed on to the ambitious goal of having all students meet the higher expectations of the Common Core, which is set at the level of college and career readiness. Reaching that level will require more than improved instruction in English and mathematics. Students will need to take much more ownership of their learning in a variety of ways. This session focuses on the skills and tools students need to master and how schools can get more students to take ownership of their learning.
SPEAKER(S): David Conley, CEO, Educational Policy Improvement Center and Professor, University of Oregon

NETWORK BREAK (3:30pm — 3:45pm)

DATE: THURSDAY, MARCH 21
TIME: 3:45pm — 4:45pm
STRAND: College & Career Readiness
ROOM: SANDLAKE
SESSION TITLE: The Promise of Transfer: The Findings of the National Commission on Transfer Policy & Practice
DESCRIPTION: The transfer pathway between community colleges and four-year institutions is over 100 years old, but it has never been a reliably productive route to the bachelor’s degree, especially for students from underserved groups. Yet, as the US digs out from the recent recession, the need for college-educated graduates has only intensified. To address this nation’s workforce needs—and meet President Obama’s national college completion goals—the transfer pathway must be strengthened. The College Board, with support from the Bill and Melinda Gates Foundation, convened the National Commission on Transfer Policy and Practice, to identify roadblocks in the expansion of the transfer pathway and propose solutions. The Commission’s report, “The Promise of Transfer,” takes to task both two- and four-year institutions for their sustained neglect of a route that may well hold the key for greater college success for underserved students. This session will review both the Commission’s findings and its provocative recommendations for reform that will be of interest to policymakers, educators, researchers, and practitioners.
SPEAKER(S): Stephen J. Handel, Executive Director, Higher Education Relationship Development and Community College Initiatives, The College Board

DATE: THURSDAY, MARCH 21
TIME: 3:45pm — 4:45pm
STRAND: Education & the Economy
ROOM: ST. JOHNS 33
SESSION TITLE: How Higher Ed Leaders View Their World
DESCRIPTION: To keep tabs on the fast-changing landscape in higher education, Inside Higher Ed and Gallup conduct a series of surveys of key campus leaders — presidents, provosts, business officers and admissions directors among them. In this session, Co-Editor Doug Lederman will discuss the results of the most recent round of surveys, with a focus on where their views converge and clash.
SPEAKER(S): Doug Lederman, Managing Editor, InsideHigherEd.com
DOUG LEDERMAN is Editor and one of three founders of Inside Higher Ed. With Scott Jaschik, he leads the site’s editorial operations, overseeing news content, opinion pieces, career advice, blogs and other features. Doug speaks widely about higher education, including on C-Span and National Public Radio and at meetings around the country, and his work has appeared in *The New York Times, USA Today, the Nieman Foundation Journal, The Christian Science Monitor,* and the *Princeton Alumni Weekly.* Doug was managing editor of *The Chronicle of Higher Education* from 1999 to 2003. Before that, Doug had worked at *The Chronicle* since 1986 in a variety of roles, first as an athletics reporter and editor. He has won three National Awards for Education Reporting from the Education Writers Association, including one in 2009 for a series of *Inside Higher Ed* articles on college rankings. He began his career as a news clerk at *The New York Times.* He grew up in Shaker Heights, Ohio, and graduated in 1984 from Princeton University. Doug lives with his wife, Sandy, and their two children in Bethesda, Maryland.

NANCY ZIMPER serves as Chancellor of the State University of New York (SUNY). With more than 467,000 students, SUNY is the nation’s largest comprehensive system of higher education. She began her work at SUNY in 2009 with a statewide tour of SUNY’s 64 campuses, which became the first phase of a systemwide strategic planning process. This plan, called *The Power of SUNY,* was launched in April 2010, with the central goal of harnessing SUNY’s potential to drive economic revitalization and create a better future for every community across New York.

As *The Power of SUNY* is put into action, Chancellor Zimpher is leading a diverse set of new initiatives at SUNY in several key areas, including research and innovation, energy, health care, global affairs, and the education pipeline. She has also been a vocal advocate for groundbreaking legislative reforms that ensure SUNY can continue to provide broad access to higher education in an environment of declining state support, while maximizing its impact as an engine of economic development.

Dr. Zimpher currently serves as chair of the Board of Governors of the New York Academy of Sciences and of CEOs for Cities; is vice chair of the NCAA Collegiate Model Enforcement sub-committee; and is a member of the Business-Higher Education Forum. From 2005 to 2011, Dr. Zimpher chaired the national Coalition of Urban Serving Universities.

Prior to coming to SUNY, Dr. Zimpher served as president of the University of Cincinnati, chancellor of the University of Wisconsin-Milwaukee, and executive dean of the Professional Colleges and dean of the College of Education at The Ohio State University. She has authored or co-authored numerous books, monographs, and academic journal articles on teacher education, urban education, academic leadership, and school/university partnerships.
Chancellor Zimpher holds a bachelor’s degree in English Education and Speech, a master’s degree in English Literature, and a Ph.D. in Teacher Education and Higher Education Administration, all from The Ohio State University.

ROSEANN O’REILLY RUNTE is President and Vice-Chancellor of Carleton University. Dr. Runte graduated with a BA summa cum laude in French from the State University of New York and obtained her MA and PhD from the University of Kansas. She has previously served as president of l’Université Sainte-Anne, principal of Glendon College, president of Victoria University, and of Old Dominion University.

Dr. Runte is the author of numerous scholarly works in the fields of French, comparative literature, economic and cultural development, higher education and the importance of research. In addition, she is a creative writer and has received a poetry prize from the Académie française.

Dr. Runte has been awarded the Order of Canada and the French Order of Merit and is a Fellow of the Royal Society of Canada. She has also been awarded the Palmes Académiques and several prizes for her work on the environment, for community and national service. In addition, Dr. Runte holds a number of honorary degrees.

Dr. Runte has served on numerous boards and commissions in both Canada and the United States. She was president of the Canadian Commission for UNESCO, president of the Humanities Federation of Canada, a member of the Royal College of Physicians and Surgeons, the Foundation for International Training, the Gardiner Museum of Ceramic Art, the Virginia Industrial National Development Authority and the Virginia Advanced Shipbuilding Integration Center. She currently serves on the advisory board of SunGard SGT, the board of the National Bank of Canada, the executive of the Royal Society, the non-profit LifeNet Health Board, the board of Fulbright Canada-U.S. and the Ontario-Quebec Private Sector Advisory Committee. She is a member of both the European and the World Academy of Arts and Sciences.

BEN WILDAVSKY is a senior scholar in Research and Policy at the Ewing Marion Kauffman Foundation. He is the author of The Great Brain Race: How Global Universities Are Reshaping the World, which won the Frandson Award for Literature in the Field of Continuing Higher Education and is being translated into Chinese, Vietnamese, and Arabic. He also is coeditor of Reinventing Higher Education: The Promise of Innovation, published by Harvard Education Press in April 2011.

Before joining the Kauffman Foundation in 2006, Wildavsky was education editor of U.S. News & World Report, where he was the top editor of America’s Best Colleges and America’s Best Graduate Schools. Before joining U.S. News, he was budget, tax, and trade correspondent for National Journal, higher education reporter for the San Francisco Chronicle, and executive editor of the Public Interest. His writing also has appeared in the Washington Post, the Wall Street Journal, Foreign Policy, The New Republic, and many other publications. He blogs for the Chronicle of Higher Education’s new global edition.

