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FROM ACCESS TO IMPACT:

Education as the Engine of Economic Mobility

#COEAC2026 • San Diego, CA • September 16-19

SESSIONS GRID

WEDNESDAY, SEPT. 16, 2026

8:00 AM – 4:00 PM

ALL DAY PRE-CONFERENCE SESSIONS

Pre-registration is required.

See San Diego: Best Practices in Student Travel for TRIO Programs

ALL
AQUA SALON EF

This interactive pre-conference experience is designed for TRIO professionals who plan, manage, or supervise student travel and want to strengthen their approach to compliance, safety, logistics, and student development. See San Diego combines an immersive guided tour of the city with a structured professional learning experience focused on best practices for creating safe, equitable, educational, and impactful student travel. As participants explore San Diego's iconic landmarks and hidden gems, TRIO programming and tourism experts will demonstrate how to intentionally design educational travel experiences that balance enrichment and cultural exposure with accessibility, risk management, and cost considerations. Along the way, facilitators will address real-world decisions involving documentation, supervision, budgeting, staff roles, and compliance while demonstrating how travel can advance TRIO objectives such as college exposure, career exploration, leadership development, and the development of cultural capital.

FACILITATORS

Scott Clark
Chief Travel Officer
Zavoria Travel
Johnson City, TN

Chris George

Director of TRIO Programs and Title III
Southcentral Kentucky
Community and Technical
College
Bowling Green, KY

Circe Thompson

Senior Tour Consultant and
TRIO Division Lead
GL Travel
Los Angeles, CA

Full STEAM Ahead: Powering Access and Innovation

ALL
AQUA SALON AB

Pre-registration is required.

Turn San Diego into your STEAM laboratory during this immersive, one-day professional development experience created for college access and success professionals. Participants will step beyond the traditional workshop setting to discover how science, technology, engineering, arts, and mathematics come alive through the places, systems, and innovations that surround us—and how those experiences can inspire students to see new possibilities for their futures. Through hands-on activities and behind-the-scenes exploration, participants will experience STEAM in action across San Diego. Tentative stops include the Globe Theatre, where mathematics, architecture, and design converge; the San Diego Trolley, where physics and geometry become part of the journey; and UC San Diego, where participants can explore advances in robotics and supercomputing. The experience may also include a visit to the Maritime Museum to examine the engineering and physics behind naval design. Throughout the day,

participants will consider how experiential STEAM learning can expand opportunities for students who have historically had limited access to these fields. More than a tour, this experience is designed to generate practical ideas that TRIO and other college access professionals can adapt to introduce students to STEAM disciplines, connect academic concepts to the real world, and illuminate pathways to college and emerging careers. Pre-registration is required.

FACILITATORS

Leo Conway

Director, Upward Bound
Pennsylvania State University
University Park, PA

Nicole Norfles

Director of Program, Practice
and Innovation
Council for Opportunity in
Education
Washington, DC

8:00 AM – 12:00 PM

MORNING PRE-CONFERENCE SESSION

Pre-registration is required.

State Leaders Caucus: Stronger Together

ALL
AQUA SALON CD

Pre-registration is required.

After one of the most consequential and demanding years in TRIO's history, state and chapter leaders have earned a moment to come together—not only to reflect on what the community has endured, but to prepare for what comes next. This half-day preconference convening offers TRIO State/Chapter Association Leaders an energizing space to reconnect, regroup, and strengthen the relationships that enable collective action. Open to current members of State Association boards, the morning begins over breakfast with candid conversation and

recognition of the extraordinary leadership required to protect TRIO programs, funding, professionals, and students amid unprecedented challenges. Together, participants will reflect on the lessons of the past year while turning their attention toward the future. The conversation will focus on strengthening state and chapter leadership, building more resilient organizational structures, deepening alignment across the TRIO community, and ensuring leaders are prepared to mobilize when the moment demands it. Just as importantly, the convening will create space to celebrate the persistence, courage, and collective resolve that carried TRIO forward. Pre-registration is required.

FACILITATORS

Jen Rudolph

Associate Vice President, Pre-
College and State Initiatives
Council for Opportunity in
Education
Washington, DC

1:00 PM – 4:00 PM

AFTERNOON PRE-CONFERENCE SESSIONS

Pre-registration is required.

Using Federal Data to Power TRIO Program Success

RESEARCH AND EVALUATION: PROVING IMPACT THROUGH EVIDENCE STRAND STRAND

ALL
AQUA SALON AB

Pre-registration is required.

TRIO programs know the power of evidence. The right data can reveal who needs support, strengthen program design, demonstrate impact, inform institutional decision-making, and help make a more compelling case for students and communities. Yet some of the nation's richest federal data resources remain underused



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by the professionals who could put them to work. This dynamic, hands-on half-day workshop will help TRIO professionals and institutional researchers move from simply finding data to using it with purpose. Participants will explore essential resources from the National Center for Education Statistics, the U.S. Census Bureau, the Bureau of Labor Statistics, and the National Center for Science and Engineering Statistics while developing the practical skills needed to locate, interpret, analyze, and apply federal data with confidence. Through guided demonstrations and TRIO-focused examples, participants will investigate student demographics, financial aid trends, educational outcomes, labor market conditions, and other indicators that can illuminate the environments in which their students live, learn, and pursue opportunity. Along the way, they will discover how federal data can strengthen needs assessments, inform strategic planning, support rigorous program evaluation, establish meaningful benchmarks, and provide critical context for communicating program impact.

PRESENTER

Sean Simone

Vice President, Research and Director
Pell Institute for the Study of Opportunity in Higher Education
Council for Opportunity in Education
Washington, DC

Reimagining Upward Bound: An Innovation Forum for Design, Data, and Student Outcomes

UPWARD BOUND/UPWARD BOUND MATH-SCIENCE

AQUA SALON CD

Pre-registration is required.

What does the next generation of Upward Bound and Upward Bound Math-Science programs look like? This practitioner-led

Innovation Forum invites UB and UBMS professionals to step outside the demands of day-to-day program management and into an energizing, restorative space designed for bold thinking, collaboration, and practical innovation. Through immersive activities and peer exchange, participants will explore new approaches to program design that respond to shifting federal priorities and evolving education and workforce landscapes while remaining firmly grounded in the enduring mission of UB and UBMS. Drawing on lessons from recent competitions and federal guidance, the forum will translate regulatory expectations into practical strategies that programs can adapt to their students, institutions, and communities. Participants will also rethink the role of evaluation as a powerful tool for learning, continuous improvement, demonstrating impact, telling the story of their work, and improving student outcomes.

PRESENTERS

Geof Garner

Director, Talent Search
Multnomah Education
Service District
Portland, OR

Maurice Mathis

Senior Director TRIO Pre-College Programs
North Carolina State University
Raleigh, NC

Jen Sims

Director, Upward Bound
University of Nevada, Reno
Reno, NV

Evaluation 101: A Step-by-Step Guide for Program Evaluation

ALL

AQUA SALON EF

Pre-registration is required.

Program evaluation should do more than satisfy a reporting requirement. Done well, it can reveal what is working, identify opportunities for improvement, strengthen decision-making,

demonstrate impact, and ultimately help TRIO programs deliver better outcomes for students. In this hands-on half-day seminar, TRIO professionals will learn how to transform evaluation from an obligation into a powerful tool for continuous improvement. Guided by the Pell Institute's Toolkit for Equitable Evaluation, participants will work through the essential stages of the evaluation process, from developing a strong evaluation plan and collecting meaningful data to analyzing results and using evidence to communicate impact, advocate for resources, and strengthen program design. The centerpiece of the seminar will be developing an actionable evaluation plan that participants can take back to their programs and put to work.

PRESENTERS

Megan Ecker-Lyster

Director of Research, Evaluation & Dissemination
University of Kansas
Lawrence, KS

Alice Ho

Director, Ronald E. McNair Postbaccalaureate Achievement Program and Senior Director, Student Success and Research Academic Advancement Program, Undergraduate Education
University of California, Los Angeles
Los Angeles, CA

7:00 PM – 8:00 PM

OPENING PLENARY SESSION

From Survival to Opportunity: Education as a Path to Economic Mobility

ALL

SAPPHIRE BALLROOM

Bestselling author Stephanie Land has brought national attention to the realities of poverty, economic mobility, and the challenges of building

a better future in the face of systemic barriers. In her memoirs, *Maid: Hard Work, Low Pay, and a Mother's Will to Survive* and *Class, Land* chronicles her journey through low-wage work, higher education, and the pursuit of economic security for herself and her family. Her story offers a powerful perspective on the obstacles confronting people who are working hard to change the trajectory of their lives—and the transformative role that access to education can play in creating opportunity.

PRESENTER

Stephanie Land

Author and First-Generation College Graduate
Portland, OR

8:15 PM – 9:00 PM

Book Signing and Sale

ALL

SAPPHIRE BALLROOM FOYER

Continue the conversation following Stephanie Land's opening keynote with a special book signing featuring the bestselling author of *Maid* and *Class*. Participants will have the opportunity to meet Land and have their books personally signed. Copies of *Maid: Hard Work, Low Pay, and a Mother's Will to Survive* and *Class* will be available for purchase on-site. Don't miss this opportunity to connect with the author whose deeply personal writing has sparked a national conversation about poverty, education, economic mobility, and the pursuit of a better life.



8:15 PM – 10:15 PM

ENTERTAINMENT

Karaoke

**SPONSORED BY GENIUS
POTENTIAL**

ALL
AQUA SALON ABCD

After a full day of learning, connecting, and exchanging ideas, it's time to turn up the music and have some fun! Join your TRIO colleagues for an evening of karaoke, laughter, and unforgettable performances, sponsored by Genius Potential.

Whether you're ready to command the stage with your signature song, team up with colleagues for a crowd-pleasing duet, or simply cheer on the brave souls behind the microphone, everyone is welcome. No perfect pitch required—just bring your energy, your TRIO spirit, and your willingness to have a good time.

Come sing, celebrate, and make a few conference memories with the TRIO community. The microphone is waiting!

SESSIONS GRID

THURSDAY, SEPT. 17, 2026

7:00 AM – 8:00 AM

WELLNESS

Breathe & Begin: Gentle Morning Yoga

ALL
SAPPHIRE TERRACE

Start your Thursday with intention. Before another energizing day of learning and connection begins, join fellow conference participants for a restorative morning yoga session designed to help you move, breathe, and reset. Come as you are, take a moment for yourself, and begin the day feeling refreshed, centered, and ready for everything ahead.

9:00 AM – 10:00 AM

PLENARY SESSION

Education as the Engine of Economic Mobility

**SPONSORED BY COLLEGE
BOARD**

ALL
SAPPHIRE BALLROOM

Public confidence in higher education has declined significantly in recent years, due in part to growing concerns about the relationship between college completion and economic mobility. These concerns are especially pronounced for students from low-income and first-generation backgrounds, who often face limited access to the social capital, professional networks, and experiential opportunities that facilitate entry into high-quality careers after graduation. As debates continue regarding the value of traditional degree pathways versus shorter-term credentialing programs, it is increasingly important to examine the

long-term economic impact of postsecondary attainment. This plenary session will explore the role of college completion as a critical driver of economic mobility and upward advancement for low-income and first-generation students.

PRESENTERS

Luis Carrillo-Rodríguez
University Recruiter
Idaho National Laboratory
Idaho Falls, ID

Lorraine Hastings
Vice President of Counselor
Community Engagement
College Board
New York, NY

Laura Turner
Vice President for Corporate
Responsibility
TIAA
Charlotte, NC

MODERATOR

Tom Stritikus
President
Occidental College
Los Angeles, CA

10:15 AM – 11:30 AM

CONCURRENT SESSIONS

1.

Small Towns, Big Impact: Elevating Rural TRIO Student Success

ALL
AQUA SALON 300

Rural TRIO students bring tremendous talent, resilience, and connection to community, yet their pathways to and through college can be shaped by challenges that demand distinctly rural solutions. Geographic isolation, limited access to educational resources, fewer college-going

role models, and distance from institutions and opportunities can make the journey especially complex. Drawing on decades of experience serving rural communities, Amy L. Verlanic and COE Board Chair Jeff Kahlden will explore how TRIO programs can turn an understanding of rural realities into stronger strategies for student success. Verlanic brings 30 years of experience serving rural Montana communities, while Kahlden offers a proven record of advancing opportunity for students in rural Texas. Through practical, data-informed approaches, participants will examine how to strengthen recruitment, deepen student support, and improve retention and persistence while building on the assets, relationships, and sense of place that distinguish rural communities. Participants will leave with actionable ideas they can adapt to their own programs to expand opportunity, strengthen student outcomes, and ensure that geography does not determine how far a student can go.

PRESENTERS

Jeff Kahlden
Director, Grant Management
Services
Dallas College
Dallas, TX

Amy Verlanic
TRIO Training Director
Sonoma State University
Rhonert Park, CA

MODERATOR

LaTonya Nixon-Smith
Vice President of Student
Services
Beaufort County Community
College
Washington, NC



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2.

The S.E.R.I.O.U.S. Conference - What and Why

👤 PRE-COLLEGE YOUTH

🏠 AQUA SALON 305

Getting into college is only the beginning. Thriving once students arrive requires a different set of skills, expectations, and strategies. This workshop series helps graduating seniors bridge the critical gap between high school and college by preparing them for the academic, social, and personal realities of postsecondary life. While academic preparation remains essential, students also need the confidence and practical skills to navigate greater independence, build healthy relationships, make responsible decisions, seek help when needed, and adjust to unfamiliar environments and expectations. Through engaging college success workshops, participants will gain guidance designed to help them anticipate challenges, make informed choices, and approach their transition with greater confidence.

The goal is not simply to help students arrive on campus—it is to prepare them to adapt, persist, and succeed once they get there.

PRESENTERS

Carole Jacobs

Project Director, Upward Bound Organization
Endeleo Institute
Chicago, IL

MODERATOR

Brandy Mitchum

Director, Upward Bound
Williamsburg Technical College
Kingstree, SC

3.

Recharge and Reignite: Navigating Burnout While Building Strong TRIO Practice

👤 ALL

🏠 AQUA SALON 310

TRIO professionals enter this work because they believe deeply in students and the power of educational opportunity. But passion alone cannot protect practitioners from the emotional labor, competing demands, and relentless pace that can make meaningful work difficult to sustain. Designed especially for newer TRIO professionals, this interactive session takes an honest look at burnout—how it develops, how to recognize it, and how it can affect not only personal well-being but also students' relationships, service delivery, and program effectiveness. Through guided reflection and self-assessment, participants will examine the individual and organizational factors that contribute to burnout and identify warning signs before they become overwhelming. Most importantly, participants will explore practical, evidence-informed strategies for setting healthy boundaries, managing workload, protecting their energy, and remaining meaningfully engaged in the work for the long term. Participants will leave with actionable tools for building a more sustainable approach to their TRIO practice—one that allows them to continue showing up for students without losing themselves in the process.

PRESENTER

Naomi Brown-Jones

Interim Director, Student Support Services
Worcester State University
Boston, MA

MODERATOR

Halan Stanfield

Compliance and Evaluation Specialist, Upward Bound and Student Support Services
San Diego State University
San Diego, CA

4.

Behind the Curtain: Transparent Leadership that Drives TRIO Impact

TRIO 101: BUILDING THE FOUNDATION FOR TRANSFORMATIONAL IMPACT STRAND

👤 ALL

🏠 AQUA SALON 311

What happens behind the scenes of a TRIO program can be just as important as what happens directly with students. Decisions about priorities, resources, data, and strategy shape the work of every staff member—and ultimately influence the experiences and outcomes of the students they serve. This session pulls back the curtain on effective TRIO leadership and explores how greater transparency can transform program culture and performance. Participants will examine how open communication, intentional use of data, collaborative decision-making, and clarity around the “why” behind key decisions can build trust, strengthen staff alignment, and create greater ownership of program goals. Moving from access to impact requires more than strong management; it requires a culture in which people understand where the program is going, how decisions are made, and how their individual contributions advance a shared mission. Participants will leave with practical strategies for leading with greater clarity, accountability, and purpose while building teams equipped to deliver stronger outcomes for students and advance TRIO's promise of educational opportunity and economic mobility.

PRESENTER

Bryan Landgren

Director, Ronald E. McNair Postbaccalaureate Achievement Program
Suffolk University
Boston, MA

MODERATOR

Sherontae Maxwell

Assistant Director of Access
University of Georgia
Athens, GA

5.

