



## 42nd Annual Seminar on Relations with the U.S. Department of Education

1001 16th Street NW, Washington, District of Columbia, 20036

Monday, March 9, 2026

### AGENDA

**8:00 a.m. – 6:30 p.m.**

#### **REGISTRATION FOR MONDAY, MARCH 9**

**Presidential-Congressional Ballroom Foyer**

*Coffee and pastries served from 8:00 a.m. – 9:30 a.m.*

**9:00 a.m. – 10:00 a.m.**

#### **PLENARY SESSION**

**Presidential-Congressional Ballroom**

#### **Changes in Student Financial Aid: How They Affect Our Students**

National shifts in student financial aid policy continue to shape how students plan for, access, and pay for postsecondary education. This session, led by experts from the National College Attainment Network (NCAN) and the National Association of Student Financial Aid Administrators (NASFAA), provides a high-level overview of recent and upcoming changes affecting students served by TRIO programs.

Presenters will examine key policy developments, including FAFSA updates, changes to federal student loan programs and repayment structures, anticipated developments related to Workforce Pell Grants, and clarifications related to professional degree classifications that influence aid eligibility and borrowing limits. The discussion will emphasize big-picture implications and emerging considerations for TRIO professionals supporting pre-college, undergraduate, and graduate-bound students in a rapidly evolving financial aid landscape.

*Presenters*

Catherine Brown

Senior Director, Policy and Advocacy

National College Attainment Network

Jill Desjean

Director, Policy Analysis

National Association of Student Financial Aid Administrators

*Moderator*

Woodrow Lewis

Director, College Initiatives

Council for Opportunity in Education

**10:15 a.m. – 11:30 a.m.**  
**BREAKOUTS**

**AI Without Anxiety: How to Integrate AI into Your Program**

Senate Meeting Room

AI is everywhere, but for many TRIO professionals, it can feel overwhelming or intimidating. It doesn't have to be. This interactive session is designed to replace uncertainty with confidence and show you how free, easy-to-use AI tools can support your everyday work. From creating eye-catching flyers and engaging social media posts to developing workshop curriculum and student resources, you'll see practical examples you can use right away. You'll leave with a clear starting point and the confidence to begin integrating AI into your TRIO program — no tech expertise required, just curiosity and a commitment to serving students well.

*Presenter*

Teriki Barnes  
Director, Upward Bound Math-Science  
Southeastern Oklahoma State University

**Incorporating the Secretary's Priorities Into Your Pre-College Program**

Federal AB Meeting Room

With new leadership comes renewed direction. The U.S. Department of Education has outlined key priorities for federal education programs, and understanding how they connect to your work is essential for strategic alignment and long-term success.

This session will unpack the Secretary's priorities — including expanding education choice, advancing artificial intelligence in education, promoting evidence-based literacy, promoting patriotic education, and returning education to the states — and explore what they may mean for pre-college and TRIO programs. Together, we'll think critically and practically about how to thoughtfully and intentionally weave these priorities into your program design, services, and messaging.

Participants will leave with a clearer understanding of the current federal landscape and concrete ideas for aligning program goals with departmental priorities while continuing to center student access, opportunity, and success.

*Presenter*

Jen Rudolph  
Associate Vice President, State and Pre-College Initiatives  
Council for Opportunity in Education

**Know Your Authority: Navigating TRIO Regulations with Confidence**

South American AB Meeting Room

TRIO professionals are entrusted with federal funds—and with that responsibility come both authority and flexibility. Yet too often, regulations feel intimidating or unclear. This session clarifies the rules and empowers you to confidently manage your TRIO budget, with both compliance and strategy in mind.

We'll break down what the regulations say, when funds can be moved without prior approval, and when formal notification or authorization from the U.S. Department of Education is required. You'll learn how to read regulatory language with confidence, quickly locate answers to common compliance questions, and navigate key sections of the OMB Uniform Guidance that directly impact your day-to-day decisions.

Leave this session equipped to move from uncertainty to authority — ready to manage your TRIO program budget effectively, strategically, and with confidence to support student success.

*Presenter*

Angelica Vialpando  
Senior Vice President, Program and Professional Development  
Council for Opportunity in Education

**Taking Your TRIO Evaluation Work from “Cringey” to “G.O.A.T.”**  
Statler AB Meeting Room

For many TRIO programs, evaluation begins and ends with the Annual Performance Report. But your data tells a much bigger story — and it deserves a wider audience.