As a consultant to national education reformers, he has written several influential reports, including “A Test of Leadership,” the report of the Secretary of Education’s Commission on the Future of Higher Education. He has been interviewed by CNN, Marketplace, The New York Times, and other media outlets. He also has spoken to audiences in the United States and abroad, including at Google, Berkeley, Columbia, Duke, Harvard, Wisconsin, the Economist’s Human Potential conference, the American College of Greece, the London School of Economics, the Organisation for Economic Cooperation and Development (OECD), the University of Melbourne, and the University of Sheffield.

Wildavsky graduated from Yale University (Phi Beta Kappa, summa cum laude). He is a guest scholar at the Brookings Institution.

DATE: THURSDAY, MARCH 21
TIME: 6:00pm — 6:15pm
ROOM: SANDLAKE
SESSION TITLE: Special Welcome
DESCRIPTION: Harris Rosen, the President & COO of Rosen Hotels & Resorts, will welcome participants of the Forum on Education & the Economy to his hotel. Mr. Rosen owns and operates the largest independently owned hotel chain in Florida. In 2000, he donated a 20-acre site and approximately $18 million to the UCF to build the Rosen College of Hospitality Management. He also provided a $5 million scholarship endowment for University of Central Florida. In addition, he spearheaded the multi-million dollar Tangelo Park Pilot Program, which has provided close to 200 high school seniors with full college scholarships over the last 18 years. The program also provides a free preschool education for all 2-, 3- and 4-year-olds in the Tangelo Park neighborhood, a disadvantaged neighborhood in Central Florida, as well as parenting classes. In 2005, Oprah Winfrey presented Rosen with the President’s Award from the US Dream Academy at an event in Washington, D.C. for his work with this program.
MODERATOR: Watson Scott Swail, President & CEO, Educational Policy Institute
SPEAKER(S): Harris Rosen, President & CEO, Rosen Hotels and Resorts, Orlando, FL

HARRIS ROSEN is the President & COO of Rosen Hotels & Resorts, the largest independently owned hotel chain in Florida. After spending the early years of his career working for other major hotel groups, including Walt Disney World, Rosen purchased his first hotel in 1974. Since then, he has added six hotels to his portfolio, for a total of four leisure hotels and three convention properties. Combined, Rosen Hotels & Resorts comprise 6,300 rooms and more than six percent of Orlando’s total hotel inventory.

Rosen is a charter member of the University of Central Florida (UCF) Board of Trustees. In 2000 he donated a 20-acre site and approximately $18 million to the UCF to build the Rosen College of Hospitality Management. He also provided a $5 million scholarship endowment for UCF.
As well as Rosen’s commitment to UCF, he spearheaded the multi-million dollar Tangelo Park Pilot Program, which has provided close to 200 high school seniors with full college scholarships over the last 18 years. The program also provides a free preschool education for all 2-, 3- and 4-year-olds in the Tangelo Park neighborhood, a disadvantaged neighborhood in Central Florida, as well as parenting classes. In 2005, Oprah Winfrey presented Rosen with the President’s Award from the US Dream Academy at an event in Washington, D.C. for his work with this program.

In 2004, Rosen has served as the Honorary Co-Chair of the Bethune-Cookman College Statue Project with the late Dr. Dorothy Height, President Emeriti of the National Council of Negro Women. The project raised funds to erect a monument to honor the legendary educator on the campus she founded which is Bethune-Cookman College, Daytona Beach, Fla.

Rosen is also a member of the Cornell Society of Hotelmen and the Waldorf Astoria Distinguished Alumni Association and is the past President of Visit Orlando. He is an honorary Tuskegee Airman and holds an honorary Black MBA from the National Black MBA Association. He serves on the boards of numerous not-for-profit organizations throughout Florida including the Boys & Girls Club, the Boggy Creek Gang and the YMCA Aquatic Center.

Among numerous accolades, Rosen was named by the Orlando Sentinel “2011 Central Floridian of the Year” and “2011 Cornell Entrepreneur of the Year” by his alma mater. He was inducted into Visit Florida’s Tourism Hall of Fame in 2010. He has received Sustainable Florida’s Legacy Award for his contributions not only for his environmental efforts, but for his contributions to the local community and has been named an Orlando Business Journal “Healthcare Hero” and featured on national media outlets for his innovative healthcare program.
SESSION TITLE: PleNary IV. In Search of Comprehensive Lifelong Education

DESCRIPTION: This session will take a look at the learning continuum, from early childhood to and through secondary, postsecondary, and career education. Focus will be on “college readiness” and the nexus between high school and college, plus an inward look at our P-20 systems. Panelists will be asked to bring their expertise to light and point towards future policy and practical considerations to foster a stronger workforce.

MODERATOR: Jason Lane, SUNY Provost Fellow and director of educational studies and senior fellow at the Nelson A. Rockefeller Institute of Government, State University of New York

SPEAKER(S): Matt Williams, Vice President of National Advocacy and Partnerships, KnowledgeWorks Foundation, Colin Groth, Associate Director, Strategic Assistance and Site Engagement at Strive Network (STRIVE), Jon Tafel, Sycamore Consulting

MATT WILLIAMS currently serves as the Vice President of National Advocacy and Partnerships for KnowledgeWorks Foundation. In this role, he is responsible for directing both federal and state relations on behalf of the Foundation. Matt assists the various divisions, subsidiaries, and major investments of KnowledgeWorks in building and maintaining relationships to advance their initiatives and also assists in advancing policy priorities for the Foundation.

Prior to his current role, Matt served as Director of Public Affairs and was responsible for directing both federal and state relations on behalf of the Foundation. Matt joined the Foundation in 2006, as a Program Officer in college and career access, providing leadership for the national community college initiative Achieving the Dream, P-16, and other college and career access programming. He is the former Director for GEAR UP Waco a comprehensive, collaborative grant project focused on increasing college access in Waco, Texas. In addition, Matt was an instructor in the Civic Education Department at Baylor University.

Matt earned a B.A. in History from the University of Texas at San Antonio and a M.S. in Education from Baylor University. He is a former member of the national board for the Partnership for 21st Century Skills. He has served on the Texas Governor’s Advisory Council for Mentoring, as well as advisory councils on after-school programming for the National Mentoring Partnership and the National League of Cities, and has worked on advocacy initiatives with the National Council for Community and Education Partnerships.

Before joining Strive, Groth served as the Government Relations Director for Southwest Ohio Regional Transit Authority where he oversaw the organization’s government affairs, served as liaison to elected officials and government bodies and developed relationships with local business and civic groups to advance public transportation issues.

Groth holds a B.A. in Communications (Interactive Communications Processes) from The Ohio State University where he also completed the Goodlinks Non-profit Management Internship program. He is a graduate of the Cincinnati USA Regional Chamber’s C-Change leadership development program and the City of Cincinnati’s Citizen’s Government Academy, an alumnus of 40 under Forty awards for both the Cincinnati Business Courier and Mass Transit Magazine and an Eagle Scout (Troop 502).

COLIN GROTH is the Associate Director for Strategic Assistance & Site Engagement at STRIVE, a national initiative working to build the cradle to career civic infrastructure in communities to identify, sustain and scale what works. The son of a public school librarian, Groth has always been passionate about the improvement of educational outcomes for all young people.