Building Pathways: How EOC Expands Access and Drives Adult Success

👤 EOC

🏠 AQUA SALON 313

or more than three decades, the Vermont Educational Opportunity Center (VEOC) has demonstrated what it means to meet adult learners where they are—geographically, professionally, and along their educational journeys. Hosted by the Vermont Student Assistance Corporation (VSAC), VEOC serves more than 1,700 adults each year, helping them navigate postsecondary admissions, financial aid, career planning, and the often-complex decisions involved in pursuing education and training after high school. Serving a largely rural state requires more than delivering services; it requires building trust, cultivating strong community partnerships, and continually adapting to the changing needs of learners and the workforce. Since 1991, VEOC has developed a model rooted in accessibility, collaboration, and responsiveness that has made it a cornerstone of educational opportunity across Vermont. In this session, participants will go behind the scenes of the VSAC VEOC model to explore how the program has built and sustained community partnerships, responded to evolving workforce needs, and remained relevant to adult learners across rural communities. Participants will leave with practical strategies and lessons they can adapt to strengthen partnerships, expand their reach, and position their own EOC programs as indispensable resources for educational access, career advancement, and economic mobility.

PRESENTER



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Merrilyn Tatarczuch-Koff

Director, VEOC

VSAC

Winooski, VT

MODERATOR

Jesse Toro

Program Director, EOC

Wahupa Educational Services

San Diego, CA

6.

Evaluating a Statewide Intervention for Student Success: Early Data from Virginia's Pell Initiative

COLLEGE

AQUA SALON 314

This session examines that question through the Pell Initiative for Virginia (PIV), administered by the State Council of Higher Education for Virginia (SCHEV). A central component of PIV is the Institution-wide Barrier Review (IwBR), through which participating institutions examine policies, practices, and processes that may unintentionally impede access, transition, persistence, and completion for Pell-eligible students.

Rather than surveying the full range of PIV activities, the session centers on one practical framework: identify the barrier, redesign the institutional response, and assess whether the barrier diminishes. SCHEV personnel will illustrate that framework at different points in the student pathway by featuring activities from the University of Virginia addressing access and enrollment pathways; William & Mary's will examine affordability, information, and student navigation; Radford University will focus on administrative and advising friction; and Virginia State University will illustrate proactive, data-informed intervention to support persistence.

Participants will leave with a transferable approach for examining institutional barriers

and converting findings into targeted, measurable action for Pell-eligible students.

PRESENTER

Barry Simmons

Associate for Finance Policy and Innovation

State Council of Higher Education for Virginia
Richmond, VA

MODERATOR

Mike Henry

Director, Student Support Services

Southwest Virginia Community College
Bluefield, WV

7.

Growing Problem with Low-Income Students Facing Unmet Financial Need

RESEARCH AND EVALUATION:
PROVING IMPACT THROUGH
EVIDENCE STRAND

ALL

AQUA SALON AB

For decades, the price of college has climbed while grant aid has failed to keep pace, fundamentally changing what it takes for students from low-income families to earn a degree. Today, the Pell Grant covers only about a quarter of college costs, while state and institutional aid vary widely depending on where students live and enroll. The result is an affordability gap that leaves many students facing substantial unmet need, taking on debt, or questioning whether college is financially within reach at all. This session will trace the changing landscape of college costs and financial aid and examine how those shifts have affected students across the income spectrum. Participants will explore why existing grant aid increasingly falls short of meeting students' actual costs and how persistent unmet financial need can undermine the promise of college access and completion. The conversation will also turn toward solutions. From

increasing the maximum Pell Grant award to reconsidering how federal, state, and institutional aid work together, participants will examine policy approaches that could restore purchasing power for students with the greatest financial need. Join this timely discussion about what it will take to ensure that the price of college does not determine who gets the opportunity to attend, persist, and graduate.

PRESENTER

Tom Mortenson

Senior Scholar, Pell Institute

Council for Opportunity in Education

Lehigh Acres, FL

MODERATOR

Caisha Jones

Director, TRIO Student Support Services STEM

Texas Woman's University
Denton, TX

8.

Taking TRIO Students Global: Fundable Leadership & STEM

ALL

AQUA SALON CD

What if a student trip could become a launchpad for leadership, career exploration, STEM discovery, and a broader understanding of the world? This session explores how TRIO and GEAR UP programs can use allowable federal funding to create purposeful experiential learning opportunities that extend student development far beyond the classroom. Join Zion Leadership Group for an inside look at two immersive experiences offered in Puerto Rico, Chicago, and Hawai'i: the Global Leadership Symposium and Global STEM Academy. Participants will discover how these programs combine leadership development, global perspectives, career readiness, and applied STEM learning—including opportunities for underwater robotics certification—to help students build confidence,

develop new skills, and envision possibilities they may never have considered. The session will move from inspiration to implementation, providing practical guidance on allowable funding, program design, and strategies for developing structured travel experiences that align with program objectives. Participants will explore how intentional experiential learning can broaden students' worldviews while strengthening college preparation, career readiness, and connections to emerging workforce opportunities. Participants will leave with fresh ideas and practical strategies for transforming travel from a destination into a meaningful educational experience—one that challenges students to explore, discover, lead, and imagine just how far their futures can take them.

PRESENTERS

Adrian Rosado

Founder and CEO

Zion Leadership Group
San Juan, PR

LaCretia Wooten

Director, GEAR UP

University of Kansas
Lawrence, KS

MODERATOR

Marco Garcia

Academic Coordinator, TRIO Programs

Chesapeake College
Feddersburg, MD

9.

Concurrent Enrollment in Action: Insights, Data, and Strategies for TRIO Programs

RESEARCH AND EVALUATION:
PROVING IMPACT THROUGH
EVIDENCE STRAND

PRE-COLLEGE YOUTH

AQUA SALON EF

Dual and concurrent enrollment are reshaping the path from high school to college—and creating new opportunities and challenges for the students TRIO serves. As these



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programs expand nationwide, TRIO professionals must understand not only who is gaining access, but also how early college experiences affect persistence, credit accumulation, financial aid, and ultimately degree completion. Drawing on national and regional data from IPEDS and the National Student Clearinghouse, state policy analysis, and practitioner experience, this session will examine the rapidly evolving landscape of dual and concurrent enrollment through a TRIO lens. Participants will explore how changes in policies and institutional practices are influencing recruitment, program design, advising, and service delivery, while confronting critical questions about credit transfer, academic alignment, affordability, and equitable access. Using an equity-minded framework informed by guided pathways and intrusive advising, Presenters will demonstrate how TRIO programs can help students navigate these increasingly complex pathways with greater confidence and purpose. Participants will also examine how data can reveal gaps, identify opportunities, and guide more intentional support for students earning college credit before high school graduation. Participants will leave better equipped to turn the growth of dual and concurrent enrollment into a genuine opportunity for TRIO students—by using data, advising, and intentional program design to ensure that earning college credit early provides a meaningful head start toward college completion.

PRESENTERS

Laura Gittings-Carlson
Executive Director, TRIO Programs
Montana State University
Billings, MT

Adrienne Shabandarian
Project Director, Upward Bound
Community College of Aurora
Aurora, CO

MODERATOR

Kimberly Williams
Executive Director of TRIO
and Educational Opportunity
Programs
Nevada State University
Henderson, NV

10.

Honors Education for the TRIO Student: Practical Strategies and Partnerships

**FUELING THE FUTURE:
ECONOMIC IMPACT AND
CAREER READINESS STRAND**

 COLLEGE
 COBALT 500

Too often, first-generation and low-income students with the talent to excel in honors education never see themselves as honors students, or are never encouraged to pursue the opportunity. The result is academic undermatching that can place some of higher education's most transformative experiences out of reach for students who stand to benefit greatly from them. This session explores how TRIO professionals and honors college faculty can work together to change that trajectory. Participants will examine the barriers and misconceptions that contribute to the underrepresentation of TRIO-eligible students in honors programs and consider how earlier identification, intentional advising, and stronger institutional partnerships can connect more students with these opportunities. Drawing on practices implemented at Louisiana State University, Presenters will demonstrate how honors experiences such as research, internships, capstone projects, thesis work, and study abroad can help students build academic and professional networks, deepen their confidence as scholars, and position themselves for competitive career and postgraduate opportunities. A collaborative discussion will challenge

participants to consider how their own institutions identify talent, communicate the value of honors education, and encourage students to pursue opportunities that match their potential. Participants will leave with practical strategies for strengthening partnerships between TRIO and honors programs, challenging assumptions about who belongs in honors education, and ensuring that talented TRIO students have access to opportunities that allow them to aim higher, go further, and fully realize their academic potential.

PRESENTERS

Joseph Givens
Manager of National
Fellowships
Louisiana State University
Baton Rouge, LA

MODERATOR

Chantal Fleming
Executive Director of TRIO
Programs
North Carolina A&T State
University
Greensboro, NC

11.

Revolutionary Relics: Using AI to Defend, Document, and Deliver for TRIO Students

 ALL
 COBALT 501

They called TRIO a relic. We call that a challenge! At a moment when TRIO programs face extraordinary federal scrutiny and uncertainty, delivering excellent services is no longer enough. Programs must also be able to document their work, demonstrate their outcomes, communicate their impact, and make a compelling case for why TRIO matters—with evidence, urgency, and precision. This session moves beyond the hype surrounding artificial intelligence to explore how AI can become a practical tool for strengthening TRIO programs. Participants will be introduced to a field-tested, compliance-

conscious framework designed specifically for TRIO environments and discover ways to use AI to strengthen documentation, streamline compliance workflows, translate data into compelling impact narratives, and amplify the story behind program outcomes. But the opportunity extends beyond program operations. Participants will also explore how TRIO can build AI literacy among first-generation and low-income students, helping ensure that the young people we serve are prepared not simply to adapt to a rapidly changing education and workforce landscape, but to compete and lead within it. TRIO has spent more than six decades evolving to meet the needs of students and communities. This session challenges practitioners to do it again—embracing new tools without abandoning the mission, values, and human relationships at the heart of the work. We are not relics. We are the revolution.

PRESENTER

Antonio Robinson
Director, Upward Bound Math-
Science
Trident Technical College
Charleston, SC

MODERATOR

Kim DeSimone
Director, Student Support
Services
Southern Oregon University
Ashland, OR

12.

Aloha 'Āina to Innovation: Community-Driven Problem Solving Through Design Thinking in Upward Bound

**FUELING THE FUTURE:
ECONOMIC IMPACT AND
CAREER READINESS STRAND**

 UPWARD BOUND
 COBALT 520

What if the community became the classroom and students were challenged to solve



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problems that matter where they live? Upward Bound Maui is reimagining summer programming by connecting students with real-world sustainability challenges and empowering them to become designers, problem-solvers, and changemakers in their own community. Through community partnerships and the Design Thinking model, students work alongside local experts who serve as subject matter experts and mentors. Beginning with the identification of a community challenge, students move through a hands-on process of research, ideation, problem-solving, prototype development, and presentation—transforming complex local issues into opportunities to create, collaborate, and lead. This session will take participants inside Upward Bound Maui's place-based, project-driven approach and demonstrate how experiential learning can simultaneously strengthen college readiness, expand career awareness, develop transferable skills, and expose students to pathways that support long-term economic mobility. Just as importantly, the model helps students recognize that their own experiences, communities, and ideas have value—and that they can play an active role in shaping the places they call home. Participants will leave with inspiration and practical ideas for transforming traditional summer programming into meaningful learning experiences that connect academic preparation with career exploration, community engagement, and student innovation.

PRESENTERS

Erin Levasseur

Associate Director, Upward Bound
University of Hawaii Maui College
Kahului, HI

Sadai Servin

Advisor, Upward Bound
University of Hawaii

Maui College
Kahului, HI

MODERATOR

Paul Barnes

Director, TRIO Programs
University of Montevallo
Montevallo, AL

13.

Innovation vs. Tradition: Honoring TRIO's Legacy While Shaping Its Future

COE ED Talk

ALL

INDIGO 202

For more than 60 years, TRIO has endured because generations of leaders have understood that this work is about more than programs. It is about relationships, community, advocacy, and a shared commitment to opening doors of opportunity for students. Each generation has inherited that legacy—and faced the responsibility of deciding how to carry it forward. Today, that responsibility takes on new urgency. Higher education is changing. Technology is transforming how we work and learn. The workforce is evolving, and the federal landscape surrounding TRIO is increasingly complex. As a new generation of professionals steps into leadership, TRIO faces a defining question: How do we preserve the values and traditions that have made this community strong while creating room for new voices, new ideas, and new ways of leading? In this COE ED Talk, participants will explore the lessons today's leaders can draw from those who built and sustained the TRIO movement, consider which traditions remain essential to its future, and confront where change may be necessary for TRIO to continue evolving and thriving. Following the opening talk, participants will join small-group conversations that bridge generations and perspectives, creating space to listen, reflect, challenge assumptions, and

imagine the leadership TRIO will need for the decades ahead. This is not simply a conversation about succession. It is a conversation about stewardship—honoring what we have inherited while accepting responsibility for what we leave to those who come next.

PRESENTER

Ray Cabrera

Director, Upward Bound
University of South Florida
Valrico, FL

FACILITATOR

Theresa Rader

Executive Director, Institute for Educational Opportunities
Montana Technological University
Butte, MT

15.

Preparing Students for Public Policy Internships: Pathways, Readiness, and Professional Growth

ALL

INDIGO 206

A public policy internship can do more than strengthen a résumé—it can give students a seat at the table where decisions are made, introduce them to careers they may never have considered, and help them discover their own capacity to lead. Yet first-generation and low-income students may be less familiar with where these opportunities exist, how to compete for them, and how to navigate the professional environments they encounter upon arrival. This session will equip TRIO professionals to help students access and succeed in public policy internships at the local, state, and national levels. Participants will explore practical strategies for identifying high-quality opportunities, strengthening applications and interview preparation, and helping students understand the workplace expectations, communication norms, and professional relationships that

can be critical to a successful internship experience. Students will also share firsthand perspectives on how policy internships have shaped their career aspirations, strengthened their professional and leadership skills, and expanded their understanding of civic engagement and public service. Participants will leave with resources and strategies to help students move from simply learning about public policy to experiencing it firsthand, building the confidence, connections, and professional capital to see themselves not only working in the rooms where decisions are made, but helping shape the decisions themselves.

PRESENTERS

Daniel Anthony Cano

Communications, Storytelling, and Community Engagement Fellow
Leadership for Educational Equity
Victorville, CA

Josh Engler

Educational Specialist, Upward Bound
Boise State University
Boise, ID

Zach Osmun

Public Policy Graduate Student, TRIO Alumnus
Rutgers University
New Brunswick, NJ

MODERATOR

Heather Hagenbuch

Director, Student Support Services
University of Buffalo
Buffalo, NY

16.

Mentoring on Purpose: Moving First-Generation Students from Access to Impact—and Impact to Legacy

START SMART FOR NEW DIRECTORS: LEADERSHIP THAT DRIVES RESULTS STRAND

ALL

SAPPHIRE 400



FROM ACCESS TO IMPACT:

Education as the Engine of Economic Mobility

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What if the true measure of mentoring is not only how far students go, but how many people they inspire and empower along the way? This high-impact session challenges TRIO professionals to think beyond access and completion and consider how intentional mentoring can help first-generation and income-eligible students build the confidence, identity, relationships, and leadership capacity to create lasting impact. Through powerful TRIO stories and a practical mentoring framework, participants will explore how meaningful mentor relationships can strengthen persistence, reinforce students' sense of belonging and purpose, and position them for college completion, career success, and economic mobility. The session will also examine how mentoring can help students see themselves not simply as beneficiaries of opportunity, but as leaders capable of opening doors for others. Participants will leave with actionable strategies for creating mentoring experiences that move students from access to achievement, from achievement to leadership, and ultimately from impact to legacy. Because TRIO's greatest success is not simply developing students who succeed—it is developing people who carry opportunity forward.

PRESENTER

Steven Robertson

Associate Director, EOP and Pre-College Programs
Marquette University
Milwaukee, WI

MODERATOR

Julie Cayton

Director, TRIO Programs
Emporia State University
Emporia, KS

17.