This session challenges participants to think beyond compliance and explore how the data they already collect can be leveraged to highlight true program impact. We'll examine how to transform evaluation findings, student outcomes, and success metrics into compelling narratives that resonate with institutional leaders, community stakeholders, and potential partners.

Your program is doing powerful work. Learn how to use your data strategically to strengthen institutional support, build meaningful partnerships, and clearly demonstrate your value beyond required reporting. It's time to move from simply submitting the APR to showcasing your impact year-round.

*Presenter*

Amy Verlanic  
Former Executive TRIO Director  
President and CEO  
ALV Consulting, Inc.

**Designing with Purpose: Compliant and Effective TRIO Communications**  
Massachusetts Meeting Room

TRIO communications do more than inform — they reflect program integrity, federal accountability, and institutional credibility. From recruitment materials to workshop presentations and student outreach, every message should meet program goals and compliance requirements.

This session explores how to develop clear communications that meet federal expectations while remaining engaging and accessible. Participants will review key considerations, including required funding acknowledgments, appropriate branding, accessibility standards, and alignment with grant objectives.

Through practical examples and guided discussion, attendees will gain a stronger understanding of how intentional communication practices support compliance, strengthen program reputation, and reinforce TRIO's commitment to student success.

Leave equipped to design and deliver materials that are visually effective, strategically sound, and federally compliant.

*Presenter*

Noah Walls

Program Coordinator, Upward Bound and Upward Bound Math-Science  
University of Nevada, Reno

**11:45 a.m. – 1:45 p.m.**  
**PLENARY SESSION**  
**Presidential-Congressional Ballroom**

*Plated lunch served at your seat*

**Presidential Perspectives: College Presidents on Leadership Strategies That Support TRIO Programs and Students**

Come learn from three college presidents as they navigate a year marked by significant challenges in higher education. As steadfast supporters of TRIO programs, they will share how institutional leaders are responding to uncertainty while remaining committed to expanding opportunity for low-income and first-generation students.

*Panelists*

Jackie Elliott

President

Central Arizona College

Hope Rivers

President

Piedmont Technical College

*Moderator*

Kimberly Jones

President  
Council for Opportunity in Education

**2:00 p.m. – 3:15 p.m.**  
**BREAKOUTS**

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Senate Meeting Room

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Woodrow Lewis  
Director, College Initiatives  
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Angelica Vialpando  
Senior Vice President, Program and Professional Development  
Council for Opportunity in Education

**Strategic Partnerships for TRIO Success**  
Federal AB Meeting Room

Every TRIO program thrives on support — from your institution, your community, and beyond. But do you know who could be your allies, champions, or collaborators? This session helps TRIO professionals map their networks and identify opportunities to strengthen program resources, including in-kind contributions, strategic partnerships, and funding. You'll explore how to assess potential supporters, build meaningful relationships, and communicate your program's value in ways that inspire investment. Leave with actionable strategies to expand your program's circle of support, increase visibility, and generate the resources needed to enhance student success.

*Presenter*

Karen Keim  
Former TRIO Director  
University of Maine, Orono

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*Presenter*

Noah Walls  
Program Coordinator, Upward Bound and Upward Bound Math/Science  
University of Nevada, Reno

**BREAK**

**3:30 p.m. – 4:45 p.m.**  
**BREAKOUTS**

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Teriki Barnes

Director, Upward Bound Math-Science  
Southeastern Oklahoma State University

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*Presenter*

Karen Keim  
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**Preparing for the 2027 Competitions (McNair, UB, UBMS, VUB)**

South American Meeting Room

Come learn the latest updates on all upcoming 2027 competitions. This session will cover what we currently know, key timelines, and practical steps you can take now to start shaping a strong proposal. Get ahead of the curve and set your program up for success in the next funding cycle.

*Presenters*

Woodrow Lewis  
Director, College Initiatives  
Council for Opportunity in Education

Nicole Norfles  
Director, Program Practice and Innovation  
Council for Opportunity in Education

Jen Rudolph  
Associate Vice President, State and Pre-College Initiatives  
Council for Opportunity in Education

Angelica Vialpando  
Senior Vice President, Program and Professional Development  
Council for Opportunity in Education

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