Prior to joining Strive, Groth served as the Government Relations Director for Southwest Ohio Regional Transit Authority where he oversaw the organization's government affairs, served as liaison to elected officials and government bodies and developed relationships with local business and civic groups to advance public transportation issues.

Groth holds a B.A. in Communications (Interactive Communications Processes) from The Ohio State University where he also completed the Goodlinks Non-profit Management Internship program. He is a graduate of the Cincinnati USA Regional Chamber’s C-Change leadership development program and the City of Cincinnati’s Citizen’s Government Academy, an alumnus of 40 under Forty awards for both the Cincinnati Business Courier and Mass Transit Magazine and an Eagle Scout (Troop 502).

JONATHAN TAFEL is President of Sycamore Street Consulting, Inc. (SSC) specializing in college access and P-16 system design. The primary focus of SSC is the formation of community collaborative approaches and opportunities to increase the successful preparation and participation of students in post-secondary education options. Jonathan retired in 2008 from the Ohio Board of Regents (OBR) where he served as the Vice Chancellor for Educational Linkages and Access in the development and coordination of education reform initiatives with the Department of Education and higher education. He provided leadership in the analysis of critical state issues and policy development surrounding direction and change strategies in enabling student access and achievement, including College Tech-Prep, Ohio College Access Network (OCAN), Gaining Early Awareness and Readiness (GEAR UP) Initiative, teacher education improvement, technology initiatives and workforce education.

He administered special academic programs such as Centers of Excellence in Math and Science education and the Ohio Resource Center for Math, Science and Reading. He was instrumental in the design and development of Ohio's Articulation & Transfer comprehensive system resulting in increased student mobility and statewide transfer guarantee. Jon earned his Ph.D. from The Ohio State University.
JOEL VARGAS is vice president at Jobs of the Future and leads the work of JFF’s “High School through College” team and helps to set the organization’s priorities and direction. He also researches and advises on state policies to promote improved high school and postsecondary success for underserved students. He has helped policymakers and intermediary organizations develop state and federal policies that expand early college schools and other school designs incorporating college coursework into high school.

Since joining JFF in 2002, Dr. Vargas has designed and implemented a research and state policy agenda for implementing early college designs; created policy frameworks, tools, and model legislation; written and edited white papers, research, and national publications; provided technical assistance to state task forces and policy working groups; served on a number of national advisory groups; and organized and presented at national policy conferences.

Dr. Vargas has directed, initiated, and studied a variety of middle school and high school programs designed to help more underrepresented students get into and through a postsecondary education. He also has been a teacher, editor, and research assistant for the Civil Rights Project at Harvard University. He is coeditor of two JFF books: Double the Numbers: Increasing Postsecondary Credentials for Underrepresented Youth (Harvard Education Press) and Minding the Gap: Why Integrating High School with College Makes Sense and How to Do It (Harvard Education Press).

In 2005, Dr. Vargas was featured in the Chronicle of Higher Education as one of “Higher Education’s Next Generation of Thinkers.” He received a B.S. in journalism from Boston University and an Ed.D. from the Harvard Graduate School of Education.

JIM NELSON is the executive director of AVID (Advancement Via Individual Determination), a college readiness system for elementary through higher education designed to increase school-wide learning and performance. Mr. Nelson is the former superintendent of the Richardson Independent School District and served as a board member and officer for Ector County ISD in Odessa, Texas from 1984 through 1995, twice serving as board president. During that time he also served as a board member and in several officer positions for the Texas Association of School Boards, including state president in 1993.

In 1996, he was appointed to the newly-created State Board for Educator Certification (SBEC), by then-Governor George W. Bush where he served as chairman until 1999, when he was appointed by Governor Bush as the Texas Commissioner of Education. During his time as commissioner, Mr. Nelson managed the more than 800 Texas Education Agency employees who worked to implement state education policy for the approximately 1,100 Texas school districts.

In spring 2003, at the request of the White House and Department of Defense, Mr. Nelson traveled to Baghdad, Iraq as a Senior Advisor to the Iraqi Ministry of Education to assist with the rebuilding of the Iraqi school system.

Professionally, Mr. Nelson was a member of the Texas Association of School Administrators and served on its Legislative Committee. He is a life member of the Texas Business and Education Coalition (TBE) board of directors, and a board member for StandardsWorks, a Washington, D.C.-based nonprofit organization committed to improving standards-based education in American schools.

Mr. Nelson earned a degree of Bachelor of Business Administration from the University of Texas at Arlington, and a Juris Doctorate from the Texas Tech University School of Law.

DAVID CONLEY is CEO, Educational Policy Improvement Center and Professor, University of Oregon. He is the founder and director of the Center for Educational Policy Research (CEPR), and founder and chief executive officer of the Educational Policy Improvement Center (EPIC), a 501(c)3 not-for profit educational research organization. CEPR and EPIC conduct research on issues related to college readiness, college and high school course content analysis, high school/college alignment and transition, large-scale high school assessment, and state adequacy funding models. Dr. Conley serves on numerous technical and advisory panels, consults with educational agencies nationally and internationally, and is a frequent speaker at national and regional meetings of education professionals and policymakers.

In 2003, Dr. Conley completed a groundbreaking three-year research project to identify the knowledge and skills necessary for college readiness: Standards for Success (funded by the Washington, D.C.-based Association of American Universities and the Pew Charitable Trust). This project analyzed course
content at a range of American research universities to develop Knowledge and Skills for University Success standards.

His most recent book, *College and Career Ready* (2010), explains the rationale and the methods for redesigning high schools to focus on college and career readiness skills. The book offers evidence for why high schools need to change their focus, provides research-backed descriptions of the knowledge and skills today’s high school students need, and suggests practical methods teachers can use to enhance the readiness of their students.

Dr. Conley received a B.A. with honors in Social Sciences from the University of California, Berkeley, a master’s degree in Social, Multicultural, Bilingual Foundations of Education, and a doctoral degree in Curriculum, Administration, and Supervision at the University of Colorado, Boulder. Before joining the faculty of the University of Oregon in 1989, he spent a total of 20 years in Colorado and California as a school-level and central office administrator in several districts, an executive in a state education department, and as a teacher in two public, multicultural, alternative schools.

**DOUGLAS WOOD** is a program officer at The Ford Foundation in New York City. His focus is on higher education issues with an emphasis on the needs of students from poor and marginalized communities in the United States. His grant making focuses on helping students transition from high school to college and improving the college completion rates of underserved students. He brings to this position broad experience in PK-12, as well as higher education policy and administration.

Prior to joining the foundation in 2011, Douglas was associate dean of administration and planning at the Eugene Lang College of the New School for Liberal Arts. During the 10 years before coming to the foundation, he also worked as executive director and chief executive officer of the Tennessee State Board of Education; served as a member of the Tennessee Higher Education Commission; and was executive director and principal investigator of the National Academy for Excellent Teaching, an institute of the Teachers College, Columbia University.

Douglas began his career as a public school teacher. After five years of teaching, he worked as a research assistant at Harvard University, the Center for Collaborative Education-Metro Boston and the Annenberg Rural Challenge, among others. He then served as a course assistant at Harvard’s JFK School of Government and a teaching fellow at Harvard’s Graduate School of Education.