Owning the Role: What "STEM-Adjacent" Teaches Us About Being the Adjacent Professional

COE ED Talk

COLLEGE

SAPPHIRE 402

Some of the people who make the greatest difference in a student's college journey are working just beyond the classroom. Advisors, coordinators, tutoring staff, program leads, and other "adjacent professionals" help students navigate unfamiliar systems, overcome barriers, build confidence, and persist toward graduation—yet the impact of this work can be difficult to measure, communicate, and even recognize within an institution. Using the experiences of STEM-adjacent professionals as a case study, this interactive session will highlight the essential role they play in the success of first-generation and low-income students. Participants will examine the realities of working alongside academic disciplines and institutional systems, including shifting priorities and resource constraints, significant emotional labor, and the challenge of demonstrating the value of relationship-driven work that does not always fit neatly into traditional measures of student success. Through facilitated discussion and peer exchange, participants will identify how "adjacency" manifests in their roles and explore practical strategies to strengthen student support, build more effective institutional partnerships, and make their contributions visible. The conversation will also address how professionals can document their impact, advocate for greater recognition and advancement, and more intentionally shape their own career trajectories. Participants will leave with an adaptable framework and worksheet, practical strategies they can apply within their own programs or institutions, and connections with peers doing similar work. Most importantly, they will be better equipped to articulate a powerful truth: work that happens outside the classroom

is not peripheral to student success—it is often what makes student success possible.

PRESENTERS

Ramiro Frausto

Associate Dean, Institute of College Initiatives
University of San Diego
San Diego, CA

Rhonda Harley

Assistant Dean, Student Engagement and Inclusive Excellence
Shiley Marcos School of Engineering
University of San Diego
San Diego, CA

FACILITATOR

Lucia Delgado

Senior Director, The Access Center
Colorado State University, Fort Collins
Fort Collins, CO

18.

From Practitioner to President's Cabinet: Leadership Lessons from the Front Lines of Student Support

ALL

SAPPHIRE 410

Few higher education leaders begin their careers expecting to become vice chancellors, executive directors, or national voices for educational opportunity. Many begin much closer to the students themselves—as advisors, counselors, teachers, TRIO professionals, and practitioners focused on helping one student overcome one barrier at a time. Yet those frontline experiences can become the foundation for extraordinary leadership. This candid and interactive panel brings together nationally respected, equity-minded leaders whose careers span more than three decades of advancing educational access and student success through TRIO, Educational Opportunity Programs (EOP), and other initiatives. Their paths to

leadership have taken different turns, but they share a defining experience: each began close to students, and the lessons learned there continue to shape how they lead people, influence institutions, and create change today. Going beyond résumés and career highlights, panelists will share the pivotal decisions, unexpected opportunities, mentors, setbacks, and moments of uncertainty that shaped their journeys from practitioners to executive leaders. They will explore what leadership actually requires, from building influence before having authority and navigating organizational change to balancing advocacy with institutional responsibility while remaining grounded in the student-centered values that first drew them to the work. Designed especially for emerging and mid-career professionals, this conversation will challenge participants to think differently about where leadership begins—and where their own careers might lead. Attendees will leave with practical strategies for developing their leadership capacity, expanding their professional networks and influence, preparing intentionally for future opportunities, and recognizing that they do not need an executive title to begin leading today.

PRESENTERS

Mara Luna

Director, Upward Bound
University of Puerto Rico, Río Piedras
San Juan, PR

Fabrizio Mejia

Vice Chancellor, Equity and Inclusion
University of California, Berkeley
Berkeley, CA

Kristin Wiles

Associate Vice President, Office of Minority Affairs & Diversity
University of Washington
Seattle, WA

MODERATOR



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Julian Ledesma

Interim Associate Vice
Chancellor
University of California,
Berkeley
Student Equity and Success,
Division of Equity and Inclusion
Berkeley, CA

19.

Ready for 2027: Navigating the New ADA Requirements for TRIO Programs

ALL
SAPPHIRE 411

April 2027 may seem far away, but preparing for new ADA requirements cannot wait until the deadline. For TRIO programs, accessibility touches nearly every aspect of the work—from websites, digital communications, and technology to student services, events, program materials, and the design of future grant proposals. This practical, forward-looking session will help TRIO professionals understand what the new ADA requirements mean for their programs and begin preparing now. Participants will examine areas of program operations that may require attention, identify potential accessibility gaps, and explore strategies to embed accessible practices into everyday planning and service delivery, rather than treating compliance as a last-minute exercise. The session will also challenge participants to think beyond minimum compliance. Building accessibility into a program from the beginning can create a stronger, more inclusive experience for every student while positioning programs to demonstrate thoughtful, intentional practices in the next grant competition. Attendees will leave with actionable steps, planning tools, and resources they can use immediately to assess where their programs stand, prioritize what needs to change, and develop a roadmap toward April 2027.

The goal is not simply to meet a deadline—it is to build accessibility into the way TRIO serves students every day.

PRESENTER

Summer Bryant

College Project Manager and
Senior Alumni Engagement
University of Kentucky
Lexington, KY

MODERATOR

LaKisha Jackson

Executive Director, TRIO
Programs
University of North Texas,
Dallas
Dallas, TX

11:45 AM – 1:45 PM

Lunch on Your Own

2:00 PM – 3:15 PM

CONCURRENT SESSIONS

20.

Beyond the Coursework: Guiding Undergraduates to Design Intentional Academic Pathways to Success

COLLEGE
AQUA SALON 300

A college degree opens doors—but increasingly, what students do beyond the classroom determines how prepared they are to walk through them. Graduate programs and employers are looking for candidates who can demonstrate more than academic achievement. They want evidence of initiative, leadership, research, problem-solving, professional experience, and the ability to translate learning into action. For first-generation, low-income, and historically underrepresented students, however, the experiences that build this competitive edge are not always equally

visible or accessible. Advisors, mentors, and student success professionals can play a pivotal role in helping students recognize these opportunities early, understand their value, and intentionally build a portfolio of experiences that supports their long-term goals. This interactive session will explore strategies to connect undergraduates with high-impact opportunities, including research, faculty mentorship, internships, conference presentations, leadership roles, and scholarly engagement. Participants will examine how these experiences can strengthen students' confidence and transferable skills while positioning them for graduate and professional education, competitive employment, and long-term career advancement. Attendees will leave with practical advising strategies and a customizable pathway-mapping template for helping students move from simply completing college to intentionally building a compelling academic and professional story. The goal is not just to help students earn the degree—it is to ensure they graduate with the experiences, relationships, skills, and confidence to make that degree work for them.

PRESENTERS

Joseph Butler

Assistant Dean for Access,
Diversity, and Inclusion,
Humanities and Social
Sciences, Office of the Dean of
the Graduate School
Princeton University
Princeton, NJ

Vishi Singh

Diversity and Inclusion
Coordinator for Recruitment
and Access Programs, School
of Engineering and Applied
Science
Princeton University
Princeton, NJ

Julie J. Yun

Associate Dean for Diversity
and Inclusion, School of
Engineering and Applied
Science

Princeton University
Princeton, NJ

MODERATOR

Kevin Hudson

Associate Director for
Institutional Diversity and
College Opportunity
Princeton University
Office of the Vice Provost for
Institutional Equity & Diversity
Princeton, NJ

21.

Educating the Post- COVID Scholar: Fostering Inclusive Learning Environments

ALL
AQUA SALON 305

Today's students are not simply returning to a pre-pandemic version of college. Many are navigating the lasting effects of disrupted learning, mental health challenges, weakened connections to educational institutions, and questions about whether they truly belong. For TRIO professionals, understanding this new reality is essential to helping students not only persist, but thrive. This session examines the evolving needs of the post-COVID scholar through a distinctly TRIO-centered lens, bringing together trauma-aware, culturally responsive, and identity-affirming practices. Drawing on research, practitioner experience, and personal narratives, participants will explore how disrupted learning and miseducation intersect with mental health, identity, belonging, engagement, and persistence—and what those intersections mean for how TRIO programs serve students today. Participants will move from understanding the challenge to reimagining the student's environment. Through evidence-based strategies, including the I Am, I Will framework, attendees will explore how to create TRIO spaces that affirm students' identities, rebuild



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connection and confidence, strengthen engagement, and help scholars recognize their own capacity to succeed. The goal is not to return students to where they were before COVID. It is to understand who they are now—and build the relationships, environments, and supports that allow them to move forward with purpose, belonging, and possibility.

PRESENTER

Daniel Jean

Associate Provost
Montclair State University
Montclair, NJ

MODERATOR

Berenice Jau

Associate Director, Student
Support Services
University of California, San
Diego
San Diego, CA

22.

Leading as Humans: Balancing Commitment and Capacity

ALL

AQUA SALON 310

In TRIO, the work is urgent, the mission is personal, and the needs rarely stop. That commitment can make it easy to keep saying yes—to one more student, one more deadline, one more responsibility—even when individual and team capacity is already stretched. But leadership that cannot be sustained ultimately puts both people and programs at risk. This facilitated discussion creates space for TRIO professionals at every level to have an honest conversation about the tension between meeting the mission's demands and protecting the capacity of the people responsible for carrying it forward. Participants will reflect on how overextension shows up in their own work and teams, examine the consequences of consistently prioritizing program needs over human capacity, and consider what

sustainable high performance can look like in a mission-driven environment. Through candid conversation and shared problem-solving, participants will explore practical approaches to recognizing capacity limits, setting realistic expectations, distributing responsibilities, supporting colleagues, and making intentional choices about where to invest time and energy to have the greatest impact. This is not a conversation about doing less for students. It is about building the individual and collective capacity to serve them well for the long haul. Participants will leave with strategies for creating healthier, more sustainable ways of working while maintaining the consistency, effectiveness, and sense of purpose that strong TRIO leadership demands.

PRESENTERS

Talim Lessane

Director, Pre-College Programs
College of Charleston
Charleston, SC

Noah Walls

Director, TRIO Programs
University of Utah
Salt Lake City, UT

MODERATOR

Mara Luna

Director, Upward Bound
University of Puerto Rico, Rio
Piedras
San Juan, PR

23.

The Power of Perception: How Expectations Shape Low-Income Student Success

**TRIO 101: BUILDING
THE FOUNDATION FOR
TRANSFORMATIONAL IMPACT
STRAND**

ALL

AQUA SALON 311

Low-income students arrive on our campuses with talent, ambition, resilience, resourcefulness, and perspectives that enrich the entire college community.

Yet too often, they encounter assumptions that define them by what they supposedly lack rather than recognizing the strengths they already possess. Those perceptions matter: educator expectations and institutional cultures can profoundly influence whether students feel they belong, believe they can succeed, and persist toward their goals. This interactive session challenges participants to confront deficit-based thinking and examine how stereotypes about low-income students can become embedded in everyday language, expectations, policies, and practices. Through reflection and engaging activities, participants will explore the connection between educator mindsets, systemic inequities, student confidence, engagement, and academic success. The conversation will move beyond identifying bias to building better practice. Participants will explore equity-driven strategies for recognizing student assets, communicating high expectations, strengthening relationships, and creating environments where students are valued for their potential rather than judged by their circumstances. Attendees will leave with practical tools to disrupt harmful assumptions and foster more affirming, mindful, and equitable learning environments. Because changing student outcomes sometimes begins with changing how institutions see students themselves.

PRESENTER

Kim Hildahl

Director, Student Support
Services
Carleton College
Northfield, MN

MODERATOR

Michelle Danvers Foust

Director, Pre-College Programs
CUNY Bronx Community
College
Bronx, NY

24.

Lessons from a 60-Year TRIO Legacy: Sustaining Innovation, Impact, and Institutional Commitment

ALL

AQUA SALON 313

What does it take for TRIO programs to remain strong, relevant, and transformative across generations of students and decades of change? At the University of Minnesota, more than 60 years of TRIO implementation have created a remarkable reservoir of experience—and lessons that are especially valuable at a moment when programs are being challenged to adapt, innovate, and demonstrate their impact. Bringing together experienced leaders from Upward Bound, Student Support Services, and McNair, this session draws on more than 80 additional years of collective professional practice and a mentorship lineage that has carried TRIO knowledge from one generation of practitioners to the next. Presenters will distill that experience into five critical themes that have helped programs sustain their mission, evolve with changing circumstances, strengthen operations, and deliver meaningful outcomes for students. More than a retrospective, this session uses the lessons of TRIO's past to confront the questions shaping its future. Participants will explore practical insights for navigating change, preserving institutional knowledge, cultivating the next generation of leaders, and continuing to innovate without losing sight of the relationships and values at the heart of TRIO. Attendees will leave with lessons forged through decades of practice—and a clearer understanding of how TRIO's accumulated wisdom can become a strategic advantage in meeting the challenges and opportunities ahead.

PRESENTERS

Anthony Albecker

Director, Ronald E. McNair



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Postbaccalaureate Achievement Program

University of Minnesota
Minneapolis, MN

Zoila Ganuza Hoaglund

Director, Upward Bound
University of Minnesota
Minneapolis, MN

Consuelo Gutiérrez-Crosby

Director, Student Support
Services
University of Minnesota
Minneapolis, MN

MODERATOR

Karen Texeira

Director, Upward Bound
CUNY-John Jay College
New York, NY

25.

TRIO in the Pacific

COLLEGE

AQUA SALON 314

TRIO's reach extends thousands of miles beyond the continental United States, across the Pacific Ocean to island communities whose histories, cultures, and relationships with the United States are often unfamiliar to professionals on the mainland. Yet these communities are an important part of the TRIO story—and understanding their experiences can help us become a stronger, more connected national community. This session will take participants across the Pacific to explore the historical relationship between the United States and the former U.S. Trust Territories and examine why federal educational support continues to play an important role in expanding opportunity for their residents. Participants will learn about the TRIO programs serving Pacific communities and gain greater insight into the educational, cultural, geographic, and economic realities that can shape students' journeys to and through postsecondary education. Presenters will also challenge common misconceptions about Pacific Island students and

communities while highlighting the distinctive strengths, identities, and perspectives they bring to higher education. Participants will consider how mainland TRIO programs can strengthen their cultural awareness, build more inclusive practices, and better engage and support students from Pacific Island communities who pursue education away from home. Attendees will leave with a deeper appreciation of a part of the TRIO community that can feel geographically distant but remains closely connected by a shared mission—and with practical insights for ensuring that wherever TRIO students begin their journeys, they encounter programs prepared to understand, welcome, and support them.

PRESENTERS

Diaz Joseph

Director, Upward Bound
College of Micronesia – FSM
Pohnpei, FM

James Oda

Former Director, Pre-College
Programs
Leeward Community College
Pearl City, HI

MODERATOR

Andrea Reeve

Faculty
Colorado State University, Fort
Collins
Fort Collins, CO

26.

Who Wants to go to College? We Do! The Data-Driven Program That Begins in 3rd Grade

PRE-COLLEGE YOUTH

AQUA SALON AB

What does it take to send 100% of your students to college—and help 86% persist and 72% graduate within six years? For Barrio Logan College Institute (BLCI), those outcomes result from 29 years of intentional program design, continuous evaluation, and a commitment to using data not simply to measure impact

but to strengthen it. This workshop takes participants behind the numbers to examine the strategic impact and evaluation framework that drives BLCI's work. Presenters will demonstrate how the organization connects its Theory of Change to logic models and key performance indicators, creating a clear line between what the program does, what it measures, and the outcomes it seeks for students and communities. Participants will also explore how BLCI collects and uses data to understand what is working, identify opportunities for improvement, inform programmatic decisions, and demonstrate impact. Rather than treating evaluation as something that happens after services are delivered, the session will show how evidence can become integral to designing and continuously strengthening programs. Attendees will leave with practical insights for creating stronger connections among strategy, evaluation, and outcomes—and for transforming data from a reporting requirement into a powerful tool to improve programs and expand student success.

PRESENTER

Cristina Aguirre

Chief Programs Officer
Barrio Logan College Institute
San Diego, CA

MODERATOR

N. Latrice Dunbar

Director, Pre-College Access
Grant Programs
University of North Georgia
Dahlonega, GA

27.

Partnering with Innovative Educators: Technology-Driven Onboarding and Tutor Training in TRIO SSS

AI AND INNOVATIVE
TECHNOLOGY: EXPANDING
OPPORTUNITY THROUGH
INNOVATION STRAND

STUDENT SUPPORT SERVICES

AQUA SALON CD

What if your TRIO SSS team could spend less time repeating orientation and training—and more time doing the high-touch work that makes the greatest difference for students? Michigan State University's TRIO Student Support Services program is using technology to do just that. This session will take participants inside MSU's use of two Innovative Educators platforms to create more efficient and consistent program operations. Go2Orientation provides new scholars with a structured digital onboarding experience, helping ensure students begin the program with a shared understanding of expectations, resources, and opportunities. TutorLingo provides standardized training for peer tutoring staff, creating a stronger foundation for delivering consistent, high-quality academic support. Presenters will demonstrate how integrating these tools into existing workflows can streamline onboarding and tutor preparation, reduce repetitive demands on professional staff, and create greater consistency across the student experience. Most importantly, participants will explore how thoughtfully using technology in routine processes can free up TRIO professionals to focus on the work technology cannot replace: building relationships, responding to individual needs, and providing meaningful support. Attendees will leave with practical insights for evaluating where digital tools can strengthen their own operations—using technology not to replace the human connection at the heart of TRIO, but to create more time for it.

PRESENTER

Jieron Robinson

Director, TRIO Student Support
Services
Michigan State University
East Lansing, MI

MODERATOR

Jessica Nelson



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Director, TRIO Programs
Rose State College
Midwest City, OK

28.

The Data Is Right...Or Is It? A TRIO Price Showdown!

RESEARCH AND EVALUATION:
PROVING IMPACT THROUGH
EVIDENCE STRAND

ALL
AQUA SALON EF

Think you know the state of college opportunity in America? It's time to put your knowledge to the test. In this fast-paced, game show-inspired session, three audience volunteers will step into the spotlight and compete to see how well they know the latest findings from the 2026 Indicators Report. Contestants—and everyone playing along from their seats—may discover that some of the answers are more surprising than they expect. Behind the competition is a serious question: What does the latest evidence tell us about who is gaining access to educational opportunities, who is being left behind, and where progress has stalled? As the game unfolds, presenters will unpack the data behind each answer, challenge common assumptions, and highlight the trends and disparities that matter most for TRIO professionals and the students they serve. Whether you take the stage or play from the audience, you'll leave with more than bragging rights. You'll gain a sharper understanding of the data shaping higher education today—and the evidence TRIO professionals can use to inform their work, strengthen their advocacy, and make the case for expanding educational opportunity. Come ready to compete, learn, and discover just how well you really know the numbers.

PRESENTER

Sean Simone

Vice President, Research and Director, Pell Institute for the Study of Opportunity in Higher

Education
Council for Opportunity in Education
Washington, DC

MODERATOR

Michele Lagnese

Director, Student Support Services
University of Pittsburgh
Pittsburgh, PA

29.

From Access to Industry: Expanding Pathways to Arts, Entertainment, and Design Credentials

FUELING THE FUTURE:
ECONOMIC IMPACT AND
CAREER READINESS STRAND

ALL
COBALT 500

Creativity is more than a passion—it can be a pathway to a thriving career. As the Arts, Entertainment, and Design (AED) industries evolve, TRIO programs have an opportunity to help students translate their creative talents into industry-recognized skills, credentials, professional portfolios, and pathways to economic mobility. This session will explore scalable strategies for connecting creative education with workforce preparation. Participants will learn how TRIO programs can integrate workforce-aligned creative curricula, portfolio-based assessment, industry-recognized credentials, and partnerships with employers and creative professionals into existing student services.

Through real-world examples, presenters will demonstrate how programs can help students move from creative exploration to career preparation by building portfolios that showcase their abilities, earning credentials that validate their skills, and developing connections to industries where those talents are in demand. Attendees will leave with actionable models for expanding access to career-connected learning

in the creative economy and helping students recognize that their creativity is not simply something they enjoy—it can become a marketable skill, a professional identity, and a pathway to opportunity.

PRESENTER

Mike Packer

President
Inspire EDU/Study Smart Tutors
Altadena, CA

MODERATOR

Kaitlynn Johnston

Assistant Director, Upward Bound
Metropolitan Family Services
Chicago, IL

30.

Streamlining Your McNair Plan of Operation

AI AND INNOVATIVE
TECHNOLOGY: EXPANDING
OPPORTUNITY THROUGH
INNOVATION STRAND

MCNAIR
COBALT 501

As costs rise and institutions place greater scrutiny on program resources, McNair professionals are being challenged to do more with greater efficiency—without compromising compliance, quality, or the individualized support that defines the program. In this practical session, two seasoned McNair directors will take participants inside the Plan of Operation to identify opportunities to modernize workflows, reduce administrative burden, and make smarter use of limited resources. Moving section by section, presenters will explore how AI tools, emerging technology, shared staffing models, and more efficient processes can strengthen program operations while preserving the high-touch relationships essential to McNair scholar success. Participants will leave with actionable ideas for examining their own Plan of Operation through a new lens—identifying where time and resources can

be saved, where technology can add value, and where the human connection remains indispensable. The goal is not simply to cut costs. It is to build a more efficient, sustainable McNair program that creates greater capacity for what matters most: preparing scholars for doctoral study and success.

PRESENTERS

Kari Azevedo

Director, Ronald E. McNair Postbaccalaureate Achievement Program
University of Central Missouri
Warrensburg, MO

Kim Rosfeld

Director, Ronald E. McNair Postbaccalaureate Achievement Program
Southern Nazarene University
Bethany, OK

MODERATOR

Melvin Simoyi

Director and Principal Investigator, Ronald E. McNair Postbaccalaureate Achievement Program
Heritage University
Toppenish, WA

31.

TRIO Then & Now: The Legacy Challenge – Live from San Diego

ALL
COBALT 520

"You stay classy, San Diego." The TRIO News Desk is live, and history is breaking! Join TRIO's own version of Ron Burgundy for a fast-paced, newsroom-inspired game show that turns more than six decades of TRIO history into an interactive challenge. Through team competition, audience participation, and segments such as "Breaking News: TRIO Origins," "Field Reports: Programs in Action," and "Policy Desk: What It Means for Your Work," participants will journey from the War on Poverty and Higher Education Act of 1965 to the programs, policies, and



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priorities shaping TRIO today. But knowing TRIO's history is about more than remembering dates and legislation. It is about understanding why these programs exist, how generations of professionals and advocates built the movement, and how that legacy continues to influence the work practitioners do every day. Participants will connect TRIO's origins to today's efforts to advance persistence, completion, and economic mobility while considering their own role in writing the next chapter. Come ready to learn, compete, laugh, and discover how well you really know TRIO. Stay informed—and, of course, stay classy.

PRESENTER

Geof Garner

Director, Talent Search
Multnomah Education Service District
Portland, OR

MODERATOR

Aaron Brown

Executive Vice President
Council for Opportunity in Education
Washington, DC

32.

A Chance to Read, A Chance to Rise: Building TRIO Book Clubs for Student Success

ALL
INDIGO 202

A great book can do more than encourage reading. It can start conversations, build community, introduce students to new perspectives, strengthen confidence, and create a shared experience that brings a TRIO program closer together. In this engaging session, the chair of COE's Opportunity Matters Book Club will demonstrate how TRIO programs can transform a simple book club into an intentional student success experience. Participants will explore how to select titles that resonate with students,

facilitate conversations that encourage participation and critical thinking, and design accessible activities that keep students engaged from the first page to the final discussion. Whether your program is launching its first book club or looking to reinvigorate an existing one, participants will leave with practical ideas for creating a reading experience that students want to join—and that strengthens literacy, reflection, connection, and belonging along the way. Give students a chance to read, and you may also give them a new opportunity to see themselves, one another, and the world differently.

PRESENTER

Deloris Davis Grant

Chair of the COE Opportunity Matters Book Club, TRIO Alumna, and Educator
Providence, RI

MODERATOR

Josh Engler

Educational Specialist, Upward Bound
Boise State University
Boise, ID

33.

From Services to Systems: Designing High-Impact TRIO Programs in Rural Communities

START SMART FOR NEW DIRECTORS: LEADERSHIP THAT DRIVES RESULTS STRAND

ALL
INDIGO 204

Great services do not automatically create great systems. For new and emerging TRIO leaders, one of the most important shifts is moving beyond a collection of individual activities and intentionally designing a program in which all services work together to advance measurable student outcomes. Grounded in the realities of rural TRIO implementation, this session will show participants how to move from compliance-driven service

delivery toward systems-based program design. Presenters will explore how to connect services to measurable objectives, build greater consistency across multiple schools and service sites, and ensure that federal resources translate into meaningful gains in student persistence, completion, and long-term success. Participants will also examine tiered approaches to student support that can help programs respond to varying levels of need, prioritize resources, and maintain quality across large geographic areas and diverse populations. Attendees will leave with practical tools to examine their own program structures, identify gaps and redundancies, and create a more coordinated system of support. High-impact TRIO programs are not defined simply by how many services they offer, but by how intentionally those services work together to move students forward.

PRESENTERS

Audrey Neal

Director, TRIO Programs
Murray State University
Murray, KY

Temesia Perdue

Director, TRIO Programs
Madisonville Community College
Madisonville, KY

MODERATOR

Dawn Eckhardt

Assistant Director, Talent Search
University of North Dakota
Grand Forks, ND

34.

Considerations for Veteran Serving Programs

EOC, SSS, AND VUB
INDIGO 206

Veterans bring extraordinary experience, discipline, leadership, and resilience to higher education, but the transition from military service to college can present

challenges that require intentional outreach, trusted partnerships, and support tailored to veterans. Whether you are considering competing for a Veterans Upward Bound grant in 2027 or already work within a veteran-serving program, this session will explore what it takes to build a strong network of support for veterans pursuing postsecondary education. Participants will examine strategies for identifying and cultivating partnerships with veteran-serving organizations, expanding program reach, strengthening recruitment and community engagement, and connecting veterans with educational opportunities and resources. The session will also encourage participants to think strategically about how institutions and community organizations can work together to meet veterans where they are and create clearer pathways into and through postsecondary education. Attendees will leave with practical considerations for strengthening existing veteran services or laying the groundwork for a future Veterans Upward Bound program—building partnerships and systems that recognize veterans' strengths while helping them successfully navigate their next mission.

PRESENTER

Ben Blake

Coordinator, Veterans Upward Bound
Boise State University
Boise, ID

MODERATOR

Beatrice Turpin-Peek

Director, Veterans Upward Bound
Prince George's Community College
Upper Marlboro, MD



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Education as the Engine of Economic Mobility

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35.

From Participant to Advocate: Amplifying Student Voices in TRIO

START SMART FOR NEW DIRECTORS: LEADERSHIP THAT DRIVES RESULTS STRAND

ALL
SAPPHIRE 400

Some of the most powerful voices for TRIO are the students who can say firsthand what these programs make possible. But helping students understand the issues affecting their programs, participate meaningfully in civic life, and share their stories requires thoughtful guidance—particularly when programs must balance advocacy, compliance, and students' academic responsibilities. This session will help TRIO directors and staff create student-centered approaches to civic engagement and advocacy that educate, empower, and elevate authentic student voices. Presenters will explore practical ways to help participants understand current issues affecting educational opportunity, tell their stories effectively, and engage in advocacy while programs remain attentive to applicable requirements and boundaries. The conversation will also address how to create opportunities for student engagement without adding unnecessary pressure to already demanding academic schedules. Participants will leave with concrete strategies for cultivating informed student advocates, amplifying their experiences, and helping young people recognize the power of their own voices. TRIO students are more than participants in these programs. When equipped with knowledge, confidence, and opportunity, they can become some of the most compelling ambassadors for ensuring that educational opportunity remains available to the students who follow them.

PRESENTERS

Stephen Rebello

Senior Director, TRIO Programs
SUNY Binghamton
Binghamton, NY

Elsie Vizearra

Organizer, West Coast Field
United States Student
Association
Los Angeles, CA

MODERATOR

Maggie Burkhead

Director, Student Support
Services
Eastern Illinois University
Charleston, IL

37.

From Fear to Fluency through Responsible Generative AI Literacy

COLLEGE
SAPPHIRE 410

Generative AI is rapidly changing how students learn, write, research, and prepare for careers. Yet many students enter college without a clear understanding of when these tools can enhance learning, when their use crosses academic boundaries, or how to critically evaluate AI-generated information. The challenge for student success professionals is no longer whether students will encounter AI—it is whether they will be prepared to use it responsibly. This session takes participants inside a UMass Boston summer bridge program that is developing a balanced approach to AI literacy grounded in critical thinking, academic integrity, and informed decision-making. Presenters will examine how differences in AI knowledge and confidence can shape students' academic choices and their transition to college-level expectations. Participants will explore how intentional curriculum design, process-based writing, formative feedback, and structured instruction can help move students from uncertainty about generative AI to responsible, confident use. Rather than treating AI simply as a shortcut

to police or a technology to embrace uncritically, the session will demonstrate how programs can help students understand both its possibilities and its limitations. Attendees will leave with a practical framework they can adapt for TRIO summer bridge programs, first-year experiences, and other student success initiatives, helping students develop the AI literacy they will increasingly need to succeed in college and beyond.

PRESENTERS

Dan Flaherty

Director, Data and Program
Assessment
University of Massachusetts
Boston
Dorchester, MA

Lorena Fuentes

Assistant Vice Provost,
Pathways and Student Success
Programs
University of Massachusetts
Boston
Dorchester, MA

Juan David Gutierrez

Director, Curriculum and
Instruction
University of Massachusetts
Boston
Dorchester, MA

MODERATOR

Kathryn Kailikole

Executive Director, Institute for
Transformative Education
San Diego State University
San Diego, CA

38.

HR Best Practices in TRIO: Building Sustainable, Compliant, and Student-Centered Teams

ALL
SAPPHIRE 411

Behind every high-performing TRIO program is a team—and how that team is hired, developed, supported, and retained can directly impact program stability and student success. Human Resources practices are not merely administrative functions; they are essential to building a

sustainable program capable of delivering consistent results. This session will examine HR through a distinctly TRIO lens, connecting decisions about hiring, onboarding, performance management, compliance, and retention to staff stability, student persistence, Annual Performance Report outcomes, and long-term grant success. Participants will explore how stronger people systems can reduce disruption, clarify expectations, strengthen accountability, and foster an organizational culture where both professionals and students can thrive. Designed for new and experienced TRIO professionals, the session will move beyond HR theory to practical strategies programs can apply to strengthen their teams and operations. Attendees will leave better equipped to align people, processes, performance, and mission—because investing intentionally in the professionals who serve students is also an investment in the students themselves.

PRESENTERS

Laura Gittings-Carlson

Executive Director
Montana State University,
Billings
Billings, MT

Xavier Xtravaganza

Associate, Human Resources
Montana State University,
Bozeman
Bozeman, MT

MODERATOR

Petra López-Vaquera

Program Director, Upward
Bound
The University of Texas Rio
Grande Valley
Edinburg, TX



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3:30 PM – 4:30 PM

EXHIBIT WALKTHROUGH

Snack Break

SPONSORED BY HILTON

ALL
INDIGO BALLROOM

4:00 PM – 5:00 PM

HOT TOPICS

HT1.

Measure and Increase Students' Career Readiness, Social Capital, and Agency

ALL
AQUA SALON 300

As expectations for TRIO programs extend beyond college access and persistence, a critical question is emerging: How do we prepare students to thrive after graduation—and demonstrate that they are becoming career-ready? This interactive session will explore practical ways TRIO professionals can help students develop the skills, professional networks, confidence, and agency they need to successfully navigate high school, college, internships, and the workforce. Drawing on experience from a former TRIO director, Presenters will demonstrate how programs can intentionally build and measure career readiness and career-aligned social capital without creating an entirely new layer of programming. Participants will leave with practical ideas for embedding career development into the work they already do and for using evidence to demonstrate how TRIO prepares students not only to enter and complete college but also to translate their education into meaningful career opportunities and economic mobility.

PRESENTERS

Destiny O'Rourke
Director of Partner Engagement

Career Launch
San Francisco, CA

Marieli Rubio
Partner and Vice President of Impact
Career Launch
San Francisco, CA

HT2.

The T.R.I.O. Model: How to Teach In a Way That Doesn't Stink (Probably Backed by Science)

ALL
AQUA SALON 310

Your students are smart. You know your material. So why doesn't everything you teach stick? This energetic session introduces the T.R.I.O. Model, a teaching approach designed for TRIO programs. Participants will explore practical, science-informed techniques for making instruction more engaging, memorable, and effective—helping students retain information long after the lesson ends. Come ready to rethink how you teach, pick up techniques you can put to work immediately, and discover new ways to turn information into learning that lasts. And yes, there will be magic. You'll have to attend to find out how that fits into the lesson.

PRESENTER

Cole Blalock
Founder
The Unlock Project
Orem, UT

HT3.