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Douglas holds an Ed.D and an Ed.M in Administration, Planning and Social Policy from Harvard University, a master's degree in English from Middlebury College and a bachelor's degree in history from Wofford College, where he is a member of Phi Beta Kappa.

DATE: FRIDAY, MARCH 22
TIME: 10:00am — 11:00am
STRAND: College & Career Readiness
ROOM: SANDLAKE
SESSION TITLE: DIALOGUE: Plenary IV & V
DESCRIPTION: This session will follow up the plenaries and talk about career and college readiness. Participants are encouraged to attend and lend their thoughts.
MODERATOR: Joel Vargas, Vice President, High School through College, Jobs for the Future
SPEAKER(S): Jim Nelson, Executive Director, AVID (Advancement Via Individual Determination), David Conley, CEO, Educational Policy Improvement Center and Professor, University of Oregon, Matt Williams, Vice President of National Advocacy and Partnerships, KnowledgeWorks Foundation, Colin Groth, Associate Director, Strategic Assistance and Site Engagement at Strive Network (STRIVE), Jon Tafel, Sycamore Consulting, Douglas Wood, Program Officer, Advancing Higher Education Access & Success, The Ford Foundation

DATE: FRIDAY, MARCH 22
TIME: 10:00am — 11:00am
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 31
SESSION TITLE: Threats to College Student Success: A System Perspective
DESCRIPTION: Research on the performance and persistence of community college students, the nature of career planning resources in secondary schools and recent changes to the work of student affairs forecast an increased threat to college student success. An overview of this research highlights the absence of and need for system coordination to ensure postsecondary student retention.
SPEAKER(S): Peter Dietsche, Wm. G. Davis Chair in Community College Leadership, Ontario Institute of Studies in Education (OISE), University of Toronto

DATE: FRIDAY, MARCH 22
TIME: 11:15am — 12:15pm
STRAND: College & Career Readiness
ROOM: ST. JOHNS 31
SESSION TITLE: College in High School: A College Readiness & Success Strategy?
DESCRIPTION: Research continues to suggest that programs and policies that encourage students to complete college-level work in high school can improve their chances of persisting in college and completing a postsecondary degree. The session will highlight a recent study on the college outcomes of 30,000 Texas high school graduates who completed a college course for dual credit. While this study and others on dual enrollment and early colleges are finding some agreement, this session will also point out important variations and areas that still demand more research and understanding.
SPEAKER(S): Joel Vargas, Vice President, High School through College, Jobs for the Future

DATE: FRIDAY, MARCH 22
TIME: 10:00am — 11:00am
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 34
SESSION TITLE: Threats to College Student Success: A System Perspective
DESCRIPTION: Research on the performance and persistence of community college students, the nature of career planning resources in secondary schools and recent changes to the work of student affairs forecast an increased threat to college student success. An overview of this research highlights the absence of and need for system coordination to ensure postsecondary student retention.
SPEAKER(S): Peter Dietsche, Wm. G.Davis Chair in Community College Leadership, Ontario Institute of Studies in Education (OISE), University of Toronto

DATE: FRIDAY, MARCH 22
TIME: 11:15am — 12:15pm
STRAND: College & Career Readiness
ROOM: ST. JOHNS 33
SESSION TITLE: From Scratch: The Four Ingredients of Increasing Student Retention
DESCRIPTION: This interactive session will cover the lessons learned from a start-up Student Success Office that was able to increase first year retention from 85.5% to 89% and graduation rates from 77% to 79% within 5 years. The session will cover the essential data required for developing a retention strategic plan and the importance of outreach to individual students and cross campus collaboration. These initiatives were accomplished without an integrated technology system.
SPEAKER(S): Kimberly Allen-Stuck, Director of Student Success and First Year Experience, Saint Joseph's University, Daniel McDevitt, Assistant Director of Student Success and First Year Experience, Saint Joseph’s University

NETWORK BREAK (11:00am — 11:15am)
SESSION TITLE: DIALOGUE: Plenary III
DESCRIPTION: A follow-up to the previous day’s plenary session.
MODERATOR: Doug Lederman, Managing Editor, InsideHigherEd.com
SPEAKER(S): Roseann Runte, President and Vice-Chancellor, Carleton University, Ben Wildavsky, Senior Scholar, Ewing Marion Kauffman Foundation

DATE: FRIDAY, MARCH 22
TIME: 11:15am — 12:15pm
STRAND: Education & the Economy
ROOM: SANDLAKE

SESSION TITLE: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 34
SESSION TITLE: Financial Literacy Is Paramount For Success (FLIPS)
DESCRIPTION: FLIPS is a financial literacy initiative which supports the University’s Strategic Plan goal of promoting and sustaining a campus environment that supports a high quality of life and learning that responds to the needs of a diverse student population. The purpose is to identify and enhance financial literacy tools and programs that will improve student success. Anticipated long-term outcomes are to decrease the Federal Direct Loan Cohort Default Rate, increase freshman-to-sophomore retention rates and increase six-year graduation rates.
SPEAKER(S): Cherylly Mills, Assistant Vice President for Enrollment Management, University of Maryland Eastern Shore, James Kellam, Director of Financial Aid, University of Maryland Eastern Shore, Nelva White, Budget Director, University of Maryland Eastern Shore

DATE: FRIDAY, MARCH 22
TIME: 12:15pm — 2:00pm
STRAND: Education & the Economy
ROOM: SANDLAKE
SESSION TITLE: PLENARY VI. Is Education Worth it: Cradle to Career
DESCRIPTION: State University of New York Chancellor Nancy L. Zimpher rejects a national dialogue that questions the value of a college degree and makes the case for a more collective, and thus more effective, delivery of education from cradle to career. By partnering with schools and communities to increase preparation for and access to college, and with businesses and employers to develop and deliver needed workforce training, universities serve as the drivers of a stronger economy and higher quality of life for all citizens. Programs highlighted include cradle to career networks, strategic enrollment management, expanded online access, innovation hubs, and cooperative education.
MODERATOR: Lee Fisher, President & CEO, CEOs for Cities
SPEAKER(S): Nancy Zimpher, Chancellor, State University of New York

DATE: FRIDAY, MARCH 22
TIME: 2:00pm — 3:00pm
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 33
SESSION TITLE: The Higher Education Arms Race
DESCRIPTION: This session will provide data linking higher education and the job market. The thesis of the session is that we potentially have enough higher education, but the rhetoric from policymakers and others is crowding out serious discussion of the postsecondary and career preparation needs in America. Data from the Bureau of Labor Statistics and other sources will be utilized.
SPEAKER(S): Watson Scott Swail, President & CEO, Educational Policy Institute

DATE: FRIDAY, MARCH 22
TIME: 2:00pm — 3:00pm
STRAND: Education & the Economy
ROOM: SANDLAKE
SESSION TITLE: The Higher Education Arms Race
DESCRIPTION: This session will provide data linking higher education and the job market. The thesis of the session is that we potentially have enough higher education, but the rhetoric from policymakers and others is crowding out serious discussion of the postsecondary and career preparation needs in America. Data from the Bureau of Labor Statistics and other sources will be utilized.
SPEAKER(S): Watson Scott Swail, President & CEO, Educational Policy Institute
institutions that received NACME Block Grants as of summer 2010. NACME will compare the graduation rates of NACME Scholars, minority students, and non-minority students at these institutions. Best practices drawn from the institutions with the largest proportion of NACME Scholar graduates will also be shared.