The Application Advantage: Building Career Readiness Through Competitive Fellowships

COLLEGE
AQUA SALON 311

What if applying for a competitive fellowship were itself a career-readiness experience? The U.S. Department of State's Critical Language Scholarship (CLS) Program offers funded,

intensive summer study abroad opportunities in nine languages, but the value of the experience begins long before students travel abroad. This session will explore how the competitive fellowship application process can help undergraduate and graduate students develop highly transferable professional skills. From crafting compelling personal narratives and articulating career goals to demonstrating cultural competency and global awareness, students can use the application experience to become stronger candidates for future academic and professional opportunities. Participants will learn how to turn fellowship advising into a high-impact career development practice that helps students become more confident communicators, more intentional about their goals, and better prepared to compete in an increasingly global workforce.

PRESENTER

Nellie Manis
Program Manager
Critical Language Scholarship (CLS) Program
Washington, DC

HT4.

Show Me The Money! Create Financial Literacy Experiences Your Students Will Never Forget

ALL
AQUA SALON 313

The first 50 participants will receive a Visa gift card—so arrive early! Financial literacy does not have to feel like another lecture about budgets and bank accounts. This high-energy session will show you how to create financial education experiences that capture students' attention, make money concepts relevant, and give participants skills they can actually use. Drawing on experience working with more than 100 TRIO programs, MJ Pittman will share strategies for transforming traditional

financial literacy workshops into engaging learning experiences that help students build confidence and make more informed financial decisions. Come ready to participate, have fun, and leave with fresh ideas for making financial literacy one of the experiences your students remember long after the workshop ends.

PRESENTER

MJ Pittman
CEO
Simple Money Academy
McKinney, TX

HT5.

Mastering TRIO Data Like a Pro with StudentAccess

ALL
AQUA SALON AB

Managing TRIO data should strengthen your program—not consume your staff's time. This session will demonstrate how StudentAccess, a platform designed specifically for TRIO programs, can simplify participant data management, streamline everyday workflows, and support federal reporting requirements. Participants will see tools such as the Multiple Student Tool, Online Applications, Dynamic Report Generator, and integrated communication features in action as they explore how technology can reduce repetitive administrative work and make critical program information easier to access and use. Discover how a more efficient approach to data management can give staff greater confidence in their information, strengthen program operations, and create more time for what matters most: serving students.

PRESENTERS

Claysa Diamond
Manager, Marketing and Communications
StudentAccess
Fort Collins, CO

Alex Grote
Vice President



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StudentAccess
Fort Collins, CO

HT6.

The Power of a High-Quality, High-Dosage Tutoring Program

👤 PRE-COLLEGE
🏠 AQUA SALON CD

Tutoring can be much more than homework help. When it is frequent, intentional, and grounded in evidence, high-dosage tutoring can become a powerful strategy for accelerating learning and strengthening student confidence. With high-impact tutoring receiving increased attention in recent TRIO grant competitions, this session will explore how to design a tutoring model that yields meaningful results for pre-college students. Participants will examine research-based approaches for increasing student participation, connecting tutoring with classroom instruction, advancing equity, and creating consistent academic support. Attendees will leave with practical strategies for designing, implementing, and sustaining a tutoring program that does more than fill academic gaps—it helps students build the skills, confidence, and momentum they need for long-term success.

PRESENTER

Fabiola Tucux
Partnership Manager
Study Smart Tutors
Los Angeles, CA

H7.

Activating Courageous Faith! Four Ways to Thrive & Succeed in Uncertain & Challenging Times as a TRIO Professional!

👤 ALL
🏠 AQUA SALON EF

Change is constant, but leading through it can be exhausting. Rapid technological advances,

economic uncertainty, organizational change, growing workloads, and mounting pressure can challenge even the most committed professionals to remain focused, confident, motivated, and effective. In this energizing session, Dr. Josh Fredenburg introduces his Courageous Faith Framework and four practical approaches for navigating seasons of uncertainty and adversity. Participants will explore actionable strategies for adapting to change, maintaining confidence under pressure, strengthening resilience, and continuing to perform effectively when the path ahead is unclear. Attendees will leave with tools to approach uncertainty with greater intention and emerge from difficult seasons stronger, more adaptable, and better prepared to thrive both personally and professionally.

PRESENTER

Josh Fredenburg
President
Circe of Change
Long Beach, CA

HT8.

Beyond Access: How TRIO Programs Use Data-Driven Test Prep to Close College Readiness Gap

👤 PRE-COLLEGE YOUTH
🏠 COBALT 500

College access begins long before a student submits an application. For many students, ACT and SAT preparation can play an important role in strengthening academic readiness, expanding postsecondary options, and building confidence for what comes next. This session will explore how TRIO and GEAR UP programs are using flexible, data-driven test-preparation strategies to strengthen student outcomes and support program goals. Participants will examine practical models for intensive boot camps, summer bridge initiatives, and year-round academic

support while considering how assessment data can help programs target instruction and respond to individual student needs. Attendees will leave with adaptable approaches for building test readiness into existing programming and using data to create more intentional pathways from college aspiration to college preparation.

PRESENTER

Pamela Daniels
TRIO Programs Manager
MasteryPrep
Myrtle Beach, SC

HT9.

How AI is Redefining College & Career Readiness for TRIO Programs

👤 ALL
🏠 COBALT 501

Artificial intelligence is not simply changing the tools students use—it is changing what it means to be ready for college, work, and the careers of tomorrow. For TRIO programs, the challenge is determining which skills students will need and how programs should respond as education and the workforce evolve. This session will examine the emerging AI-era readiness landscape, connecting changing federal priorities, labor market signals, and the experiences of TRIO programs already navigating this transition. Participants will hear what practitioners are seeing on the ground, which approaches are gaining traction, and what they have learned from early implementation. Attendees will leave with a clearer understanding of how AI is reshaping expectations for students and a practical starting point for evaluating their own programming. The goal is to prepare students not for the workforce as it once existed, but for the education and career landscape they are actually entering.

PRESENTER

Michael Nowak
Co-Founder and CEO
AI Essentials
Lemont, IL

HT10.

The Empowerment Blueprint™: A Four-Stage Framework for Developing Students Who Persist, Lead, and Thrive, Moving Beyond Motivation to Sustainable Student Transformation

👤 ALL
🏠 COBALT 520

Motivation can spark change, but lasting student success requires something deeper. Students need confidence in who they are, clarity about where they are going, resilience when obstacles arise, and the skills to turn their aspirations into action. This session introduces The Empowerment Blueprint™, a four-stage developmental framework designed to help TRIO professionals move beyond one-time motivational experiences toward intentional, sustained student development. Participants will explore practical strategies to strengthen identity and confidence, increase engagement, cultivate purpose and resilience, and build career readiness. Presenters will also demonstrate how the framework can be integrated into existing TRIO services to create a cohesive, year-long developmental experience rather than a series of disconnected workshops. Attendees will leave with a model to help students do more than feel inspired in the moment—one that equips them to persist, lead, and thrive over time.

PRESENTER

C. Michael Cozart
Founder & Chief Empowerment Officer
The Cozart Group, LLC



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Mobile, AL

HT11.

The TRIO Student Success Ecosystem: Scaling High-Touch Support Without Scaling Staff

ALL
INDIGO 202

TRIO's greatest strength has always been high-touch, relationship-centered support. But as caseloads grow, compliance demands increase, and staffing remains limited, how can programs preserve that personal connection without asking professionals to do the impossible? This session introduces the concept of a Student Success Ecosystem that strategically combines technology, peer support, intentional communication, and self-service resources to extend a program's reach while protecting the interactions where professional expertise matters most. Participants will explore how to distinguish services that should remain deeply personal from those that can be standardized, automated, or delivered digitally. Through practical examples involving online orientation, resource hubs, workshops, reminders, and peer mentoring, attendees will discover ways to provide students with more consistent and timely support while reducing repetitive workload for staff. Leave with practical ideas for scaling support without simply scaling staff—and for using technology to create more capacity for, rather than replace, the human relationships at the heart of TRIO.

PRESENTERS

Katie Anderson

Business Development Representative
Innovative Educators
Boulder, CO

Stephanie Neve

Director, Student Support Services
Grand View University

Des Moines, IA

Fred Scott

Head of Partnerships
Innovative Educators
Boulder, CO

Lee Williams

Executive Director of Student Success, Retention, and EOC
Texarkana College
Texarkana, TX

HT12.

Gateway to Innovation: Creating Career Access at National Laboratories

ALL
INDIGO 204

Some of the nation's most consequential scientific and engineering work happens inside its National Laboratories. How can TRIO professionals help ensure their students see themselves as part of that innovation? Representatives from Idaho National Laboratory and Savannah River National Laboratory will introduce participants to internships, fellowships, workforce development programs, and early-career pathways available across the National Laboratory system. The session will focus on expanding awareness of these opportunities among first-generation, income-disadvantaged, and underrepresented students and helping them understand how their education and skills can translate into high-impact STEM careers. Participants will leave with practical strategies for connecting TRIO scholars to National Laboratory opportunities, strengthening their professional readiness, and opening pathways to careers where students can contribute to cutting-edge innovation while building long-term economic mobility.

PRESENTERS

Terrence Buck

Academic Research Partnership Manager & University Recruiter
Savannah River National Laboratory

Aiken, SC

Luis Carrillo-Rodríguez

University Recruiter
Idaho National Laboratory
Idaho Falls, ID

HT13.

Financial Fluency for TRIO Student Success

ALL
INDIGO 206

College access alone does not guarantee persistence, completion, or economic mobility. TRIO students often make consequential financial decisions while simultaneously balancing school, work, family responsibilities, and preparation for life after graduation. Helping them navigate those decisions requires more than teaching financial facts—it requires building financial fluency and agency. This session introduces the Higher Education Financial Wellness Alliance's emerging Financial Competency Framework and its Know-Do-Be approach to financial learning. Participants will explore how four competency domains and a developmental progression can help students move from knowing financial concepts to applying them confidently in real-world situations. Attendees will examine how competency-based financial learning can be integrated into TRIO advising, coaching, programming, and assessment to strengthen persistence, completion, career readiness, and economic mobility. Participants will leave with practical ideas for helping students develop not only financial knowledge but also the confidence and capacity to make informed financial decisions during college and beyond.

PRESENTER

Phil Schuman

Executive Director, Higher Education Financial Wellness Alliance
Indiana University
Bloomington, IN

HT14.

Transform Your Student Success Programming with DreamCatcher Curriculum

ALL
SAPPHIRE 400

What if you could expand your student success programming without spending countless staff hours building every workshop from scratch? This interactive session introduces the DreamCatcher Curriculum, a ready-to-use collection of college-preparation and student-success resources designed to help TRIO programs save time while keeping students engaged. Participants will explore professionally designed workshops covering more than 30 college-preparation and success topics, including resources for parents and veterans. Through hands-on demonstrations and sample materials, attendees will experience the curriculum from both the facilitator and student perspectives and examine how guides, activities, and student handouts can be incorporated into existing programming. Leave with fresh ideas, practical resources, and a closer look at an affordable curriculum model designed to reduce preparation time while helping programs deliver consistent, engaging student success experiences.

PRESENTER

Aimee Gutowski

Co-Founder & Co-Owner
DreamCatcher Curriculum
Fayetteville, AR

Whitney Srsen

Co-Founder & Co-Owner
DreamCatcher Curriculum
Fayetteville, AR

HT15.

Elevate Your Program's Impact: Maximize Student Engagement, Achieve Proven Results

ALL
SAPPHIRE 410



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Getting students through the door is only the beginning. The greater challenge is keeping them engaged, strengthening their academic skills, building their confidence, and creating experiences that sustain their momentum toward long-term success. This interactive session will explore approaches to student recruitment, retention, enrichment, test preparation, and tutoring that programs can use to strengthen engagement and academic outcomes. Participants will examine strategies for helping students prepare for standardized exams, develop critical-thinking skills, build resilience, and maintain motivation throughout their educational journeys. Combining practical tools, evidence-based approaches, and fresh perspectives, the session will challenge participants to think more intentionally about how individual services work together to create a stronger student experience. Attendees will leave with actionable ideas for increasing engagement and helping students build the skills and confidence to succeed academically and beyond!

PRESENTERS

Jim Giovannini

CEO & Founder
Elevated Minds
Park Ridge, IL

Yuval Trachtenberg

VP of Partnerships
Elevated Minds
Park Ridge, IL

HT16.

BLUMEN SOFTWARE: Discover Why BOT Goes Beyond the Traditional TRIO Database

ALL
SAPPHIRE 411

What if your TRIO database could do more than store data? This demonstration of Blumen Online for TRIO (BOT) will show participants how the platform combines student data

management, communication, document storage, reporting, security, and workflow tools into a single system designed for TRIO programs. Participants will see features including multilingual online forms with document uploads and digital signatures, two-way texting, two-factor authentication, mobile data entry, paperless student document storage, automated event check-in, Prior Experience monitoring, National Student Clearinghouse integration, batch data processing, advanced student filtering, and custom imports from institutional information systems such as Banner, PeopleSoft, Datatel, AccuTrack, and Colleague. The session will also demonstrate BOT's Annual Performance Report tools, including multi-tiered error checking to help programs identify potential reporting issues, as well as the platform's SOC 2 compliance and data security features. Whether you currently use BOT or are evaluating alternatives to your existing database, this session offers an opportunity to see the platform in action and consider how more integrated technology could reduce administrative work, strengthen data management, and support more efficient TRIO operations.

PRESENTER

Gunjan Seth

Vice-President
COMPANSOL-BLUMEN
Houston, TX

7:30 PM – 9:30 PM

SPECIAL EVENT

Educational Opportunity Dinner and TRIO Acheivers' Awards

ALL
SAPPHIRE BALLROOM

Please note that your conference badge is your official meal ticket to the Educational Opportunity Dinner. People without an appropriate conference badge will not be permitted inside the ballroom.

9:30 PM – 12:00 AM

The Opportunity After-Party: The Night Isn't Over Yet!

ALL
SAPPHIRE BALLROOM

The celebration doesn't stop when the Educational Opportunity Dinner ends! Keep the connections, conversations, and good vibes going at The Opportunity After-Party. Hit the dance floor, visit our photo booth, reconnect with colleagues and friends from across the TRIO community, and make a few new connections along the way.

6:30 PM

CASH BAR OPENS

ALL
SAPPHIRE BALLROOM FOYER



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SESSIONS GRID

FRIDAY, SEPT. 18, 2026

6:45 AM – 8:00 AM

WELLNESS

Sunrise Walk

ALL

MEET AT THE SAPPHIRE TERRACE

Start Friday with movement, fresh air, and some of San Diego's best waterfront views. The COE Wellness Committee invites you to step away from the conference pace and join fellow attendees for an easygoing Sunrise Bay Walk along the waterfront promenade. Meet at the Hilton San Diego Bayfront at 6:00 a.m., with the group departing at 6:15 a.m., for scenic views, meaningful conversation, and a refreshing start to the day. Whether you come for the exercise, the fellowship, or a quiet moment before a full conference schedule, lace up your walking shoes and make a little time for yourself as San Diego wakes up.

9:00 AM – 10:00 AM

PLENARY SESSION

State of the TRIO Nation: A Leadership Briefing from COE

ALL

SAPPHIRE BALLROOM

At a consequential moment for TRIO and American higher education, the need to understand the federal landscape is more important than ever. COE President Kimberly Jones will deliver a timely briefing on the federal policy developments shaping the future of TRIO. President Jones will share the latest insights on federal appropriations, TRIO grant competitions, and program

administration, and the congressional and regulatory issues that will influence TRIO's path forward.

PRESENTER

Kimberly Jones

President

Council for Opportunity in Education
Washington, DC

10:15 AM – 11:30 AM

CONCURRENT SESSIONS

39.

The Evolution of the Pell Grant: Policy Shifts and Their Impact on Students

ALL

AQUA SALON 300

The Pell Grant has opened the doors of higher education for generations of students—but changes in federal policy have continually reshaped how far that support can go. This session will preview findings from new Pell Institute research tracing the legislative history of the Pell Grant from its roots in the Higher Education Act of 1965 through major policy shifts of the past 25 years. Presenters will examine how those changes have affected low-income students' ability to pay for college and what the evolving role of Pell means for access and affordability today. Following the research presentation, three experts will connect the findings to TRIO programs, financial aid practices, and the broader higher education landscape, providing participants with historical context to understand the policy choices shaping students' opportunities now and in the future.

PRESENTERS

Stephanie Cruz

Director, EOC

Rhode Island Community College

Warwick, RI

Helen Faith

Associate Vice Provost,
Enrollment and Student

Financial Services

University of Virginia

Charlottesville, VA

Younger Oliver

Graduate Research Associate

Pell Institute for the Study of
Opportunity in Higher Education
Washington, DC

Claire Viall

Vice President, Public Policy,
Postsecondary Education, and
Finance

Strada Foundation

Indianapolis, IN

MODERATOR

Esosa Ruffin

Program Coordinator

Pell Institute for the Study of
Opportunity in Higher Education
Council for Opportunity in
Education
Washington, DC

40.

Research and Academic Engagement: Utilizing Campus Partnerships to Strengthen Student Success

MENNAIR

AQUA SALON 305

Strong McNair experiences are rarely built by one office alone. This session explores how strategic campus partnerships can expand research opportunities, strengthen academic engagement, and create rigorous, student-centered experiences for first-generation and low-income scholars. Drawing on Loyola Marymount University's McNair Scholars Program, presenters will share how collaboration across the university can support curriculum development,

advising, outreach, and the complex logistics behind high-impact programming. Participants will also consider how programs can adapt as financial supports and the broader TRIO environment changes. Attendees will leave with practical ideas for building partnerships that expand program capacity while keeping scholars' academic development and graduate school aspirations at the center.

PRESENTERS

Esmeralda Cabrera

Assistant Director, Ronald E.
McNair Postbaccalaureate
Achievement Program

Loyola Marymount University
Los Angeles, CA

Elizabeth Wimberly-Young

Assistant Vice Provost, Student
Research, Learning, and
Innovation

Loyola Marymount University
Los Angeles, CA

MODERATOR

Suja Patel

Associate Dean and Director
of Ronald E. McNair
Postbaccalaureate Achievement
Program and Student Support
Services

Rutgers University–Newark
Newark, NJ

41.

Guiding Students to Authentic Choices

PRE-COLLEGE YOUTH

AQUA SALON 310

Students are surrounded by expectations—from family, peers, schools, social media, and an overwhelming number of college and career options. How can TRIO professionals help them separate outside pressure from what they genuinely want for their futures? Designed for practitioners working with students in grades 6–12, this session offers practical strategies for helping young people identify their strengths, interests, and values and use that self-knowledge to make more intentional



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decisions. Participants will explore advising approaches, ready-to-use activities, and conversation frameworks that build confidence and decision-making skills. Leave prepared to help students quiet the noise, recognize their own potential, and make college and career choices that authentically reflect who they are and who they want to become.

FACILITATORS

Teriki Barnes

Director, Upward Bound Math/Science

Southeastern Oklahoma State University
Durant, OK

Geof Garner

Director, Talent Search
Multnomah Education Service District
Portland, OR

MODERATOR

Demetri Jones

Executive Director, TRIO Programs
Hinds Community College,
Utica Campus
Utica, MS

42.

TRIO Who? Raising the Profile of Your Program on Your Campus

TRIO 101: BUILDING THE FOUNDATION FOR TRANSFORMATIONAL IMPACT STRAND

ALL
AQUA SALON 311

Your TRIO program may be changing students' lives—but does the rest of your campus know it? Visibility can influence everything from student recruitment and referrals to institutional partnerships and long-term support. This session will help TRIO professionals move from being one of the campus's best-kept secrets to becoming a recognized and valued part of the institution. Participants will explore practical strategies for communicating TRIO's purpose and impact to faculty, staff,

and administrators, building stronger internal relationships, and creating more campus champions for the program. Leave with actionable ideas for raising your program's profile, expanding awareness of the services you provide, and making it easier for the students who need TRIO to find their way to you.

PRESENTER

Jon Crider

Director, Ronald E. McNair Postbaccalaureate Achievement Program

Texas Tech University
Lubbock, TX

MODERATOR

Tanya Montgomery

Director, Student Support Services
Washington University
St. Louis, MO

44.

Beyond the Basics: Integrating Global Citizenship and Hands-on STEM to Transform Student Engagement

UPWARD BOUND
AQUA SALON 314

Compliance may define the framework, but imagination can transform the student experience. This session takes participants inside Northeastern Illinois University's STEAM Academy for Social Impact, where global citizenship, design thinking, and hands-on underwater robotics are woven into the Upward Bound experience. Participants will explore how ambitious, experiential learning can fit within TRIO program structures while building problem-solving, collaboration, technical, and workforce-readiness skills. Through an interactive design-thinking exercise, attendees will examine a replicable model for connecting daily program activities to larger questions of community impact and economic mobility. Leave with fresh ideas for moving beyond

the basics and creating learning experiences students will remember—and skills they can carry into college and careers.

PRESENTER

Aaron Cortes

Director, STEAM Pathways
Northeastern Illinois University
Chicago, IL

MODERATOR

Stephanie Campbell

Director, Upward Bound
Polk State College
Winter Haven, FL

45.

Beyond the APR: Transforming the Use of TRIO Data Through an Evaluation Partnership

RESEARCH AND EVALUATION: PROVING IMPACT THROUGH EVIDENCE STRAND

ALL
AQUA SALON AB

The APR tells an important story—but it does not have to be the end of your program's data story. This session follows the partnership between Southern Methodist University's College Access TRIO programs and its Center on Research and Evaluation (CORE), from building foundational data infrastructure and evaluation capacity to conducting more rigorous analyses of student outcomes. Participants will see how a sustained evaluation partnership can help programs move beyond compliance reporting, ask better questions, and turn data into evidence of long-term impact. Presenters will share practical lessons for strengthening evaluation capacity, translating findings into useful insights, and using evidence to inform program improvement. Leave ready to think differently about the data you already collect—and what it can reveal about the difference your program makes.

PRESENTERS

LaChelle Cunningham

Director, College Access

Programs

Southern Methodist University
Dallas, TX

Celeste Fernandez

Lead Analyst and Evaluation Manager

Southern Methodist University
Dallas, TX

MODERATOR

Laura Rodeheaver-Van Gelder

Director, Student Support Services
Calvin University
Grand Rapids, MI

46.

From Access to Anywhere: Scaling TRIO Impact Through Online Orientation and Digital Engagement

AI AND INNOVATIVE TECHNOLOGY: EXPANDING OPPORTUNITY THROUGH INNOVATION STRAND

STUDENT SUPPORT SERVICES
AQUA SALON CD

What if students could begin building a relationship with TRIO before they ever walk into the office? Colorado Mesa University is using online orientation and digital engagement to extend support beyond traditional in-person services and create a more accessible, consistent student experience. This session will take participants inside a scalable model that uses digital tools to strengthen onboarding, communication, and persistence while keeping equity and student needs at the center. Presenters will explore how online resources can expand reach without sacrificing personalization or relationship-building. Participants will leave with practical approaches for developing or strengthening virtual TRIO programming that meets students where they are, connects them to support earlier, and keeps them engaged throughout their college journey.

PRESENTERS



FROM ACCESS TO IMPACT:

Education as the Engine of Economic Mobility

#COEAC2026 • San Diego, CA • September 16-19

Paige Cadman

Director, Student Support Programs
Colorado Mesa University
Grand Junction, CO

Jess Hanson

Engagement Specialist, Student Support Services
Colorado Mesa University
Grand Junction, CO

MODERATOR

Sylvia Turner

Director, Student Support Services
Maryville College
Maryville, TN

47.

Put Your Oxygen Mask on First: Sustaining Yourself While Supporting Others

COE ED Talk

ALL

AQUA SALON EF

TRIO professionals are problem-solvers, advocates, and champions for students—but a career built around caring for others can quietly consume the time and energy needed to sustain ourselves. How do we continue showing up for students without disappearing from our own lives? This COE ED Talk creates space for an honest conversation about boundaries, priorities, and sustainable practices in student-centered work. Participants will examine the expectations placed on helping professionals, reflect on the habits that drain or protect their capacity, and exchange strategies for creating healthier ways of working. The goal is not to care less. It is to build the capacity to keep caring, leading, and serving effectively for the long haul.

PRESENTER

Marcia Liu

Adjunct Assistant Professor,
Asian American Studies Program,
Hunter College
Licensed Counseling Psychologist
New York, NY

FACILITATOR

Jackie Lam

Associate Director, Upward Bound and Cal-SOAP
Japanese Community Youth Council
San Francisco, CA

48.

Navigating Federal Financial Aid Changes: What TRIO Practitioners Need to Know

FUELING THE FUTURE:
ECONOMIC IMPACT AND CAREER READINESS STRAND

ALL

COBALT 500

Federal financial aid is changing, and TRIO professionals are often among the first people students turn to for help making sense of what comes next. This session will break down major financial aid provisions taking effect beginning July 1, 2026, including changes affecting Pell Grants, student loans, institutional accountability, and other areas of federal aid. Participants will learn how to track regulatory developments, distinguish reliable guidance from noise, and anticipate questions students and institutions may face as implementation unfolds. Leave with a clearer understanding of the changing financial aid landscape and practical resources for helping students navigate new rules, weigh their options, and make informed decisions about paying for college.

PRESENTER

Christina Mortellaro

Director of TRIO Adult Educational Opportunity Center
SUNY Genesee Community College
Batavia, NY

MODERATOR

Michael Wade

Director, Student Educational Opportunity
University of Wyoming
Laramie, WY

49.

Out of Many, One: Bringing Multiple Innovative Technologies Together for Singular Success

AI AND INNOVATIVE TECHNOLOGY: EXPANDING OPPORTUNITY THROUGH INNOVATION STRAND

STUDENT SUPPORT SERVICES AND UPWARD BOUND

COBALT 501

One new technology can solve a problem. A thoughtfully connected technology ecosystem can transform an experience. This session takes participants inside San Diego State University Upward Bound's summer pilot of an "Upward Bound App," built with Flare group-communication software to connect multiple learning platforms and student experiences. Presenters will show how integrated tools can strengthen communication, career readiness, digital credentialing, and access to emerging opportunities such as talent marketplaces. Just as importantly, the session will address the questions programs must ask before adopting technology: Does it protect student privacy? Is it secure and FERPA-conscious? Is it affordable, sustainable, and right for the program? Participants will leave with a practical framework for evaluating and connecting technologies so that multiple tools work together toward one goal: a more seamless and meaningful student experience.

PRESENTERS

Diana Cortes Garcia

Assistant Director, Institute for Transformative Education
San Diego State University
San Diego, CA

Emily Jenkins

Communications Specialist,
Institute for Transformative Education
San Diego State University
San Diego, CA

Kathryn Kailikole

Executive Director, Institute for

Transformative Education
San Diego State University
San Diego, CA

Halan Stanfield

Compliance and Evaluation Specialist, Institute for Transformative Education
San Diego State University
San Diego, CA

MODERATORS

Chrissy Rivera

Director, Talent Search
Pullman, WA

Cynthia Park

Professor Emerita, Institute for Transformative Education
San Diego State University
San Diego, CA

50.

Conference Room Conversations: Building a Motivated and Accountable TRIO Team

ALL

COBALT 520

The conversations that shape a team do not happen only during annual reviews. They happen every day—in meetings, check-ins, difficult conversations, and the moments when leaders clarify what good work looks like. This interactive session will show TRIO leaders how to turn ordinary "conference room conversations" into intentional opportunities to strengthen performance, accountability, and motivation across multigenerational teams. Participants will explore how to set and negotiate clear expectations, measure progress, deliver useful feedback, and respond to different strengths, dispositions, and work styles. Grounded in performance-management principles and the human side of leadership, the session will provide practical tools to build a high-support, high-accountability culture in which staff understand their roles, feel valued for their contributions, and work together toward stronger program outcomes.

PRESENTERS



FROM ACCESS TO IMPACT:

Education as the Engine of Economic Mobility

#COEAC2026 • San Diego, CA • September 16-19

Sari Byerly

Assistant Vice President,
Student Pathways and Success
Weber State University
Ogden, UT

David Rivera

Associate Professor
CUNY Queens College
New York, NY

MODERATOR

Jennifer Luken Sutton

Assistant Director, Expert
Guidance and Recruitment
Strategies
First Gen Forward
Washington, DC

51.

Your Voice Matters: Importance of Voting!

COE ED Talk

ALL

INDIGO 202

Voting is one of the most direct ways individuals can participate in the decisions that shape their communities, yet barriers to civic engagement can leave many students and families feeling disconnected from the process. This nonpartisan COE ED Talk will explore how TRIO professionals can help participants understand civic responsibility, recognize the value of their voices, and become more informed and engaged members of their communities. Through facilitated discussion, participants will examine common barriers to participation, share approaches for civic education, and consider appropriate ways TRIO programs can encourage engagement without directing political choices. Leave with ideas for helping students and families see civic participation not as something distant from their lives, but as one way to understand and engage with the communities around them.

PRESENTER

Oscar Felix

Retired TRIO Director
San Diego, CA

FACILITATOR

Dolores Gomez

Director, Upward Bound
Parris Foundation
Houston, TX

52.

Leading with Your Strengths

START SMART FOR NEW
DIRECTORS: LEADERSHIP THAT
DRIVES RESULTS STRAND

ALL

INDIGO 204

Effective leadership does not begin with becoming someone else. It begins with understanding what you already do exceptionally well—and learning how to use those strengths with greater intention. This session will help participants identify the talents that shape their leadership, examine how those strengths influence communication and decision-making, and apply them to build trust and improve team performance. Participants will leave with practical strategies for leading more authentically and confidently, while also recognizing how their natural abilities can be leveraged to create stronger relationships, healthier teams, and greater organizational impact.

PRESENTERS

Douglas Fiore

Dean, College of Education
University of Central Missouri
Warrensburg, MO

MODERATOR

Fabiola Falto Castro

Director, Student Support
Services
Antillean Adventist University
Mayaguez, PR

54.

First-Time Director Playbook: What No One Tells You About Leading a TRIO Program

START SMART FOR NEW
DIRECTORS: LEADERSHIP THAT

DRIVES RESULTS STRAND

ALL

SAPPHIRE 400

The first months as a TRIO director can feel like being handed the keys while the vehicle is already moving. Compliance matters, but new directors quickly discover that the job is equally about leading people, setting priorities, building systems, and creating a culture that produces results. This session offers a practical playbook for navigating the first six months of leadership, with particular attention to staff supervision, clear expectations, performance challenges, and alignment between daily work and APR outcomes. Participants will leave with concrete tools to build a high-support, high-accountability team and establish leadership habits that strengthen the foundation for program success.

PRESENTER

Caitlin Siefkes

Director, Student Support
Services and Upward Bound
Dakota County Technical
College/Inver Hills Community
College
Rosemount, MN

MODERATOR

Shelly Siegel

Retired TRIO Director
North Hennepin Community
College
North Brooklyn Park, MN

55.

Career Connection: Aligning International Education with Career Readiness

COLLEGE

SAPPHIRE 402

Global learning is often described as transformative. This session asks a more specific question: How can TRIO professionals help students translate that transformation into career value? As institutions face growing expectations to demonstrate workforce

outcomes, presenters will explore how study abroad, international internships, and virtual global experiences can help students develop the perspectives, technical abilities, adaptability, and professional competencies employers value. Participants will learn evidence-informed strategies for helping students articulate what they gained from global experiences and for embedding career readiness throughout international education programming. Leave with advising tools and adaptable models for expanding access to global learning while helping first-generation and low-income students connect those experiences to future careers.

PRESENTERS

Rosa María Acevedo

Assistant Professor of Practice
in Educational Foundations,
Organizations, and Policy
University of Pittsburgh
Pittsburgh, PA

Lindsay Calvert

Director, IINetwork and Center
for International Opportunities
Institute of International
Education
Houston, TX

Heather Hagenbuch

Director, Student Support
Services
University of Buffalo
Buffalo, NY

MODERATOR

Jackasha Wiley

Associate Vice Chancellor for
Student Access
Rutgers University–New
Brunswick
Piscataway, NJ

56.

Scaling What Works: Lessons from the Community College Initiative

STUDENT SUPPORT SERVICES

SAPPHIRE 410

What happens when proven
Student Support Services
practices stop at the program



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door—and start becoming part of how an entire institution serves students? Leaders from three community colleges recognized with COE's Award for Institutional Effectiveness will take participants inside their efforts to scale SSS-informed practices campuswide. Through case studies, presenters will show how they identified institutional challenges, built momentum for change, embedded effective practices into broader systems, engaged campus partners, and used data to sustain progress. Participants will also work with COE's Institutional Effectiveness Blueprint as a practical guide for their own scaling efforts. Leave with concrete examples and actionable strategies for turning what works in SSS into stronger systems that reach more low-income and first-generation students.