**SPEAKER(S): Christopher Smith**, Director of Research and Program Evaluation, NACME

**DATE:** FRIDAY, MARCH 22  
**TIME:** 3:00pm — 4:00pm  
**STRAND:** College & Career Readiness  
**ROOM:** ST. JOHNS 31  
**SESSION TITLE:** The Completion Arch: Measuring Community College Student Success  
**DESCRIPTION:** Recognizing the importance of community colleges in preparing more students for academic and career success and in revitalizing America’s economy, the College Board launched The Completion Arch. Through a single Web-based resource, all publicly available metrics relating to student progress are accessible. The Completion Arch aids educators and state and national policymakers working to assess and increase student success by presenting metrics that encompass the entire community college student experience, from enrollment to college completion to career. Session leaders will provide background and context for different metrics in the database as they pertain to developmental education, transfer and persistence – all from the perspective of the community college and the community college student.  
**SPEAKER(S): Stephen J. Handel**, Executive Director, Higher Education Relationship Development and Community College Initiatives, The College Board

**DATE:** FRIDAY, MARCH 22  
**TIME:** 3:00pm — 4:00pm  
**STRAND:** Education & the Economy  
**ROOM:** ST. JOHNS 33  
**SESSION TITLE:** Universities and Colleges as Economic Drivers: Measuring Higher Education’s Role in Economic Development  
**DESCRIPTION:** Local, state, and national economies are facing unprecedented levels of international competition. The current fiscal crisis has hampered the ability of many governments in the developed world to directly facilitate economic growth. At the same time, many governments in the developing world are investing significant new resources into local infrastructure and industry development initiatives. At the heart of the current economic transformation lie our colleges and universities. This session will examine how this institutions, through their roles in education, innovation, knowledge transfer, and community engagement can work toward spurring economic growth and prosperity.  
**SPEAKER(S): Jason Lane**, SUNY Provost Fellow and director of educational studies and senior fellow at the Nelson A. Rockefeller Institute of Government, State University of New York
## Schedule

### THURSDAY, MARCH 21

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<thead>
<tr>
<th>Time</th>
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<tr>
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<td>The Higher Education Arms Race (SWAIL)</td>
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<td>Forecast 3.0: Creating a World of Learning Through Policy (WILLIAMS)</td>
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<td>PLENARY VII. The Evolution and Current State of Student Financial Aid and Loan-Debt (and why you should care!)</td>
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<td>PLENARY VIII. Student Retention, Persistence, &amp; Completion</td>
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<td>PLENARY X: Corporate Panel: Stem Education, Workforce Development, and Global Competitiveness: The Challenge of Inclusion</td>
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DESCRIPTION: The KnowledgeWorks Future Forecast 3.0 previews five disruptions that will reshape learning over the next decade. Responding to them with creativity rather than fear will be critical to preparing all learners for an uncertain future. This session examines the connective tissue between the disruptions of the Future Forecast and advancing education policy to develop a world of learning for all of today’s learners.

SPEAKER(S): Matt Williams, Vice President of National Advocacy and Partnerships, KnowledgeWorks Foundation

DATE: FRIDAY, MARCH 22  
TIME: 3:00pm — 4:00pm  
STRAND: Education & the Economy  
ROOM: SANDLAKE  
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SPEAKER(S): Matt Williams, Vice President of National Advocacy and Partnerships, KnowledgeWorks Foundation

NETWORK BREAK (4:00pm — 4:15pm)
JOE RUSSO was appointed director of financial aid at the University of Notre Dame in 1978 after serving in two similar capacities in upstate New York. In 2005, he became the director of student financial strategies for the University. He is a graduate of Le Moyne and Syracuse University and was named an honorary alumnus of Notre Dame in 1992.

Mr. Russo, who is now in his 47th year as a financial aid administrator, has served as a consultant for a number of organizations, including the College Board and the U.S. Department of Education, and was the editor of the National Association of Student Financial Aid Administrators Journal of Student Financial Aid for 21 years. He was a charter member of the NCAA Committee on Financial Aid and Amateurism and has testified before the U.S. Congress on major public policy issues related to student aid. Mr. Russo has been involved in training throughout his entire career. In 2004 he was named to the College Scholarship Service Hall of Fame by the College Board. He has served on the Board of Directors for the Marine Corps Scholarship Foundation, Scholarship America, and the Private College 529 Plan.

He has published two books on student aid for Random House and in the summer of 2006 was appointed a Fellow at New College of Oxford University serving as a consultant for higher education pricing and student aid policies for the United Kingdom. Another book entitled Student Financial Aid: Lessons for the UK from the US was published in 2007 by the Centre for Higher Education Studies at Oxford. In October 2007, Mr. Russo was appointed by the White House to a federal commission charged with advising Congress on matters of access to and affordability of American higher education. Another book entitled The Art & Science of Student Aid Administration in the 21st Century was published by the National Association of Student Financial Aid Administrators in 2010. Mr. Russo retired from the University the end of March 2012 after 34 years of dedicated service and leadership.

JOEL HARRELL is Deputy Director, School Experience Group and the Director of the Minority Serving and Under Resourced School Division within the U.S. Department of Education/Federal Student Aid. Dr. Harrell began his post-secondary educational training at Rust College in Holly Springs, MS where he earned a Bachelor’s degree in History and Political Science. He later earned his MPA and a coctorate in higher education administration from Mississippi State University.

Dr. Harrell has over thirty years of experience in the higher education administrative arena having served in senior administrative positions at Mary Holmes College, Knoxville College, Mississippi State University, The University of Tennessee at Chattanooga, and Florida A & M University. Prior to the beginning of his federal government career, his most recent on campus position was Vice President of Enrollment Services and Student Affairs at Clark Atlanta University.

In his current role, he is responsible for providing leadership to a team that supports and provides special services, training and technical assistance to over 6,000 institutions that participate in the Title IV Student Financial Assistance Programs. He also provides leadership and strategic vision for Federal Student Aids outreach efforts to Historically Black College and Universities, Hispanic Serving Institutions, and Tribally Controlled Colleges and Universities and Asian American Native American Pacific Islander-Serving Institutions, Predominately Black Institutions, and Alaska Natives/Native Hawaiian Serving Institutions that participate in the Title IV Federal Student Aid Programs.
SESSION TITLE: The Ford Foundation: Pathways to Success
DESCRIPTION: Corridors of College Success is the Ford Foundation’s two-fold strategy for mitigating the educational, economic, and social barriers that inhibit vulnerable first-generation college students access to and successful participation in postsecondary education. The strategy is not to create new place-based collaborations related to college access and success, but to build on promising existing collaborations by scaling up these efforts and by building a policy environment such that these collaborations can be strong and successful with vulnerable populations.
SPEAKER(S): Douglas Wood, Program Officer, Advancing Higher Education Access & Success, The Ford Foundation

DATE: SATURDAY, MARCH 23
TIME: 8:30am — 9:30am
STRAND: College Costs & Affordability
ROOM: SANDLAKE
SESSION TITLE: DIALOGUE: Plenary VII
DESCRIPTION: This session will follow-up the plenary on student financial aid from Friday afternoon. Participants are encouraged to attend and lend their thoughts.
MODERATOR: Carrie Besnette Hauser, Senior Fellow, Ewing Marion Kauffman Foundation
SPEAKER(S): Carl Dalstrom, President and CEO, USA Funds, Joe Russo, Former Director, Student Financial Strategies, University of Notre Dame, Joel Harrell, Deputy Director, School Experience Group and the Director of the Minority Serving and Under Resourced School Division within the U.S. Department of Education/ Federal Student Aid.