PRESENTERS

Tyler Henry

TRIO Academic Coordinator
Chesapeake College
Chesapeake, MD

Crystal Mohamed

Director, Student Support Services
Oklahoma City Community College
Oklahoma City, OK

Vanessa Unti

Associate Director, Student Support Services
South Seattle College
Seattle, WA

MODERATOR

Alfred Herrera

Retired Assistant Dean,
Academic Partnerships and
Director, Center for Community
College Partnerships
University of California, Los Angeles
Los Angeles, CA

11:45 AM – 1:30 PM

PLENARY SESSION AND LUNCHEON

Walter O. Mason

and First-Generation College Celebration Day Awards Luncheon

ALL

SAAPPHIRE BALLROOM

Please note that your conference badge is your official meal ticket to the Awards Luncheon. People without an appropriate conference badge will not be permitted inside the ballroom.

As the highest honor awarded by COE, the Walter O. Mason Award recognizes individuals who have made outstanding contributions to college opportunity programs and have significantly advanced educational opportunities for low-income, first-generation students. We are also excited to announce the winners of the 2026 First-Generation College Celebration Day grant competition. Don't miss this inspiring event that highlights the power of education to change lives!

1:30 PM – 2:30 PM

HOT TOPICS

HT17.

Strategic Learning Assessment (SLA): Helping Students Become More Strategic, Self-Regulated, Lifelong Learners

ALL

AQUA SALON 300

What if students could see not only where they struggle as learners, but exactly what they can do next? This session introduces the Strategic Learning Assessment (SLA), a 20-minute online tool designed to help students better understand the habits and skills that influence academic success. The SLA examines 11 areas, including communication, critical thinking, learning strategies, focus, growth mindset, persistence, help-seeking,

belonging, stress management, test preparation, and time management, then provides tailored recommendations for growth. Through a live demonstration, participants will experience both the student and administrator views and see how personalized feedback and program-level data can support more strategic, self-regulated learning. Leave with a clearer picture of how assessment can turn student self-awareness into practical action.

PRESENTER

Michael Ealy

CEO
Longsdale
Trinity, FL

HT18.

Compass: A Smarter Way to Manage TRIO Data & APR

ALL

AQUA SALON 310

Stop chasing paperwork and start working smarter. This session will demonstrate how the Compass TRIO Database brings digital applications, QR-code attendance and service tracking, automated data collection, and built-in reporting into one program-management system. Participants will see how streamlined workflows can reduce repetitive administrative work, improve data accuracy, and make information easier to use throughout the year—not just when the APR is due. Come see Compass in action and explore how a more integrated approach to data can give staff more time and better information to focus on student success.

PRESENTER

Urban Pelicon

CIO
CoBro Consulting
San Diego, CA

HT19.

Pathways That Matter: Advancing Social Mobility

Through College and Career Readiness

ALL

AQUA SALON 311

College access is only the beginning. Long-term social and economic mobility depends on whether students can translate educational opportunity into college completion, career readiness, and meaningful choices about their futures. This session will explore how evidence-based college and career readiness strategies can create stronger pathways through rigorous coursework, college planning, and career-connected advising. Presenters will demonstrate how College Board programs—including AP, the SAT Suite, and BigFuture—can be used to identify opportunities, reduce barriers, and support students across the transition to postsecondary education. Participants will leave with practical approaches for connecting academic preparation, college planning, and career exploration into a more coherent pathway toward long-term success.

PRESENTERS

Lauri Benton

Executive Director, Counselor
Community Engagement
College Board
Stone Mountain, GA

Markeela McGill

Director, Implementation for the
West Coast College Board
Sacramento, CA

HT20.

Leading by Example: What AI Readiness Looks Like for TRIO Professionals

ALL

AQUA SALON AB

It is difficult to prepare students for an AI-enabled future if the professionals guiding them are still figuring out what AI readiness means for themselves. Drawing on data from a Spring and Summer 2026 practitioner survey, this session will examine where TRIO



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staff currently stand in their understanding, confidence, and use of AI—and where the most significant gaps remain. Rather than stopping at diagnosis, the session will translate those findings into practical next steps programs can use to strengthen staff readiness. Participants will leave with a clearer picture of what AI readiness looks like in day-to-day TRIO practice and a starting point for equipping themselves and their teams to lead students responsibly in an increasingly AI-shaped learning and work environment.

PRESENTER

Michael Nowak

Co-Founder and CEO
AI Essentials
Lemont, IL

HT21.

Unlocking Academic Success with Tutor.com: Empowering TRIO Students, Anytime, Anywhere!

ALL
AQUA SALON CD

Students do not stop needing academic support when the TRIO office closes. This session will explore how Tutor.com's 24/7 online tutoring, bilingual Spanish support, writing review, and test-preparation services can extend individualized academic assistance beyond traditional program hours. Participants will see how on-demand support can complement existing TRIO services and help students strengthen coursework, prepare for exams, improve writing, and maintain progress toward graduation. Leave with practical insights into how virtual academic support can expand access to help when—and where—students need it most.

PRESENTERS

Dorsey Baldwin

Customer Success Manager,
TRIO Partnerships
Tutor.com
New York, NY

David Wills

Senior Director, Library & TRIO Programs
Tutor.com
New York, NY

HT22.

When AI Meets Engagement: Practical Strategies That Have Boosted TRIO Attendance, Retention, and Outcomes

ALL
COBALT 500

AI may be changing education, but many TRIO programs are still wrestling with an equally immediate challenge: getting students to show up, stay engaged, and act on the opportunities designed for them. This high-energy session brings those challenges together, exploring how edutainment, cultural relevance, real-world connections, and practical AI strategies can strengthen attendance, retention, staff efficiency, and student engagement. Presenters will share approaches that can support college readiness, FAFSA completion, STEM exploration, career development, and other grant-aligned outcomes without simply adding more work to already full plates. Participants will leave with a realistic engagement blueprint, ready-to-use AI ideas, and practical strategies they can adapt immediately.

PRESENTERS

Bert Gervais

AI-Certified Student Engagement Consultant
Genius Potential
Brooklyn, NY

David Horne

Student Engagement Consultant
Genius Potential
Brooklyn, NY

HT23.

Elevating Education: One Great Educator at a Time

ALL
COBALT 501

Educators enter this work because they want to make a difference. But when exhaustion, frustration, and burnout begin to crowd out that purpose, even deeply committed professionals can lose connection to the reasons they started. This session offers an energetic, practical approach to rebuilding that connection. Participants will explore strategies for reaching disengaged students, building authentic trust, establishing respect without diminishing students, and creating the kind of presence young people remember long after a program ends. Come ready to reflect on the educator you want to be, reconnect with the purpose behind your work, and leave with practical ideas for showing up with greater intention and impact.

PRESENTERS

Jim Giovannini

CEO & Founder
Elevated Minds
Park Ridge, IL

Yuval Trachtenberg

VP of Partnerships
Elevated Minds
Park Ridge, IL

HT24.

Attendance Isn't the Problem—Identity Is

ALL
INDIGO 202

When students stop showing up, attendance may be the symptom rather than the root problem. This interactive session introduces Feel It, Flip It, Flex It, a three-phase framework for examining how belonging, identity, and the stories students tell themselves can influence engagement and persistence. Participants will experience the framework firsthand while exploring ways to recognize belonging gaps, help students reframe limiting narratives, and connect everyday advising conversations

to persistence and completion goals. Grounded in research and designed for immediate application, the session will send participants home with practical tools for looking beyond the attendance record and responding to what may be driving disengagement underneath it.

PRESENTER

Donnie Landon

Founder & TRIO Community Partner
Landon Legacy Speaking

HT25.

The 2027–2028 FAFSA Has Changed: Preparing TRIO Students and Families

ALL
INDIGO 204

The 2027–2028 FAFSA brings another round of changes for students, families, and the professionals who guide them. This session will break down key updates to the form alongside federal higher education changes that may affect eligibility, student borrowing, and the amount of aid families receive. Participants will examine what these changes can mean across different family circumstances and what students should consider before completing the FAFSA. The session will also demonstrate tools for modeling potential financial-aid scenarios and helping families prepare earlier, compare options, and approach the process with greater clarity. Leave better equipped to reduce confusion and help students make informed decisions in a changing aid environment.

PRESENTER

Matt Carpenter

Founder and CEO
College Aid Pro
Salem, MA

HT26.

Empower: Because 'I'll Just Fix It in Excel' Is Not a Strategy



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ALL
SAPPHIRE 400

You already have a database—so why are critical pieces of your program still living in Excel? When staff rely on side spreadsheets to fill gaps between systems, workflows become harder to manage and important information can become fragmented. This session will demonstrate how COE's Empower APR software brings student tracking, support, engagement, and reporting into one platform designed to reduce that patchwork. Participants will see how integrated data can simplify workflows, surface more useful insights, and reduce time spent maintaining parallel systems. The goal is straightforward: fewer workarounds, better information, and more staff capacity focused on student success.

PRESENTER

Andrew Gillis
VP of Growth
Bright Learning Lab
Lehi, UT

HT27.

Student and Teacher Agency Create Workforce Pathways. Data and Program Evaluation Unlock Secure Employment and College/Career Success

ALL
SAPPHIRE 410

Students are better prepared for college and careers when they learn to take ownership of their growth—and educators have the flexibility and information to respond to what learners need. This session will explore how student and teacher agency can strengthen academic development, career preparation, and pathways to employment. Participants will also examine how data and program evaluation can be used to understand progress, refine services, and connect educational experiences to college and career outcomes.

Leave with practical ideas for creating learning environments where students have greater ownership, educators can adapt with purpose, and evidence helps programs make stronger decisions about preparing learners for the future.

PRESENTER

David Waldherr
Founder
Cambridge Grant Award Program
Glenview, IL

HT28.

Mastering TRIO Data Like a Pro with StudentAccess

ALL
SAPPHIRE 411

Managing TRIO data should strengthen your program—not consume your staff's time. This session will demonstrate how StudentAccess, a platform designed specifically for TRIO programs, can simplify participant data management, streamline everyday workflows, and support federal reporting requirements. Participants will see tools such as the Multiple Student Tool, Online Applications, Dynamic Report Generator, and integrated communication features in action while exploring how technology can reduce repetitive administrative work and make critical program information easier to access and use. Discover how a more efficient approach to data management can give staff greater confidence in their information, strengthen program operations, and create more time for serving students.

PRESENTERS

Claysa Diamond
Marketing & Communications Manager
StudentAccess
Fort Collins, CO

Alex Grote
Vice President
StudentAccess
Fort Collins, CO

2:45 PM – 4:00 PM

CONCURRENT SESSIONS

58.

Elevating Success Through a First-Gen Student Success Lens: Why it Matters Now

COLLEGE
AQUA SALON 300

First-generation students are central to the future of higher education, but serving them well cannot remain the responsibility of one program, office, or champion. As enrollment patterns shift and institutions confront new questions about access, equity, and student success, this session will examine why the “how” of supporting first-generation students must become an institution-wide commitment. Presenters will connect the national enrollment landscape to practical examples of systems-level change, showing how institutions can create more seamless and sustainable pathways across the student experience. Participants will leave with strategies for moving beyond isolated interventions and building a campus culture in which first-generation student success is understood as everyone's work.

PRESENTERS

Wendy Beesley
Assistant Vice wPresident,
Network Strategies
FirstGen Forward
Washington, DC

Martina Martin
Vice President, FirstGen
Forward Network
FirstGen Forward
Washington, DC

Jennifer Luken Sutton
Expert Guide
FirstGen Forward
Washington, DC

MODERATOR

Stephanie Cruz

Director, EOC
Rhode Island Community College
Warwick, RI

60.

Igniting the Alumni Engine: Driving Educational Opportunity Into the Future

ALL
AQUA SALON 310

TRIO alumni are more than former participants—they can become mentors, advocates, collaborators, donors, and powerful ambassadors for educational opportunity. This interactive session will explore how programs can build and sustain alumni networks that strengthen opportunities for current students while extending TRIO's reach at the institutional, state, regional, and national levels. Through real-world examples, participants will examine strategies for engaging alumni through events, advocacy opportunities, professional networks, and platforms such as LinkedIn, while also considering how early exposure to service and advocacy can cultivate the next generation of engaged alumni. Leave with actionable ideas for igniting an alumni engine that keeps relationships alive long after students leave the program—and turns TRIO impact into a lasting cycle of opportunity.

PRESENTER

Michele Lagnese
Director, Student Support Services
University of Pittsburgh
Pittsburgh, PA

MODERATOR

Ryan Brevik
Director, Student Support Services-STEM
Boise State University
Boise, ID



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61.

TRIO Still M.A.T.T.E.R.S.: A Foundation That Transforms Lives

**TRIO 101: BUILDING THE
FOUNDATION FOR
TRANSFORMATIONAL IMPACT
STRAND**

👤 ALL
🏠 AQUA SALON 311

Passion may bring new professionals to TRIO, but understanding how regulations, program design, and daily practice fit together is what helps them turn that passion into results. This session will demystify the foundations of TRIO and show how key requirements connect directly to student-centered service delivery. Grounded in equity and real-world practice, participants will explore practical ways to strengthen compliance, engagement, and program operations while keeping persistence, completion, and long-term economic mobility in view. Leave with greater clarity about not only what TRIO programs are required to do, but why the work matters—and how thoughtful implementation can transform those requirements into meaningful student outcomes.

PRESENTER

LaTonya Nixon-Smith
Vice President of Student
Services
Beaufort County Community
College
Greenville, NC

MODERATOR

Nadine Butts
Director, Student Support
Services
University of Mary
Bismarck, ND

62.

Beyond Test Optional: Practical ACT/SAT Strategies for Admissions, Scholarships, and Engagement

👤 PRE-COLLEGE
🏠 AQUA SALON 313

In a test-optional era, ACT and SAT preparation is no longer a one-size-fits-all proposition. The more useful question is: Which students can benefit from testing, and how can TRIO programs help them prepare strategically? This session will examine how test scores may continue to influence admissions and scholarship opportunities, how to identify students for whom targeted preparation could add value, and how to help students set realistic score goals connected to their postsecondary plans. Participants will also explore low-cost, interactive approaches that encourage voluntary participation, peer learning, and sustained engagement, as well as strategies for communicating with families and building accountability into existing services. Leave with data, classroom-ready activities, and an implementation framework you can put to work immediately.

PRESENTERS

Sergio Galvez
Director, Pre-College Programs
California Lutheran University,
TRIO Pre-University Programs
Thousand Oaks, CA

Jonathan Mallaley
Founder
Tried & True Education
Westlake Village, CA

MODERATOR

Dalia Hernandez
Director, TRIO Programs
California State University, San
Bernardino
San Bernardino, CA

63.

Leadership Development for First-Generation Students

👤 ALL
🏠 AQUA SALON 314

TRIO programs are often the place students turn for academic, personal,

and professional support. That makes them an ideal environment for helping first-generation students see themselves not only as successful students, but as leaders. This session will highlight how four TRIO programs at North Carolina Central University collaborate to create intentional leadership development opportunities throughout the student experience. Participants will explore programming, partnerships, and strategies that build confidence, strengthen engagement, and help students practice the skills they will need in their careers and communities. Leave with practical ideas for making leadership development a more visible and purposeful part of your own TRIO programming.

PRESENTERS

Domanique McMillian
Associate Director, TRIO
Student Support Services Intern
North Carolina Central
University
Durham, NC

Simone Spencer
Associate Director, TRIO Access
North Carolina Central
University
Durham, NC

MODERATOR

Ryan Dunham
Director, TRIO Programs
SUNY Schenectady County
Community College
Schenectady, NY

64.

Mental Health Matters: Supporting Student Well- Being in a Changing World

COE ED Talk

👤 ALL
🏠 AQUA SALON AB

Student well-being is inseparable from student success. Yet today's students are navigating stress, anxiety, uncertainty, financial pressure, family responsibilities, and barriers to mental health care—challenges that can directly

affect belonging, persistence, and academic performance. This COE ED Talk will examine the evolving mental health landscape and the important, but appropriately bounded, role TRIO professionals can play in creating supportive environments. Participants will explore ways to recognize signs of emotional distress, respond with care, connect students to appropriate resources, and strengthen a culture of belonging without stepping beyond the TRIO professional's role. Small-group conversations will give attendees space to share what they are seeing on their campuses and exchange practical, peer-informed strategies for supporting student well-being.

PRESENTER

Carlton Green
Licensed Psychologist
Green Psychological Services
College Park, MD

FACILITATOR

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

65.

Translating First-Gen Access into Measurable Impact Through Human-Centered & AI-Enhanced Support

**AI AND INNOVATIVE
TECHNOLOGY: EXPANDING
OPPORTUNITY THROUGH
INNOVATION STRAND**

👤 ALL
🏠 AQUA SALON CD

Technology can expand capacity, but relationships remain at the heart of first-generation student success. This interactive session explores how TRIO professionals can combine the two—using human-centered practices and thoughtfully selected AI tools to strengthen advising, engagement, and persistence.



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Participants will connect the historical roots of the first-generation student concept in TRIO to current barriers affecting completion and economic mobility, then enter a “support sandbox” to test strategies for expanding individualized support without losing the human connection. The session will introduce an equity-minded framework for evaluating AI’s benefits and limitations, as well as the Guided Pláticas approach within the Circle of Champions model. Attendees will leave with an actionable plan for using innovation to prepare students for richer advising and mentoring conversations—not to replace them.

PRESENTERS

Alicia Cárdenas

Community College Counseling Faculty

West Valley College
Saratoga, CA

Luis Chavez

Community College Academic ECD Pathways Counseling Faculty

Chabot College
San Ramon, CA

MODERATOR

Andi Dieckman

Director, Student Support Services
University of Central Missouri
Warrensburg, MO

66.

Workforce Pell & TRIO: What Practitioners Need to Know Now

ALL

AQUA SALON EF

Workforce Pell is creating new possibilities for students pursuing short-term education and training—and new questions for the professionals advising them. This session will give TRIO practitioners a clear introduction to Workforce Pell and examine how it intersects with traditional Pell Grant pathways. Participants will explore eligibility requirements,

program approval criteria, and advising considerations, and discuss how short-term credentials and stackable pathways may expand postsecondary options. The session will also emphasize the importance of evaluating program quality and outcomes so that students can distinguish between a credential that is simply available and one that meaningfully advances their goals. Leave better prepared to help participants compare pathways, ask the right questions, and make informed decisions about education, training, and economic mobility.

PRESENTER

Lee Lambert

Chancellor
Pima Community College
Tucson, AZ

MODERATOR

Christiana Headley

Director, Student Support Services
Augustana College
Rock Island, IL

67.

Helping Students Create Evidence That Shows Their Durable Skills

FUELING THE FUTURE:
ECONOMIC IMPACT AND
CAREER READINESS STRAND

ALL

COBALT 500

Students develop critical thinking, communication, collaboration, data literacy, and other durable skills throughout their education—but they do not always know how to recognize or prove what they can do. This session introduces a competency-based approach for helping students intentionally develop, assess, and document those abilities through civic engagement and real-world learning. Participants will compare traditional knowledge-based frameworks with competency-based education, explore how students can identify evidence of skills they are already building, and

learn to use a rubric to guide reflection and self-assessment. Leave with tools for helping students turn experiences into compelling evidence—and build portfolios that make their readiness for college, careers, and future opportunities visible.

PRESENTERS

Sara Emhof

Academic Director
Close Up Foundation
Arlington, VA

Scot Wilson

Vice President, Academics
Close Up Foundation
Arlington, VA

MODERATOR

Rose Calzontzi

Director, Student Support Services
Sonoma State University
Rohnert Park, CA

68.

Designing Belonging at Scale: Using Storytelling & Technology to Support First-Generation Students

AI AND INNOVATIVE
TECHNOLOGY: EXPANDING
OPPORTUNITY THROUGH
INNOVATION STRAND

ALL

COBALT 501

Belonging should not depend on whether a student happens to find the right person, office, or moment. For institutions serving large numbers of first-generation students, the challenge is designing belonging intentionally—and at scale. This session shares how one college, where nearly 70% of students are first-generation, drew on TRIO-informed practices to create digital experiences that use storytelling, guided reflection, and skill-building to address imposter feelings and strengthen engagement. Participants will see how routine orientation and support resources can be redesigned as more meaningful student experiences, including in virtual environments. Leave with a

ready-to-use planning template for creating digital support that helps more students feel seen, capable, and connected.

PRESENTER

Lee Williams

Executive Director, Student Success, Retention, and EOC
Texarkana College
Texarkana, TX

MODERATOR

Cicely Morgan

Academic Coaching Coordinator, Student Support Services
University of Nevada
Las Vegas, NV

69.

Expanding Opportunity: Helping TRIO Students Navigate Selective College Admissions

PRE-COLLEGE YOUTH
COBALT 520

Too many high-achieving TRIO students rule out selective colleges before they ever apply—often because of concerns about cost, competitiveness, or whether they would belong. This panel brings admissions leaders from highly selective institutions together to help TRIO professionals replace assumptions with clearer information. Through facilitated questions and audience discussion, panelists will explain how applications are evaluated, what can make a student a competitive candidate, how financial need is considered, and how counselors can help students build balanced college lists that reflect both academic potential and personal goals. Participants will leave with current admissions perspectives and practical strategies to help students explore, apply to, and enroll at institutions that may once have felt out of reach.

PRESENTERS

Karla Arriaga

Senior Associate Director, Undergraduate Admissions



FROM ACCESS TO IMPACT: Education as the Engine of Economic Mobility

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California Institute of Technology
Pasadena, CA

Whitney Green

Director, Admissions
Princeton University
Princeton, NJ

Dara Norwood

Associate Director, Multicultural Outreach
Undergraduate Admissions
Yale University
New Haven, CT

Jonathan Williams

Vice President and Dean,
Admissions and Financial Aid
Pomona College
Claremont, CA

MODERATOR

Kevin Hudson

Associate Director, Institutional Diversity and College Opportunity
Princeton University
Office of the Vice Provost for Institutional Equity & Diversity
Princeton, NJ

70.

Abraca-data: Using Dashboards to Understand Higher Education, Your State, and Your Program

RESEARCH AND EVALUATION:
PROVING IMPACT THROUGH EVIDENCE STRAND

ALL
INDIGO 202

Good data can sharpen a needs assessment, strengthen an argument, reveal an inequity, and help a program decide what to do next—but only if you can find and use it. In this hands-on session, the Pell Institute will take some of the mystery out of higher education data by guiding participants through interactive dashboards that bring together TRIO and broader state-level indicators. Participants will learn how to quickly explore measures related to people, economics, policy, and educational outcomes and identify the information most relevant to their own states and programs. Bring your questions and leave

with practical experience turning a few clicks into evidence you can use for planning, evaluation, advocacy, and stronger TRIO programming.

PRESENTERS

Nicole Brunt

Research Associate, The Pell Institute for the Study of Opportunity in Higher Education
Council for Opportunity in Education
Washington, DC

Sean Simone

Vice President, Research and Director, The Pell Institute for the Study of Opportunity in Higher Education
Council for Opportunity in Education
Washington, DC

MODERATOR

Shareka R. Brown

Associate Director, Student Support Services
Forsyth Technical Community College
Winston-Salem, NC

71.

The First-Year Director's Playbook: Managing People, Performance, and Priorities

START SMART FOR NEW DIRECTORS: LEADERSHIP THAT DRIVES RESULTS STRAND

ALL
INDIGO 204

Your first year as a TRIO director can feel like managing six jobs at once: stewarding a federal grant, supervising staff, building institutional relationships, monitoring compliance, managing resources, and still keeping student outcomes at the center. This session offers a practical playbook for bringing those responsibilities into focus. Using real-world examples, participants will explore fiscal stewardship, regulatory compliance, supervision, organizational culture, grant management, and stakeholder engagement through the lens of intentional leadership. Leave with actionable

tools for setting priorities, strengthening accountability, and building a program that is not only compliant but also sustainable, respected, and positioned to deliver measurable results for students.

PRESENTER

Kevin Pearson

Dean of College Access Services
Central Carolina Community College
Sanford, NC

MODERATOR

Robin Williams

President of the Northwest Association of Educational Opportunity Programs
Astoria, OR

72.

Seen, Heard, and Supported: Creating Spaces Where Neurodivergent Students Thrive

ALL
INDIGO 206

ing a campus where neurodivergent students thrive begins with understanding that different ways of learning, communicating, processing sensory information, and navigating social environments are not deficits to be erased. Drawing on research, lived experience, and disability services practice, this session will challenge common misconceptions while highlighting both the strengths and the barriers neurodivergent students may encounter. Participants will explore inclusive communication, practical accommodations, student advocacy, and strategies for creating more accessible learning environments. A disability-services director will also offer guidance on how TRIO professionals can collaborate effectively with campus disability offices. Leave with a deeper understanding of neurodiversity and concrete

ways to help students feel seen, heard, supported, and empowered to succeed.

PRESENTERS

Dawn Kahlden

Director, Disability Services
Tarrant County College
Northwest Campus
Fort Worth, TX

Sebastian Myrick

Executive Director, Pre-College Programs
South Seattle College
Seattle, WA

MODERATOR

Alejandra González

Program Director, Student Support Services
Texas A&M International University
Laredo, TX

73.

Thrown into the Fire: Revitalizing a TRIO Program in a Shifting Policy Landscape

START SMART FOR NEW DIRECTORS: LEADERSHIP THAT DRIVES RESULTS STRAND

ALL
SAPPHIRE 400

Sometimes new leadership begins with a clean slate. Sometimes it begins in the middle of a fire. This workshop examines what it takes to stabilize and strengthen a TRIO program while navigating inherited practices, changing compliance expectations, state-level requirements, and institutional misunderstandings about federal regulations. Participants will explore practical approaches for interpreting grant requirements, identifying and addressing compliance concerns, educating campus stakeholders, and protecting program integrity during periods of disruption. Designed for leaders working through complex transitions, the session will offer strategies for moving from reaction to direction—building clearer systems, stronger institutional understanding, and a more



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sustainable foundation for the program's future.

PRESENTER

Charles Morris

Director, Ronald E. McNair Postbaccalaureate Achievement Program

University of Alabama at Birmingham
Birmingham, AL

MODERATOR

Linda Rettig

Senior Director for TRIO College Programs
Grand Valley State University
Allendale, MI

75.

The Cost of Ambition: Preparing TRIO Students for Graduate School in a New Aid Landscape

COLLEGE
SAPPHIRE 410

For many TRIO students, the question is no longer simply whether graduate school is academically possible—it is whether they can afford to pursue it. As financial aid policies, borrowing options, and repayment structures change, students considering advanced degrees face new uncertainty about the true cost of their ambitions. This session will examine recent and emerging changes in graduate student financial aid and what they may mean for SSS and McNair participants planning for advanced study. Through guided discussion and scenario-based activities, participants will identify common financial challenges and explore strategies for helping students compare funding options, understand borrowing decisions, and plan with greater confidence. Leave with tools and resources for helping students pursue graduate education with clearer information about both the opportunity and the financial commitment ahead.

PRESENTERS

Helen Faith

Associate Vice Provost for

Enrollment and Student Financial Services

University of Virginia
Charlottesville, VA

Alice Ho

Director, Ronald E. McNair Postbaccalaureate Achievement Program and Senior Director, Student Success and Research, Academic Advancement Program, Undergraduate Education

University of California, Los Angeles
Los Angeles, CA

MODERATOR

Melissa Raucii

Assistant Director, College Programs
University of Rochester
Rochester, NY

76.

Building Disability Advocacy Groups in TRIO

COLLEGE
SAPPHIRE 411

Belonging grows when students have both support and a voice. This session will explore how TRIO Student Support Services programs can create and sustain disability advocacy groups that strengthen community, promote self-advocacy, and elevate the experiences of students with disabilities within the institution. Drawing on a campus example, presenters will show how students used an advocacy group not only to connect with one another, but also to bring greater visibility to disability issues and ensure their needs remained part of institutional conversations. Participants will leave with practical steps for launching or strengthening similar groups and ideas to help students turn shared experiences into connection, confidence, and constructive campus change.

PRESENTERS

Veronica Sidor

Director, Student Support Services
Aquinas College

Grand Rapids, MI

Nisha van Laar

Director, TRIO Student Support Services

Aquinas College

Grand Rapids, MI

MODERATOR

Heather Kenny

Director, Student Support Services
Virginia Commonwealth University
Richmond, VA

4:15 PM – 5:15 PM

PLENARY SESSION

Presidential Perspectives on Scaling Student Success

SPONSORED BY ECMC FOUNDATION

ALL
SAPPHIRE BALLROOM

Scaling student success requires more than identifying a promising practice—it requires leadership willing to make that practice part of how an institution operates. With support from the ECMC Foundation, COE recognized three community colleges with the inaugural COE Award for Institutional Effectiveness for expanding proven Student Support Services practices beyond individual programs and across their campuses. In this plenary conversation, the presidents of those institutions will examine the leadership decisions that made that transformation possible. Grounded in COE's Institutional Effectiveness Model, panelists will explore four elements of successful scaling: defining the problem and positioning SSS practices as a solution, integrating those practices into institutional systems, building partnerships across campus, and using data to measure and strengthen impact. Participants will leave with an executive-level view of what it takes to move

from a successful program to institutional change—and from access to measurable gains in persistence and completion.

PRESENTERS

Monica Brown

President
South Seattle College
Seattle, WA

Clifford Coppersmith

President
Chesapeake College
Wye Mills, MD

Mautra Staley Jones

President
Oklahoma City Community College
Oklahoma City, OK

MODERATOR

Archie Cubarrubia

Vice President, Grants
ECMC Foundation
Los Angeles, CA

8:30 PM – 10:30 PM

ENTERTAINMENT

SPONSORED BY STUDY SMART

TRIO Champions Commence: 60 Seconds to Glory!

ALL
AQUA SALON ABCD

Close out Friday night with 60 Seconds to Glory, a fast-paced, Minute to Win It-style competition where attendees will have just one minute to conquer a series of hilarious challenges. Step up and test your skills, cheer on your colleagues, or simply enjoy the spectacle as competitors race against the clock for bragging rights and delightfully cheesy prizes. Between challenges, grab your friends and colleagues and head to the photo booth to capture a few final memories from San Diego. No athletic ability—or dignity—is required. Just bring your competitive spirit, your sense of humor, and a willingness to play along.



SESSIONS GRID

SATURDAY, SEPT. 19, 2026

9:00 AM – 10:00 AM

PLENARY SESSION

Opening Doors, Expanding Opportunity: A Congressional Keynote with Rep. Suzanne Bonamici

ALL
SAPPHIRE BALLROOM

For Congresswoman Suzanne Bonamici, the promise of educational opportunity is personal. She began her higher education journey at Lane Community College before transferring to the University of Oregon, where she earned both her bachelor's and law degrees. That experience has helped shape a congressional career focused on strengthening education and expanding opportunity for students and families. A leader on the House Education and Workforce Committee and Ranking Member of the Early Childhood, Elementary, and Secondary Education Subcommittee, Bonamici has made education policy and student opportunity central priorities of her work in Congress. Drawing on both her personal journey and her work as a policymaker, Congresswoman Bonamici will offer her perspective on the challenges and opportunities facing students, educators, and institutions at a consequential moment for American education. Her remarks will underscore the importance of ensuring that students from every background have access to the support, preparation, and opportunity they need to succeed.

PRESENTER

Rep. Suzanne Bonamici
(D-OR-01)
Washington, DC

10:15 AM – 11:15 AM

PLENARY SESSION

A Chance in the World: From Opportunity to Impact with Steve Pemberton

ALL
SAPPHIRE BALLROOM

Long before Steve Pemberton became a bestselling author, philanthropist, and nationally recognized business leader, he was a young person searching for a path through extraordinary hardship. Educational opportunity—and the people who helped him see possibilities beyond his circumstances—changed the trajectory of his life. A TRIO Upward Bound alumnus, Pemberton went on to build a distinguished career in executive leadership while becoming a powerful voice on opportunity, belonging, resilience, and human potential. His life story, chronicled in his bestselling memoir *A Chance in the World*, demonstrates what can happen when someone recognizes possibility in a young person and helps illuminate a path forward. Drawing on his journey from a TRIO student to accomplished author and executive, he explores the people and experiences that shape our lives, the responsibility we carry to create opportunity for others, and the lasting impact educators and mentors can have—often before they fully understand the difference they have made.

PRESENTER

Steve Pemberton
Author, Executive, and TRIO
Alumnus

11:30 AM – 12:30 PM

Awards, Installation of Officers, and Remarks from the 2026–2027 Board Chair, Ray Cabrera

ALL
SAPPHIRE BALLROOM

12:30 PM – 1:30 PM

Book Signing and Sale

ALL
SAPPHIRE BALLROOM FOYER

Join Steve Pemberton for a special book signing and an opportunity to continue reflecting on his extraordinary journey from adversity to opportunity, leadership, and impact. Copies of Pemberton's books will be available for purchase. Before leaving San Diego, take home a signed book and a lasting reminder of the people, relationships, and moments that can change the trajectory of a life.