DATE: SATURDAY, MARCH 23
TIME: 8:30am — 9:30am
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 33
SESSION TITLE: P.U.M.P! (Peer Undergraduate Mentoring Program): An Initiative to Increase Retention among Predominately First Generation Students in Developmental Mathematics at an Urban University
DESCRIPTION: P.U.M.P! (Peer Undergraduate Mentoring Program) is a recently created structured mentoring initiative implemented at an urban university in the Northeast. Preliminary results demonstrate significant increases in developmental mathematics pass rates for participants, many of whom are ethnic minority and first-generation students. Rigorous and comprehensive assessments were used to evaluate program efficacy. The presentation will outline the design, implementation, and evaluation of the program, and provide insights and best practices related to peer mentoring.
SPEAKER(S): Rosa Perez, Director, Educational Opportunities Center, Kean University, Sarah Ambrose-Roman, Assistant to the Dean, New Jersey City University, Erik Morales, Associate Professor, New Jersey City University

DATE: SATURDAY, MARCH 23
TIME: 8:30am — 9:30am
STRAND: Student Retention, Persistence, & Completion
ROOM: ST. JOHNS 31
SESSION TITLE: Mobilizing Existing Resources & Establishing Partnerships: Creating Exciting, Innovative Financial Literacy Initiatives
DESCRIPTION: The Morgan State University Office of Student Success and Retention (OSSR) provides intrusive, intentional, individualized support for students from matriculation to graduation. One of their most exciting and innovative programs is the Financial Literacy Program. The vision for Morgan State University’s OSSR Financial Literacy Program is to reverse the cycle of low family income and socio-economic status by enhancing the financial literacy of Morgan students and their families thereby increasing their retention and graduation rates. The grant provides a full-time AmeriCorps; VISTA member who works as Morgan’s Financial Literacy Coordinator in the Office of Student Success and Retention. USA Funds first began assisting Morgan State with its Financial Literacy Program more than ten years ago by providing free access to their on-line LifeSkills financial literacy curriculum. This coming academic year, Morgan plans to incorporate the USA Funds LifeSkills on-line course into the financial aid process by requiring students who submit a financial aid appeal to complete the on-line course. This session will demonstrate how any university can mobilize existing resources and establish partnerships to develop creative and sustained financial literacy initiatives.
MODERATOR: Denise Feser, SVP School and Student Services, USA Funds
SPEAKER(S): Tiffany Beth Mfume, Director, Office of Student Success and Retention, Morgan State University

DATE: SATURDAY, MARCH 23
TIME: 9:30am — 10:30am
STRAND: Student Retention, Persistence, & Completion
ROOM: SANDLAKE
SESSION TITLE: PLENARY VIII. Student Retention, Persistence, & Completion
DESCRIPTION: This plenary session brings together some of North America’s most notable retention experts to discuss current issues in student success. The panelists will introduce the latest data on retention and persistence and talk about policy and practice at the state, provincial, and institutional levels.
MODERATOR: Jay Goff, Vice President Enrollment and Retention Management Saint Louis University
SPEAKER(S): Wes Habley, Coordinator of State Organizations and Principal Associate in Educational Services, ACT, Jack Schmit, Director of Grant Procurement and Student Support, Indiana University, Peter Dietsche, Wm. G. Davis Chair in Community College Leadership, Ontario Institute of Studies in Education (OISE), University of Toronto
JAY GOFF (Director) is Vice President for enrollment and retention management at Saint Louis University in St. Louis, Missouri. Prior to joining SLU in 2011, Mr. Goff served as Dean of enrollment management at Missouri University of Science & Technology in Rolla, Missouri. While at Missouri SP&T, the institution achieved record enrollments, retention, and graduation rates. Mr. Goff has written articles and presented workshops at many regional and national programs, mostly focusing the values of team building and training, quality student-service systems and data-driven planning. He serves on the ACT national education advisory board and is AACRAO’s strategic enrollment management conference coordinator for four-year colleges and universities. Goff completed his undergraduate and graduate degrees in communication studies with a focus on organizational communication from Southeast Missouri State University and the University of Kansas, respectively. His doctoral work focuses on leadership development in higher education.

WES HABLEY is Assistant Vice President for Strategic Partnerships at ACT, Inc. Dr. Wes Habley earned his Bachelor’s Degree in Music Education and his Masters Degree in Student Development from the University of Illinois-Urbana/Champaign. His doctorate in higher education administration was earned at Illinois State University where he was recently inducted into the College of Education Hall of Fame. Habley has more than 50 published works on academic advising and student retention. His most recent publications include Increasing Persistence: Research-based Strategies for College Student Success (2012), Status of Academic Advising (2004) and What Works in Student Retention in 2004 and 2010. He has delivered more than 400 presentations at professional meetings and has served as a consultant or workshop leader at more than 125 colleges in the US, Canada, and the Middle East. Habley is a founding Board member of NACADA and served as President and Treasurer. He served for 22 years as the Director of the Summer Institute on Academic Advising and is the recipient of NACADA’s awards for service and for outstanding contributions to the field of advising.

JACK SCHMIT is Director of Grant Procurement and Student Support with the Vice President for Diversity, Equity and Multicultural Affairs at Indiana University. In this position he works as the University-wide coordinator for the Herbert Presidential Scholars program and also with the STEM Summer Scholars Institute, which is a partnership with 12 Historically Black Colleges and Universities. Prior to his current position, he worked with the Indiana Career and Postsecondary Advancement Center for 15 years. The Center communicated with over 300,000 households in Indiana through a direct mail campaign, hosted an extensive Web site on education and work, and maintained a toll free Hotline for career and college information. Dr. Schmit has worked with diverse student groups in college access programs throughout the education pipeline from middle school programs to graduate school.

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Dr. Schmit is a first-generation college student who received his bachelor’s degree in Psychology from South Dakota State University and Masters degree in Guidance and Counseling from Northern State University (South Dakota). In 1991, he completed a Ph.D. in college administration from Indiana University and is co-author of a book titled, Going to College: How Economic, and Educational Factors Influence the Decisions Students Make. This book chronicles a nine-year study of the college decision-making process of Indiana high school students. The study examines the factors that influenced both student intentions and what students actually did four years after high school. Dr. Schmit continues to work in the field of college access through his association with the National College Access Network. His is the author of the Guide to Creating a Higher Education & Career Planning Hotline, which is one in a series of guidebooks published by NCAN for expanding college access nationwide. Dr. Schmit is also the creator of the A6 Framework for college access and success, which is an organizing tool for school principals designed to create a college going culture in schools. He has served as a consultant for NCAN in national expansion efforts in Indiana, Pennsylvania, Texas, Tennessee, Missouri and Washington.

PETER DIETSCHE is an Assistant Professor and William G. Davis Chair in Community College Leadership, University of Toronto, Ontario Institute for Studies in Education (OISE). An educator and administrator for over 30 years, Dr. Peter Dietsche has established an exceptional reputation by dedicating himself to improving the educational experience for first-year students at two-year institutions. Dr. Dietsche is a passionate advocate of learning-centered environments where students’ needs and demographics are critical components of the programming process, and has proven himself as a popular faculty member in both the college and university environment. His enthusiasm for students and student learning is infectious and one of the reasons that staff members are the backbone of Canada’s colleges and institutes of excellence.

DATE: SATURDAY, MARCH 23
TIME: 10:30am — 11:30am
STRAND: Education & the Economy
ROOM: SANDLAKE
SESSION TITLE: PLENARY IX. An International Comparison of Education Systems
DESCRIPTION: As we consider the constant drumbeat of international education rankings, our panelists will discuss their relative importance and the specific ties between education, the economy and society. Using the international education rankings as a jumping off point, our expert panelists will discuss the variance in education systems, with a particular focus on human capital in education, and what we can learn from excellent school systems globally to impact our work locally. In addition, the panelists will discuss how our lessons from international education in the developed world can help us expedite educational improvement in developing countries as well.
MODERATOR: Pranav Kothari, Managing Director, Mission Measurement
SPEAKER(S): Pasi Sahlberg, Director General of CIMO (in the Ministry of Education), Finland, Bob Wise, President, Alliance for Excellent Education (and former Governor, West Virginia)

PASI SAHLBERG (invited) is Director General of CIMO (in the Ministry of Education) in Helsinki, Finland. He has experience in classroom teaching, training teachers and leaders, coaching schools to change and advising education policy-makers around the world. Dr. Sahlberg has lived and worked in the United States (World Bank in Washington DC) and Italy (European Commission). He is an international keynote speaker and has published over 100 articles, chapters and books, among them «The Fourth Way of Finland» (2011), “Rethinking accountability in a knowledge society” (2010), “Creativity and innovation through lifelong learning” (2009), and «Education Reform for Raising Economic Competitiveness» (2006). He earned PhD from the University of Jyväskylä (Finland) in 1996. Dr. Sahlberg is a member of the Board of Directors of ASCD and Adjunct Professor at the University of Helsinki and the University of Oulu. His latest book is «Finnish Lessons: What can the world learn from educational change in Finland?»

BOB WISE is president of the Alliance for Excellent Education and former governor of West Virginia. He currently cochairs the Digital Learning Council with Jeb Bush, former governor of Florida. Governor Wise also chairs the National Board for Professional Teaching Standards.

Under Governor Wise’s leadership, the Alliance continues to build its reputation as a respected authority on high school policy by advocating for reform in America’s secondary education system and working to ensure that all students graduate from high school prepared for college, careers, and to be contributing members of society.

Governor Wise has appeared on national television and radio programs such as Lou Dobbs Tonight (CNN), the Charlie Rose Show (PBS), the Diane Rehm Show(NPR), and Washington
As governor of West Virginia from 2001 to 2005, he fought for and signed legislation to fund the PROMISE Scholarship program, which has helped thousands of West Virginia high school graduates continue their education in the Mountain State. Governor Wise also established a character education curriculum in all state schools and created the Governor’s Helpline for Safer Schools. During his administration, West Virginia saw a significant increase in the number of students completing high school and entering college.

From 1983 to 2001, Governor Wise served in the U.S. House of Representatives representing the 2nd District of West Virginia. During his tenure, he worked aggressively to preserve federal financial aid for students to attend college and served as a member of the House Education and Labor Committee. Governor Wise earned a bachelor's degree from Duke University and a JD from Tulane University School of Law. He has a black belt in Taekwondo. He and wife, Sandy, live in Washington, DC with their two children.

**NETWORK BREAK (11:30am — 11:45am)**

**DATE:** SATURDAY, MARCH 23  
**TIME:** 11:45am — 12:45pm  
**STRAND:** College Costs & Affordability  
**ROOM:** ST. JOHNS 31  
**SESSION TITLE:** Financial Literacy: A Missing Link on Your Campus?  
**DESCRIPTION:** Join this session and learn how to implement a Financial Literacy Program on your campus. We will discuss what type of program you have now, how others are implementing financial literacy on their campuses along with new and tested implementation ideas. See a USA Funds Life Skills lesson and join in on an activity that you can provide to your students.  
**MODERATOR:** Denise Feser, SVP School and Student Services, USA Funds  
**SPEAKER(S):** Bonnie Weaver, Consultant, USA Funds

**DATE:** SATURDAY, MARCH 23  
**TIME:** 11:45am — 12:45pm  
**STRAND:** STEM  
**ROOM:** SANDLAKE  
**SESSION TITLE:** PLENARY X: Corporate Panel: Stem Education, Workforce Development, & Global Competitiveness: The Challenge of Inclusion  
**DESCRIPTION:** Among the most anxiety-inducing questions among government, business, and education leaders is how to maintain American competitiveness in the global economy. In reports such as 2010's Rising Above the Gathering Storm, Revisited: Rapidly Approaching Category 5; and 2007's Rising Above the Gathering Storm: Energizing and Employing America for a Brighter Economic Future (published by the National Academies), we are warned that our way of life is threatened because we are in danger of falling behind in science, technology, engineering, and mathematics (STEM), the disciplines that have powered American prosperity for decades. The solution to America's competitiveness problem is to activate the hidden workforce of young men and women who have traditionally been underrepresented in STEM careers—African Americans, American Indians, and Latinos. We believe that diversity drives innovation and that its absence imperils our designs, our products, and, most of all, our creativity—all
components of competitiveness.

MODERATOR: Irving Pressley McPhail, President and CEO, National Action Council for Minorities in Engineering, Inc. (NACME)

SPEAKER(S): Wendy Vincent, Director of Marketing, EMC Global Services; Jambey Clinkscales, Program Manager, Hewlett-Packard Company; Eric M. Weaver, Director of Education and Workforce Policy, Intel Corporation; Catherine Didion, Senior Program Officer, National Academy of Engineering (NAE)

IRVING MCPHAIL is president and CEO of the National Action Council for Minorities in Engineering. McPhail served as Chancellor of the Community College of Baltimore County (CCBC), one of Maryland’s largest and most influential higher-education providers, from 1998 to 2005. Under his leadership, CCBC successfully reorganized from three separate community colleges into a single, multi-campus public college that is highly regarded for promoting academic excellence, developing potential, nurturing talent, and cultivating partnerships that benefit the people, families, and businesses of the Baltimore metropolitan region.

McPhail also served as president of St. Louis Community College at Florissant Valley and president of LeMoyne-Owen College. He has held senior tenured faculty appointments at Morgan State University, Delaware State University, LeMoyne-Owen College, and Pace University, and served for one year as chief operating officer of the Baltimore City Public Schools.

The son of an upholsterer and a homemaker, McPhail grew up in Harlem, New York. He earned an academic scholarship to Cornell University, where he took a bachelor’s degree in development sociology. He holds a master’s degree in reading from the Harvard Graduate School of Education. McPhail has received numerous awards, including: the 2004 Harvard Graduate School of Education Alumni of Color Achievement Award; the Exemplary Leader and Pioneer awards from the National Council on Black American Affairs of the AACC; the Learning Facilitator and Distinguished Service awards from the Community College Leadership Doctoral Program at Morgan State University; the Certificate of Honor from the Baltimore County Public Schools; and the Emerging Scholars Award for Commitment to Excellence in Developmental Education from St. Louis Community College at Florissant Valley.

WENDY VINCENT is Director of Marketing, EMC Global Services. With revenues of $20 billion in 2011 and more than 53,000 people worldwide, EMC is a global leader in enabling businesses and service providers to transform their operations and deliver IT as a service. Fundamental to this transformation is cloud computing. Through innovative products and services, EMC accelerates the journey to cloud computing. Wendy leads a worldwide team that drives communication strategies and market awareness for Global Services which provide strategic guidance and technology expertise to help organizations drive business value through IT innovation. Previously she held leadership positions in marketing and sales at IBM, Digital Equipment Corporation, Compaq and Giga Information Group. She is currently Board Liaison for National Action Council for Minorities in Engineering (NACME), Vice Chairperson of the Board of Directors for the Central Boston Elder Services, Director of Membership for the Greater Boston Harvard Business School Women Alumni (HBSWA), and Chair of the Protocol Committee for the Boston Chapter of the Links Inc. Wendy is a graduate of Trinity College in Hartford Connecticut and holds an MBA from Harvard Business School.

JAMBΕΥ CLINKSΑCLES is serves as Hewlett Packard (HP) Program Manager for the Verigy account for HP as a PMO and Hosting lead. As a program manager he is leading the server virtualization project, as well as enterprise upgrades for Exchange 2010, Active Directory, and Service Center Configuration Manager (SCCM). Previously Jambey was the Americas Web Hosting Transformation on the Unilever Global Enterprise Computing Transformation Program where he was responsible for moving all promotional and production websites from the Unilever data centers Trumbull, Connecticut into the HP Next Generation Data Centers in Alpharetta and Suwanee, Georgia. Before that he was the Senior Technical Delivery manager with responsibility for Electronic Data System (EDS) Infrastructure Operations for GM Asset Management (GMAM) New York. Jambey’s team was recognized for their success moving all production applications and servers to a highly redundant VM Ware environment. In 2009 he became the Chairman of the HP Black Employee Leadership Council. He is a member of the New York chapter of Black Data Processing Associates (BDPA) a global, member focused organization that provides professional growth and technical development for African Americans in the IT industry through education, mentoring, services and business networking. He served as a Delegate for New York at the BDPA since 2007 at the annual national technology conference. Jambey is an Alumni of the Executive Protégé Program of the IT Senior Management Forum (ITSMF).

ERIC WEAVER is Director of Education and Workforce Policy for the Intel Corporation. Eric was recruited by Intel to help start the newly created Digital Health platform group. Intel’s unique culture empowered him to gradually expand into a role with a keener focus on his strongest passions—managing Intel’s Legal and Corporate Affairs team as Chief of Staff to the General Counsel. In addition to his duties as chief of staff to the general counsel, Eric’s responsibilities also included participation in the World Justice Forum, a worldwide program whose mission is to lead a global, multidisciplinary effort to strengthen the Rule of Law for the development of communities of opportunity and equity, and the Association of Corporation Counsel’s Value Challenge, a project to reconnect value and costs for legal services. In June 2009, Eric accepted the challenge to join the Global Public Policy team in Washington, D.C. He earned his bachelors degree from Howard University and held management positions in the telecommunications industry for Ameritech (SBC). Eric left Ameritech to earn his Juris Doctor at University of Detroit Mercy School of Law.
Catherine Didion is a Senior Program Officer at the National Academy of Engineering (NAE). Her portfolio includes the Diversity of the Engineering Workforce program with a charge to provide staff leadership to the NAE's efforts to enhance the diversity of the engineering workforce at all levels including the diversity of those being prepared to enter the future workforce. Current projects include the Engineer Girl web site that is geared to middle school students with a focus on encouraging girls to consider engineering studies and careers and the Engineer Your Life web site for high school students. Didion is the Principal Investigator (PI) of a National Science Foundation (NSF) grant, The 2-Year to 4-Year Engineering and Engineering Technology Transfer Students Pilot Project, which aims to better understand the number of community college students enrolled in individual engineering programs as well as those who have either completed an associates degree program or directly transferred to a baccalaureate program. Didion has presented testimony before the US Congress and US federal agencies. and was named as one of “100 Women Leaders in STEM” in 2012. Her honors include American Association for the Advancement of Science (AAAS) Fellow; AWIS Fellow; Drucker Foundation Fellow; Texaco Management Institute Fellow; Secretary of the US Air Force Inaugural Environmental Civic Leaders Tour; and Certificate of Commendation and Distinguished Service, Embassy of the United States of America. Didion completed her undergraduate degree at Mount Holyoke College and graduate work at the University of Virginia.

DATE: SATURDAY, MARCH 23
TIME: 2:30pm — 3:30pm
STRAND: STEM
ROOM: SANDLAKE
SESSION TITLE: DIALOGUE: Plenary X
DESCRIPTION: This session will follow-up the plenary on STEM. Participants are encouraged to attend and lend their thoughts.
MODERATOR: Irving Pressley McPhail, President and CEO, National Action Council for Minorities in Engineering, Inc. (NACME)
SPEAKER(S): Wendy Vincent, Director of Marketing, EMC Global Services; Jambey Clinkscales, Program Manager, Hewlett-Packard Company; Eric M. Weaver, Director of Education and Workforce Policy, Intel Corporation; Catherine Didion, Senior Program Officer, National Academy of Engineering (NAE)
The Importance of Student Retention and Success

Each year, over one million freshman students leave higher education without a credential, many of whom will never return to a college or university campus. While this may signal the end of a dream for some students, it similarly signals a lost opportunity for institutions of higher education.

Collectively, institutions in the United States and Canada forfeit over $1 billion each year in lost revenue due to student dropout and departure. The average institution loses over $4 million each academic year in lost tuition revenue and government subsidies, a figure that fails to include lost alumni revenue, wasted fiscal and human resources, and lost funding opportunities.

Of course, when students leave, institutions lose more than money—they lose the essence of what makes great institutions: the ability to serve students and society by preparing them for a rich and rewarding career. The returns to student success are tangible at the institutional level, and institutions benefit greatly from helping students persist and graduate.

The Educational Policy Institute understands the importance of student success. Our organization has the expertise and tools to help your institution improve student success, from initial definition of the retention challenges to strategic planning and the incorporation of policies, strategies, and interventions aimed at increasing retention and graduation rates.

Let the Educational Policy Institute help you improve student success.
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Upper Level Meeting Rooms, Upper Butler and Sandlake
EPI RETENTION CONSULTING SERVICES

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Our retention consulting and support is customized for every institution and organization we work with by working closely with administrators, staff, and faculty to assess current institutional efforts to increase student retention and achievement. Our retention consulting provides support in planning, implementing, and monitoring the effects of new strategies and programs. To strengthen retention at your institution, EPI offers professional development, strategic planning, and both on-site and off-site support.

Our Student Success team, led by internationally-recognized researcher Dr. Watson Scott Swail, provides expertise in strategic planning, financial aid, student support services, academic services, curriculum and instruction, and institutional research, will design a systematic approach to identify and address your unique challenges. EPI can work with small or large colleges and universities. Our solutions are customized for your particular needs.
USA Funds® is a nonprofit corporation that partners with higher education institutions, nonprofit organizations and government agencies to make a meaningful and measurable contribution toward enhancing the success of postsecondary students. We support financial literacy programs for college students, debt management and default prevention consultation and assistance, training for financial aid administrators, and student aid policy compliance support, and provide funding for college access and success initiatives.

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